CHAPTER 6: PLANNING A REPORT

Training Objectives

Actively participating during this chapter helps you learn:

- How to determine the needs for a report
- How to plan the report layout
- How to determine where information exists in Microsoft Dynamics™ GP
- How to identify the Main Table and determine table linking
- How to examine the need for grouping, sorting and restricting

Introduction

Before using Report Writer, it is a good idea to plan your report. While planning, consider the needs the report should meet and how Report Writer's features can best be used. Determine whether a new custom report is needed or if an existing report could be modified.

It is usually valuable to require a sketch of a report when responding to requests for new reports so requirements are completely understood prior to report development starting. Good planning increases the chance of a successfully well received report.

Microsoft Dynamics GP provides resource descriptions to locate where data resides within tables. The Field, Table and Window Descriptions provide the ability to locate the information you need for a report. These resources are also discussed in this chapter.

The following checklist identifies the major steps you should take when planning a report. After the checklist there is an explanation of each step and which Report Writer procedures you can refer to for more information.

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Planning a Report Checklist

- ❑ 1. Determine the information needed on the report.
- ❑ 2. Review existing Microsoft Dynamics GP reports to determine if there is one that can be modified.
  - If there is, determine whether the report should be a primary copy of an original Microsoft Dynamics GP report or a secondary copy.
  - If there is not, create a custom report (a report created from an empty layout window).
- ❑ 3. Plan the report layout.
- ❑ 4. Determine which tables contain the information you need on the report and which fields are needed within those tables.
- ❑ 5. Determine which table is the report's main table and how table linking should be done.
- ❑ 6. Identify how you want the information grouped in the report.
- ❑ 7. Determine how the report should be sorted and restricted. Add any necessary restrictions and sorts or use the **Using Key** and **Max Records** fields.
- ❑ 8. Determine whether any **user-defined** fields are required and how to create them. (Calculated Fields)
- ❑ 9. Create and save the report.

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Determine Report Needs

Write a quick paragraph describing the purpose of the report. Review the paragraph for significant words and phrases. Based on this information, determine the Microsoft Dynamics GP module or series with which the report will be used. Also look for the nouns in the significant words and phrases selected. These give you a good idea of the fields needed on the report.

An example in the following paragraph describes the purpose of a report that is needed by the manager of the sales division in a company:

"I need a report that lists all of my salespeople. For each salesperson, I want to see a list of their customers, and for each customer, I want to see their total purchases for the past 90 days."

Significant words and phrases in this paragraph might include "salespeople," "customers…for each salesperson," and "total purchases for the past 90 days." The nouns in these phrases include "salespeople," "customers," "purchases," and "days."

Translating these nouns into fields, you come up with the following fields: **Salesperson ID** or **Salesperson Name**, **Customer ID** or **Customer Name**, and **Balance** or **Amount**. You now have an idea of what is required on the report.

Review Existing Microsoft Dynamics GP Reports

Based on the information you want to see on a report, determine which module or series (Receivables Management, General Ledger, etc.) this report falls into. Use the sample reports provided with Microsoft Dynamics GP to determine if a report similar to what you need already exists in Microsoft Dynamics GP. These reports can be accessed from the Help menu in Microsoft Dynamics GP.

You can also use the lesson company or your company and print out any report that might meet your needs. If a report does exist, you may be able to make some minor modifications to achieve the desired output.

If a Similar Report Exists

If a similar report does exist, decide whether to make a primary or a secondary copy of the report.

A primary copy of an original report replaces the original report and is printed in the same place in Microsoft Dynamics GP where the original is printed, which means you can use the Report Options window for the original report to specify sorting and restricting options for the primary copy.

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A secondary copy of an original report does not replace the original report. It exists in conjunction with the original and is printed from the Customized option on the Reports drop-down list, which means that you cannot use the Report Options window for the original report to specify sorting and restricting options for the secondary copy.

Use the Sample Reports provided with Microsoft Dynamics GP to review the sorting and restricting options for the potential primary or secondary copy. To see the report sorted or restricted by a means other than those allowed in the Report Options window for the original report; make a secondary copy so you can create user-defined sorting and restricting options.

Print a sample of the original report to the screen and note the name of the report next to "Screen Output " – in the upper left corner of the Screen Output window. This is the name of the report you modify in Report Writer. Switch into the Report Writer application, and highlight the report in the Original Reports list.

