CHAPTER 3: REPORT LAYOUT WINDOW, COLUMNS, AND GRAPHICS

Training Objectives

Actively participating during this chapter helps you learn:

- What options and tools can be used with text and graphic reports
- How to place fields on reports
- The different sections on a report layout
- How to use various Microsoft Dynamics™ GP Report Writer tools (text tool, divider tool, date/time tool, and the page number tool)
- How to apply different fonts, colors, and patterns to fields using the Drawing Options window
- How to add and store graphics

Introduction

This chapter focuses on the Report Layout window in Report Writer. This window is used to design and modify a report in Report Writer. The Toolbox appears when the Report Layout window is opened. It provides significant functionality when designing a report. You can add text to a report using the toolbox. The Arrange tab on the window lets you organize fields on a report quickly, instead of arranging each field individually. A number of other related windows are also discussed in this chapter.

The Report Section Options window determines which sections you want on a report. Each of the five main sections of a report is discussed. Additional headers and footers are discussed in a later chapter. Drawing Options allow you to change fonts, colors and sizes for fields on a report. This window is also discussed in detail in this chapter.

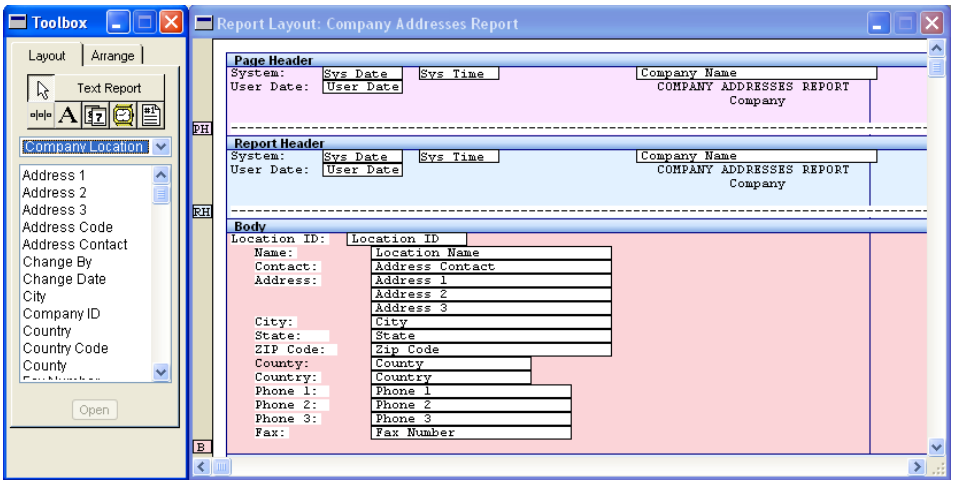
Information about added graphics to reports is discussed. The ability to add a graphic to use on other reports is also possible in Report Writer. This is demonstrated in one of the labs at the end of the chapter.

The Report Layout Window

Use the Report Layout window to design or make changes to an existing report or to design a new custom report. When the Report Layout window is opened there are two separate windows:

- The Report Layout window
- The Toolbox window

To open the Report Layout window, click the **Layout** button in the Report Definition window. The Report Layout window opens and the current report layout displays.



Use the Toolbox to add text and graphics to a report. Options available to add the date and time on a report are also available from the toolbar. A **Page Number** icon makes adding page numbers to fields easier. The Arrange tab offers additional tools to organize fields and text on a report. These options are discussed in more detail later in this chapter.

Each table linked for a report can be selected from the drop-down menu. All of the fields in the table are available in the scrolling window area and can be added to a report using a standard Windows mouse click and drag process. Calculated fields and global fields can also be added using the drop-down menu.

The Report Layout window is separated into report sections. Fields can be removed or arranged with a simple click and drag process. If the layout is open, you can also access other related windows from the Tools and Layout menus on the menu bar.

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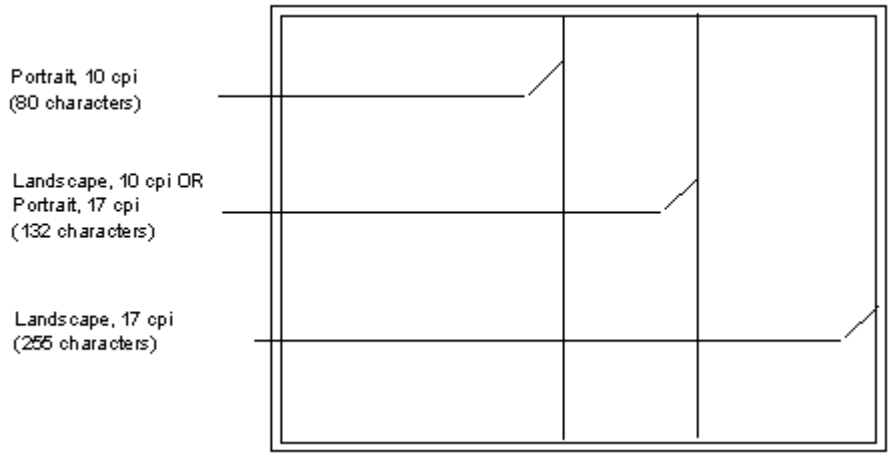
Margin Lines

Before modifying a report layout, check the current page and printer setup selections to make sure they are correct. Clicking the horizontal scroll arrow at the lower right corner of the window and scrolling to the right, you see the right margin line. If you are creating a graphics report, only one appears.

If you are creating a text report, three margins are displayed. The margins are determined by the current page setup and printer settings made at the operating system level. The three margin lines indicate the margins based on the page and printer setup selections available.

- Use the left margin to print a report in portrait mode using standard text.
- Use the middle margin to print a report in condensed text, normal text in landscape mode, or on a wide-carriage printer.
- Use the right margin to print a report in condensed text on a wide-carriage printer or in landscape mode.



For a text report, the layout area includes a left border, a right border, and two additional vertical guides. These help to place fields in the layout area and are especially useful if you are using a preprinted form and have specified a fixed-pitch text option. Then, regardless of the printer selected, you are assured of the proper placement of fields. For a graphics report, the layout area includes the left and right borders. Select Print Setup from the File menu to select a printer, paper size and orientation. For more information on printer and page setup, refer to your operating system manual.

HINT: *The orientation settings made here can be saved with the report; when printing the report, check to be sure that the page and printer settings selected are compatible with the report. Then make the appropriate selection in Report Definition, and save it with the report layout.*

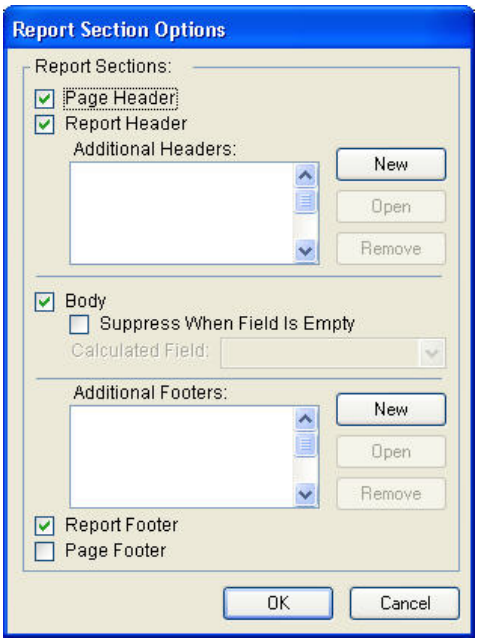
Report Sections

TOOLS→SECTION OPTIONS

The Report Section Options window allows you to do the following tasks:

- Activate or inactivate report sections
- Remove additional headers and footers
- Open the Header/Footer Options window to define new additional headers and footers
- Keep records from printing if certain conditions are not met

Before adding fields and data to a report layout, decide where to place that information in the layout area. Regardless of the type of report you create, the Report Layout window for a new report contains four evenly-spaced blank sections, separated by border lines. Each border is labeled in the left margin using a one or two-letter abbreviation. The Report Section Options window is only available from the Tools menu when the Report Layout window is open.



