

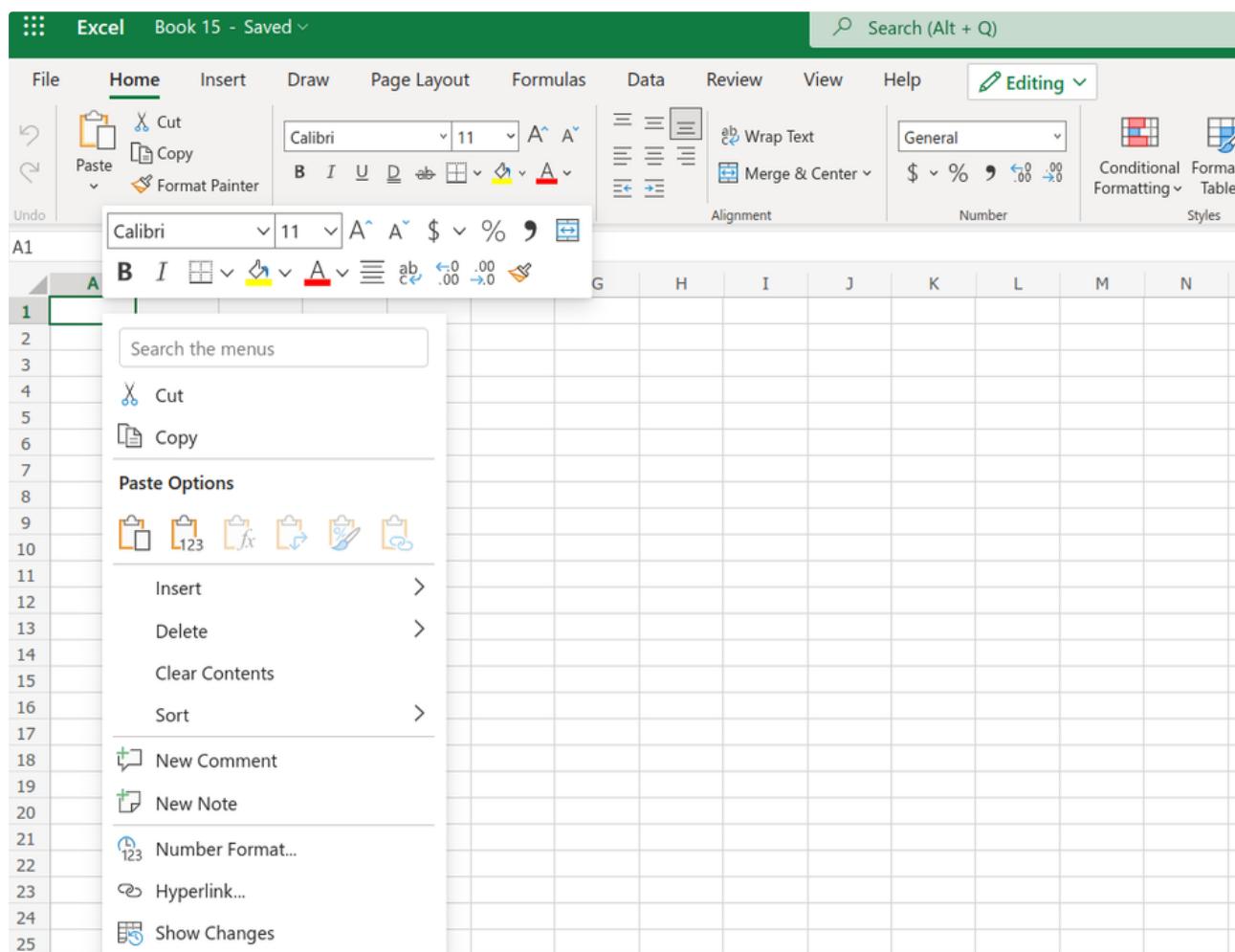
# Example - Create Excel template step by step

Guide to create a simple excel template with JXLS and Scope data model



1. Create a blank file with extension .xlsx (Microsoft Excel Open XML Spreadsheet)

2. Open Sheet 1. Go to cell A1, right click with mouse, then choose "New Comment"



3. Define a comment "jx:area(lastCell="S20")". This is an instruction to JXLS to process the area between A1 to S20 and populate all expressions, comments in it.

