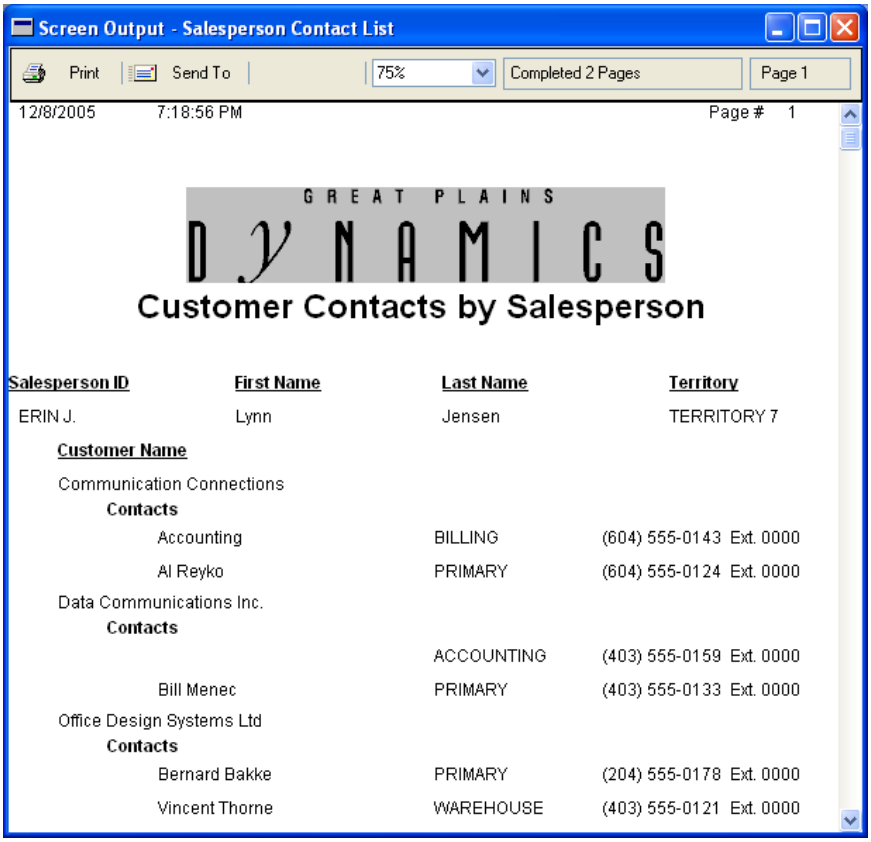
APPENDIX B: REPORT WRITER CASE STUDIES

Day One: Case Study

Company: Fabrikam, Inc.

Scenario: You have been asked to create a new report that lists all customer contacts for each of your company's salespeople. This report will be based on three Microsoft Dynamics™ GP tables and include different report sections for each table. When you complete the project, the first page of the report should look similar to the following illustration:



Challenge Yourself!

1. Use the above window output to create the new report. You should be able to gather the information required to fill in the Report Definition window.
2. In order to access customer information on the report, you need to add some customer tables to the report.

3. Add the RM Customer Master table and the Customer Master Address File to the report.
4. Sort this report by salesperson, and within each of the salesperson's information, sort by customer.
5. Use the following information to add two additional headers to the report.

Header Name	Field to Break on
Salesperson	Salesperson ID
Customer	Customer Number

6. Add the System Date, System Time, Page Number, and Page # label to the Page Header section of the report.
7. Resize the RH section of the report so that it is larger. It should be at least two inches high.
8. Add the old Dynamics Logo to the report using the picture tool. Center the picture in the middle of the Report Header section of the report.
9. Center a title below the graphic on the report called Customer Contacts by Salesperson. The Font of the title should be Helvetica 24 and Bold.
10. Add the following text prompts and fields to the Salesperson header.

Text Prompts	Fields
Salesperson ID	Salesperson ID
First Name	Salespersons First Name
Last Name	Salespersons Last Name
Territory	Sales Territory
Customer Name	----------

11. Add the **Customer Name** field to the Customer header section and a bold text prompt called Contacts to the same section of the report.
12. Add the **Contact Person**, **Address Code**, and **Phone 1** fields to the B section of the report from the Customer Master Address File. Remove the non-essential sections and spacing from the report.
13. Print the report from Report Writer. The report should look similar to the illustration shown at the beginning of project.
14. Create a restriction so that only ERIN J.'s customers appear on the report.
15. Print the report from Report Writer.

