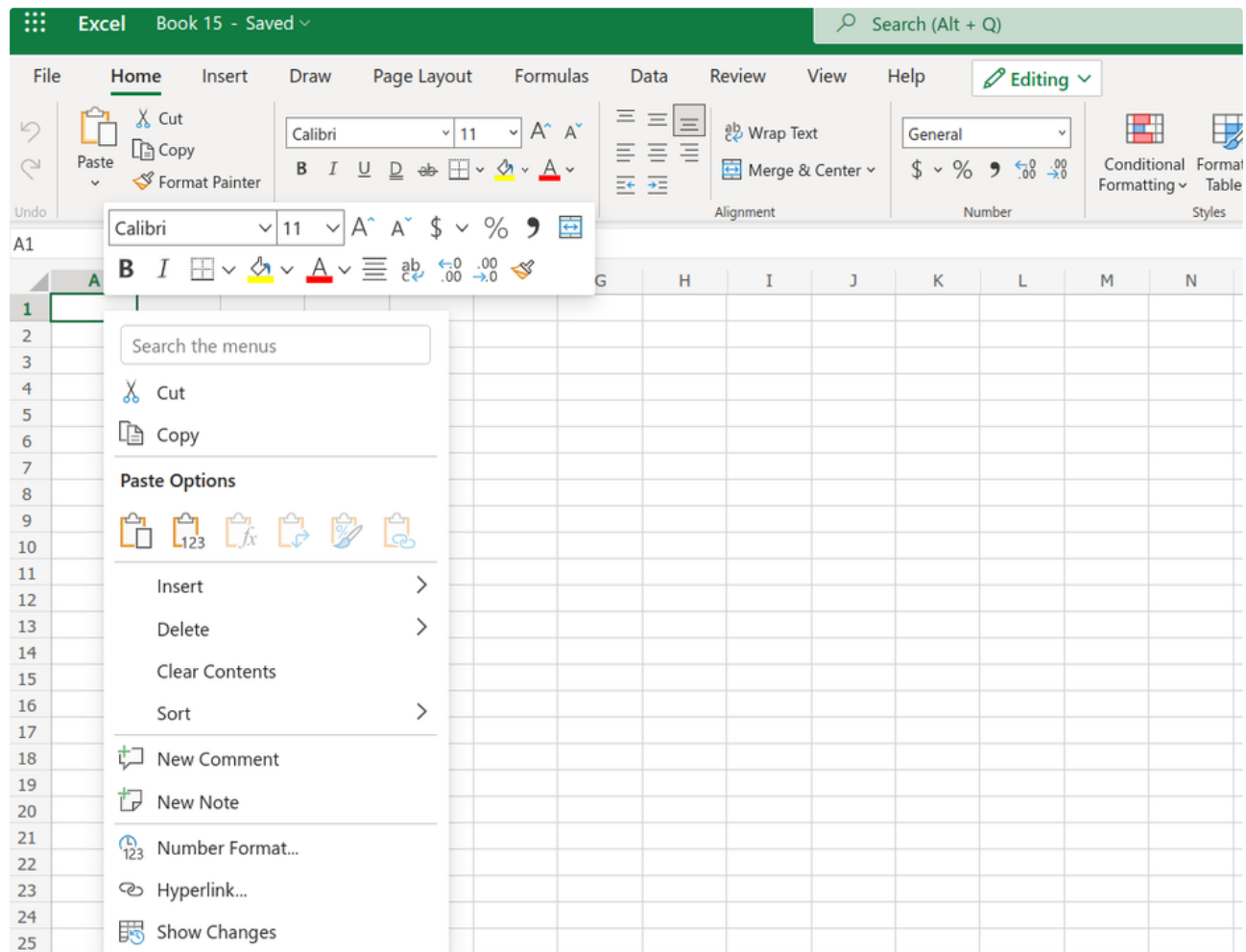


Example - Create Excel template step by step

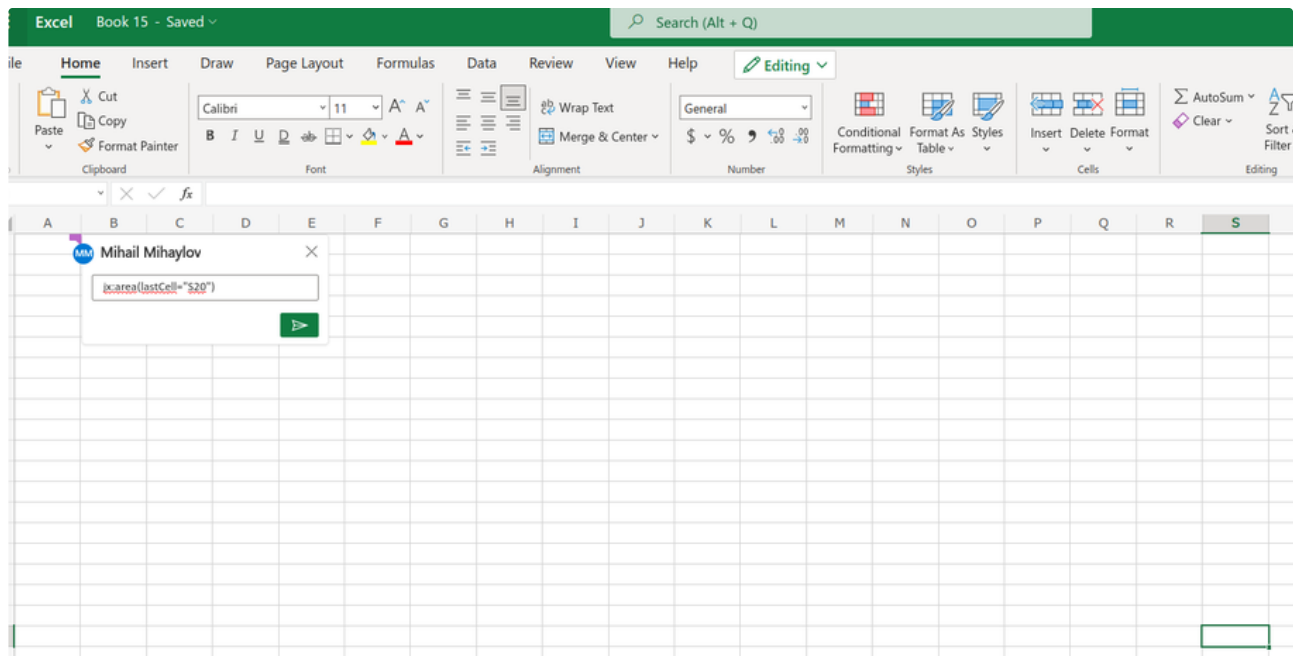
Guide to create a simple excel template with JXLS and Scope data model



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"