Excel Book 15 - Saved

File Home Insert Draw Page Layout Formulas Data Review View Help Editing

Font Alignment Number Styles Cells Editing

Mihail Mihaylov

jx:area(lastCell=\"\$20")

4. As this is a Scope template, your context will have a global variable "scope". Scope name and name of client could be printed in cell A2 and B2

Type in cell A2 expression **`\${scope.name}**

Type in cell B2 expression **`\${scope.clientName}**

Excel Book 15 - Saved

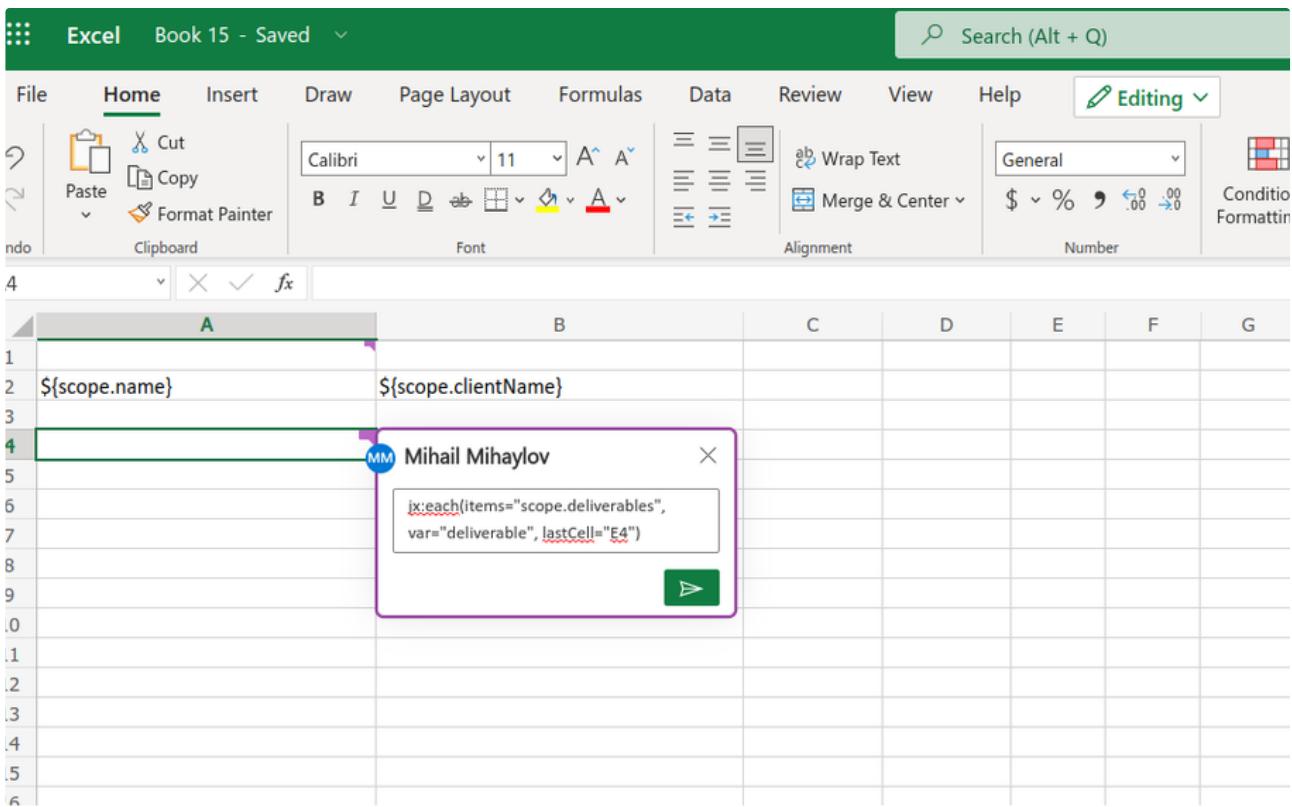
File Home Insert Draw Page Layout Formulas Data Review View Help Editing