The report can have up to four different types of sections:

- Page headers and footers
- Report headers and footers
- Body
- Additional headers and footers

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When opening a layout window for reports, only these sections appear in the report layout window. To resize a section, click its label at the left side of the window. Click B in the case of the body or RH in the case of the report header, etc., and drag it up or down.

Each section's border indicates the bottom of the section. After fields have been placed in a section, you cannot drag the border above the lowest field in the section. Sections can always be expanded by dragging the Section icon down the layout window.

HINT: *In general, position fields at the very top of each report section because any white space between the top of the section and the field below is repeated for every record printed.*

If you create a new custom report, only the following sections will appear by default:

- Page Header
- Report Header
- Body
- Report Footer

Report Sections and Usage

Page Header (PH)	Items in this section are placed at the top of every report page. Page number, date and time fields are commonly placed in this section of a report. Prevent the Page Header from being included on the first page of a report by clearing the **First Page Header** option check box in the Report Definition window. To exclude page headers from a report, clear the **Page Header** check box in the Report Section Options window.
Report Header (RH)	Items in this section appear only on the first page of a report. The title of the report and introductory information are often included in this section. If a page header is also included on the first page, the report header appears after the page header. To exclude a report header from a report, clear the **Report Header** check box in the Report Section Options window.

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Additional Headers (H1, H2, H3 ...)	Additional headers and footers allow you to create groupings in your report. Each header prints when the data in the field it is based upon changes. Therefore, the sorting order used affects the order the headers appear on the report. For example, if the field related to Header 2 is sorted before the field for Header 1, Header 2 prints before Header 1 on the report. Use the Report Section Options window to add additional headers. You can have up to 15 additional headers in a report.
Body (B)	The report body normally contains the bulk of the report. Depending upon the number of additional headers and the sorting order used, there can be a body section for each additional header section.
Additional Footers (F1, F2, F3...)	Additional headers and footers allow you to create groupings in the report. Footers should correspond to headers and break on the same fields. They are often used to display summary data, such as a total of all records in the report's body under the footer's related header. Use the Report Section Options window to add additional footers. You can have up to 15 additional footers in a report.
Report Footer (RF)	Items in this section appear only on the last page of a report. Summary information is often included in this section. If a Page Footer is also included on the last page, the Report Footer appears before the page footer. To exclude a Report Footer from a report, clear the **Report Footer** check box in the Report Section Options window.
Page Footer (PF)	Items in this section are placed at the bottom of every report page. This section often includes administrative information, such as the name of the person running the report. Prevent this section from being included on the last page of a report by clearing the Last Page Footer option in the Report Definition window. To exclude page footers from a report, clear the **Page Footer** check box in the Report Section Options window.

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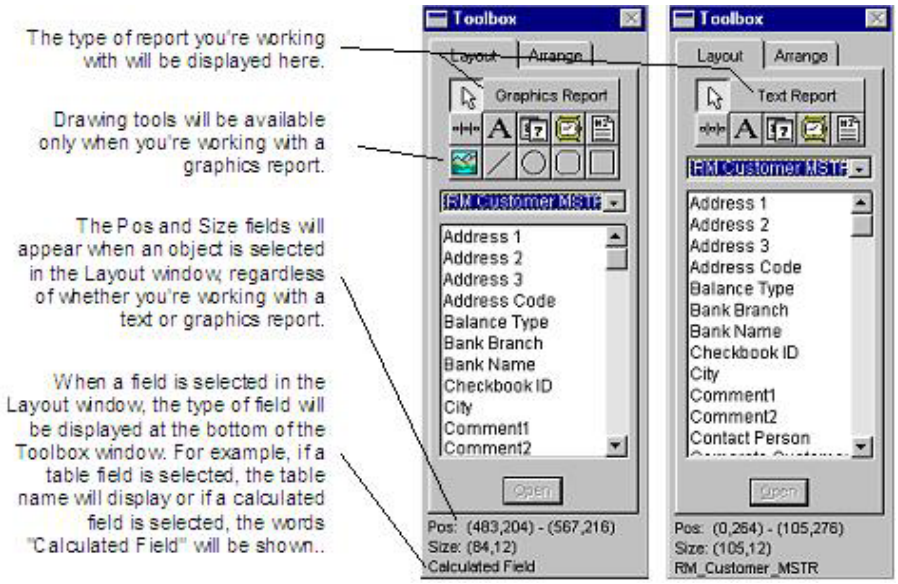
The Toolbox Window

The Toolbox window's Layout and Arrange tabs allow you to toggle between two different sets of tools. Tools in the Layout tab help place information in the layout area, while tools in the Arrange tab are used to arrange selected items in the layout area.

The appearance of the Toolbox window's Layout tab is slightly different, depending upon whether you are creating a text report or a graphic report, as shown in the following illustration. Notice that the Drawing tools to add graphics, lines, and shapes are not available when creating a text report.



To activate the Toolbox window, move the pointer from the Report Layout window to the Toolbox window. Each of the Layout and Arrange tools are described in the following sections.

Layout Tools

The Layout tools help place information in the layout area of the report.

HINT: *Tooltips appear below the mouse pointer as it moves over each of the tools within the Toolbox. These indicate the name of the selected tool. Similar tips are also available for the fields shown in the fields list. As the mouse pointer is placed over a field that is not completely displayed in the list, a title tip appears giving the full name of the field.*

Tool	Function
	The arrow tool is used to select and move single or multiple objects in the report layout. Objects highlighted by this can be dragged into position on a report layout and can be modified using Drawing Options and other windows.
	The divider tool is used to divide the report into columns, if you print the report data in columns or printing labels. To select a division on the report, click the divider tool, and then click in the body of the report where you want the division. The division must be added to the right of any existing fields; it does not appear if there are fields or other objects to the right of where you have clicked. Once a division on the report is placed, you cannot add any objects to the right of the division. You can reposition a division by dragging it with the arrow tool.
	The text tool is used to add text to the report layout. Text can be formatted with a different color, font, and pen size using the Drawing Options window.
	The date and time tools are used to add fields that display the current date and time to the report. The date and time are determined by the operating system. To place the fields on the report, select the appropriate tool, and then click in the layout area. The date and time can be formatted with a different color, font, and point size using the Drawing Options window.
	The page number tool is used to add a field that contains the current page number to the report. To place page numbers on the report, select the tool, and then click in the layout area.

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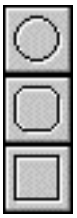
The following layout tools are available for graphics reports only:

Tool	Function
	The picture tool is used to add graphics that are stored in the Report Writer picture library to any of your reports. Refer to the "Adding and Storing Graphics" section for more information.
	The line tool is used to draw lines in the report layout. Specify the line's pen size and color using the Drawing Options window.
	The rectangle, circle, and rounded rectangle tools are used to add simple graphics to the window layout. Specify background, foreground, and pen colors and patterns for these objects using the Drawing Options window.

Arrange Tools

The arrange tools are divided into three sections:

- Align tools
- Size tools
- Tile tools

The position and size information at the bottom of the window shows where the field is located on the layout grid.

***HINT**: Arranging objects cannot be undone. Be sure to save your report layout before arranging objects. If you are unsatisfied with the result of an arrangement close the window without saving the changes and return to the original layout.*

Align Tools

The align tools arrange the selected fields without changing the spacing between the fields and without changing the size of the individual fields.

Align tool	Function
	Use the Align to top tool to align the selected objects with the top object in the group.
	Use the Align to left tool to align the selected objects with the leftmost object in the group.
	Use the Align to right tool to align the selected objects with the rightmost object in the group.
	Use the Align to bottom tool to align the selected objects with the bottom object in the group.