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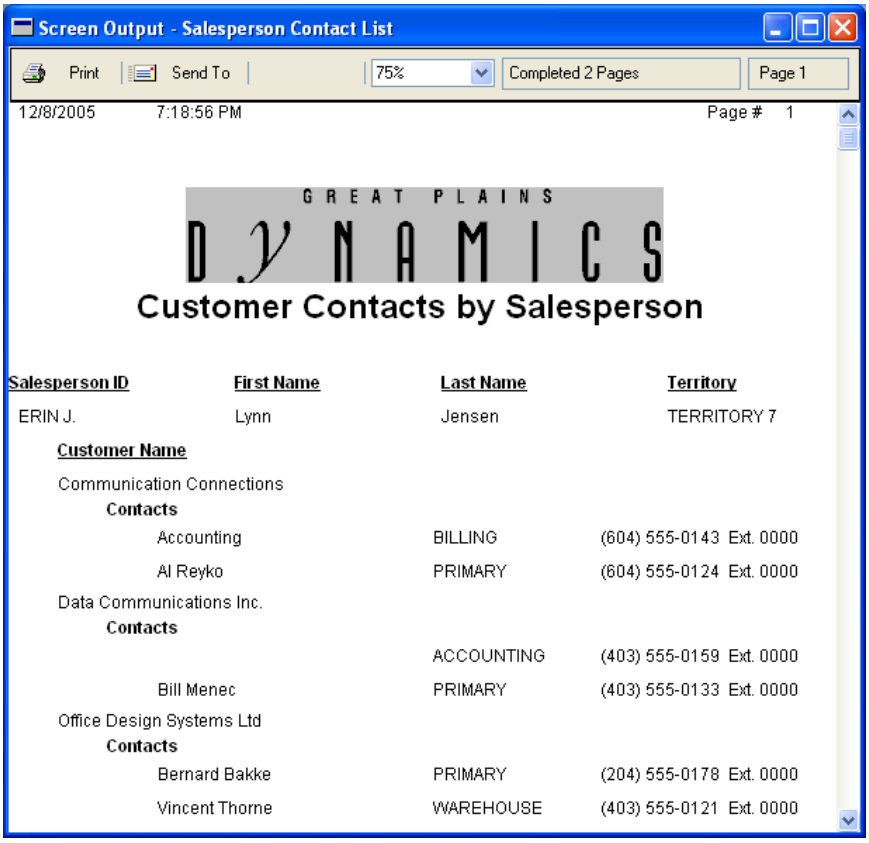
Day One: Case Study

Company: Fabrikam, Inc.

Scenario: You have been asked to create a new report that lists all customer contacts for each of your company's salespeople. This report will be based on three Microsoft Dynamics GP tables and include different report sections for each table. When you complete the project, the first page of the report should look similar to the following illustration:

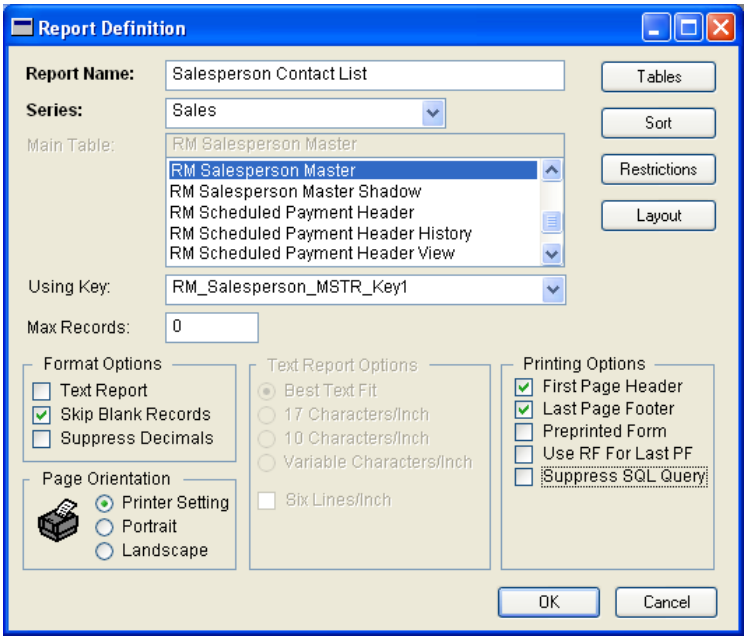


Need a Little Help?

1. Launch Report Writer.
2. Create a new Report Definition window using the following information:

Report Name	Salesperson Contact List
Series	Sales
Main Table	RM Salesperson Master
Using Key	RM_Salesperson_MSTR_Key1

3. Accept the defaults for the other fields. The Report Definition Window appears as follows:



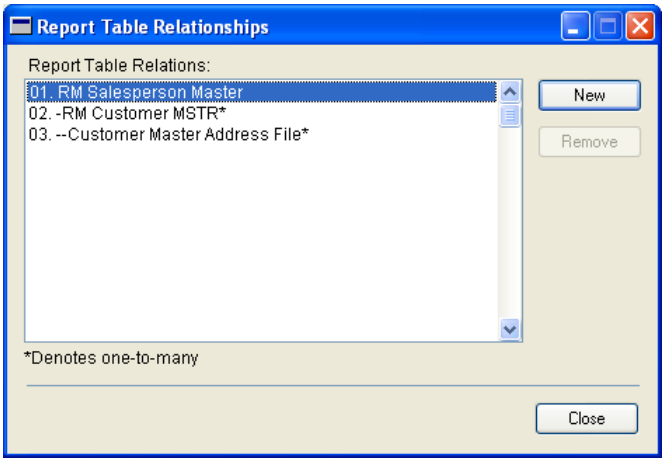
To access customer information on the report, you need to add some customer tables to the report.