Font Alignment Number Styles

A6		B	C	D	E	F	G	H
1								
2	<b>`\${scope.name}</b>	<b>`\${scope.clientName}</b>						
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								

5. Define a loop of scope's deliverables. Loop is defined with the pre-defined jxls comment **jx:each**

Define a new comment in cell A4 - **jx:each(items="scope.deliverables", var="deliverable", lastCell="E4")**



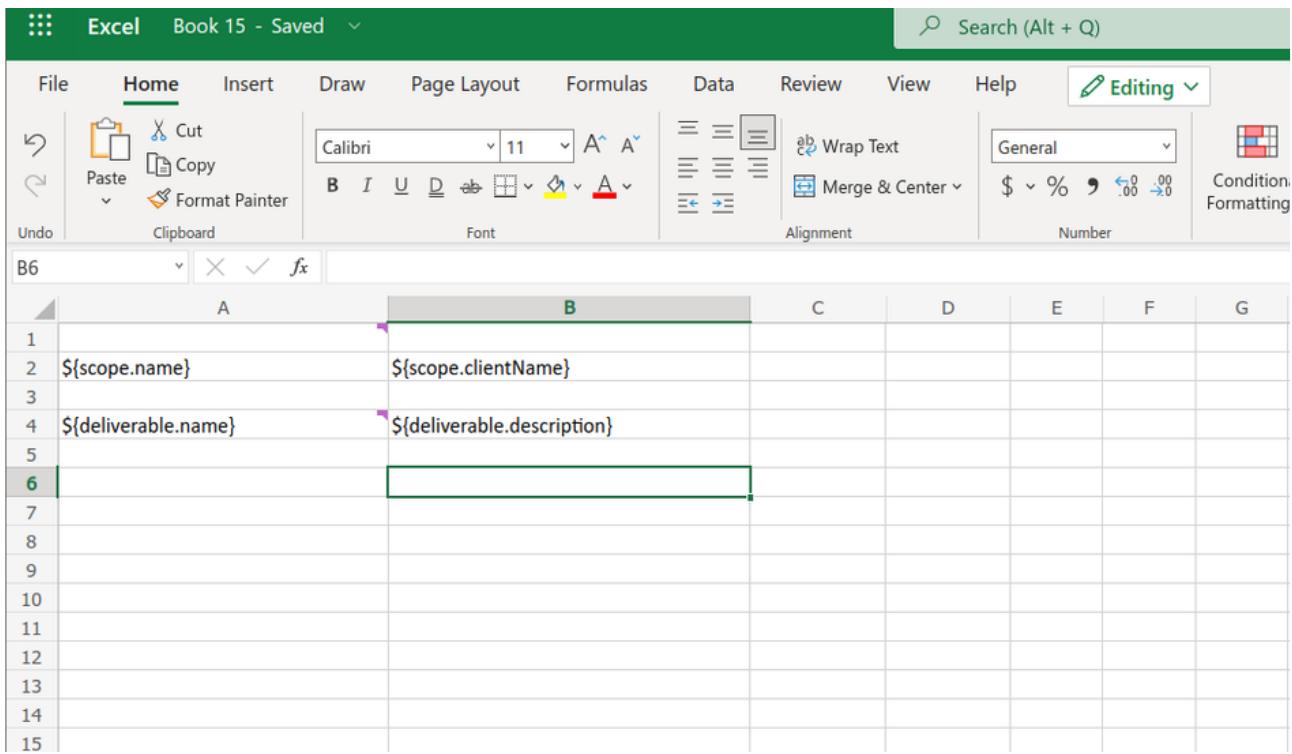
The screenshot shows the Microsoft Excel interface with the ribbon menu. A tooltip is displayed over cell A4, containing the JXLS code: `jx:each(items="scope.deliverables", var="deliverable", lastCell="E4")`. The tooltip also shows the user's name, Mihail Mihaylov, and a green circular icon with the letters MM.