Size Tools

The size tools are used to uniformly size selected objects. These tools do not change the spacing between the individual objects.

Size tool	Function
	Use the Size to shortest tool to shrink the selected objects to the height of the smallest object in the group.
	Use the Size to narrowest tool to shrink the selected objects to the width of the smallest object in the group.
	Use the Size to widest tool to expand the selected objects to the width of the largest object in the group.
	Use the Size to tallest tool to expand the selected objects to the height of the largest object in the group.
	Use the Resize to default tool to automatically resize the space in which text items appear when the text size changes. Also use this tool to change the length of the field to the default length, which is the keyable length of that field.

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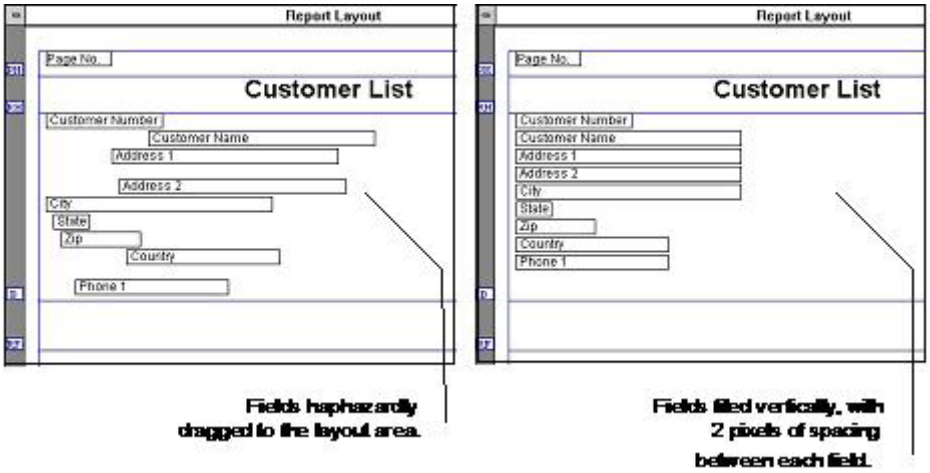
Tile Tools

The tile tools are used to tile a group of selected objects. Enter a value in the **Space** field to specify the desired number of pixels between objects.

Tile tool	Function
	This creates "columns" of fields. Use the tile horizontally tool to align the selected objects with the top object in the group, similar to the Align to top tool. In addition to aligning the objects, this tool also changes the horizontal spacing between the objects. The objects are separated by the number of pixels specified in the **Space** field.
	This creates "rows" of fields. Use the tile vertically tool to align the selected objects with the leftmost object in the group, similar to the Align to left tool. In addition to aligning the objects, this tool also changes the vertical spacing between the objects. The objects are separated by the number of pixels specified in the **Space** field.

The following illustration shows a Report Layout window before and after the Tile tool is used.



Notice how the Tile tool arranged the items so they have a left-hand margin and are neatly arranged with the spacing specified. For additional information on using the Tile tools, you can search help using the Help menu option in Report Writer.

Placing Fields in the Layout

To place fields on the report, drag the appropriate field from the table list on the toolbox window to the layout area and position it. (To drag fields, click them with the mouse and hold down the mouse button and drag the mouse pointer to the location where you want the field to appear.)

HINT: *Similar to the tooltips that are displayed for each of the tools in the Toolbox window, title tips are available for the fields shown in the fields list. As the mouse pointer is placed over a field that is not completely displayed in the list, a title tip appears, giving the full name of the field.*

The field automatically appears on the report sized according to the maximum length of the information it contains; for example, an account description with a keyable length of fifty is long enough to contain fifty characters when you place it on the report layout. Each field can be resized as desired; however, if you shorten fields, the information may not be displayed in its entirety when the report is printed. If you resize a field by vertically enlarging it, the field's text is centered. If you reduce a field's height, it is not printed correctly.

Each section of the report is colored differently, making it easier to differentiate each report section as fields are placed on the report layout. If you prefer not to have colored sections, turn this option off under the Layout menu.

HINT: *Fields that store values displayed in Microsoft Dynamics GP with check boxes or option buttons require extra steps to print their values in their entirety. For example, the fields used in the Payment Terms Setup window to enter the values the discount is calculated on are check boxes. The field used in the Shipping Methods Setup window to specify whether a shipping method is delivery or pickup is a group box. Refer to the Report Writer online help for more information on this topic.*

Table Fields

The fields in each table that are associated with the report are available to be placed on the report.

HINT: *Text fields use a control type called Text. Data stored in a text field is printed as it appears in Microsoft Dynamics GP windows, with the following restrictions:*

- ***Text reports****: If the field is not resized in the layout window, the first 10 kilobytes of the data is printed. (Text fields can store up to 32 kilobytes of data.) If the width of the field is resized, the first 10 kilobytes of data are printed within that width. Additional data stored in the field is not printed.*
- ***Graphic reports****: If the field is not resized in the layout window, only the first line of data is printed on the report. If the field is resized, the data is printed to fill the resized area. Additional data stored in the field is not printed.*

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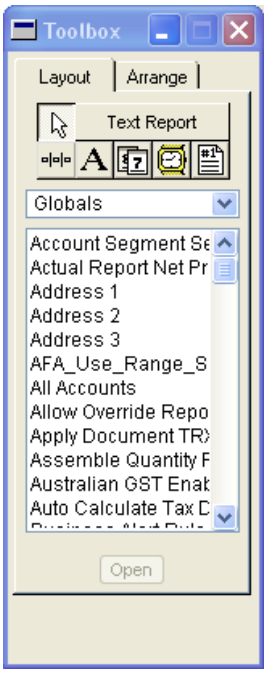
Globals

In addition to the fields in the data table or tables being used, you can place fields from the Globals list on the report. Globals are fields you can use on any report, without linking the tables they are stored in to the report. They can be viewed by clicking the name of the data table displayed at the left of the layout window. The word "Globals" appears where the name of the data table is usually displayed and the variables appear beneath, as shown below.



The content of the global fields list is based on the user and company logged into when you launched Microsoft Dynamics GP. For example, the **Company Name** field returns the value "Fabrikam, Inc." if you logged into the lesson company in the current session. Use global fields on reports like fields in report tables. Globals are typically used in report or page header sections.

Calculated Fields

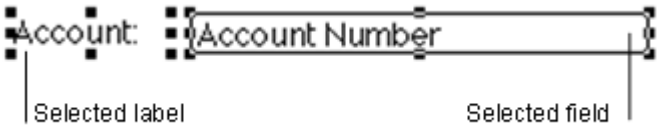
You can create calculated fields, which can be based upon table fields or other calculations defined.

Legends

Legends are fields added to a report to display information that is passed to the report when it is printed. Use legends to display string values representing the sorting and restriction options selected by the user running the report. Legend values can also be used as elements in calculated fields in Report Writer. Since legend values must be passed into the report by the application, they are generally available only for modified reports. Any new reports created cannot use legends, unless you have Visual Basic for Applications (VBA) and have set up scripts that set the legend values.

Selecting and Moving Items

To select an item in the report layout window, click the arrow tool in the toolbox, then click the item. To select multiple items, select the first item, and then hold down the shift key while selecting the additional items. Selected items appear as in the following illustration.



Fields may also be selected using the "lasso" method where you select multiple fields at the same time. Place the mouse to the upper left of the first field you want to select. Click the mouse, and drag the lasso around the remaining fields to select them. Once fields have been selected, they can be moved one grid at a time by using the mouse to drag the fields to a new location.

On graphic type reports, you can move items a pixel at a time, whether the grid is active or inactive, by selecting the item and using the arrow keys. A pixel, or "picture element," is the smallest graphic unit that can be displayed on the screen. The pixel coordinates are shown in the lower left corner of the layout Toolbox window.