3. Add the RM Customer Master table to the report by using the Report Tables Relationships window.

4. Add the Customer Master Address File to the report also.

HINT: *Add this table using the RM Customer Master table as a link.*

The Table Relationships window displays as follows:



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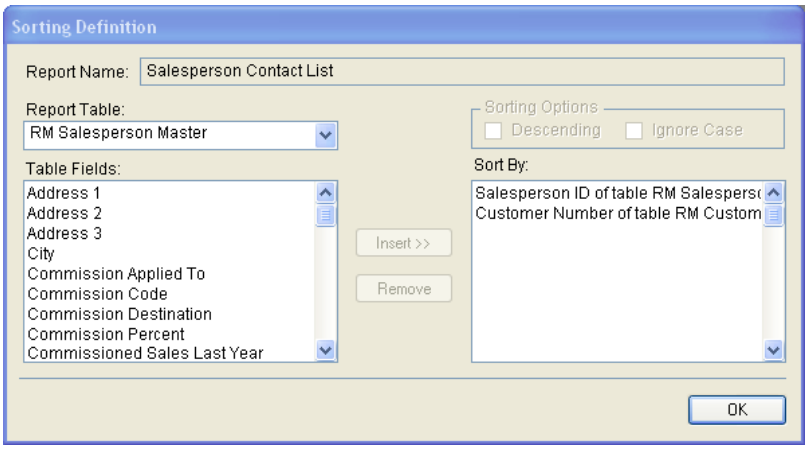
5. You want this report to sort by salesperson, and within each of the salesperson's information, sort the detail by customer. Use the Sorting Definition window to add the following sorts:

   First Field: Salesperson ID
   Second Field: Customer Number

***HINT**: Highlight the Salesperson ID Sort before inserting the Customer Number Sort.*

The Sorting Definition window should look as follows:

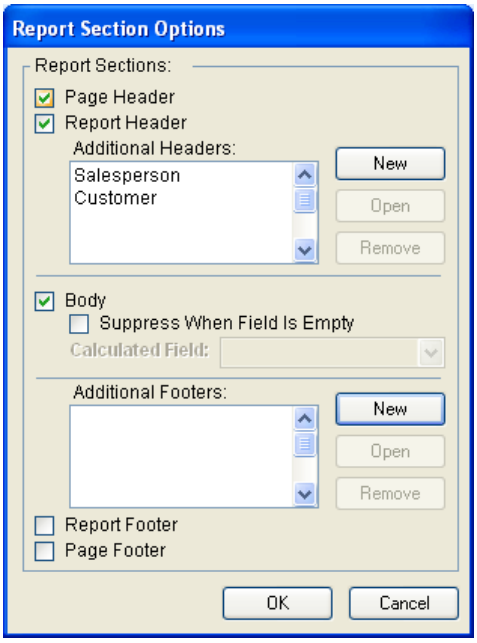


6. Open the Report Layout window.
7. Remove the Report Footer section from the report using the Report Section Options window.
8. Use the following information to add two additional headers to the report.

Header Name	Report Table	Field to Break on
Salesperson	RM Salesperson Master	Salesperson ID
Customer	RM Customer MSTR	Customer Number

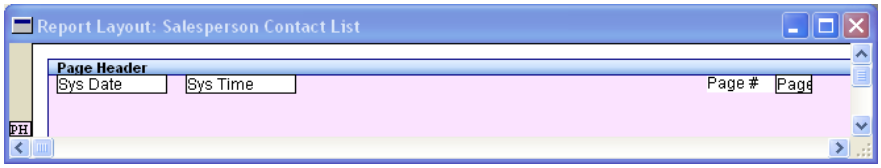
***HINT**: Highlight the new additional header that was just added before clicking the **New** button to add the second additional header.*

After the new report sections have been defined, the Report Section Options window should look as follows:



9. Add the System Date, System Time, and Page Number to the PH section at the top of the report.
10. Add a text prompt next to the **page number** field.
11. Resize the page header to remove the extra white space within the section.

    When complete, the page header should look as follows:



12. Resize the RH section of the report so that it is larger. It should be at least two inches high.
13. Add the old Dynamics Logo to the report using the picture tool. Center the picture in the middle of the RH section of the report.
14. Use the text tool to add a title to the report called Customer Contacts by Salesperson. Place this title below the graphic that was just added and center it.

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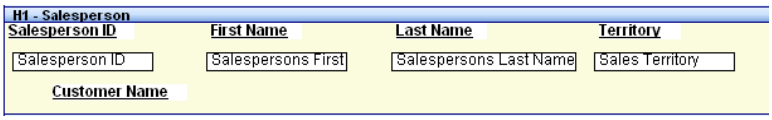
15. Change the Font of the title to Helvetica 24 and select **Bold** as the **Font Style** using the Drawing Options window.

    When complete, the report header should look as follows:

16. Resize the H1 section of the report so it is about three grids larger.
17. Add the following bold and underlined text prompts and fields to the Salesperson header (H1). The fields will be added from the RM Salesperson Master table.

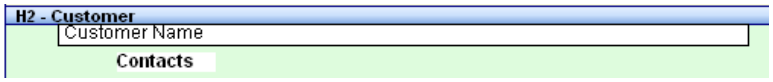
Text Prompts	Fields
Salesperson ID	Salesperson ID
First Name	Salespersons First Name
Last Name	Salespersons Last Name
Territory	Sales Territory
Customer Name	

When complete, the H1 section of the report should look as follows.



