Knowledge Base

Exaquantum/Batch

Exaquantum Batch report templates locked for edit in Report Template Manager

KB-1103-23

Document Summary	
Article Type	User Guide
Products Affected	Exaquantum/Batch
Versions Affected	R3.10
Function Affected	Report Template Manager
Available Resolution	Avoidance and recovery
Audience	Report Template Administrators
Summary	Closing the Microsoft Excel Compatibility Checker using the either the X dialogue or the Cancel button can result in Report Templates remaining locked for edit.
Review Date	Document to be reviewed before February 2024

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Chapter 1 Introduction

Exaquantum/Batch includes reporting functionality. Reports are generated using a Microsoft Excel workbook as a template before being converted to PDF format.

An issue has been seen where a template is marked as locked in the Exaquantum/Batch Template Manage application and cannot be edited.

The purpose of this document is to describe when this situation can arise and how it can be avoided.

Recovery procedures are also included.

1.1 Audience

In order to edit Exaquantum/Batch Report Templates, a user must be in the Exaquantum Administrators group.

This document is therefore aimed at these users.

Chapter 2 Fault Description

Exaquantum/Batch report templates are developed using Microsoft Excel. The format of Excel has been enhanced by Microsoft since the original templates were developed.

When using more recent versions of Microsoft Excel, an attempt to save the template file may result in the compatibility checker that is part of Microsoft Excel being displayed.

If the compatibility check dialog is closed using the X dialog or the cancel button, it can cause the Excel report template file to remain locked, meaning that users cannot edit existing templates.

The issue is reported with Exaquantum/Batch R3.10 and Microsoft Office 2013 but could also be seen on other versions of Exaquantum/Batch and Office.

Chapter 3 Fault Detail and Cause

Exaquantum/Batch report templates were developed using Microsoft Excel xls format which was the only format available during development.

Since Exaquantum/Batch was developed, Microsoft have enhanced the format of the files created by Microsoft Excel.

Files created prior to the enhancement will have an extension of xls whereas those created after the enhancement will have an extension of xlsx or xlsm.

When a report template file with a xls extension is opened in Microsoft Excel version 2007 or later, it is possible to that it has been updated with features that are not supported in the xls format.

This will result in the Microsoft Excel Compatibility Checker being activated when the report template file is saved.

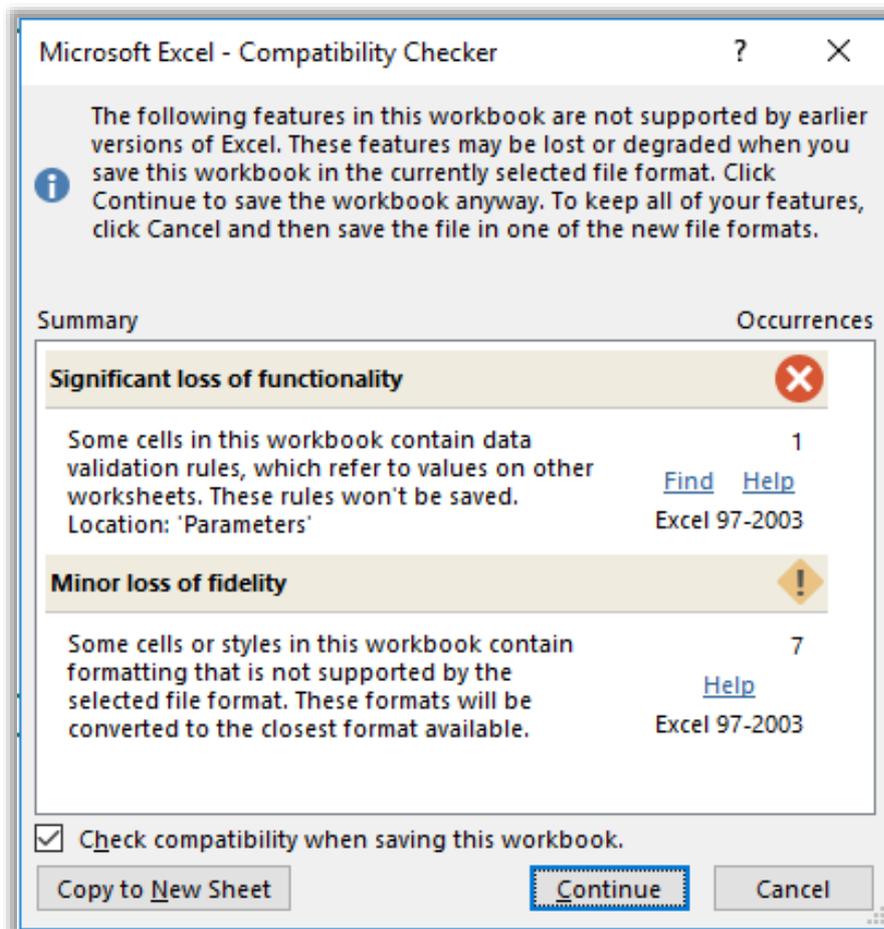Not all changes will have this effect. See Figure 3-1.