If the **Copy** button is dimmed the report uses a temporary table, and you cannot create a secondary copy of the report because the temporary table is generated by code initiated in the Report Options window for the original report.

If a Similar Report Does Not Exist

If a similar report does not exist in Microsoft Dynamics GP, determine if a custom report can be created. Prior to doing this, review the helpful hints below to make sure the right decision is made. Otherwise, continue to the next step in the checklist.

HINT: *Do not skip this step and assume that either the report does not exist in Microsoft Dynamics GP or you already know which report the one you need is similar to.*

If a similar report exists in Microsoft Dynamics GP, make sure the report selected is not already being used for another purpose in Microsoft Dynamics GP.

If the report is being used for another purpose and therefore cannot be modified, use the report as a basis for creating a custom report. Write down the tables used in the report, how the tables are linked, the fields used in the report, how the report sections are used, and any other information that might assist you in creating a custom report.

You cannot use a temporary table in a custom report because there is no way to tell Microsoft Dynamics GP or Report Writer to generate the temporary table before the report is printed.

Reports used to print invoices and checks require a more complex layout, particularly if using preprinted forms. For these types of reports, it is best to modify existing reports rather than create new ones.

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Plan the Report Layout

Consider how the report should appear when it is complete. Draw some sample report outputs on a piece of paper or use an existing report to determine how the report should look. Analyze your drawing using a top-down approach.

This helps determine the following:

- Order to use when linking tables into the report
- Keys for sorting purposes
- Order to create additional headers and footers
- Any needed user-defined sorts

Drawing the report on paper also helps in planning how much space the various elements of the report require. This is strongly recommended and increases the likelihood of a successful report design. Consider the size of a report's headings (for the first page and for succeeding pages), if you want to see totals at the end of the report or possibly at the bottom of each page, whether you want to use graphics, and any other options that affect the layout.

Some factors affect the page setup and printer settings selections you make. For example, if the report is particularly wide, you may want to print the report using landscape orientation rather than portrait orientation, or to consider using condensed text (17 characters per inch) rather than standard text (ten characters per inch). If the report requires graphics, make sure that the report is not designed as a text report, since graphics cannot be added to text reports.

If the report has very few fields on it but contains hundreds of records, you may want to print it in columns so it does not require as many pages. If you need several levels of information, such as detailed customer information for each salesperson on staff, group the information using additional headers and footers to clearly display the relationship among the different pieces of information.

Field Options can total fields where necessary, and if certain data is more important than others, use Drawing Options to highlight the information so it stands out on a report.

If you plan to modify an existing report, many of the considerations in the previous paragraphs are irrelevant. However, it is a good idea to go through this step anyway because in the process, you may identify the need for another additional header or footer or a sorting or restricting option that does not currently exist.

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Determine Where Information Exists within Microsoft Dynamics GP

After determining which fields you want on the report and how they are to be displayed, the next step is to determine where they exist in the system. This section introduces you to several sources of online information, how to use them, and when to use them.

Table Descriptions

FILE→TABLE DESCRIPTIONS (WITHIN REPORT WRITER)

TOOLS→RESOURCE DESCRIPTIONS→TABLE (WITHIN MICROSOFT DYNAMICS GP)

Tables are resources used to store related records. Each Microsoft Dynamics GP table has three names:

- A technical name
- A display name
- A physical name

The physical, technical, and display names of each table are displayed in the Table Descriptions window. To access this window, select Table Descriptions on the File menu within the Report Writer, or within Microsoft Dynamics GP, select Table from the **Resource Descriptions** option on the Tools menu.

HINT: *The term file is often used for a storage place in other applications and some of our documentation. These words refer to the same thing in Microsoft Dynamics GP.*

How to Use Table Descriptions

After you have opened the Table Descriptions window, click the Table lookup button to open the Table Names window. In the Table Names window, select a product (usually Microsoft Dynamics GP) and the series to which the table belongs. This displays a list of all the tables associated with that product and series.

To view detailed information about a specific table, highlight a table in the list and click **OK** to return to the Table Descriptions window. Information in the Table Descriptions window pertinent to Report Writer includes the following:

Keys and Key Segment fields – Use the information in the Key Segments list to determine the components of the **Using Key** field in the Report Definition window. This key determines how a report is sorted in the absence of a user-defined sorting option.

