



**The ideal solution to enable Evolve users  
to build their own reports using Excel**

**No new tools to learn;  
No custom development costs**

## MODULE HIGHLIGHTS:

- Create an unlimited number of templates in Excel using basic formulas and codes.
- Pull information from any data table within your Evolve database.
- Define input parameters for reports such as date ranges.
- Enable users to access a list of ExcelReports from within Evolve, and to easily execute them on demand.

# ExcelReports FOR Evolve

*ExcelReports for Evolve* turns a familiar Microsoft Office program into a powerful tool for developing custom reports against your live Evolve data. Define an unlimited number of custom report templates, and make them available to users within Evolve for easy selection and generation. Lay out your template on a standard Excel spreadsheet using simple formulas and codes; there is no need to write any programming code or to learn a new application.

Microsoft Excel - Book1

File Edit View Insert Format Tools Data Window Help

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Customer No.	Name	Sales
CENTRALMFG	Central Manufacturing Company	\$ 249,932.90
COPPERSUPPLY	Copper Supply Limited	\$ 119,036.80
GENPARTS	General Parts Distribution Inc.	\$ 259,336.50
PINNACLE	Pinnacle Products	\$ 172,948.00
PRECISION	Precision Corporation	\$ 221,380.80
RELIABLE	Reliable Plastics Corp.	\$ 80,370.00
VELOCITY	Velocity Machine and Tool	\$ 47,897.50
<b>GRAND TOTAL</b>		<b>\$ 1,150,902.50</b>

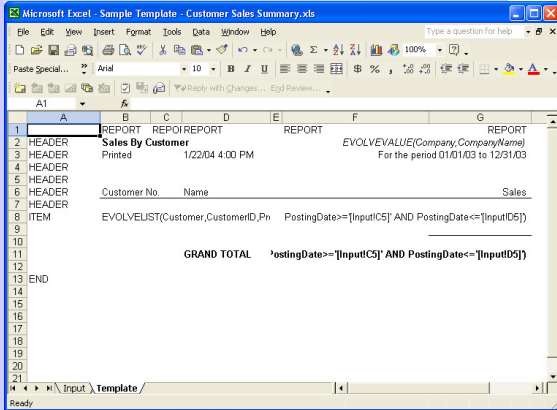
Sheet1 / Sheet2 / Sheet3

Ready



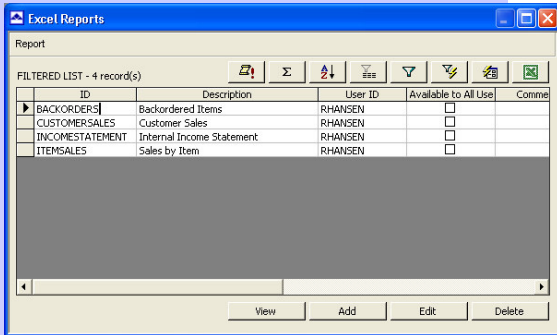
# Use your existing Excel skills to create dynamic new reports that are accessible from within Evolve and use real-time data.

## 1. Create an unlimited number of report templates.



Using a simple Summary set of codes, define the rows and columns that will make up the report (headers, items, etc.). Use the "EVOLVELIST" function to pull in a list of data records from any table in the database. Embed other functions such as EVOLVEVALUE (lookup a field value, such as the Name for a given Customer) and EVOLVESUM (sum up a numeric field such as "Subtotal") to provide detailed information including analytical sums. Incorporate base Excel functions to stamp dates and times on reports, and use cell formatting to ensure the output looks as good as the data. Set up an "Input" sheet for users to key in criteria that will affect the report output (such as a date range to summarize sales information).

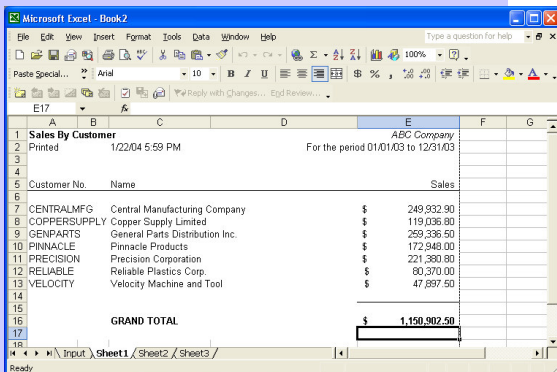
## 2. Link your templates to a list of ExcelReports in Evolve.



Easily set up each template within Evolve to show up on a list of ExcelReports. Keep reports private for your own usage, or make them available to all users. Directly from the ExcelReport list, the template can be opened up for editing or entering input parameters. Just as easily, a single menu click will Run the selected report and produce an output Excel file.

The ExcelReport list is common across all companies. Open any company that you have set up in Evolve and run any of the available ExcelReports; the data will generate based on the currently selected company. There is no need to perform multiple setups within each one.

## 3. Generate your reports at any time with real-time data.



Run any report from the ExcelReport list, and Evolve will generate results based on your template and the requested data as it exists in Evolve at that point in time. Easily share reports through e-mail after generation; there is no risk of broken Evolve links once the file has been created.

The *ExcelReports for Evolve* module will empower you to easily retrieve and analyze data that would have previously required custom report development. Modify templates as your business changes to provide new analyses and insights into your operations without waiting for development support.



**Your business changes; your software changes;  
your reporting tool should be no different.**

**ExcelReports FOR Evolve**