Figure 3-1 - Excel Compatibility Checker

If the user closes the dialog with the X button or clicks the Cancel button, an error will be raised, as shown below.
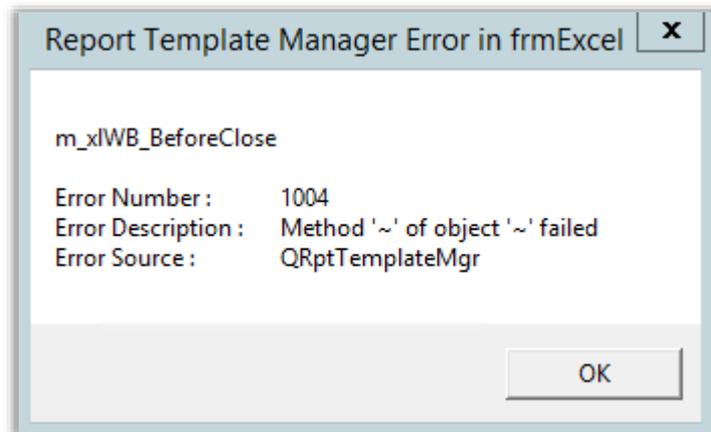

Figure 3-2 - Error generated when Checker is closed

The error may have opened behind the Excel Window effectively hiding the message. It will then appear that Excel has frozen.

If Excel or the Template Manager application are then killed using the task manger the template edit process will have been terminated without completing meaning that template file could remain locked.

If the template file remains locked, no further edits are possible for this template.

Notes:

Any templates saved in the newer .xlsx or .xlsm format will not have this problem since there is no compatibility check (see also Chapter 6).

The need to disable the Compatibility Checker is documented in the Disabling the Compatibility Checker for Report Templates page in the online help accessible from the Help menu of any Exaquantum/Batch Application and BatchWeb.

Chapter 4 Recovery Options

4.1 Unlocking the template file without closing the Template Manager

If the situation described previously is experienced, the applications should not be killed using Task Manager.

Carry out the steps listed below to recover.