	A	B	C	D	E	F	G
1							
2	<code> \${scope.name}</code>	<code> \${scope.clientName}</code>					
3							
4							
5							
6							
7							
8							
9							
0							
1							
2							
3							
4							
5							
6							

Now the cells between A4 to E4 are a loop over all deliverables. JXLS will print out several rows in vertical direction, depending on the count of deliverables.

**deliverable** is OutputTemplateDeliverable object type.

You can define  `${deliverable.name}` in cell A4 and  `${deliverable.description}` in cell B4.



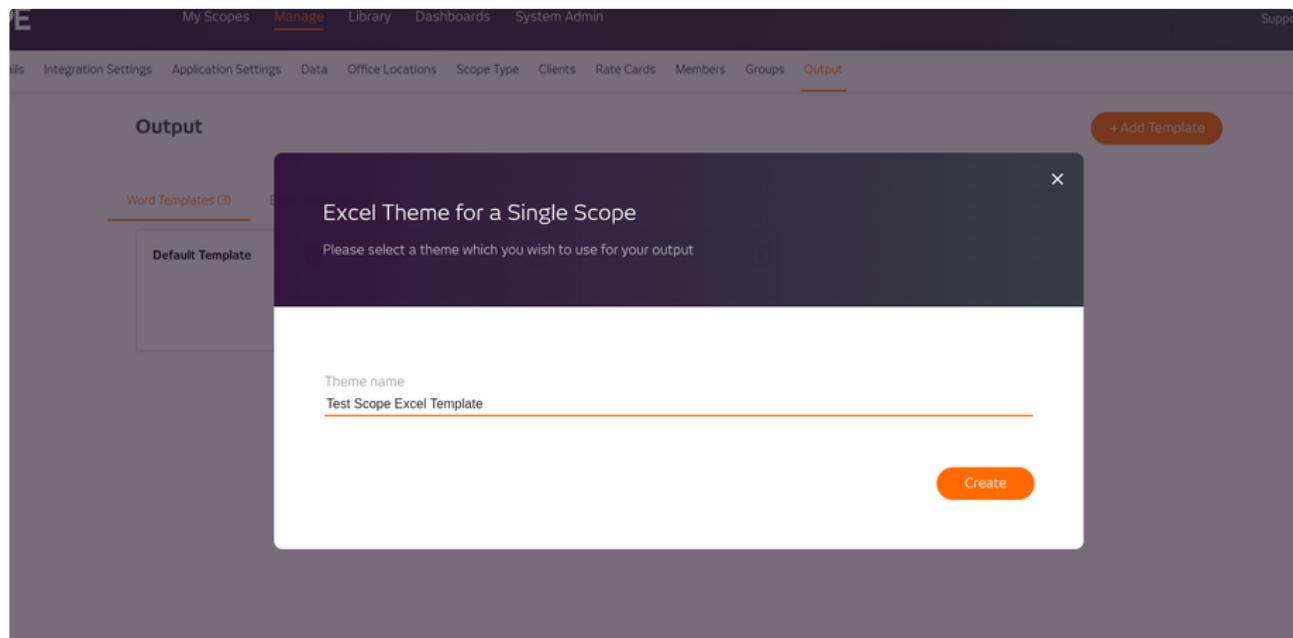
The screenshot shows the Microsoft Excel interface with the ribbon menu. A table is displayed with two rows and two columns. The first row contains the header cells A1 and B1. The second row contains the data cells A2, B2, A4, and B4. The cell B4 is currently selected and has a green border.

