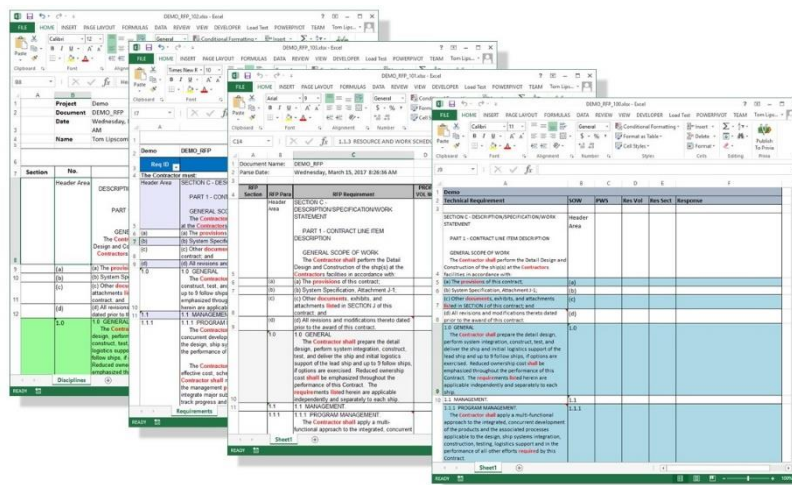


## Document Analyzer – Excel Export Templates

Atebion’s Excel Export provides fantastic flexibility in customizing your Analysis Results (parsed segments/paragraphs) and Deep Analysis Results (parsed sentences). For example, you can now use your own internal forms without having to cut-and-paste from Atebion’s standard Excel export files.

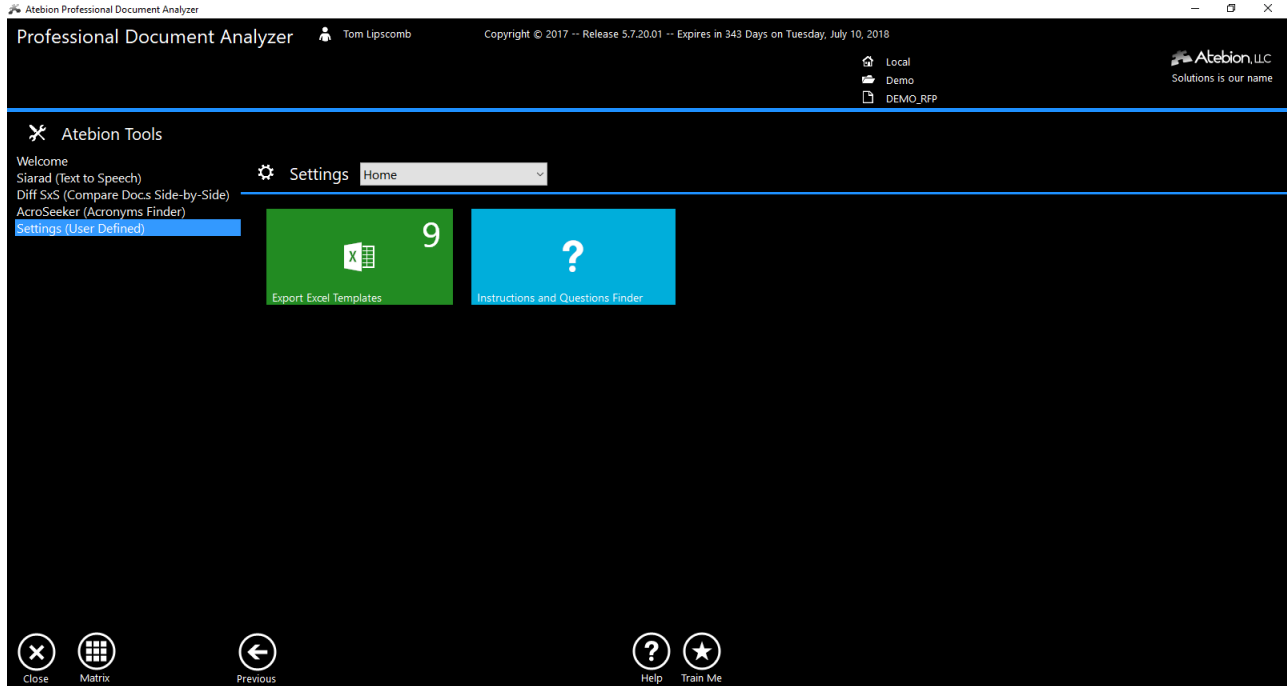
### Enhancements to Analysis & Deep Analyses Excel Exports

- **Segment/Paragraph and Sentences** – Converts **Highlighted Keywords** to **Red Bold** font, and retains **Bold**, *italic*, and Underline text.
- **User definable Excel (\*.xlsx) Templates**
  - **Analysis Results – Features**
    - Whole Number rows Background Color (optional) (definable)
    - Alternating Color rows (optional) (definable)
  - **Deep Analysis – Features**
    - Exclude Number and/or Caption for Sentence rows (optional)
    - Segment/Paragraph Background Color (optional) (definable)
  - **Both Analysis Results and Deep Analysis – Features**
    - Notes from within the Document Analyzer can be automatically embedded into Excel cells as Comments (creation denoted by registered Document analyzer user’s name)
    - Test Template Settings while working on the Template
    - Restore from your previous Template save.
    - Downloadable Excel Templates from Atebion LLC within the Document Analyzer
    - Data entry validation



## Maintaining Excel Templates

To **Create, Download, Edit** or **Delete** an Excel Export Template, go to the **Tools/Settings** area and select the **Export Excel Templates**.