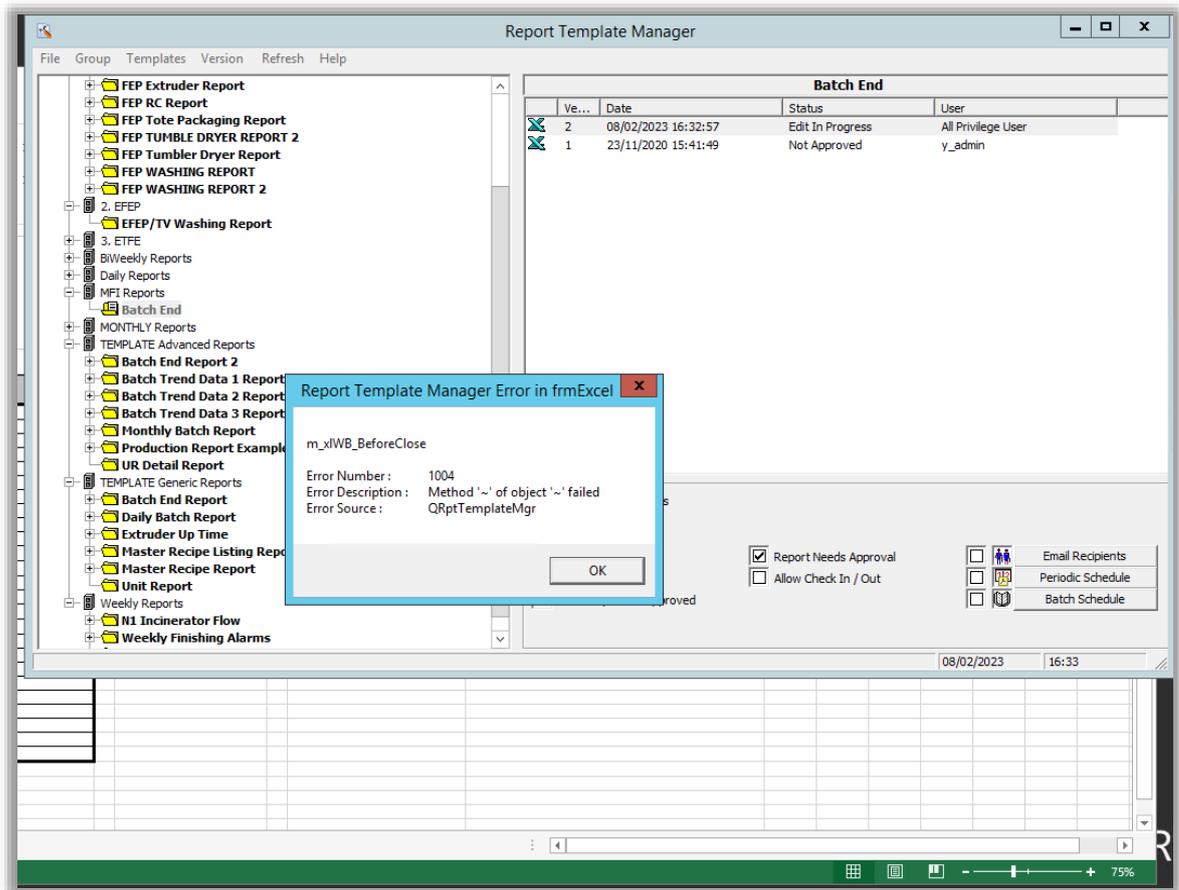1. Access the error message by clicking on the Report Template Manager Window (see Figure 4-1).

Figure 4-1 - Error Message displayed after Report Template Manager UI brought to the front

2. Click the OK button to close the error message dialog. This will return Focus to Excel.
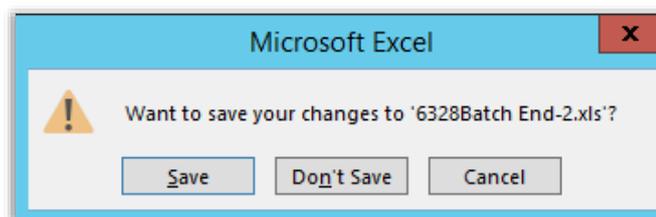
3. Click Save to save the template file (see Figure 4-2).