The **Pos** and **Size** fields appear at the bottom of the Toolbox window when a field is selected in the layout area. The **Pos** field displays the coordinates of the selected field's upper left and lower right corners in pixels. The **Size** field displays the total width and height in pixels of the selected field. Use the arrow tool to remove items from the report as well. Select the appropriate item, and click **Clear** from the **Edit** menu, or press the delete key on the keyboard.

Using the Grid

You may find it easier to use the layout window with the grid activated or inactivated. The grid allows you to align fields, labels, and other items on the report more easily. The grid is active when you begin working with a new report. If the selections are displayed in the **Layout** menu, there is a check mark next to the Grid selection. To turn the grid off, select **Grid** from the **Layout** menu to clear it.

HINT: *The size of the grid used in the Report Writer is 12 pixels by 7 pixels.*

To view the grid, select Show Grid from the Layout menu; to stop displaying the grid, select Show Grid again to clear it. To display the grid behind objects in the layout, select Grid To Back. If you have placed an item in the layout area without using the grid and want to align it to the grid, turn the grid on, select the item and select Align To Grid.

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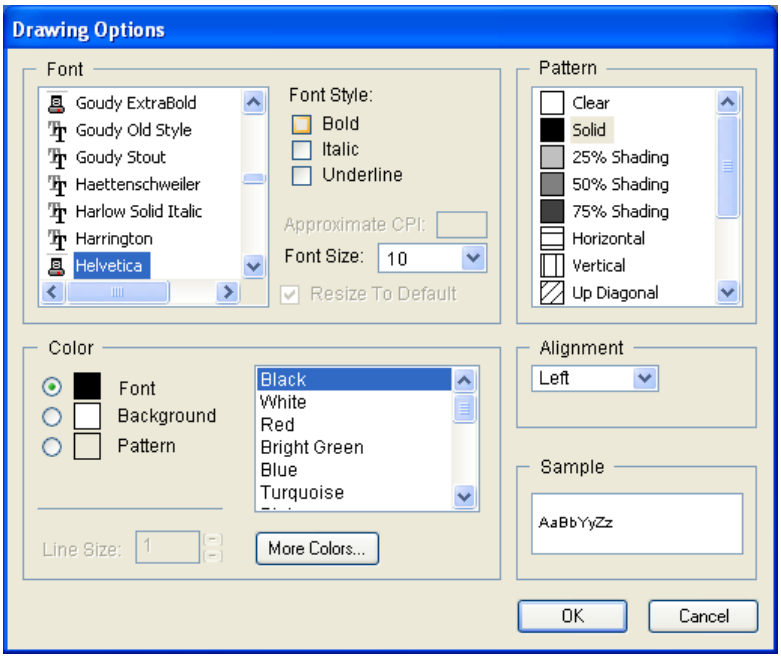
Drawing Options

TOOLS→DRAWING OPTIONS

You can customize the color, pattern, and font of most items on the report with the Drawing Options window. These options can be set as default options before adding objects to the window, or they can be set individually for each text prompt or field. To set them as default options, select Report Drawing Options from the Tools menu before any items are added or selected in the report layout window. After defining the defaults, any new objects added to your report layout use the drawing options set.

To set drawing options individually for an item, first select the item, and then select Report Drawing Options from the Tools menu, or click CTRL + D if it is text or a graphic. If the field is text, access by double clicking on the item.

HINT: *Apply drawing options to items by selecting one or several items, then opening the Drawing Options window and selecting options that apply to all the items selected. If the default drawing options are changed, new objects are added using those options, but existing objects are not affected.*



HINT: *Use the Font section to select the desired font, font size, and font style.*

HINT: *After the drawing options have been changed for an object, the* ***Size to Default*** *tool can be used to automatically adjust the size of the object in the layout window. The* ***Size to Default*** *tool can be found on the* ***Arrange*** *tab within the Toolbox window.*

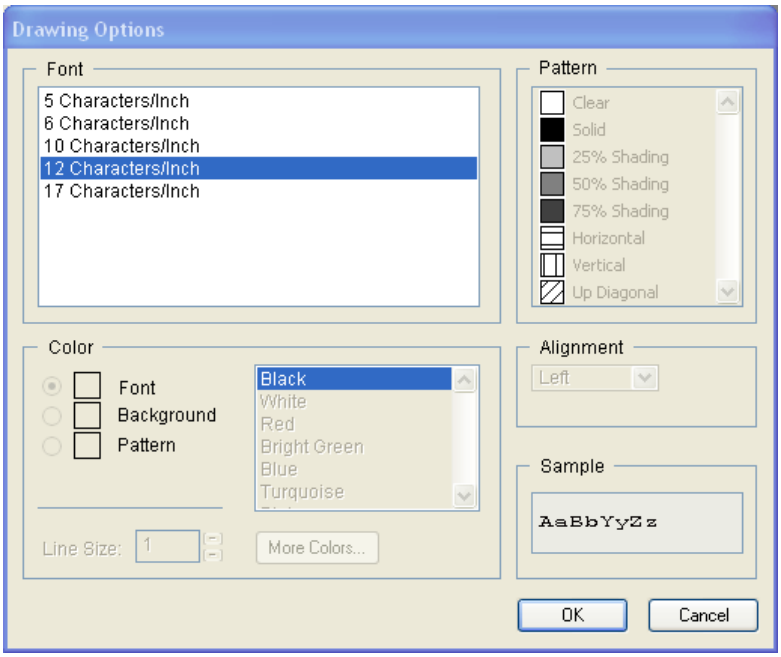
Use the Color section to select the font, background, and foreground colors.

- Font color refers to the color used to print field information or the border around a field or object.
- Background color is the color inside the border of the field.
- Foreground color is the second color of the pattern if a pattern is selected at the bottom of the Drawing Options window.

Use the Alignment section to define the positioning of certain fields in the layout area. The three options available are described as follows:

- **Left** alignment – The field is aligned starting from the left side of the object.
- **Right** alignment – The field is aligned from the right side of the object.
- **Center** alignment – The field is centered vertically and horizontally within the object.

You also have the ability to set drawing options for text reports that use the Variable Characters/Inch text report option. The methods used to set the drawing options are similar to the ones used to define drawing options for graphics reports. Set these options as default values or individually for different objects.



A different version of the Drawing Options window is used in comparison to the one shown for graphics reports. Most of the options for graphics reports are not available for text reports. The only option available for a text report is the option to select a font size.

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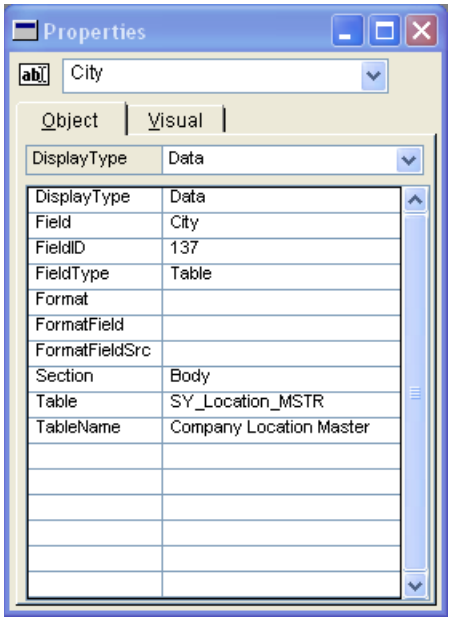
Properties

LAYOUT→PROPERTIES

The Properties window allows you to set characteristics of the report and the objects in the report layout. To set a property, use the arrow tool to select the report or an object in the report layout.

You can also choose an object by selecting it in the drop-down list at the top of the Properties window. An icon will appear next to the drop-down list to indicate the type of object selected.



Click a tab to display Object or Visual properties. To set a property, select it in the list and then change its value in the settings box. Setting the property value involves choosing a value from a drop-down list, typing a value, or using a lookup. Some properties cannot have their values changed.