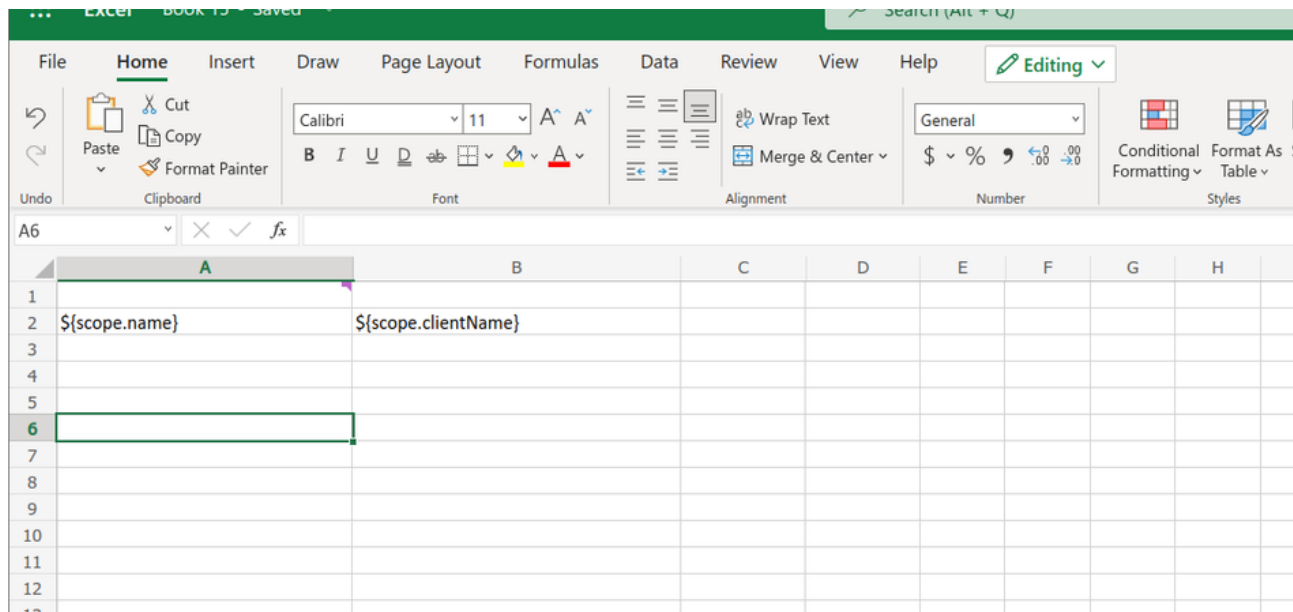
3. Define a comment "**jx:area(lastCell="S20")**". This is an instruction to JXLS to process the area between A1 to S20 and populate all expressions, comments in it.