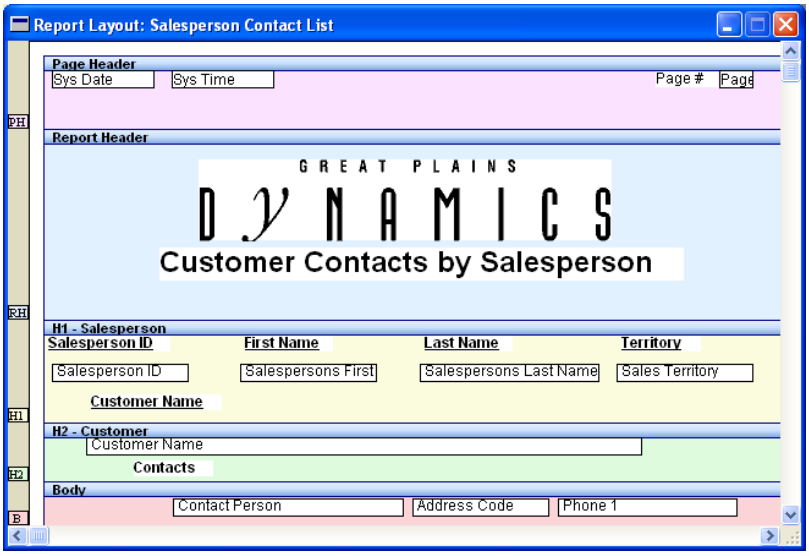
18. Add the **Customer Name** field from the RM Customer MSTR table to the Customer header (H2) section of the report.
19. Add a bold text prompt called Contacts to the same section of the report.

    When complete, the second additional header should look as follows:



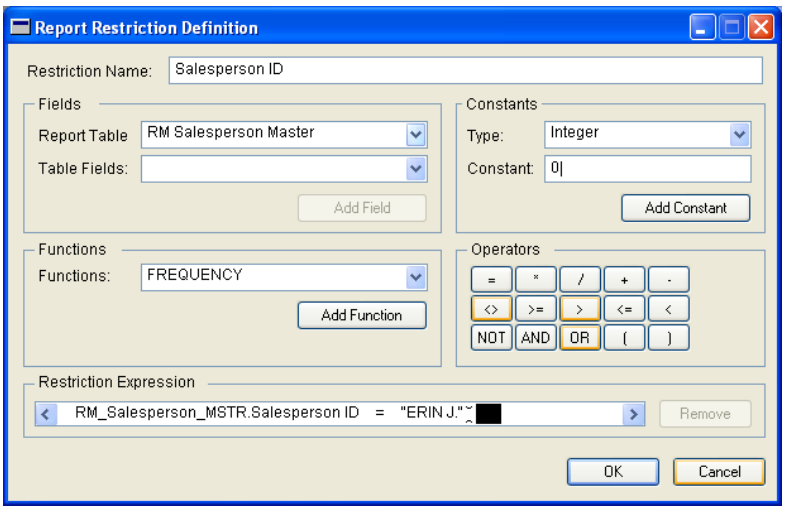
20. Add the **Contact Person**, **Address Code**, and **Phone 1** fields to the B section of the report from the Customer Master Address File. Resize the fields as necessary and remove any extra space from the section.

When complete, the entire report layout looks as follows:



21. Save your changes to the report.
22. Print the report from the Report Writer. The report should look similar to the illustration shown at the beginning of project.
23. Open the Report Restrictions window.
24. Enter **Salesperson ID** as the **Restriction Name**, and use the information in the following illustration to create the restriction.

    When complete, the window should look as follows:



25. Print the report from the Report Writer.

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Planning a Report: Case Study

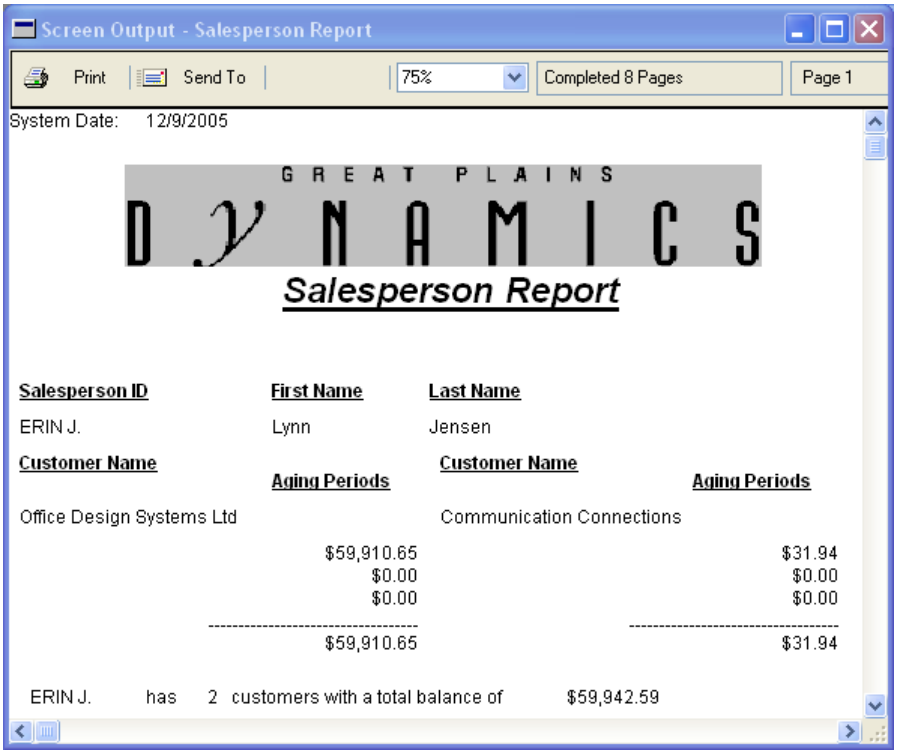
Company: Fabrikam, Inc.