HINT: *Double-clicking a property in the properties list is a shortcut to setting its value. For instance, double-clicking a property whose value is set with a drop-down list will set the property to the next value in the list.*

To view report properties, be sure the Properties window is open. Select the arrow tool from the Toolbox and click anywhere in the background of the layout area to select the report. These properties are typically set in the Report Definition window instead of the Properties window.

For additional information related to changing properties, access the window help for the Properties window in Report Writer.

Saving a Report Layout

To save a report, close the layout window by clicking the close box. An alert message appears, asking whether you want to save changes. Click **Save** to save the report. Items placed on the report are not saved until you close the report and select **Save** in the alert message dialog box.

If working on a report for a considerable period of time, it is recommended that you save your work periodically using this method. When finished with the report, click **OK** in the Report Definition window to close the window and save the report definition information.

HINT: *Be sure not to place fields and text below the last frame line in the layout area. If you do, an alert message appears when you close the report layout window, stating that items placed below the last frame line will be removed.*

Using the Divider Tool

This section explains how to use Report Writer's divider tool. Use the divider tool to print report data in columns, or to print labels.

Dividing your reports into columns can be useful to reduce the amount of space the report uses. When simply printing an account list, the report can take up quite a few pages if the accounts are listed one above the other. Since the account takes up only a small portion of the width of the report, you can divide the layout into several columns to use the entire layout area. When printing labels, the divider tool can be used to divide the report into the number of columns and the exact width of the labels.

HINT: *The divider tool is commonly used to print mailing labels. Because the layout for this type of report must be very precise, it may be easier to modify a mailing label report than to create a new one.*

Placing Dividers on a Report

Select the divider tool from the Toolbox, and click in the body of the layout area to place it on the report. Columns can be used only in the body of the report and to the right of fields in the layout. Position the division marker by clicking it to select it and dragging it to the new position; reselect the divider tool to place additional division markers on the report. The division markers appear as dotted lines.

Divide the report into as many columns as desired of equal or unequal width. If the data in a field requires more room to print than is allowed by the column, the data is truncated. To make the columns evenly spaced show or use the grid by selecting Grid from the Layout menu.

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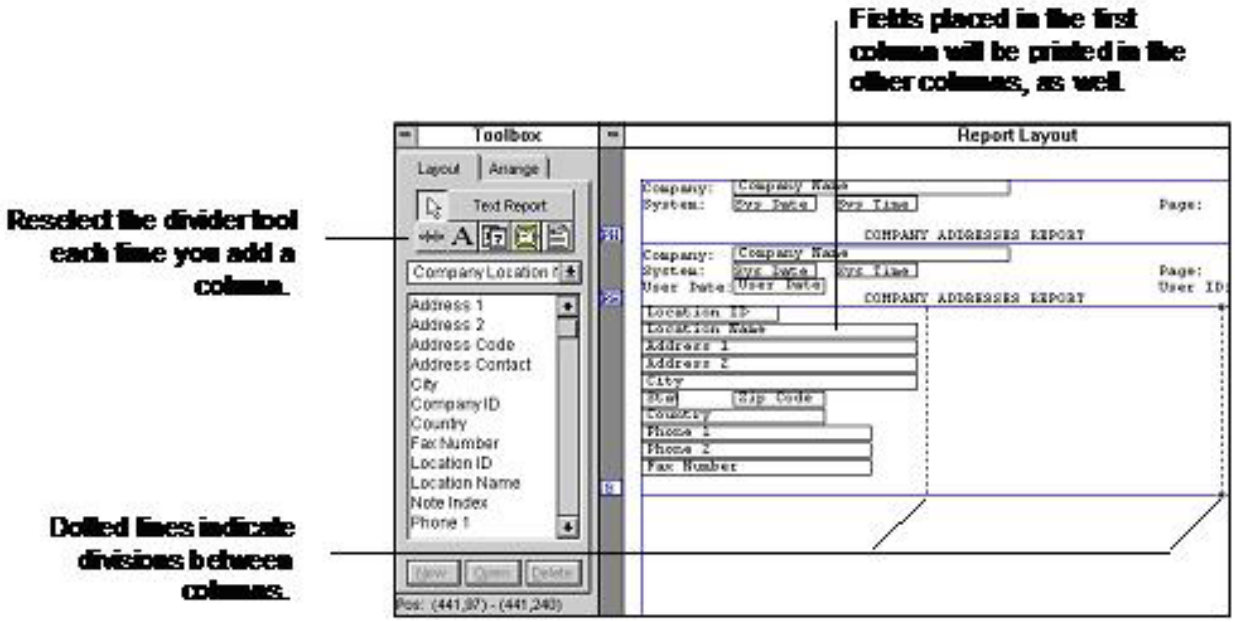
To remove a division from the report, select it, and then click **Clear** from the Edit menu. If printing the same information in each column of the report, place the field(s) in the first section, and the data prints in all of the columns.

HINT: *The information is printed from left to right and then down to the next row.*

You cannot add a field to the right of the division because the information to the left of the division is repeated to the right of the division. Similarly, you cannot add a division to a report if there is a field, text, or picture to the right of where you have attempted to position the division.

The illustration shows the divider tool used to create a report printed in columns.



Adding and Storing Graphics

This section explains the process of adding a graphic (picture) to the Report Writer picture library and using the picture library to paste the graphic into a graphics report.

Graphics such as a company logo, pictures, and the symbols used in day-to-day business activities, can be added to reports using the Report Writer picture library. If several different graphics are used on reports, store these in Report Writer and add them to other reports by accessing the library.

The library allows you to store a graphic once and use it in several places. This reduces the amount of disk space necessary to store the graphic. Using the picture library also allows you to change a graphic everywhere it appears on reports by modifying it at a central location.

Adding a Picture to the Picture Library

Select a graphic to use on reports and then select the **Copy** command from the **Edit** menu to place the graphic on the clipboard.

HINT: *To use a picture in Microsoft Dynamics GP, it must be a size of 32K or less. To decrease the storage size of a graphic before pasting it into Microsoft Dynamics GP, decrease the resolution of the graphic, reduce the number of colors, or resize the graphic before copying it to the clipboard.*

HINT: *You can use graphic file formats that are bitmaps (.BMP).*

Select **Pictures** from the **Resources** menu to open the Pictures window. Click **New** to open the Picture Definition window.

In the Picture Definition window, name the picture, then click in the area below the **Picture Name** field (a double line appears around the outer edge of the box), and paste the graphic into that area.

HINT: *To change a picture in the pictures library, select the name from the list, and click the* ***Open*** *button. Then paste a new graphic over the existing graphic in the Define Pictures window. All existing occurrences of the old graphic are replaced by the new graphic.*

Click **OK** to add the picture to the library.

Using a Picture from the Picture Library

The procedure for using a picture from the picture library is as follows:

1. Open a graphics report by clicking **New** or **Open** in the Report Writer window, then clicking **Layout** in the Report Definition window. Pictures cannot be printed on text reports.
2. Select the picture tool from the Toolbox, and then click in the report layout area where you want the upper left corner of the picture to appear. The Pictures window opens.
3. Highlight the name of the desired picture and click **OK**; the picture appears in the layout.
4. Position the picture appropriately, resizing if necessary. If a picture is resized, the picture clarity may be affected. Use the corner edges to expand or shrink the picture in the layout area of a report.