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Field list – Use this to view a list of the fields stored in the selected table. Use the Storage Type column to determine the storage types of each field in the table. This information can be used when creating calculated fields and restrictions and when modifying formats.

Field Info button – Click this button to open the Additional Field Information window. In this window, pertinent fields include **Array Size** and **Keyable Length**. The Format section can be used to view the format type assigned to a field, as well as the definition for that format type.

The Static Values scrolling list gives the value that corresponds to the integer value stored in the field. Use this list when creating conditional expressions to translate integer values stored in option button and check box fields. The Description scrolling list includes additional useful information about the field.

Additional Info button – Click this button to open the Additional Table Information window. This window lists existing relationships between the selected table and other Microsoft Dynamics GP tables and how those relationships were defined. The Description scrolling window lists additional useful information about a table.

When to use Table Descriptions

Use Table Descriptions when you know the name of the table needed on the report and to find out additional information about the table. Also use Table Descriptions to determine if a relationship exists between two tables and to find the field or fields that make up one of the table's keys.

After you become familiar with Microsoft Dynamics GP and how data flows through the system, you will use Table Descriptions more than the other two sources of online information (Field Descriptions and Window Descriptions).

Field Descriptions

FILE→FIELD DESCRIPTIONS (WITHIN REPORT WRITER)

TOOLS→RESOURCE DESCRIPTIONS→FIELD (WITHIN MICROSOFT DYNAMICS GP)

A field is a unit of data. In Microsoft Dynamics GP, fields are entered in windows. When saving the information entered in a Microsoft Dynamics GP window, each individual piece of information is stored in a field. A collection of related fields is stored as a record. Related records are stored together in a table.

An example of a field in Microsoft Dynamics GP is a customer. A customer record might consist of the customer name, address, city, state, and zip code fields. The customer records are stored in the RM Customer MSTR table. Use the Field Descriptions window to access information about fields in Microsoft Dynamics GP. To access this window, select **Field Descriptions** from the **File** menu.

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How to Use Field Descriptions

In the Field Descriptions window, select a product (usually Microsoft Dynamics GP) and the core. A core is similar to a series in Microsoft Dynamics GP and can be defined as a location where resources, such as fields, are stored in a dictionary.

Fields are assigned to a core based on the module that was created at the time the field was created (keep in mind one field can be used in many different tables). The System Manager module was created first; therefore, any field created during the process of building System Manager would be stored in the System core. For example, the **Account Number** field was created in the process of building System Manager.

The **Account Number** field is stored in the System core rather than the Financials core, as would be expected based on the name of the field. It follows, then, that when looking for a field using the Field Descriptions window, you should look first in the System core, then in the core where you would expect to find the field. Select the field to view information in.

The Tables Containing Field list is then populated with a list of tables that use that field. To view detailed information about a specific field, click the **Field Info** button to open the Additional Field Information window. This is the same window that opens when clicking the **Field Info** button in the Table Descriptions window.

When to Use Field Descriptions

Use Field Descriptions when you know the name of the field you want to see on a report, but do not know the table in which it is stored. After obtaining a list of possible tables, use Table Descriptions to access additional information about both the field and the tables.

Window Descriptions

FILE→WINDOW DESCRIPTIONS (WITHIN REPORT WRITER)

TOOLS→RESOURCE DESCRIPTIONS→WINDOW (WITHIN MICROSOFT DYNAMICS GP)

A form is a group of one or more windows that interrelate with one another. A form may have several windows that can be displayed and used separately, but together all the windows function for a specific purpose. The use of forms is not readily apparent when using Microsoft Dynamics GP, but grouping windows into forms makes the flow of data through the system much more efficient.

Each Microsoft Dynamics GP window has two names: a technical name and a display name. The display name, which appears at the top of a window when it is opened, is the most commonly used name in Microsoft Dynamics GP.

You need to know a window's display name when using Window Descriptions. To access the Window Descriptions window, select **Window Descriptions** from the File menu.

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How to Use Window Descriptions

In the Window Descriptions window, select a product (usually Microsoft Dynamics GP) and the series to which the window you need information about belongs. This displays a list of all the windows associated with that product and series.

Use the **Find** button to locate the specific window about which you want to see information. Because you already know the display name of the window, this is the most efficient means of locating the window in the Window Descriptions scrolling list. Enter the window name in the Find window exactly as it appears in the window.