Figure 4-2 - Excel Save Dialog

4. The Compatibility Checker will again be displayed.

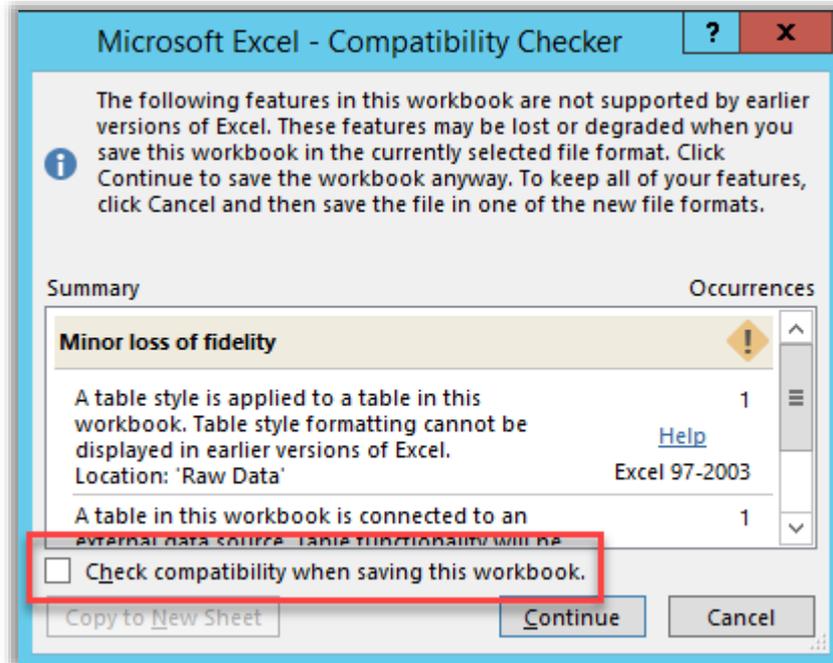5. Uncheck the Check compatibility option (see Figure 4-3).

Figure 4-3 - Compatibility Checker with Check compatibility option highlighted

6. Click on the Continue button.

7. The template will be saved with any incompatibilities removed. The check compatibility setting will be retained for future edits on this template.

4.2 Unlocking if Don't Save button is clicked

If the Don't Save button is clicked, Excel will close but the template will remain locked (see Figure 4-4).
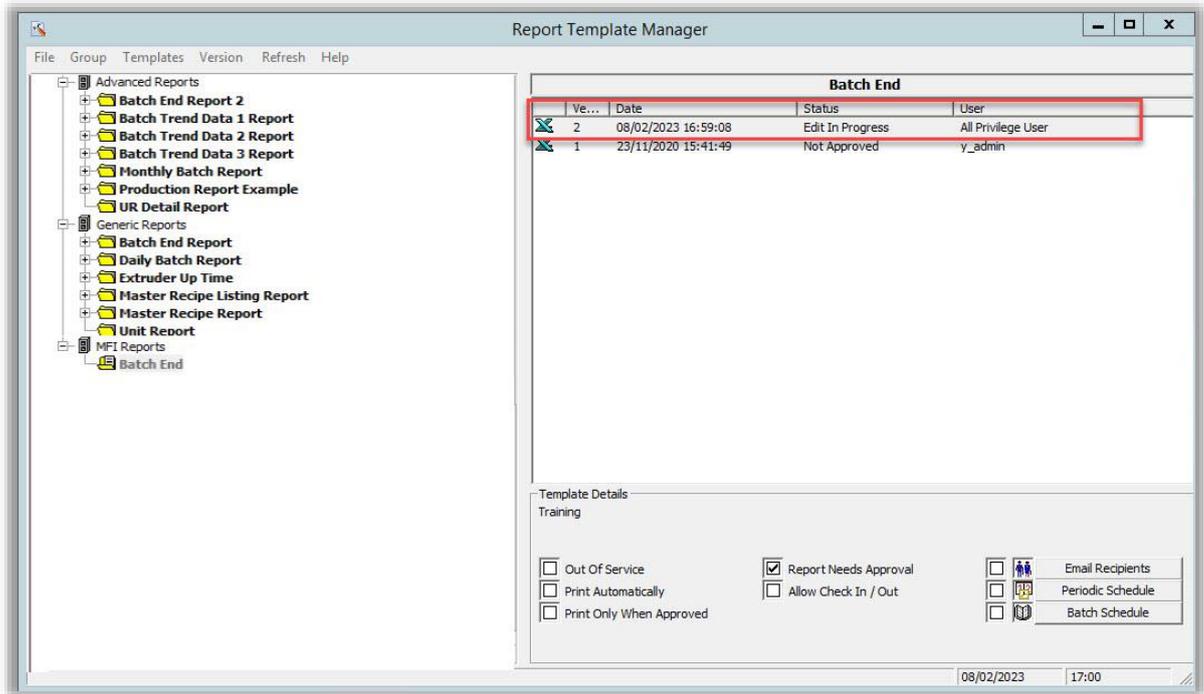