HINT: *If you paste a picture into the layout area without first naming it and storing it in the picture library, a message window appears, asking you to name the picture. Enter a name and select* ***OK****. The picture appears in the layout area and is placed in the picture library under the name you have given it.*

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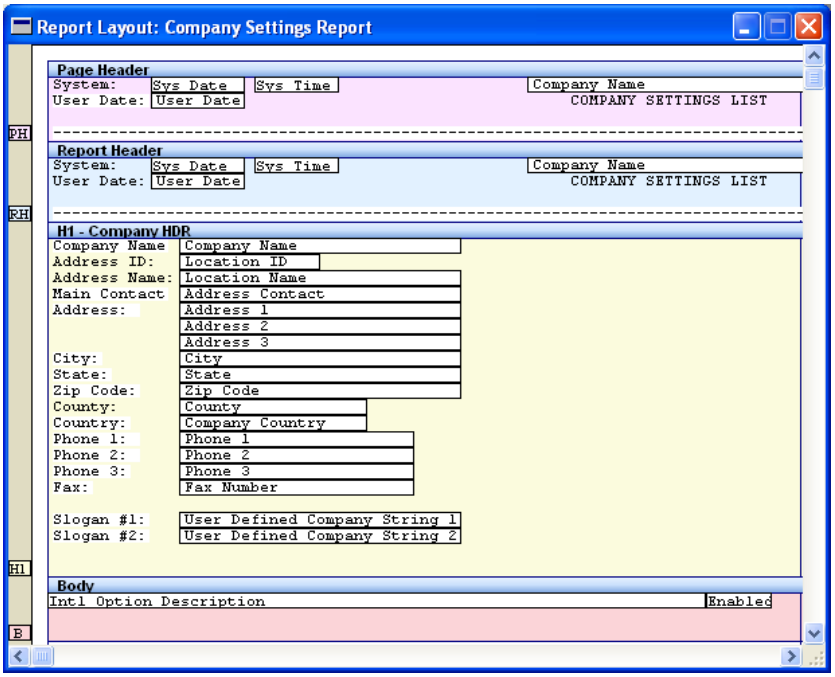
Lab 3.1 – Adding Fields

Company: Fabrikam, Inc.

Scenario: Your company wants to start printing its slogans on various reports throughout the system. There are two User Defined fields available for each company, and you decide to use these fields to store the company slogans. At this point in time, you have not decided which reports these slogans should appear on. To view the new fields, modify the Company Settings Report. You need to set access to the primary copy to print the modified report from the Microsoft Dynamics GP system.

Challenge Yourself!

1. Enter slogans in the Company Setup window **User Defined 1** and **User Defined 2** fields.
2. The report should look like the following illustration when complete.



3. Set access to the modified report in Fabrikam, Inc. for your User ID.
4. Print the report from the Microsoft Dynamics GP system, using the same window used to print the original version. Verify that the new slogans entered are being printed on the report.

Lab 3.1 – Adding Fields

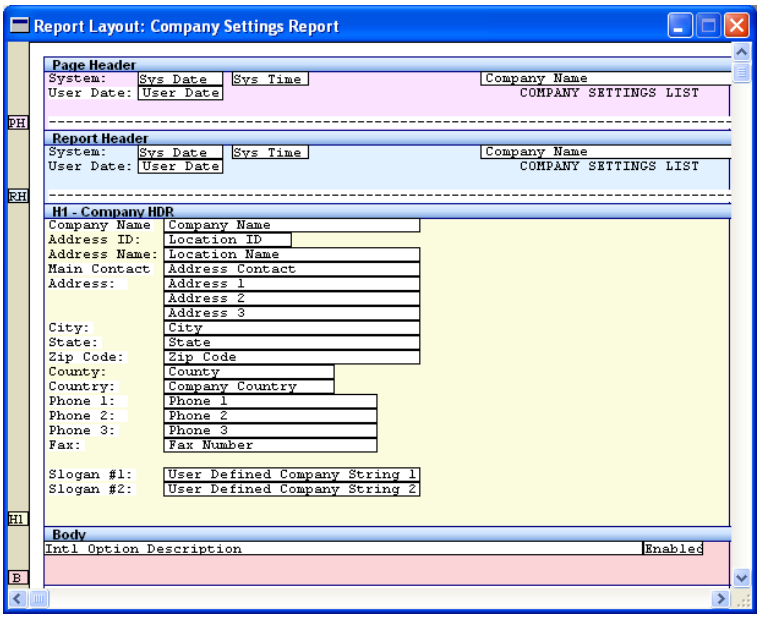
Company: Fabrikam, Inc.

Scenario: Your company wants to start printing its slogans on various reports throughout the system. There are two User Defined fields available for each company, and you decide to use these fields to store the company slogans. At this point in time, you have not decided which reports these slogans should appear on. To view the new fields, modify the Company Settings Report. You need to set access to the primary copy to print the modified report from the Microsoft Dynamics GP system.

Need a Little Help?

1. Open the Company Setup window in Microsoft Dynamics GP.
2. Enter slogans in the **User Defined 1** and **User Defined 2** fields.
3. Launch Report Writer and insert the Company Settings Report from the Original Reports list to the Modified Reports list.
4. Open the Report Layout window. Complete these steps:
   - Delete the labels for the **User Defined 1** and **User Defined 2** fields and add new labels for Slogan 1 and Slogan 2.
   - Remove all of the field and text prompts on the right-hand side of the layout in the H1 section.
   - Remove all fields below the Slogan fields in the layout.

   The modifications you make to the report should resemble the following illustration when complete.



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5. Save the modifications to this report.
6. Click **OK** in the Report Definition window.
7. Set access to the modified report in Fabrikam, Inc. for your User ID using the Security Setup window.
8. Print the report from the Microsoft Dynamics GP system, using the same window used to print the original version.
9. Create a new report option for this report.
10. Verify that the new slogans you entered are being printed on the report.

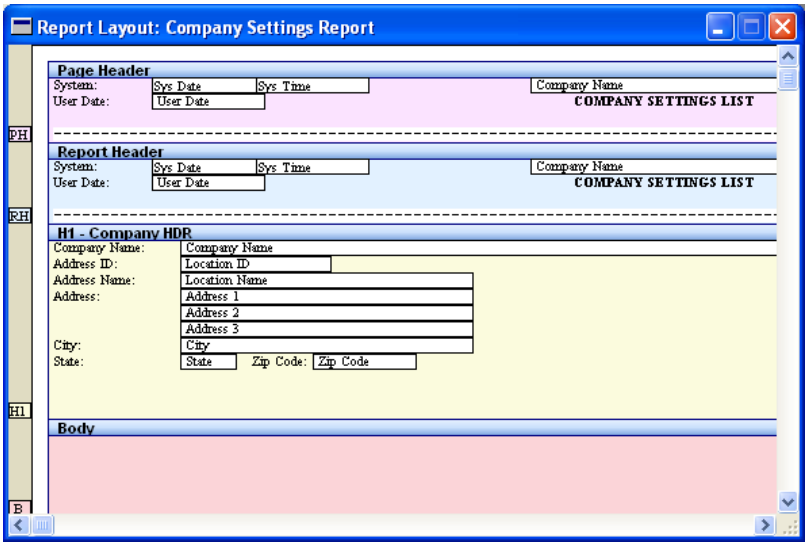
Lab 3.2 – Convert Text Report to Graphic

Company: Fabrikam, Inc.

Scenario: Depending on the audience for a report, it may be advantageous to change the quality of appearance. You have recently learned that the Company Settings Report is going to be distributed at an important meeting, and, therefore, you decide to make a few changes.

Challenge Yourself!

1. Delete the existing primary copy of the Company Settings Report, and create a new one.
2. Change the report to a Graphic report on the Report Definition window.
3. Make changes to the Report Layout until it resembles the following illustration:



4. Change the font for all the text and table fields in the report to Times 10.
5. Make the title of the report bold in both the report header and page header sections.

