

User Guide

PolyWorks | ReportLoop™
for Excel



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Introduction

About this document

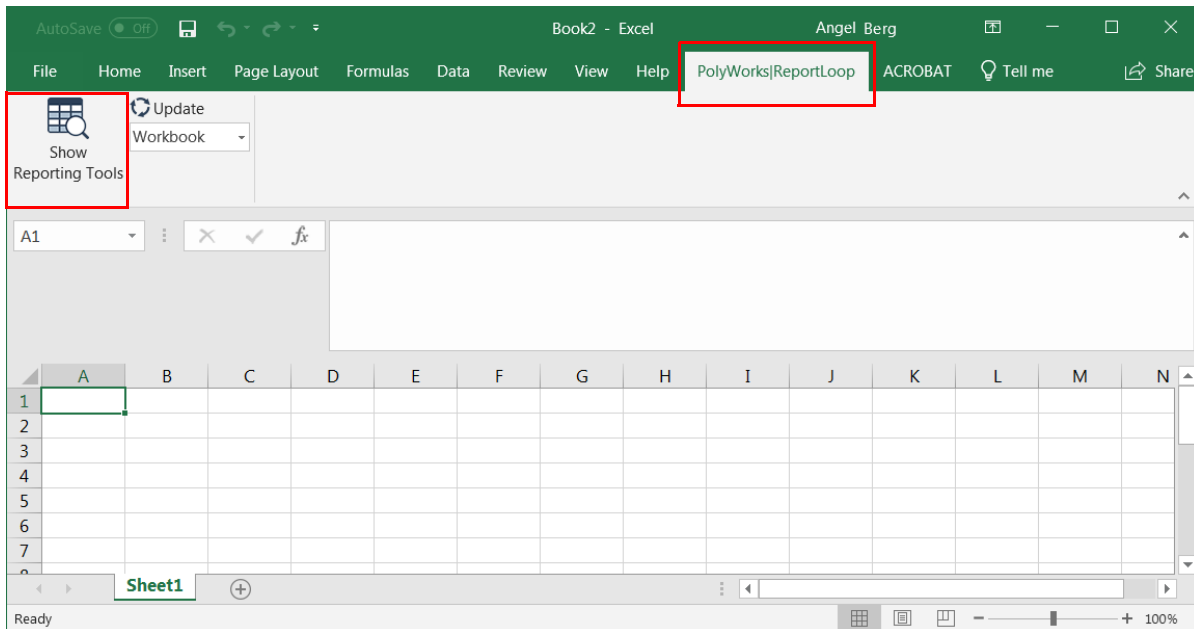
This guide explains how to use PolyWorks | Report Loop. It outlines the normal functionalities and provides information and examples on how to get started.

About PolyWorks | ReportLoop™ for Excel

PolyWorks | ReportLoop for Excel is a powerful reporting solution that digitally interconnects the PolyWorks Metrology Suite to Microsoft® Excel. It allows you to inject 3D inspection data into corporate Excel reports by directly linking spreadsheet cells to PolyWorks controls, control views, tables, and snapshots, as well as project, object, and piece properties, without having to create macros. And as formulas are written in each cell, the Excel report has built-in intelligence that allows it to automatically update cells when the inspection project has been modified.

Using the PolyWorks | ReportLoop tab

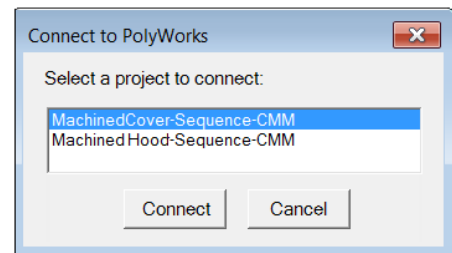
Once PolyWorks | ReportLoop is installed, using the MSI file, the **PolyWorks | ReportLoop** tab is made available in Excel. This tab offers the reporting tools that can be used to quickly and easily insert PolyWorks inspection data into Excel spreadsheets and update that data. Pressing the **Show Reporting Tools** button opens the PolyWorks Reporting Tools pane.



In the PolyWorks Reporting Tools pane, you can connect to an open PolyWorks | Inspector or PolyWorks | Reviewer project by clicking the **Connect** item.



If more than one PolyWorks project is open, a dialog box is displayed to specify which project to connect to.