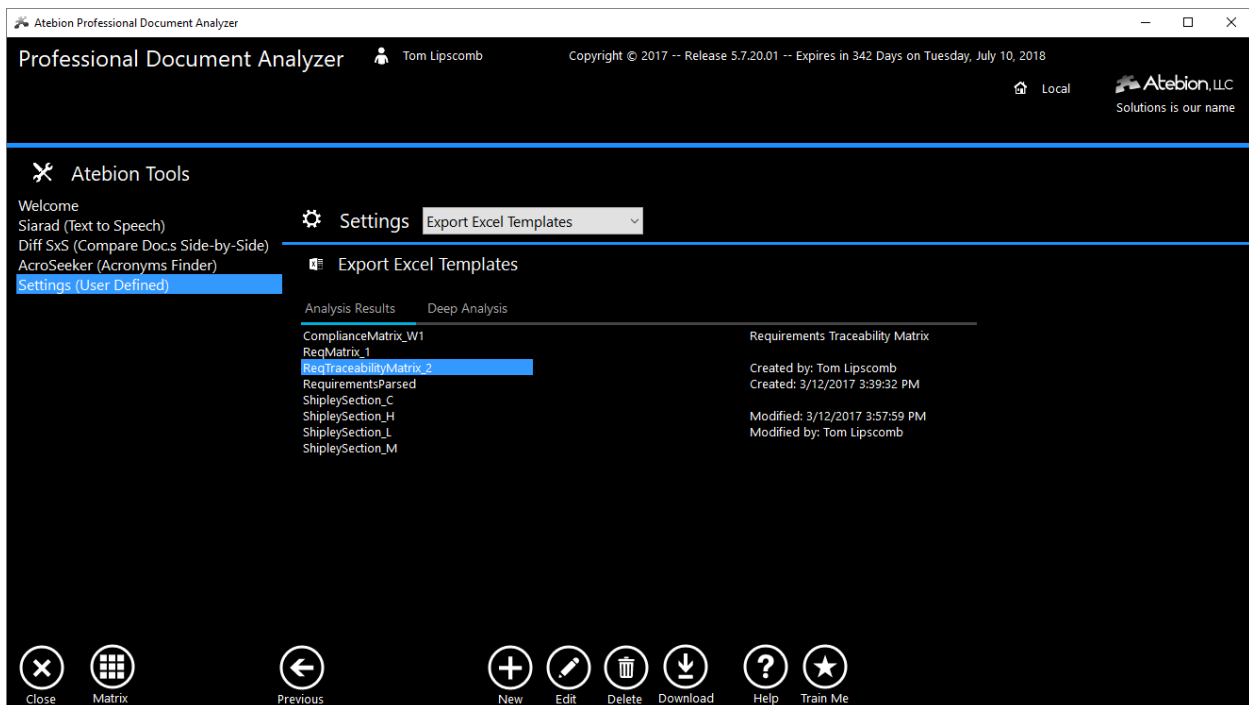
**Download** – Click the Download button at the bottom of the window to download Excel Templates from Atebion’s website. Suggest Downloading and editing a template prior to defining your first template, so that you can become familiar with template settings.

**New** – Click the New button at the bottom of the window to define a new Excel Template.

**Edit** – Select a Template name to modify. Notice there two tabs, Analysis Results and Deep Analysis.

**Delete** – Select a Template name to remove the selected Template. Note: Your deleted Template files (\*.xlsx & \*.xml) are saved in a Backup folder.

**Sharing Templates** – To share your templates with others, click on the Excel icon (denoted in the screen image). Then Windows Explorer will open the folder were your Templates are held. You will also notice a Backup folder which holds your backup templates (previous modified and deleted).



The screen image below shows the Excel Template window for defining your data settings. When defining a Template, the first thing you should do is select the Excel (\*.xlsx) you will be using for your template. We suggest that you have this Excel file open while setting your data field locations.

There are three main setting areas of this Excel Template window.