Figure 4-4 - Report Template Manager with Lock Highlighted

The lock can be cleared by following the steps below.

1. Right mouse click on the Report Template Manager icon on the task bar and select the Close window option (See Figure 4-5).
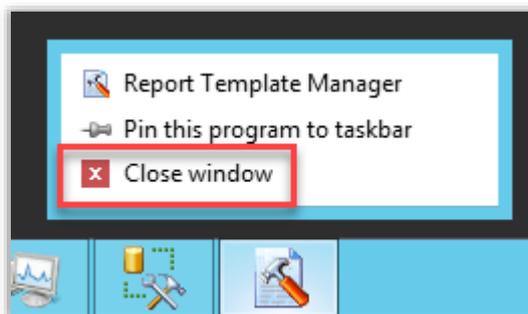

Figure 4-5 - Report Template Manager Task Bar Icon Pop-up dialog

2. This will clear the lock and allow the template to be edited once more but might result in the compatibility checker being redisplayed later.

4.3 Clearing the Lock Manually

If a template remains locked and cannot be unlocked using the Report Template User Interface it will be necessary to remove the lock from the database table manually using the SQL Server Management Studio.

The following steps describe the procedure. Refer to figure 8 below as required.

1. Open SQL Server Management Studio using the Run as Administrator option from the Start Menu.
2. Click Connect when prompted.
3. Open a new Query Window by clicking on the New Query button at the top of the screen.
4. Enter the following Query into the Query Window.

   Delete from QBatch..ReportTemplateVersion where
   ReportTemplateUID = (Select UID from QBatch..ReportTemplate
   where Name = 'Name of Locked Template')

5. Replace the text Name of Locked Template but not the quotes with the actual name of the locked template.
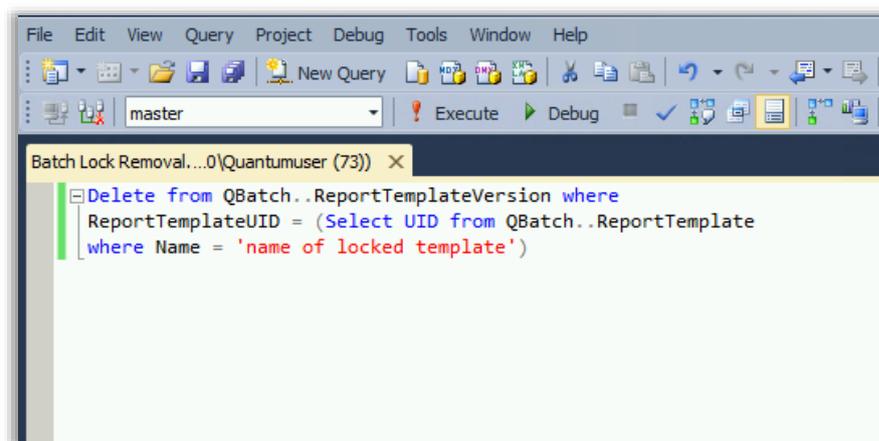6. Click the Execute button.

Figure 4-6 - SQL Server Management Studio with lock removal script

Chapter 5 Correct method for saving edited templates

To update templates and close Excel the options on the Template Ribbon with Microsoft Excel should always be used.

If Microsoft Excel detects an older Excel format has been used, the compatibility checker dialog will be displayed when the template is saved.

The check compatibility option should be unchecked (see Figure 5-1).