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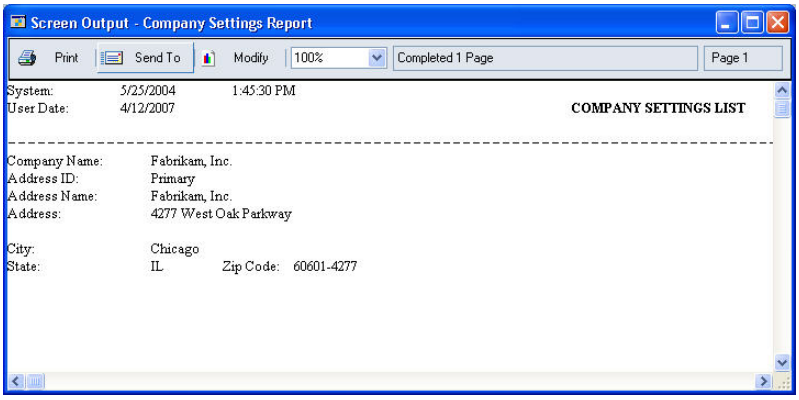
6. Print the report from the Microsoft Dynamics GP system.

   The report should look similar to the following:



7. Go back to the report Layout window in Report Writer from the Screen Output. Remove the **Address 3** field from the Layout, since you plan to only use a maximum of two address lines for your company.

8. Switchback to Microsoft Dynamics GP, and print the Company Settings report again.

9. There should be only one line of empty space between the Address fields and the **City** field.

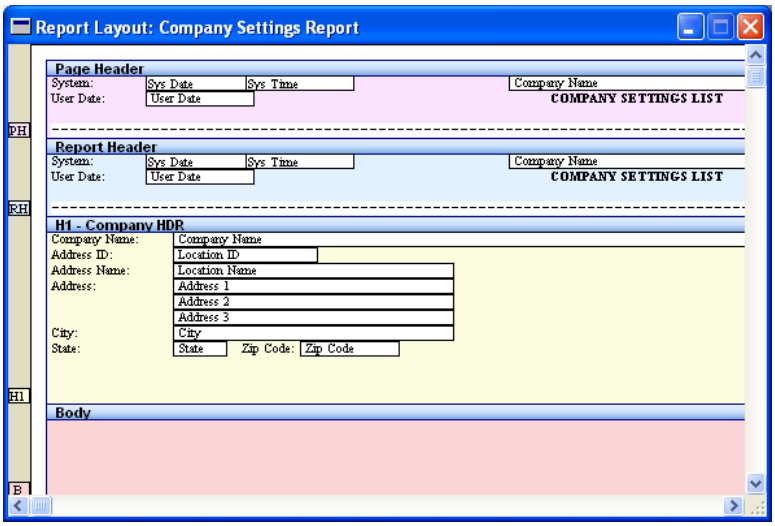
Lab 3.2 – Convert Text Report to Graphic

Company: Fabrikam, Inc.

Scenario: Depending on the audience for a report, it may be advantageous to change the quality of appearance. You have recently learned that the Company Settings Report is going to be distributed at an important meeting, and, therefore, you decide to make a few changes.

Need a Little Help?

1. Launch Report Writer from the **Customize** option on the **Tools** menu.
2. Delete the existing primary copy of the Company Settings Report from the Modified reports list.
3. Create a new primary copy and open it.
4. Unselect **Text Report** in the Report Definition window and open the Report Layout window.
5. Remove all fields and labels in the H1 area of the report except the **Company Name**, **Location ID**, **Location Name**, **Address**, **City**, **State**, and **Zip Code** fields.
6. Reposition the fields and labels to close up the space left by the **Address Contact** field.
7. Move the **Zip Code** field and label to its own line.
8. Change the font for all the fields in the report to Times 10.
9. Make the title of the report bold in both the report header and page header sections. When complete, the window should appear like the following:



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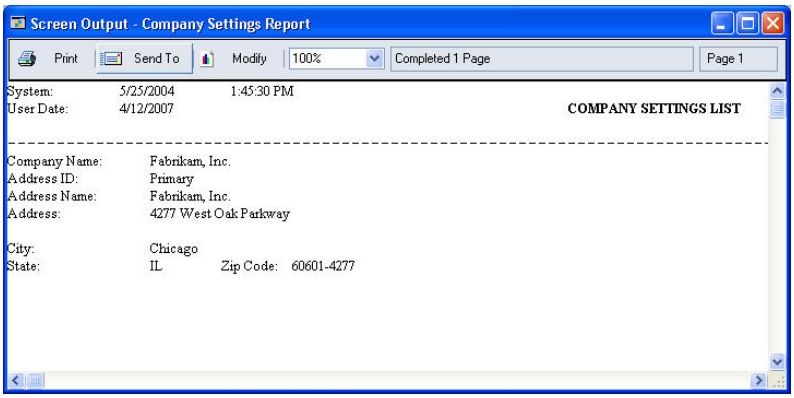
10. Save changes to the report layout.
11. Switch to Microsoft Dynamics GP by selecting Microsoft Business Solutions–Microsoft Dynamics GP from the **File** menu.
12. Print the report from the Microsoft Dynamics GP system by selecting **Reports** and **Company** and inserting the demo option for the Company Settings report.

    The report should look similar to the following:



13. Go back to the report Layout window in Report Writer from the Screen Output. Remove the **Address 3** field from the Layout, since you plan to only use a maximum of two address lines for your company.
14. Save the changes to the report.
15. Switch back to Microsoft Dynamics GP and print the report again.
16. Notice the change to your report. There should be only one line of empty space between the **Address** fields and the **City** field. This blank line exists because you have no address listed on the second line for the sample company.

Lab 3.3 – Adding Fields, Text, and Graphics

Company: Fabrikam, Inc.

Background Information: The goals of this exercise are to practice working in the Report Layout window, learn how the Drawing Options window can be used to customize a report, learn how to paste a picture into your Picture Library, learn how to place a graphic into your report layout, and practice using the divider tool.

Scenario: The annual company conference is fast approaching and since the company logo has changed, you need to print new name tags for every employee. The name tags include the name of the employee, the position held by the employee, the department in which the employee works, the starting date of the employee, and the company logo.

Challenge Yourself!

Creating the New Report

1. Create a new report called Employee Name Tags.

***HINT**: You need to remove multiple Report Sections and increase the size of the Body section.*

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2. Increase the size of the body. Note the size of the section in the lower portion of the Toolbox window.

Adding Fields and Text to the Report Layout Window

3. Refer to the following illustration for guidance on adding fields and labels to your report. Change the fonts as necessary.

***HINT**: Names are Times 18, and other fields are Helvetica 10.*

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Adding a Graphic to the Picture Library

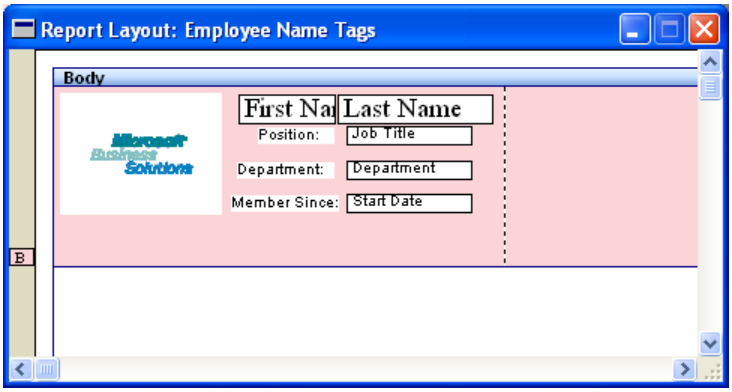
4. Use a drawing application, such as Microsoft® Paint, to create a logo for your company. Copy the logo to the clipboard, and paste it into the Picture Library within Report Writer, naming it Company Logo.

