Using the Property Reporting Wizard

The Property Reporting Wizard generates reports about the shapes in your drawing, including custom-property data associated with them.

A custom-property field is a database field in which you can enter information relevant to a shape. Many Visio masters come with custom-property fields already assigned. For example, shapes on some network stencils have custom-property fields for ID, System, Processor, and RAM. You can also add custom-property fields of your own using the Custom Properties Editor. To run the editor, choose Tools > Macro > Custom Properties Editor.

Once a shape has custom properties, you need to add values for the properties. To add values, select the shape, then choose Shape > Custom Properties. Enter the values in the Custom Properties dialog box.

Choosing shapes for reports

You can report on all shapes on all pages of a drawing, or you can report on selected shapes. The Property Reporting Wizard offers you a variety of ways to select shapes.

All Shapes In The Drawing Click here to report on all shapes on all pages of your drawing.

Currently Selected Shapes Click here to report on shapes you selected before you started the wizard.

Shapes You Select Yourself Click here to keep the wizard running and select the shapes in your drawing that you want to report on. The shapes you select can be on different drawing pages.

All Shapes With Custom Property Click here to report only on shapes with a specific custom-property field (for example, cost). Choose the property you want from the list.

All Shapes On Layer: Click here to report only on shapes assigned to a specific layer. A layer is a named category of shapes. To learn more about layers, choose Help > Visio Help, click Index, then type "Layers."

Assigning shapes to a layer

The wizard assigns to a layer all of the shapes you've selected to include in your report. The layer doesn't affect the appearance of your drawing. It simply places the shapes in a category that you can select, hide, lock, print, or color separately. Having the shapes in a report on one layer also makes it easier to update the report.

To learn more about layers, choose Help > Visio Help, click Index, then type "Layers."

Labelling the report shape data

If you generate a numerical report, only summary data from the spreadsheet appears in the report shape in your drawing. For example, if you generate a report in which you calculate the total duration of a process, the spreadsheet includes a row for each shape in the drawing and a value for the duration associated with each shape as well as the total duration. The report shape includes only the result of the calculation-total duration-and a label.

If you generate an inventory, all the data from the spreadsheet also appears in the report shape.

To replace an existing label, under **Label**, click the label you want to replace, then type a new label.

Report shape options

In addition to typing a title for the report shape and choosing the drawing page on which the shape should appear, you have the following options:

Include Subtotal Reports On Each Page Check to place a report shape on each drawing page. This shape includes the report information relevant to that page only.

Total Identical Items If you're generating an inventory, check to group duplicate shapes (that is, shape instances that share the same master). Leave unchecked to list each shape individually.

Display Column Headings Check to display headings for the columns in the report shape.

Choosing a report type

On this screen, you choose the type of report you want to create. The report results are put into a spreadsheet, which opens when you click **Next**.

Numeric reports

If you choose one of the standard calculations (**Total**, **Average**, **Medium**, **Minimum**, **Maximum**), the results of the calculation are presented in the spreadsheet.

If you choose **Custom**, you can enter formulas into appropriate spreadsheet cells to include advanced calculations in your report. For details about using the spreadsheet, click the Help button on the spreadsheet screen.

The wizard takes some of the data (the column headings and the calculation results) from the spreadsheet and presents it in a report shape in your Visio drawing. If you add formulas to the spreadsheet, select the cells you want the report shape to include before you click **Next** to leave the spreadsheet.

Inventory report

If you create an inventory report, the results of the inventory are presented in the spreadsheet.

When you click Next, the wizard takes the inventory data and presents it in a report shape in your Visio drawing.

Choosing what to include in your report

Properties you choose to include in your report become column headings, or fields, in the spreadsheet and appear in the report shape in your drawing.

Numeric reports

The wizard automatically includes column headings for Page Name, Shape Name, and Shape Text in the spreadsheet for a numeric report, whether or not you choose those properties on this screen. The information in these columns is necessary for identifying the shapes.

If you want other properties to appear in the spreadsheet as column headings, move them into **Include**.

Inventory reports

Only properties you choose on this screen appear as column headings in the spreadsheet for an inventory report. Move the properties you want as column headings into **Include**.

Export [data]

Exports an inventory report based on shape properties. The Export [data] command is available for certain types of drawings in which you may incorporate data frequently, such as network diagrams, office layouts, and organization charts.

When you export information, you choose whether to report on all pages in the document, whether to report on all shapes or selected shapes, and whether to create a report in Excel, Notepad, or Access format.

Range   Specifies whether you want to create an inventory report for the entire document or the current page.

Include   Specifies whether to include all shapes, only selected shapes, or all shapes on a specific layer.

Export To   Specifies whether to export the inventory report to Notepad, Microsoft Excel, or Microsoft Access.

File Name   Specifies text you enter as the name of the inventory report; for example, "Bill of Materials."

Total Identical Items   Totals identical items in the inventory report.

Display column Headings   Displays column headings in the resulting inventory report.