**Template Definitions** – Denoted in Red (Top & Left).

**Header Information Locations** – Cell locations. Denoted in Yellow (Center)

**Data Row Element Locations and Options** – Denoted in Light Blue (Right & Bottom).

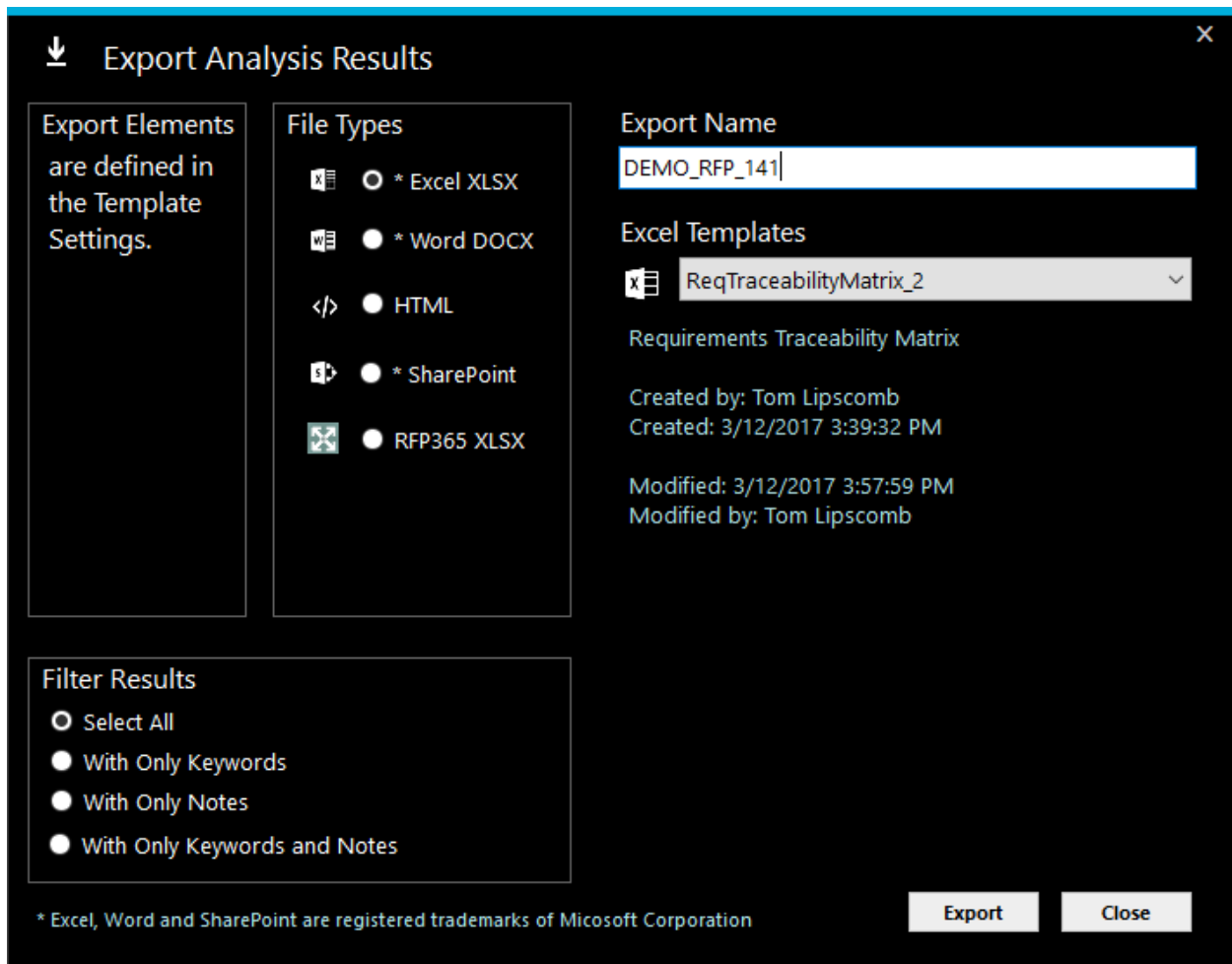
## Exporting Analysis Results to Excel Templates

If you don't see the Excel Templates dropdown list, then you currently don't have any templates defined yet. Then go to the Tools/Settings as referenced on page 3.

All the Export Elements for Templates are defined as part of the Template's settings.

If you select "-- None --" from the Excel Templates dropdown list and click the Export button, then a standard Document Analyzer Excel Export file will be generated. This standard Excel Export file has been enhanced from the old type. Now it displays found Keywords denoted in **Red Bold** font and the content is much cleaner.

The Deep Analysis Export for Excel Templates has nearly the same user interface.



**Export Analysis Results**

Export Elements are defined in the Template Settings.

**File Types**

- \* Excel XLSX
- \* Word DOCX
- HTML
- \* SharePoint
- RFP365 XLSX

**Export Name**

DEMO\_RFP\_141

**Excel Templates**

ReqTraceabilityMatrix\_2

Requirements Traceability Matrix

Created by: Tom Lipscomb  
Created: 3/12/2017 3:39:32 PM

Modified: 3/12/2017 3:57:59 PM  
Modified by: Tom Lipscomb

**Filter Results**

- Select All
- With Only Keywords
- With Only Notes
- With Only Keywords and Notes

\* Excel, Word and SharePoint are registered trademarks of Microsoft Corporation

Export Close