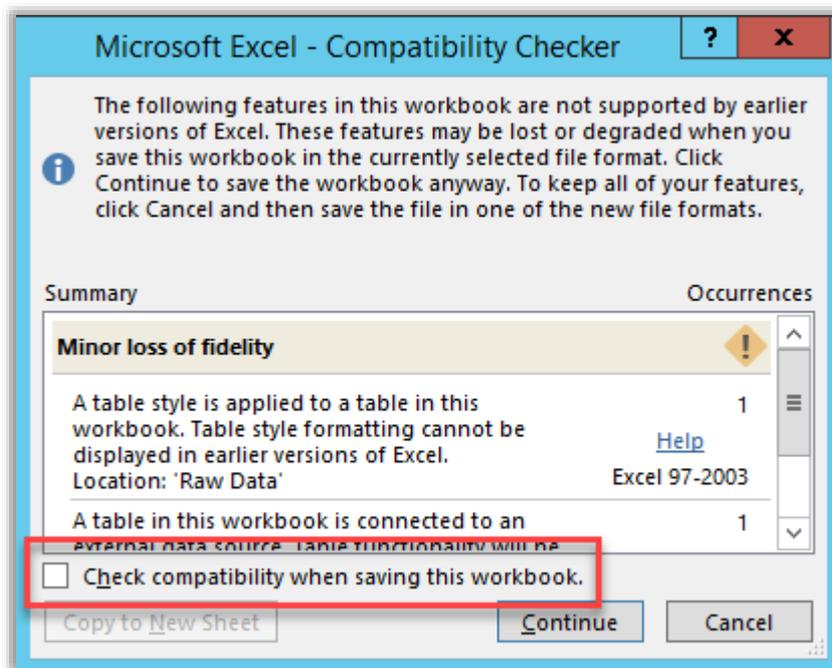Clicking on the Continue will save the template with any incompatibilities removed.

Figure 5-1 - Compatibility Checker with Check compatibility option highlighted

The check compatibility setting will be retained for this template file for future edits.

Chapter 6 Updating an existing template saved in the xls format to xlsx or xlsm

The issue described in this article only occurs when the template is created using the xls format. The Exaquantum Report Template manager also supports the xlsx and xlsm file formats.

To convert an existing xls formatted template perform the steps below.

1. Export the existing xls version of the template using the export option on the Version menu.

   This menu is also displayed when you right mouse click on the latest version of the template on the right hand side to the Report Template Manager dialog.

2. Open the exported file in Excel.

3. Use the Save As option to save the file as either the xlsx or xlsm format (xlsm is used if the report contains macros).

4. Close Excel.

5. Import the converted template back into the Report Template Manager as a new version of the template.

6. Make any changes that are required, save and approve as normal.

Chapter 7 Template saved with an incorrect extension

On very rare occasions it is possible for a template to be saved to the database with an incorrect extension.

If this happens, the template will no longer be editable and will not produce reports if used.

The extension can be changed using SQL Server Management studio.

The process for using SQL Server Management Studio is described in the chapter that covers manually unlocking a template.

The script to be used in this case is the one below.

```
Update QBatch..ReportTemplate set extension = 'xls|xlsx|xlsm'
where Name = 'Report Name'
```

Replacing xls|xlsx|xlsm with the correct extension and Report Name with the name of the report with the problem.

Chapter 8 Further Reading

The following documents may be useful in relation to this article:

- Exaquantum Installation Guide (IM 36J04A13-01E)
- Batch Trouble Shooting Guide – KB0043

More support is available from:

- Website www.ymx.yokogawa.com\support
- Knowledge base www.ymx.yokogawa.com/knowledge-base
- Email support@ymx.yokogawa.com

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Highlights

The Highlights section gives details of the changes made since the previous issue of this document.

- ## Summary of Changes

This is Issue 1.0 of the document related to Product Library version 1.0.

- ## Detail of Changes

The changes are as follows:

Chapter/Section/Page	Change