	A	B	C	D	E	F	G
1							
2	<code> \${scope.name}</code>	<code> \${scope.clientName}</code>					
3							
4	<code> \${deliverable.name}</code>	<code> \${deliverable.description}</code>					
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							

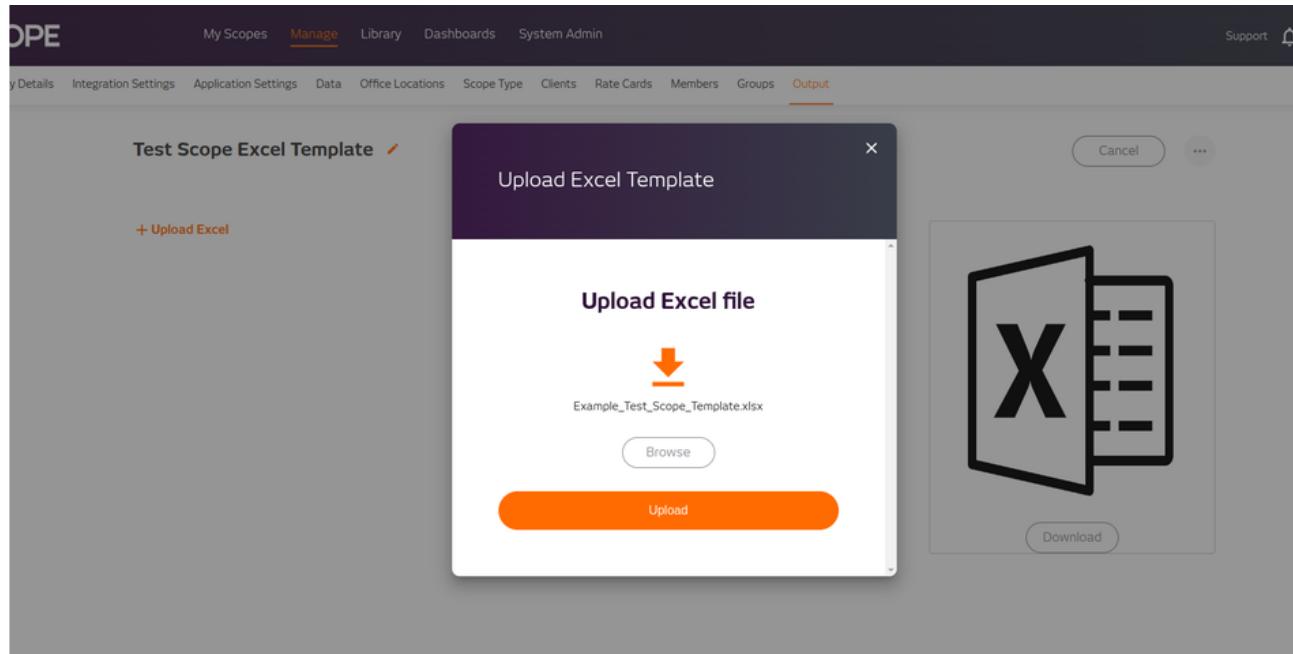
6. Go to Scope and create a new Scope Excel Template.

Go to **Manage** → go to **Output** → click on **Add Template** → click on **Scope Excel Template**

Type a name, then click **Create** button.



Then open the template and upload the Xlsx file, that was already created in the previous steps.



Click **Upload** button. Now the xlsx template is successfully uploaded in Scope. Next step is map this template with an existing client.

7. Go to **Manage**, go to **Clients**, then choose a client and click on it.

Go to **Scope Output excel** field and click, then select the "Test Scope Excel Template" from the drop down menu.

Clients &gt; Air France



Rate Cards (1)

Air France - air ticket (GBP)

Relationship Since



Output

Default Template

Folder Output

Default Folder Template

Scope Output excel

Test Scope Excel Template

Folder Output excel

FTE

8. Create a Single Scope with same client.

Create at least one deliverable.

Activity

Details

Team

Breakdown

Output

S-346

+ Add Item

...

info scope 123 456 ✓

Scope Type: No Type Language: EN Client: Air France Rate Card: Air France - air ticket Rate Card Version: 2 Traffic Status: Not Trafficable -- Created By: Mihail Mihail Date created: 02/08/2022 Version: 1

Start date: 02/08/2022 End date: 02/08/2023 Output: Default Template

Budget: £240,240.00 Allocated: £0.00 Remaining: £240,240.00 Contracted: £0.00 Balance: £240,240.00 Third Party Cost Budget: £120,120.00 Third Party Cost Balance: £120,120.00

