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# FormatX

The Best Tool to Format Your  
Business Data in Microsoft® Excel

User Guide

Version 1.00

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# What is FormatX?

- FormatX has only one purpose – to make you more productive by providing **consistent, well presented, formatted data** in Microsoft® Excel
- The name FormatX comes from two ideas
  - The software Formats for eXcel
  - The software Formats eXports of data from databases
- As you can see from the graphic below, FormatX makes column oriented data much more presentable

## Two pages of non-formatted text converted to a report using FormatX

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>#</th> <th>Date</th> <th>Expected</th> <th>Descriptor</th> <th>Customer</th> <th>Currency</th> <th>Items</th> <th>Order</th> <th>Total</th> <th>Price</th> <th>Total</th> <th>Billed</th> </tr> <tr> <td>7</td> <td>5/1/2001</td> <td>5/6/2001</td> <td>Combined</td> <td>COMBINEI</td> <td>C</td> <td>40</td> <td>32,760.00</td> <td>37,674.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td>8</td> <td>9/4/2000</td> <td>9/9/2000</td> <td>Combined</td> <td>COMBINEI</td> <td>C</td> <td>35</td> <td>45,980.00</td> <td>51,942.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td>9</td> <td>9/4/2000</td> <td>9/9/2000</td> <td>Majestic O</td> <td>MAJESTIC</td> <td>C</td> <td>36</td> <td>12,370.00</td> <td>13,639.23</td> <td></td> <td></td> <td></td> </tr> <tr> <td>10</td> <td>9/4/2000</td> <td>9/9/2000</td> <td>Sears Order</td> <td>SEARS</td> <td>C</td> <td>36</td> <td>15,120.00</td> <td>17,583.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td>11</td> <td>9/10/2000</td> <td>9/15/2000</td> <td>Halmon Or</td> <td>HALMON</td> <td>C</td> <td>28</td> <td>25,900.00</td> <td>27,808.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td>12</td> <td>9/10/2000</td> <td>9/15/2000</td> <td>Hale TV</td> <td>HALE TV</td> <td>US</td> <td>53</td> <td>30,900.00</td> <td>31,125.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td>13</td> <td>9/10/2000</td> <td>9/15/2000</td> <td>Roy's Order</td> <td>ROY'S</td> <td>C</td> <td>30</td> <td>9,750.00</td> <td>10,570.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td>14</td> <td>9/18/2000</td> <td>9/23/2000</td> <td>Hallmark TV</td> <td>HALLMARK TV</td> <td>C</td> <td>19</td> <td>16,820.00</td> <td>18,878.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td>15</td> <td>9/18/2000</td> <td>9/23/2000</td> <td>Guytel Order</td> <td>GUYTEL</td> <td>C</td> <td>38</td> <td>48,650.00</td> <td>56,128.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td>16</td> <td>9/18/2000</td> <td>9/23/2000</td> <td>The Bay Order</td> <td>THE BAY</td> <td>C</td> <td>36</td> <td>13,790.00</td> <td>15,681.