Estimated Time: 40 Minutes

Scenario: Plan and design a report by determining the tables and fields needed, sorting options, additional sorting methods and additional restrictions, and the report layout desired.

Challenge Yourself!

Your finished report should look similar to the following illustration:



1. Define the new Sales report using the following information:

Report Name	Salesperson Contact List
Main Table	RM Salesperson Master
First Page Header	Uncheck

Accept the defaults for information not provided.

2. Link the following tables to the report:
   - RM Customer MSTR
   - Customer Master Summary
3. Sort the report by Salesperson ID and then by Customer Name in descending order, and select to ignore case.
4. Create the Additional Header and an Additional Footer that break on the Salesperson ID.
5. Add a page break to cause a separate page to print for each salesperson.
6. Add the **System Date** field to the Report Header and the Page Header sections.
7. Add the old Dynamics logo graphic to the Report Header.
8. Add the name of the report to the Report Header and the Page Header sections.
9. Add the following text prompts and fields to the Salesperson Header.

Text Prompts	Fields
Salesperson ID	Salesperson ID from the RM Salesperson Master
First Name	Salesperson First Name from the RM Salesperson Master
Last Name	Salesperson Last Name from the RM Salesperson Master
Customer Name	
Aging Periods	

10. In the Body section of the report, add the Aging Periods as Array.
11. Format the report so fields from the Body automatically print again on the right side of the page.
12. Create the **Aging Periods Total-Body calculated** field to total Aging Period Amounts 1, Aging Period Amounts 2 and Aging Period Amounts 3.
13. Add this field to the body of the report under the existing Aging Period Amounts.
14. Create the **Aging Period Total-Footer 1 calculated** field, and place it in the additional footer section.

***HINT**: This uses the newly created **Aging Periods Total-Body calculated** field.*

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15. In the additional footer section of the report, add the following fields:
    - Salesperson ID
    - Customer Name

16. Add text prompts to the Salesperson Footer as needed to complete the following sentence:

    Salesperson ID has Customer Name customers with a total balance of Aging Period Total-Footer 1.

17. Use the **Report** Field Options window by double-clicking on the following fields to change their field types.
    - Change **Customer Name** to Count
    - Change **Aging Periods** Total-Footer 1 to Sum

18. Attach a format to the **Aging Period Total-Footer 1** field by opening the Report Field Options window for the field. Select the Dollar11 format from the Format Lookup scrolling window.

HINT: *Formats determine how a field should display on a report. Formats can be assigned globally for a field, or they can be set individually on each report. The Dollar11 format that is selected in this exercise is a format that has been defined in Dynamics for an amount field. It has options set so that a thousands separator will be used when the value of this field is displayed along with a currency symbol. More information about formats will be provided in the chapter called Data Types, Formats and, Strings.*

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19. In the **Report Footer**, add the **Salesperson ID** field and a text prompt to complete the following sentence. Change the field type for **Salesperson ID** to Count.

    Total number of salespeople: **Salesperson ID.**

20. Set restrictions for the report so it only prints the customers with the total balance of Aging Periods 1, 2, and 3 that are greater than 0. This can be done using fields from the Customer Master Summary table.

21. Print the report from Report Writer.

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Planning a Report: Case Study

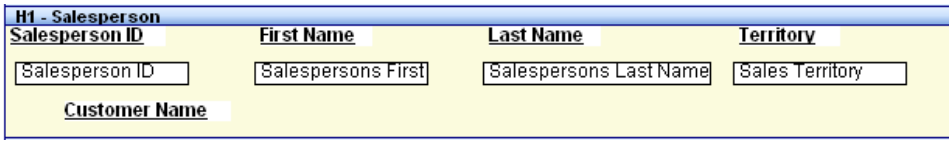
Company: Fabrikam, Inc.

Estimated Time: 40 Minutes

Scenario: Plan and design the report by determining the tables and fields needed, sorting options, additional sorting methods and additional restrictions, and the report layout desired.

Need a Little Help?

Your finished report should look similar to the following illustration:



1. Launch Report Writer. Click the **Reports** button on the Toolbar, and then click the **New** button to create a new report.
2. Define the report using the following information:

Report Name	Salesperson Report
Series	Sales
Main Table	RM Salesperson Master
Using Key	RM_Salesperson _MSTR_Key1
First Page Header	Uncheck

