INSERT TABLE/FORM – Setup and Formatting

This is a beginning demonstration of setting up and formatting a Word Template RTF file for BI Publisher using the **Table/Form dialog box**. For more detailed and advanced information, see the various links in the SFIS Blog BIP Templates page as well as the documents in the red-outlined boxes below. Note that this is only one way of achieving the desired final output.

The template is based on a query and XML file containing information from the EXT_ORG_PRI_VW and EXT_ORG_TBL_ADM tables.   This set of data contains a selection of colleges in the US sorted by State, City, and Organization/Institution Name displaying the Org ID, Name, and ATP Code.

The fields are:

> STATE
> CITY
> EXT_ORG_ID
> DESCR50
> ATP_CD

REAL DATA: For formatting purposes, the XML file contains **real data**, i.e., the query is downloaded to XML, and when the **PDF Preview** is invoked, actual data is shown. Once the design has been finalized, the BI Publisher Data Source will be created along with the Report Definition.

** Read more about using **real data** at: FAQs about Using Real Data When Designing and Previewing Your Template. **

TABLES: Tables display rows of data by looping through each set of information (in this case, each organization). The Table/Form dialog contains methods to enable you to create tables (as well as forms).
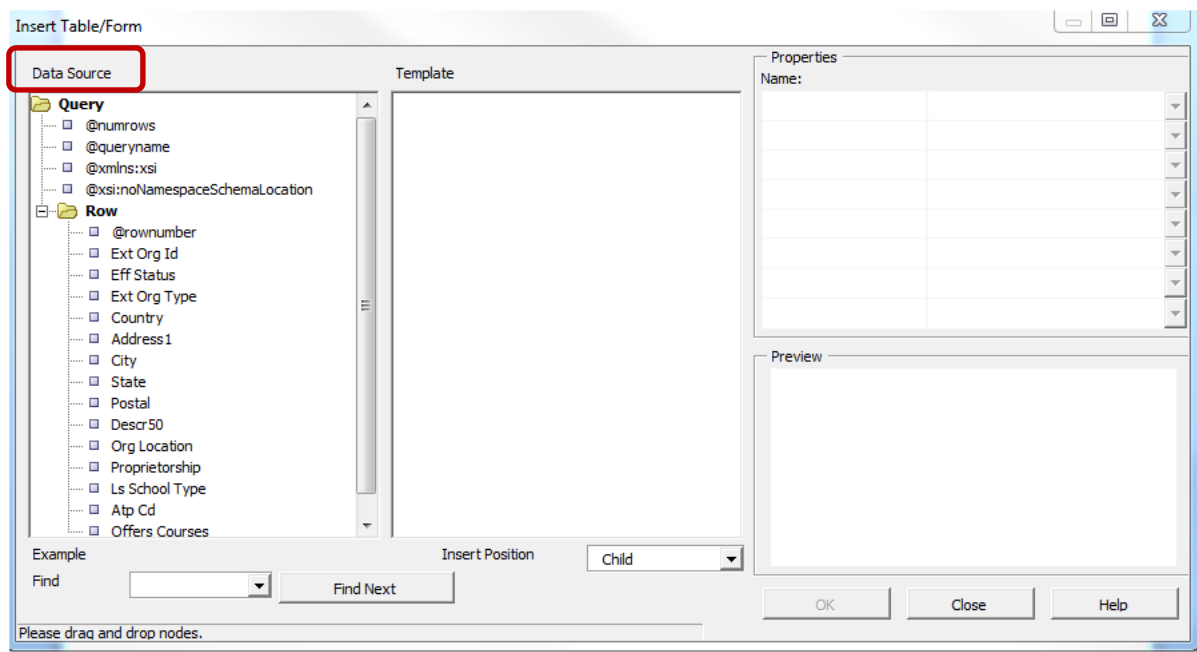
The Insert Table/Form has three main sections:
1. Data Source: all the fields from the Query/XML
2. Template: the fields to be used in the final document
3. Properties: the formatting properties for the template and a preview area