Placing a Graphic in the Report Layout Window

5. Add the Company Logo to your report.

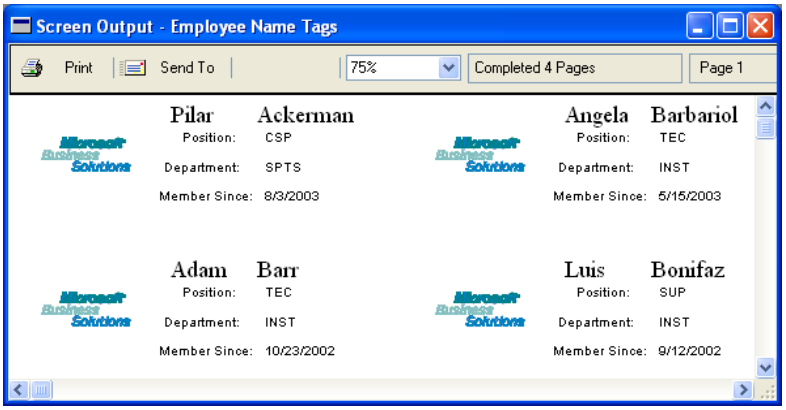
Creating Columns

6. Create two columns for your report.



Printing the Report

7. Print the report to screen. The output should appear like the following:



Lab 3.3 – Adding Fields, Text, and Graphics

Company: Fabrikam, Inc.

Background Information: The goals of this exercise are to practice working in the Report Layout window, learn how the Drawing Options window can be used to customize a report, learn how to paste a picture into your Picture Library, learn how to place a graphic into your report layout, and practice using the divider tool.

Scenario: The annual company conference is fast approaching and since the company logo has changed, you need to print new name tags for every employee. The name tags include the name of the employee, the position held by the employee, the department in which the employee works, the starting date of the employee, and the company logo.

Need a Little Help?

Creating the New Report

1. Launch Report Writer.
2. Create a new report. Make the following selections in the Report Definition window:

Report Name	Employee Name Tags
Series	Payroll
Main Table	Payroll Master
Using Key	Key 1
Max Records	0
Format Options	None
Page Orientation	Portrait
Text Report Options	None
Printing Options	None

3. Open the Report Layout window.
4. Remove the PH, RH, and RF sections from the layout. Hint: Use the Report Section Options window.
   – Clear the check boxes next to the following sections: **Page Header**, **Report Header**, and **Report Footer**. The only section that should be selected is the Body section.
5. Increase the size of the body. Note the size of the section in the lower portion of the Toolbox window.

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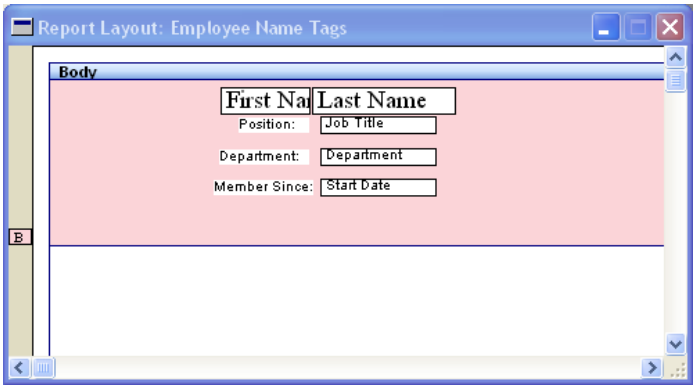
Adding Fields and Text to the Report Layout Window

6. From the Toolbox, add the following fields into the Body of the report:
   - **First Name**
   - **Last Name**
   - **Job Title**
   - **Department**
   - **Start Date**

7. Use the Text tool to add the following text prompts to the report:
   - **Position**
   - **Department**
   - **Member Since**

8. Change the font assigned to the **First Name** and **Last Name** fields to Times 18. Change the font assigned to the remainder of the fields and all of the text prompts to Helvetica 10.



Adding a Graphic to the Picture Library

9. This step in creating the report is going to take place outside of Report Writer and the Microsoft Dynamics GP system. Use a drawing application, such as Microsoft Paint, to create a logo for our company. Copy the logo to the clipboard, and paste it into the Picture Library within Report Writer.

10. Switch back to Report Writer. Select Pictures from the Resources menu to open the Pictures window. Open the Picture Definition window, and enter "Company Logo" in the **Picture Name** field. Then click inside the Picture frame.

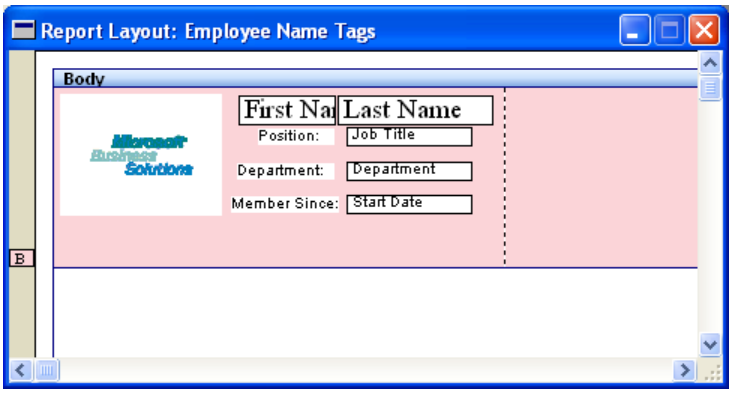
11. Note that the frame now consists of two lines rather than one. Paste your graphic into the picture frame and save it. Verify that your picture is listed in the Pictures window and return to the Report Layout window.

Placing a Graphic in the Report Layout Window

12. Use the Picture tool to add the Company Logo to your report. Use the handles to resize the graphic. Move the graphic into the body of the report to the left of the text prompts and fields.

Creating Columns

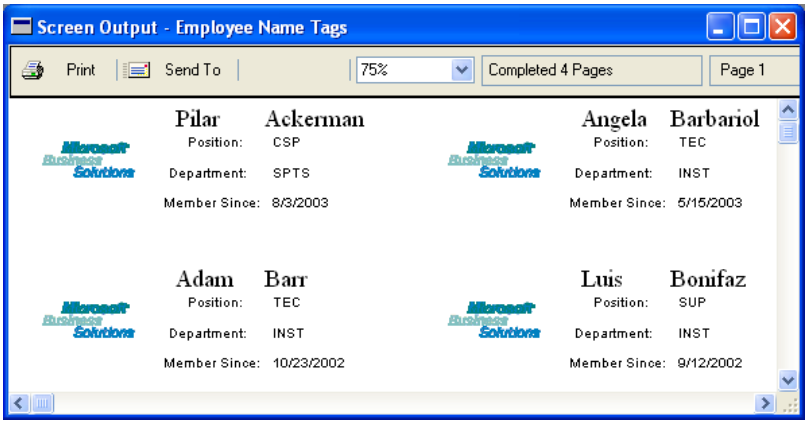
13. Use the Divider tool to create two columns for our report.



14. Close the Report Layout window, making sure to save your changes.
15. Click **OK** to close the Report Definition window.

Printing the Report

16. Print the report to screen. The output should appear like the following:



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Test Your Knowledge – Report Layout

1. Can you use the Report Drawing Options window to change fonts for text prompts, fields, or both?

2. What is the storage size limitation for graphics in Report Writer?

3. In which report sections are you allowed to use the Divider tool?

4. When using the Divider tool, will text be printed from left to right and then from top to bottom or from top to bottom and then left to right?

Conclusion

Report Layout Window, Columns, and Graphics

Some key points to remember from this chapter include:

- The Report Layout window is used to modify report items
- Fields, text and other items can be added or moved in the layout
- The Toolbox provides a number of tools for text reports and additional graphics options for graphics reports
- Reports can have multiple sections; selections are made in the Report Section Options window
- Report Headers, Page Headers, Additional Headers, a Body, Report Footers, Page Footers and Additional Footers are all section options on a report
- Drawing Options allow you to change fonts, colors and sizes
- The "lasso method" can be used to select multiple items when performing tasks
- The Properties window provides another place to make changes to layout items
- Graphics such as a company logo can be stored in the picture library and used on multiple reports
- The Divider tool is used to create columns on reports

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Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

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