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}`

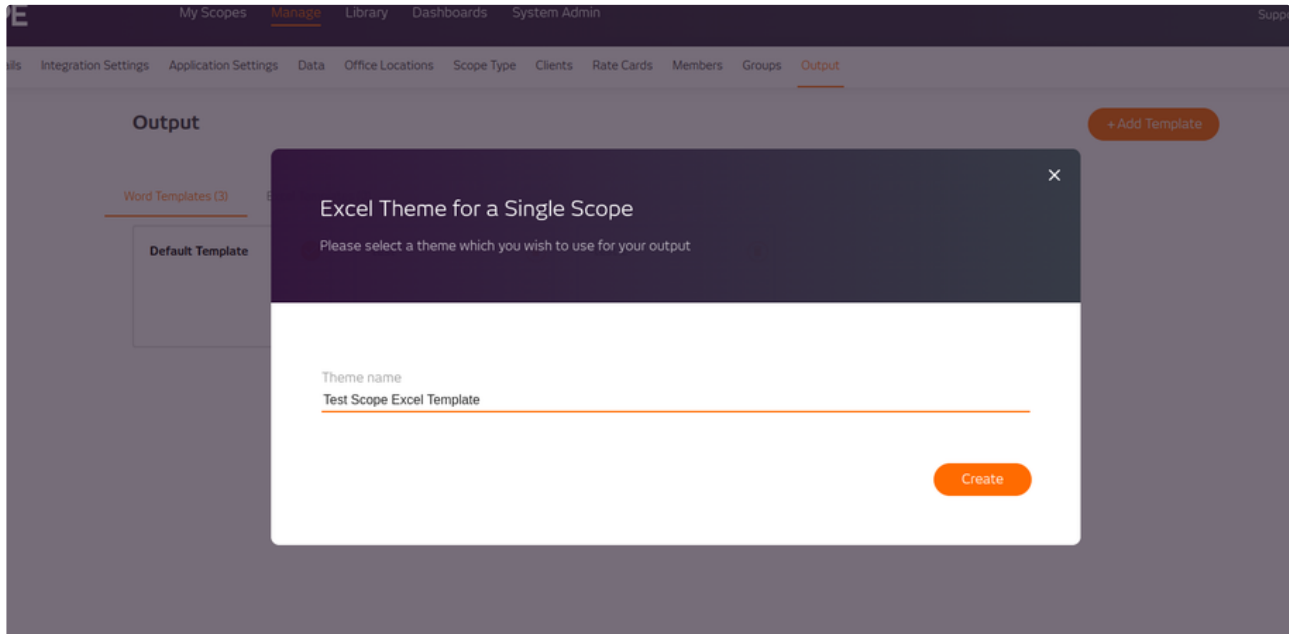


5. Define a loop of scope's deliverables. Loop is defined with the pre-defined jxls comment `jx:each`

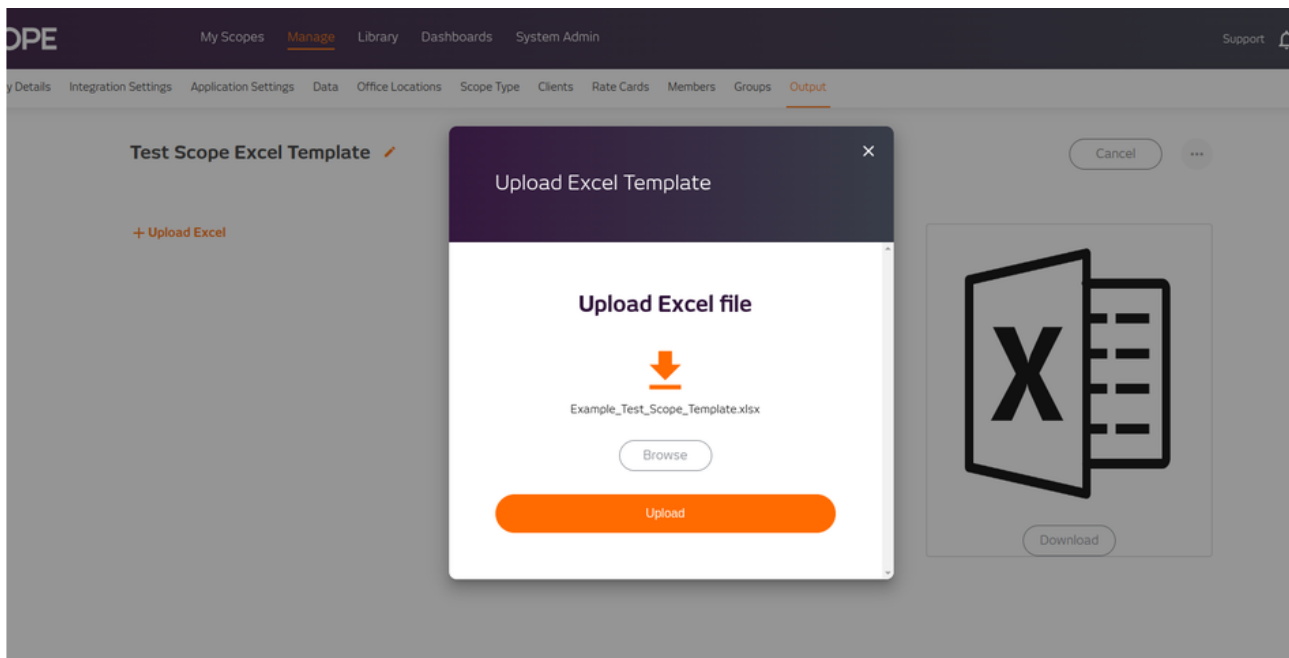
Define a new comment in cell A4 - `jx:each(items="scope.deliverables", var="deliverable", lastCell="E4")`

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 > 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.

SCOPE

My Scopes

Manage

Library

Dashboards

System Admin

Activity

Details

Team

Breakdown

Output

S-346

+ Add Item

...

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

Scope Totals

£0.00

0 hrs

£0.00

mit scope. The
1 scope must
in zero and not

9. Go to **Output** → go to **Excel Template**.

Click **Preview** button

DetailsTeamBreakdownOutput

Output

Word TemplateExcel Template

TEMPLATE: Test Scope Excel Template

Preview

10. Download the file and open it with Excel.

Excel scope 123 456

Search (Alt + Q)

FileHomeInsertDrawPage LayoutFormulasDataReviewViewHelpEditing

Undo

Cut

Paste

Format Painter

Clipboard

Calibri

11

A^A^

B

I

U

D

Wrap Text

Merge & Center

General

\$

%

Font

Alignment

Number

B10

	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						