In this example, the fields are from the two External Organization tables noted above. The report will display the institutions in ascending order by the fields of STATE (State), CITY (City) and DESCR50 (Name of the Institution).
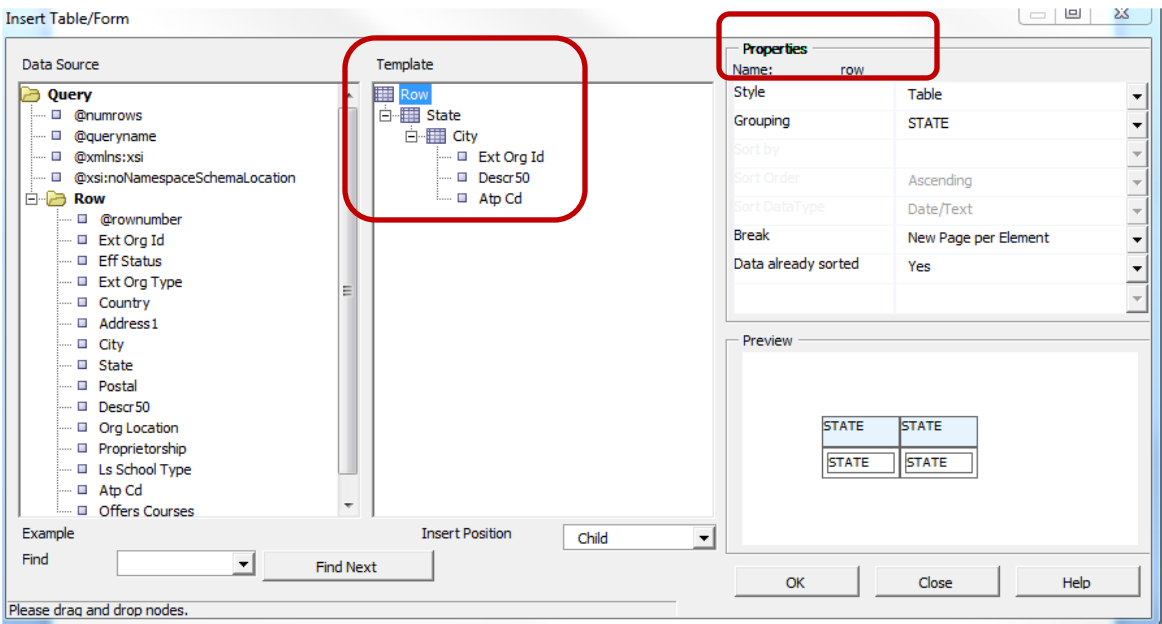

** For detailed information on how to get started with templates, read the document XML Publisher Templates by Example. For specific information on the **Table/Form dialog**, search the document for "Get your employees listing." **

When first opened, the dialog box displays all of the Data Source information in the left-hand section.
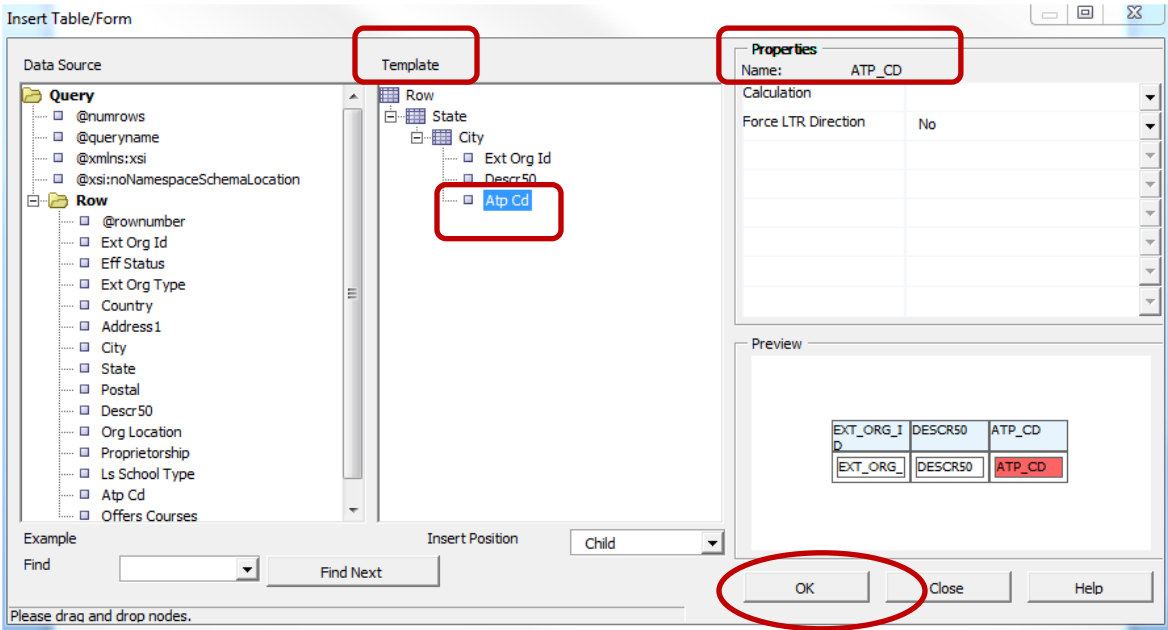