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td>17</td> <td>9/25/2000</td> <td>9/30/2000</td> <td>TGS Electronic</td> <td>TGS ELECTRONIC</td> <td>C</td> <td>30</td> <td>9,600.00</td> <td>11,025.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td>18</td> <td>9/25/2000</td> <td>9/30/2000</td> <td>Halberts Order</td> <td>HALBERTS</td> <td>C</td> <td>36</td> <td>29,300.00</td> <td>33,890.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td>19</td> <td>9/25/2000</td> <td>9/30/2000</td> <td>Haldon Order</td> <td>HALDON</td> <td>C</td> <td>40</td> <td>36,205.00</td> <td>39,789.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="7"></td> <td><b>326,245</b></td> <td><b>365,731</b></td> <td colspan="3"></td> </tr> </table>	#	Date	Expected	Descriptor	Customer	Currency	Items	Order	Total	Price	Total	Billed	7	5/1/2001	5/6/2001	Combined	COMBINEI	C	40	32,760.00	37,674.00				8	9/4/2000	9/9/2000	Combined	COMBINEI	C	35	45,980.00	51,942.00				9	9/4/2000	9/9/2000	Majestic O	MAJESTIC	C	36	12,370.00	13,639.23				10	9/4/2000	9/9/2000	Sears Order	SEARS	C	36	15,120.00	17,583.00				11	9/10/2000	9/15/2000	Halmon Or	HALMON	C	28	25,900.00	27,808.00				12	9/10/2000	9/15/2000	Hale TV	HALE TV	US	53	30,900.00	31,125.00				13	9/10/2000	9/15/2000	Roy's Order	ROY'S	C	30	9,750.00	10,570.00				14	9/18/2000	9/23/2000	Hallmark TV	HALLMARK TV	C	19	16,820.00	18,878.00				15	9/18/2000	9/23/2000	Guytel Order	GUYTEL	C	38	48,650.00	56,128.00				16	9/18/2000	9/23/2000	The Bay Order	THE BAY	C	36	13,790.00	15,681.00				17	9/25/2000	9/30/2000	TGS Electronic	TGS ELECTRONIC	C	30	9,600.00	11,025.00				18	9/25/2000	9/30/2000	Halberts Order	HALBERTS	C	36	29,300.00	33,890.00				19	9/25/2000	9/30/2000	Haldon Order	HALDON	C	40	36,205.00	39,789.00											<b>326,245</b>	<b>365,731</b>				<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2" style="text-align: center;">Closed Date Time</td> </tr> <tr> <td colspan="2" style="text-align: center;">Jun 23/03 4:14 pm</td> </tr> </table>	Closed Date Time		Jun 23/03 4:14 pm	
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<b>ABC Power Products Ltd.</b>						<b>Order Report</b>					
#	Date	Expected Ship Date	Description	Customer	Currency	Items Ordered	Total Price	Total Billed	Closed Date Time		
7	5/1/2001	5/6/2001	Combined Order (40 Items)	COMBINED	C	40	32,760	37,674	Jun 23/03 4:14 pm		
8	9/4/2000	9/9/2000	Combined Order (35 Items)	COMBINED	C	35	45,080	51,942			
9	9/4/2000	9/9/2000	Majestic Order (36 Items)	MAJESTIC	C	36	12,370	13,639			
10	9/4/2000	9/9/2000	Sears Order (36 Items)	SEARS	C	36	15,120	17,583			
11	9/10/2000	9/15/2000	Halmon Order (28 Items)	HALMON	C	28	25,900	27,808			
12	9/10/2000	9/15/2000	Hale TV Order (53 Items)	HALE TV	US	53	30,900	31,125			
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14	9/18/2000	9/23/2000	Hallmark TV Order (19 Items)	HALLMARK TV	C	19	16,820	18,878	Jun 23/03 4:14 pm		
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							<b>326,245</b>	<b>365,731</b>			