Items	QUANTITY	START DATE	LAST EDITED	PROFIT	AGENCY HOURS	AGENCY PRICE	⋮
del 123 Del 123	1	1 minutes ago	02/08/2022	£0.00	0 hrs	£0.00	
del 456 Del 456	1	just now	02/08/2022	£0.00	0 hrs	£0.00	
Scope Margin				N/A	N/A	N/A	
Scope Totals				£0.00	0 hrs	£0.00	

limit scope. The scope must be zero and not

9. Go to Output → go to Excel Template.

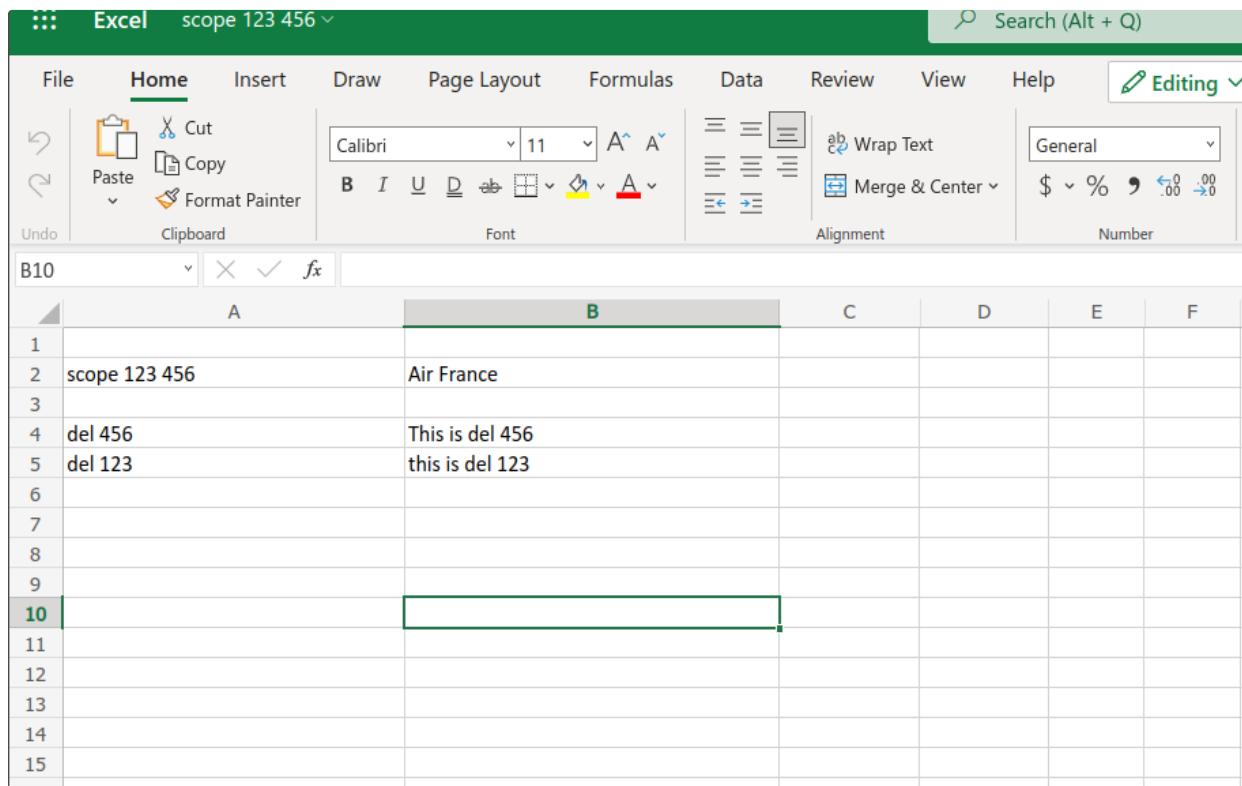
Click Preview button

**Output**Word Template **Excel Template**

TEMPLATE: Test Scope Excel Template

Preview

10. Download the file and open it with Excel.



	A	B	C	D	E	F
1						
2	scope 123 456	Air France				
3						
4	del 456	This is del 456				
5	del 123	this is del 123				
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						