For the format described above, the Row and the five fields are dragged from Data Source section to the Template section and placed in the desired tree structure.

Each field's properties are shown to the right. For example, this first image shows the information related to all the fields in the table, including the grouping on the STATE field:

And this image shows the information related to the last field, ATP_CD. You can get an idea of how that field will look in the Preview section:

The following chart shows the Properties selected for each element in the template.

Name	row	STATE	CITY	EXT_ORG_ID	DESCR50	ATP_CD
Style	Table	Table	Table			
Grouping	STATE	CITY	DESCR50			
Sort By						
Sort Order	Ascending	Ascending	Ascending			
Sort DataType	Date/Text	Date/Text	Date/Text			
Break	New Page Per Element	New Section Per Element	New Section Per Element			
Data already sorted	Yes	Yes	No			
Showing Group Value		Yes	Yes			
Calculation						
Force LTR Direction				No	No	No

Below is the appearance of the Template when the above properties are applied (by clicking OK).   There are now additional fields corresponding to the chosen properties: G, F, E, PB.

BI PUBLISHER PROPERTIES: You can double-click on these *or any fields* to see their BI Publisher Properties.

These additional fields are indicated below in the color of the following text.

G – before STATE to indicate the beginning of the Grouping as well as the order

E – the last "E" displayed. It is at the end of each STATE Grouping to indicate the grouping is closed

G – before CITY to indicate the beginning of each City's Grouping as well as the order

E – at the end of each CITY Grouping to indicate it is closed

F – "for-each" code to designate the start of each row by EXT_ORD_ID, i.e., each organization/institution, as well as the order

E – "end-for-each" code to designate the end of each organization/institution's row

PB – split by page break on each STATE grouping

State				
G STATE				
	State			
	City	City		
	G CITY	Ext Org Id	Descr50	Atp Cd
		F	DESCR50	ATP_CD
		EXT_ORG_ID		E
		E		
	PB E			

This is a sample of how the Template looks for the first few cities in the State of Alaska when the Preview > PDF is selected at this point. It shows tables within tables, formatted with labels and borders:

State				
AK				
	State			
	City	City		
	Anchorage	Ext Org Id	Descr50	Atp Cd
		129410	Alaska Pacific University	4201
		100726	Anchorage Community College	4866
		129581	University Of Ak Anchorage	4896
	Bethel	Ext Org Id	Descr50	Atp Cd
		100609	University Of Alaska Fairbanks	004370
	Haines	Ext Org Id	Descr50	Atp Cd
		128222	Covenant Life College	0127
	Juneau	Ext Org Id	Descr50	Atp Cd
		129582	University Alaska Juneau	4897
		100608	University Of Alaska Juneau	4366
	Ketchikan	Ext Org Id	Descr5	Atp

The table elements can be manipulated using **MS Word tools** in a number of ways to clean up the appearance of the data. For example, the size of the columns can be changed to better fit the data, and the extraneous labels of State and City can be removed:

State					
G STATE	City				
	G CITY		Ext Org Id	Descr50	Atp Cd
			F EXT_ORG_ID	DESCR50	ATP_CD
					E
			E		
	PB E				

The Preview for Alaska now looks like this:

State					
AK	City				
	Anchorage		Ext Org Id	Descr50	Atp Cd
			129410	Alaska Pacific University	4201
			100726	Anchorage Community College	4866
			129581	University Of Ak Anchorage	4896
	Bethel		Ext Org Id	Descr50	Atp Cd
			100609	University Of Alaska Fairbanks	004370
	Haines		Ext Org Id	Descr50	Atp Cd
			128222	Covenant Life College	0127
	Juneau		Ext Org Id	Descr50	Atp Cd
			129582	University Alaska Juneau	4897
			100608	University Of Alaska Juneau	4366
	Ketchikan		Ext Org Id	Descr50	Atp Cd
			100615	University Of Alaska Southeast	4379
	Kodiak		Ext Org Id	Descr50	Atp Cd
			100610	University Of Alaska Anchorage	4372
	Kotzebue		Ext Org Id	Descr50	Atp Cd
			100678	Prince William Sound Community College	4636
	Palmer		Ext Org Id	Descr50	Atp Cd
			100642	University Of Alaska Anchorage	4509
	Sitka		Ext Org Id	Descr50	Atp Cd
			129535	Sheldon Jackson College	004742
			100716	University Of Alaska Southeast	4754
	Soldotna		Ext Org Id	Descr50	Atp Cd
			100611	Kenai Peninsula College	4373

The **Ext Ord Id**, **Descr50** and **Atp Cd** labels can be moved up to the same level as **City**.

State					
G STATE	City		Ext Org Id	Descr50	Atp Cd
	G CITY		F EXT_ORG_ID	DESCR50	ATP_CD
					E
			E		
	PB E				

These edits change the appearance to the following:

State				
AK	**City**	**Ext Org Id**	**Descr50**	**Atp Cd**
	Anchorage	129410	Alaska Pacific University	4201
		100726	Anchorage Community College	4866
		129581	University Of Ak Anchorage	4896
	Bethel	100609	University Of Alaska Fairbanks	004370
	Haines	128222	Covenant Life College	0127
	Juneau	129582	University Alaska Juneau	4897
		100608	University Of Alaska Juneau	4366
	Ketchikan	100615	University Of Alaska Southeast	4379
	Kodiak	100610	University Of Alaska Anchorage	4372
	Kotzebue	100678	Prince William Sound Community College	4636
	Palmer	100642	University Of Alaska Anchorage	4509
	Sitka	129535	Sheldon Jackson College	004742
		100716	University Of Alaska Southeast	4754
	Soldotna	100611	Kenai Peninsula College	4373

The following image shows the format after removing the table borders on all but the City table, changing two of the field labels, resizing the columns, and re-aligning the last column so that ATP Codes line up on the right.

State				
G STATE	**City**	**Ext Org Id**	**Institution**	**ATP Code**
	G CITY	F	DESCR50	
		EXT_ORG_ID		ATP_CD E
		E		
PB E				

The first part of the Preview now appears as follows. Each state grouping has a similar appearance.

State				
AK	**City**	**Ext Org Id**	**Institution**	**ATP Code**
	Anchorage	129410	Alaska Pacific University	4201
		100726	Anchorage Community College	4866
		129581	University Of Ak Anchorage	4896
	Bethel	100609	University Of Alaska Fairbanks	004370
	Haines	128222	Covenant Life College	0127
	Juneau	129582	University Alaska Juneau	4897
		100608	University Of Alaska Juneau	4366
	Ketchikan	100615	University Of Alaska Southeast	4379
	Kodiak	100610	University Of Alaska Anchorage	4372
	Kotzebue	100678	Prince William Sound Community College	4636
	Palmer	100642	University Of Alaska Anchorage	4509
	Sitka	129535	Sheldon Jackson College	004742
		100716	University Of Alaska Southeast	4754
	Soldotna	100611	Kenai Peninsula College	4373