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## Why use FormatX? I can format myself!

- How many times have you exported data from your business systems, imported the data files into Microsoft® Excel and then had to take time to:
  - change column widths
  - put in borders and gridlines
  - add headers and footers (with page numbering)
  - bold headers
  - put in commands to make headers repeat on each page
  - format the data to fit properly on the appropriate number of pages
  - insert other tedious formatting?
  
- Sure, you can do all these things manually, but if you open unformatted data files often, this repetitious formatting activity takes up time and energy
  
- FormatX makes some reasonable assumptions about the raw data and formats it so that you will almost always be able to use the output immediately
  
- With the push of a button, FormatX can provide a well formatted report for well laid-out data with the following attributes:
  - a row of titles
  - rows of similar data beneath each title
  - zero or more total lines



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## What Exactly Does FormatX Do?

What	How
• Determines how many columns	• By finding the last filled cell in the first row of your data
• Determines how many rows of 'title' and 'body'	• By finding the last filled cell in the first column of your data
• Determines how many 'total' lines	• By counting the number of lines with any data after the body data

FormatX then does the following:

### ■ General formatting

- Uses the filename to construct the left, center and right headers
- Puts date and time fields in the left footer and page numbering in the right footer
- Bolds all titles and totals
- Puts a thin line above each field with data in the first line of totals
- Sets the print area for the file to include all titles, body and totals
- Makes hairline interior gridlines and thicker exterior gridlines
- Makes titles repeat at the top of each page
- Makes the file display in landscape (wide) if applicable
- Formats to 1, 2, 3 or 4 pages wide if appropriate
- Interprets any '\ ' in the titles to tell Excel that the title is to be on multiple lines

### ■ Column-specific formatting

- For numeric data
  - Puts in a comma separator
  - Puts in the default number of decimal places if decimal places exists, otherwise puts in none
  - Formats the column (including the title) right justified
- For non numeric data
  - Centers the column if the data contains single characters, or left justifies the column otherwise
- Each column width is set to the maximum width of the data in that column

### ■ Other formatting

- All headers are Arial, 18 point, bold
- All footers are Arial, 10 point
- All body data is Arial, 12 point

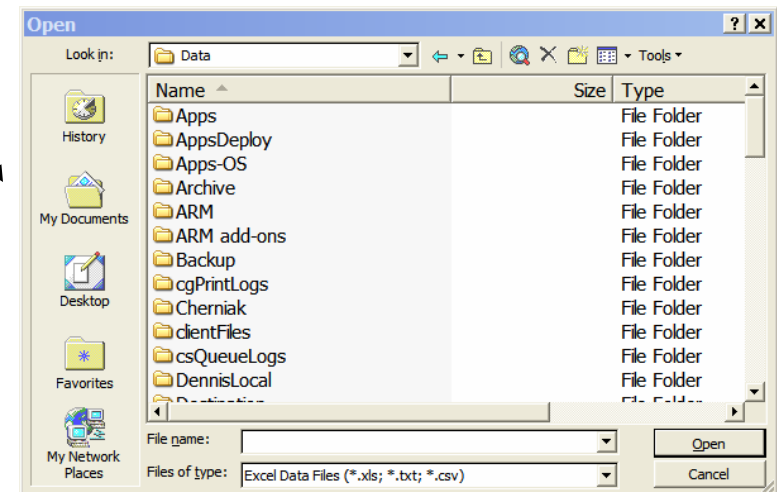


## How do I use FormatX?

- FormatX can be used in two ways: One file at a time, or multiple files in batch
- One file at a time
  - Open FormatX (it is a single file called FormatX.xls). You will see two buttons as shown at the right
  - Press the button 'Locate File To Format' and a standard file open dialog box will appear, as shown at the bottom right of this page
  - Notice that FormatX gives you a choice of .xls, .txt, and .csv files
  - Navigate through your disk hierarchy, and locate the file containing the data to format
  - Click on 'Open'
  - FormatX will open the file in Microsoft® Excel, and proceed to format the data according to the rules in the previous page
  - While FormatX is processing, an indicator of how the formatting is proceeding is always present on the status bar (at the bottom of the Excel display). This display shows:
    - The name of the file being processed
    - The total number of formatting commands
    - Which formatting command (numerically) is currently being applied