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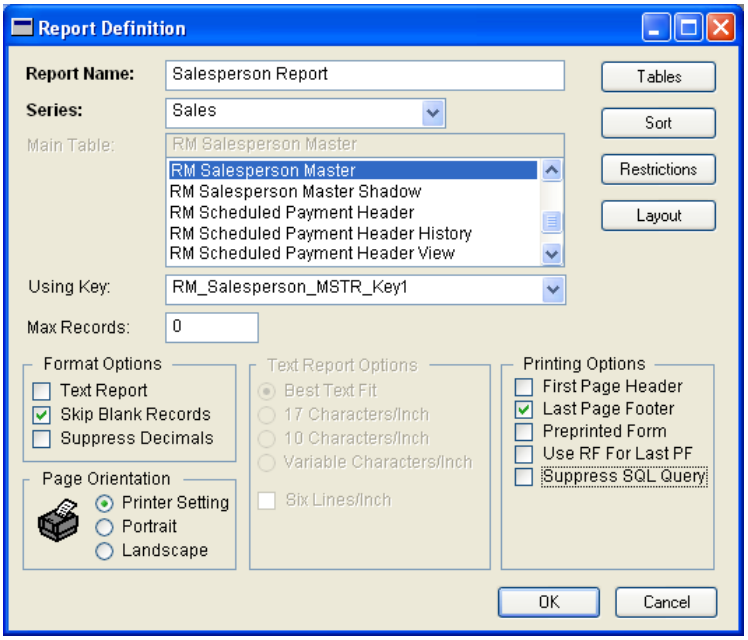
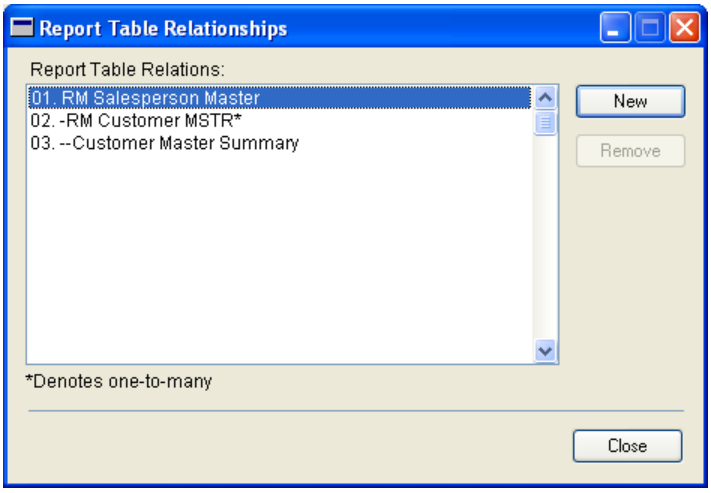
Accept the defaults for any information that is not provided. The window should look like the illustration below when finished.



3. Open the Report Table Relationships window. Link your tables by the daisy chain method. The tables to link are as follows:

   – RM Salesperson Master→RM Customer MSTR
   – RM Customer MSTR→Customer Master Summary

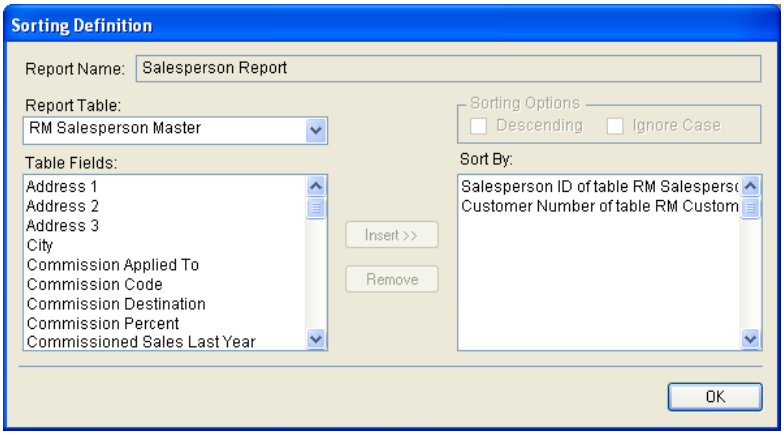
   When you have finished linking tables, the Report Table Relationship window should look as follows:



4. Open the Sorting Definition window.

5. For the Primary Sort, use the RM Salesperson Master table, sort by Salesperson ID.
6. For the Secondary Sort use the RM Customer MSTR table, sort by Customer Name in descending order, and choose to ignore case.

   The Sorting Definition window appears as follows:



7. Open the Report Layout window.
8. Open the Report Section Options window.
9. Create the Additional Header with the following information:
   - Header Name — Salesperson
   - Field to break on — Salesperson ID
10. Create the Additional Footer with the following information:
   - Footer Name — Salesperson Total
   - Field to break on — Salesperson ID

NOTE: *Add a page break to cause a separate page to print for each salesperson.*

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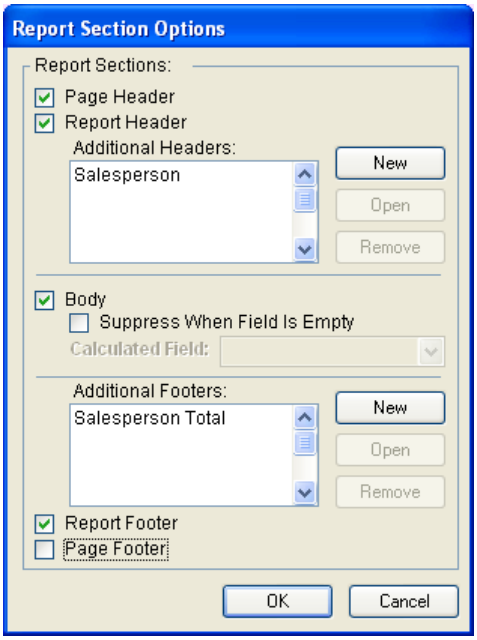
The Report Section Options window should look as follows after you creating the additional header and footer.



11. Add the **System Date** field to the Report Header and the Page Header sections.
12. Use the Picture tool to add the Dynamics Logo graphic to the Report Header. Center the Logo across the section.
13. Add the name of the report, "Salesperson Report," to the Report Header and the Page Header sections. Center the text across the section. Using the Drawing Options window make the title Bold, Italic, and Underlined with a font of Helvetica 24.
14. Add the following text prompts and fields to the Salesperson Header. (H1) Make the headings bold and underlined using the Drawing Options window.