Inserting PolyWorks inspection data into spreadsheets

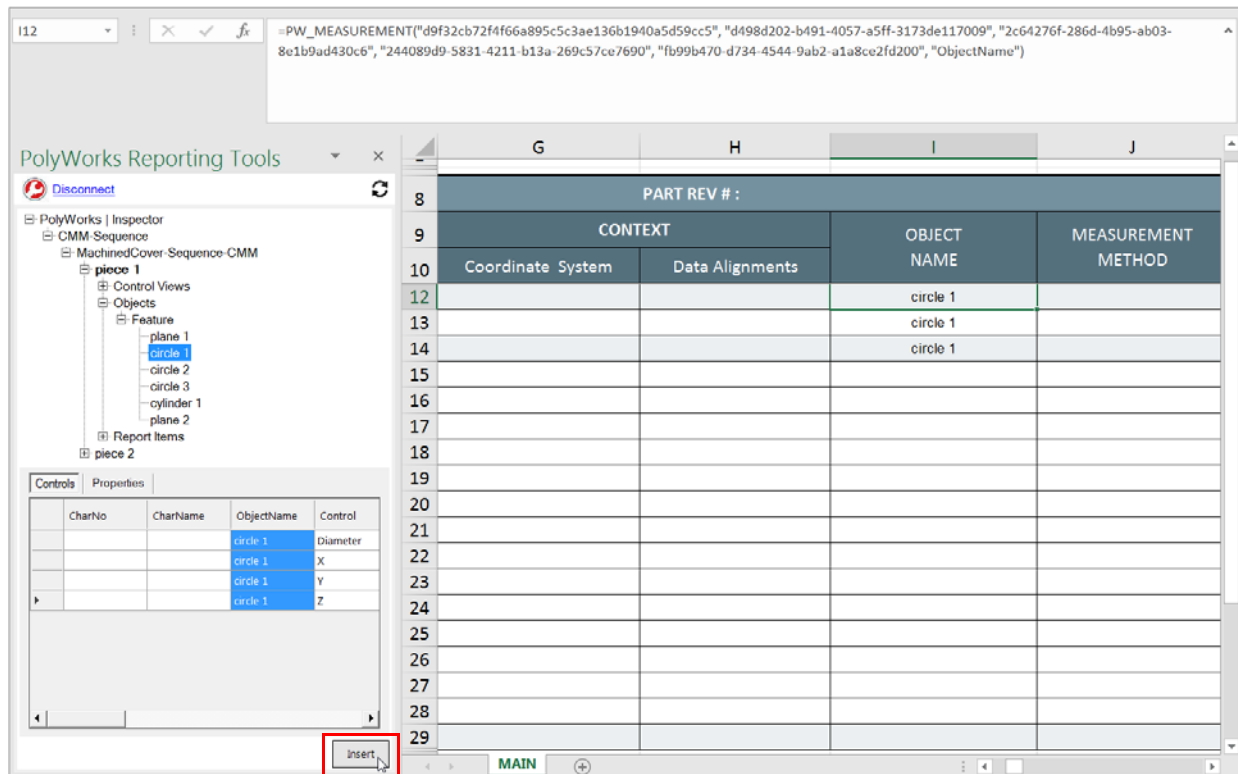
Once connected to a PolyWorks project, a tree view is displayed in the PolyWorks Reporting Tools pane displaying the workspace as well as project and piece names. The measurement objects, control views, and report items are also displayed. Note that formatted reports in PolyWorks projects are not considered. The **Refresh** button, in the top right corner of the pane, refreshes the list displayed in the tree view based on changes saved in PolyWorks | Inspector.

To insert PolyWorks inspection data within Excel spreadsheets, select an item in the tree view in the PolyWorks Reporting Tools pane. Once an item is selected, different tabs, such as the **Controls** and **Properties** tabs, are displayed at the bottom of the pane above the preview area. The tabs displayed depend on the selection in the tree view.

Once a tab is selected, selecting specific information in the preview area below the tab and clicking the **Insert** button inserts that information into the Excel sheet along with the corresponding formulas. You can also double-click the selected information in the preview area to insert it into the spreadsheet. The selected information can also be copied and pasted into the spreadsheet by pressing the CTRL+C and CTRL+V shortcut keys. The information is inserted into the cells, or range of cells, that have been selected in the spreadsheet.

When inserting snapshots into a spreadsheet, they are not inserted into cells but rather are floating and can be moved by dragging.

Report items are inserted into spreadsheets according to their position in the PolyWorks | Inspector report.



Updating PolyWorks inspection data inserted into spreadsheets

The **Update** button can be used to update cells and snapshots. The **Update** list box allows you to choose which Excel spreadsheet items are updated at a time: cells and snapshots in the entire workbook, on the current sheet, or just the selected cells or snapshots.

When connected to a PolyWorks|Inspector project, changes saved in that project for the current piece are also automatically updated in the Excel spreadsheet. If the changes are not saved in the PolyWorks project, you can still update the items in Excel by pressing the **Update** button. In this case, items will be updated according to the selection made in the **Update** list box.

When not connected to a PolyWorks|Inspector project, pressing the **Update** button updates the inspection data that has been inserted into the Excel spreadsheet for all the pieces found in the project that is open in PolyWorks|Inspector, according to the selection made in the **Update** list box.