Locate File To Format

Format Open Files



## How do I use FormatX? (cont'd)

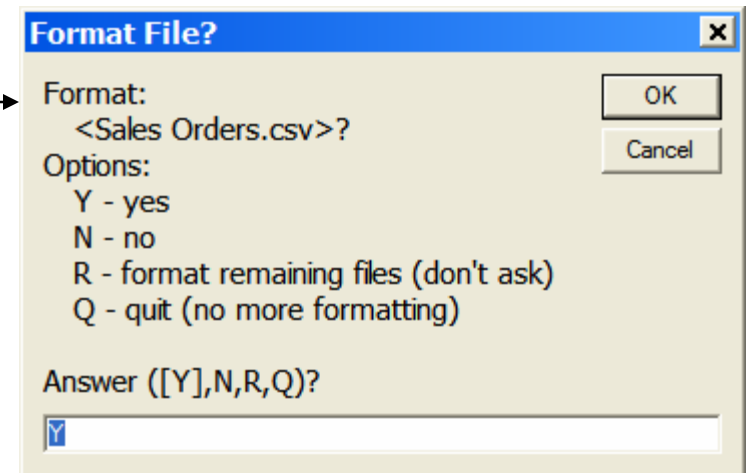
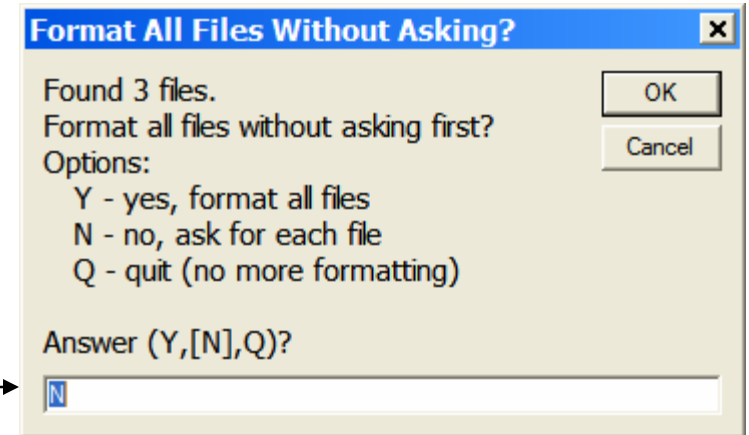
### ■ Processing in batch

- You can also process multiple data files in one command. In order to do so, open (in Excel) all the files to process. Do this before or after you open FormatX
- Go to the FormatX window, or open FormatX, and you will see the two action buttons 'Locate File to Format' and 'Format Open Files'
- If you click on the second button 'Format Open Files', FormatX will proceed to count the number of open files and give you a prompt similar to the one to the right
- If you type 'Y' (followed by enter), FormatX will proceed to format all the open files with no other entry required
- If you type 'Q', FormatX will go back to showing you the two buttons
- If you type 'N', FormatX will proceed to the first file and show you a prompt as shown on the right.

Your options are:

- Y; FormatX will format the file \*
- N; FormatX will not format the file \*
- R; FormatX will format this file and all remaining files without any further questions
- Q; FormatX will return to the two action buttons

\* FormatX will prompt for the next file to format



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## Additional Controls

- An initialization file called FormatX.ini is provided which modifies the default behavior of FormatX
  - see the help file, FormatX.hlp, under the topic “FormatX.ini: The initialization file” in the “contents” for detailed information
  
- This initialization file allows the user to override defaults, such as:
  - Default header font, size, style
  - Default footer font, size, style
  - Default body font, size, style, text colour, interior color
  - Default title font, size, style, text colour, interior color
  - Default total font, size, style, text colour, interior color
  - Default numeric action
  - Default formatting for single character data



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## What else do I need to know?

- That's all there is to using FormatX
- FormatX as described is a stand-alone tool to format data without user intervention. A more full-featured tool exists called FormatX+ (or FormatX Developer). It is described briefly in the appendix





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# Appendix



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## FormatX+ (FormatX Developer) – Everything FormatX has, and much more

### ■ Purpose

- FormatX+ provides the developer the ability to send formatted data directly to Microsoft® Excel without the user having to do anything outside of the application exporting the data

### ■ FormatX+ differences

- makes no assumptions about the way data is organized. The export program has much more control over formatting than in FormatX (see below)
- provides an easy to understand set of formatting commands which can be put into a data file after the exported data
- The exporting program can automatically launch Microsoft® Excel which will open the text file with formatting commands, and provide the user with a fully formatted report
- This interaction appears to the user as if your application is writing directly to an Excel spreadsheet

### ■ With FormatX+, you can:

- automatically format your exported data file without user intervention
- separately format each header and footer, including page numbering, date and time stamping, etc.
- format (font, size, style) down to the column level, and even down to the field level
- have different numbers of decimal places in different numerical columns
- control right / left / center justification down to the field level
- have the ability to set column widths using just the data width, not the title width
- precisely control the grid lines of the report
- and more ...

- Go to <http://www.CherniakSoftware.com/FormatX> to find out more