Text Prompts	Fields
Salesperson ID	Salesperson ID from the RM Salesperson Master
First Name	Salesperson First Name from the RM Salesperson Master
Last Name	Salesperson Last Name from the RM Salesperson Master
Customer Name	
Aging Periods	

15. In the Body section of the report, add the Aging Periods as Array Fields. Also include the **Customer Name** field from the RM Customer MSTR table.

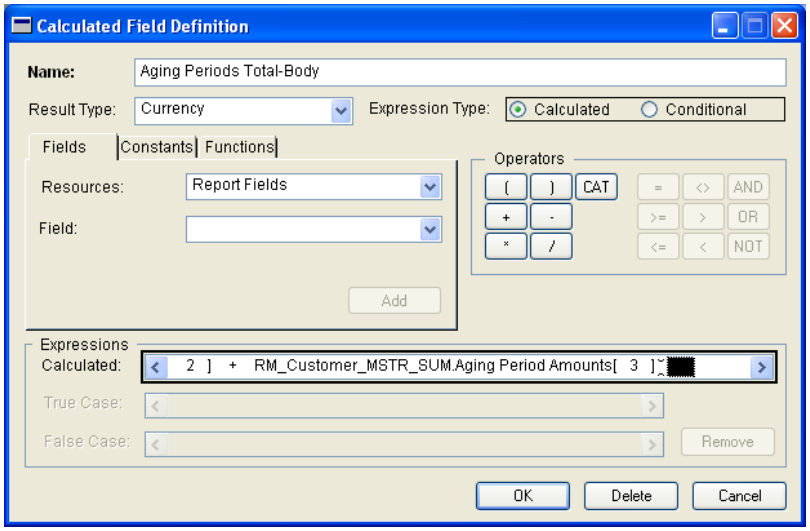
16. Use the column tool so that it automatically prints these fields again on the right side of the page.

17. Create the calculated field **Aging Periods Total-Body** for totaling the aging periods. Assume that only three aging periods are used in your company.

    The following expression will result:

    EXPRESSION =

    RM_Customer_MSTR_SUM.Aging Period Amounts [1] +
    RM_Customer_MSTR_SUM.Aging Period Amounts [2] +
    RM_Customer_MSTR_SUM.Aging Period Amounts [3]



18. Add this field to the body of the report under the existing Aging Period Amounts.

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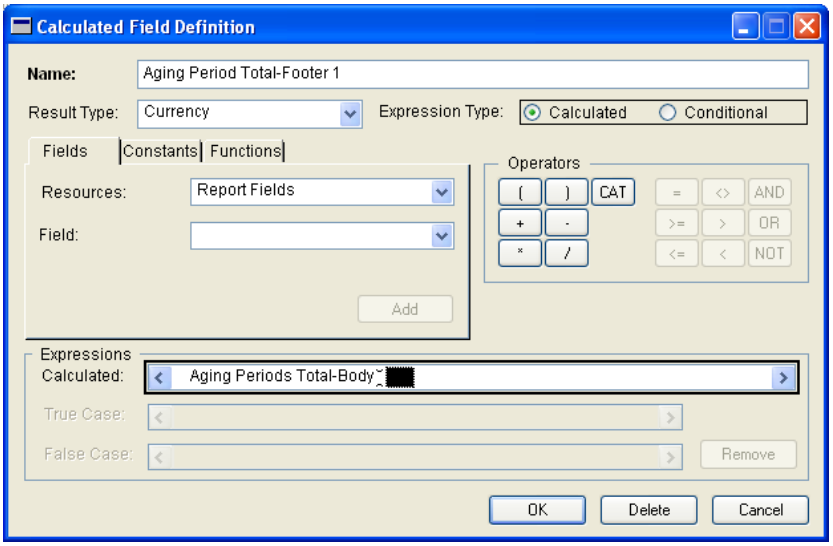
19. Create the calculated field **Aging Period Total-Footer 1**, and place it in the additional footer section.



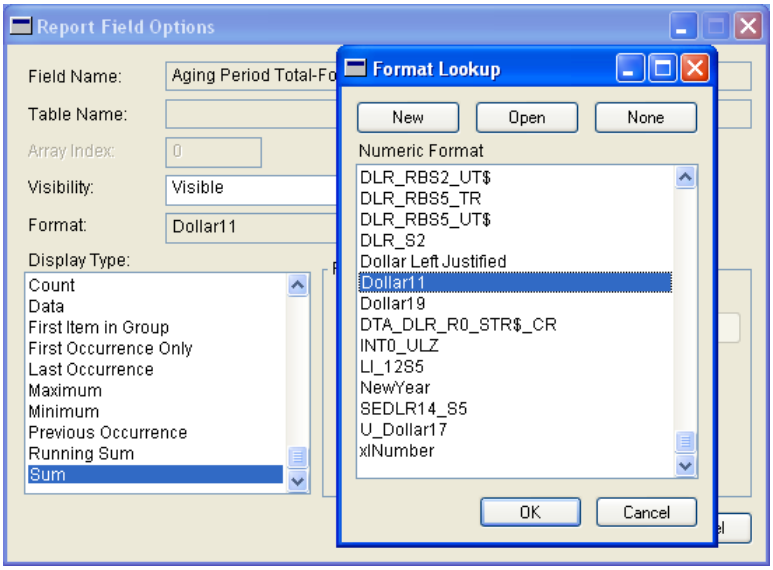
20. In the additional footer section of the report, add the following fields:
    - Salesperson ID from the RM Salesperson Master
    - Customer Name from the RM Customer MSTR

21. Add text prompts to the Salesperson Footer (F1) as needed to complete the following sentence:
    - Salesperson ID has Customer Name customers with a total balance of Aging Period Total-Footer 1

22. Use the Report Field Options window by double-clicking on the following fields to change their field types.
    - Change Customer Name to Count
    - Change Aging Periods Total-Footer 1 to Sum

23. Attach a format to the **Aging Period Total-Footer 1** field by opening the Report Field Options window for the field. Select the Dollar11 format from the Format Lookup scrolling window.

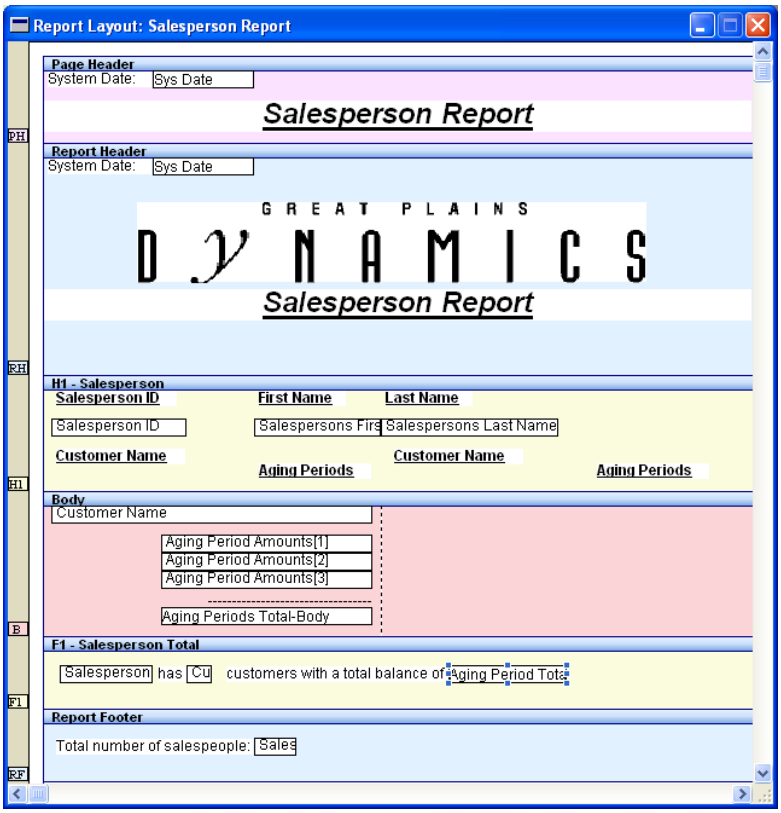
HINT: *Formats determine how a field should display on a report. Formats can be assigned globally for a field, or they can be set individually on each report. The Dollar11 format that is selected in this exercise is a format that has been defined in Microsoft Dynamics GP for an amount field. It has options set so that a thousands separator will be used when the value of this field is displayed along with a currency symbol. More information about formats will be provided in the chapter called Data Types, Formats, and Strings.*



24. In the Report Footer, add the **Salesperson ID** field from the RM Salesperson Master and a text prompt to complete the following sentence. Change the field type for **Salesperson ID** to Count.

    Total number of salespeople: **Salesperson ID.**

    The Report Layout should look as follows:



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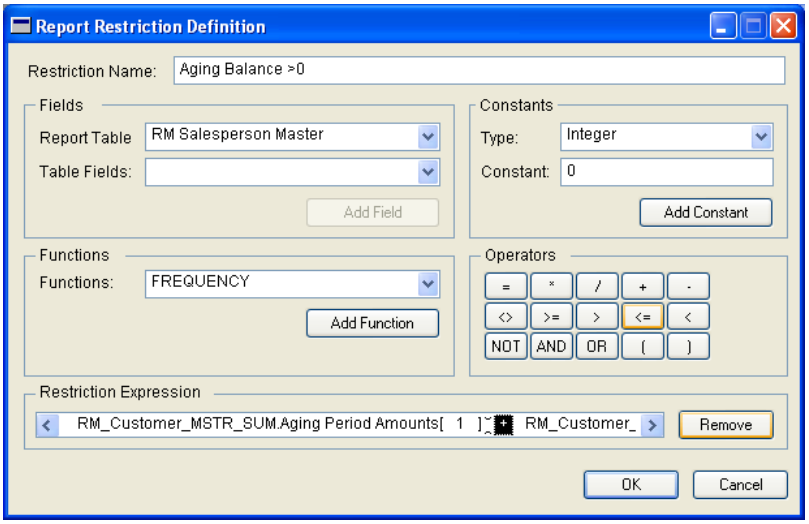
25. Close the layout of the report, and save your changes.

26. Set restrictions for the report, so it only prints the customers with the total balance of Aging Periods 1, 2, and 3 that are greater than 0. This can be done using fields from the Customer Master Summary table.

    The following expression will result:

    EXPRESSION = RM_Customer_MSTR_SUM. Aging Period Amounts [1] + RM_Customer_MSTR.SUM Aging Periods Amounts [2] + RM_Customer_MSTR._SUM Aging Period Amounts [3] > 0.00000



27. Print the report from Report Writer.

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