Once Microsoft Dynamics GP has located the window, highlight its name in the Window Descriptions scrolling list. The Window Fields list displays a list of the field names as they appear in the window (not necessarily the same name as used in tables). The Tables list displays the tables used to store the data entered in that window.

When to Use Window Descriptions

Use Window Descriptions when you know where the information is entered or displayed in Microsoft Dynamics GP, but are not sure of the field name or the table(s) used to store the field. Once you have a list of possible tables, use Table Descriptions to access additional information about both the field and the tables.

Identify the Main Table and Determine Table Linking

After determining which tables contain the fields needed on your report, determine which table will be the report's main table and how table linking should be done.

To do this, use a top-down approach. Look at the report from the highest level of detail to the lowest level of detail. Typically, the table that contains the highest level of detail becomes the main table in the report, and the tables that represent the lowest level of detail are located at the bottom of the table hierarchy structure.

The second-to-the-lowest level of detail is located one level up from the bottom of the hierarchy structure and so on, until you reach the highest level of detail in the report (the main table).

When one-to-many relationships exist between more than one set of tables linked in a report, the tables represented by the lowest one-to-many link must be located in the body of the report.

The tables represented by the next-to-the-lowest level must be located in the additional section closest to the body of the report, and so on until you reach the tables that contain fields representing the highest level of detail.

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Identify How Information will be Grouped

Create additional sections to "match" the linking determined in the previous step. Typically, the fields that represent the lowest level of detail are placed in the body of the report. The next level of detail is placed in the additional section closest to the body of the report and so on, until you have reached the highest level of detail in the report.

For example, if you have determined that you will have four levels in your table hierarchy structure, with Level 1 being the main table and Level 4 being the table that contains the lowest level of detail, you need to have three additional sections in the report.

The first additional header contains fields from the table at Level 1, the second additional header contains fields from the table at Level 2, the third additional header contains fields from the table at Level 3, and the body of the report contains fields from the table at Level 4.

Determine Sorting and Restricting Needs

Continue to use a top-down approach when determining how your report is sorted. Look at the information that you will be placing in the additional sections and the body. The way information is displayed in each section usually determines how you sort the information.

Determining the need for restrictions is more of a two-step process: you can identify any known restrictions at this stage in the report planning process, but you also should look at your report after it has been created to see if further restrict are needed for the report's output.

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Determine the Need for User-Defined Fields

This section discusses identifying the need for user-defined fields and how to create them. Use the following steps as a guideline.

1. Determine if you need to create a user-defined field. Use Table Descriptions to determine if the information you need already exists (in the format required) in one of the linked tables. Since most user-defined fields include totals of some kind, look for fields that contain total amounts.
2. If you find a field that stores the information needed on the report, and it is located in a table not currently linked into the report, determine if it can be linked into the report (be sure the link is added at the correct level of the file hierarchy structure so you get the output you expect).
3. If the totals do not exist within any fields, determine if these fields can be created in Report Writer. The fields could be created in one of two ways:
   - Using calculated fields
   - Changing the field type assigned to the field
4. By viewing the different field types that can be assigned to fields in Report Writer, you find that the Count field type can be used to count the number of times a field is printed in the body of the report or the Sum field type can be used to total the values stored in a field printed in the body of the report.
5. If you cannot achieve the desired output by changing the field type assigned to the field, decide if a calculated field can be created and used.

Create and Save the Report

The last step in the report planning process is to gather together all the information found using the previous steps and create the report, being sure to periodically save your changes.

Lab 6.1 – Report Planning

Before using Report Writer to create a new report, plan your report ahead of time. While planning, consider the needs the report should meet and how Report Writer's features can best be used to meet them. In this lesson, you will be planning a custom report that will be created in a later lesson. Complete the following steps to plan a report.

1. Determine the information you need on the report.

   The first step in the planning reports process is to determine exactly what you need to display on the report. An easy way to do this is to write a quick paragraph describing the purpose of the report. Then review the paragraph for significant words and phrases.

   Based on this information, determine the Microsoft Dynamics GP module with which the report is used. Also look for the nouns in the significant words and phrases selected; these give a good idea of the fields you need to see on the report.

   For example, say: I need a report that lists all of my salespeople. For each salesperson, I want to see a list of their customers, and for each customer, I want to see their aging balance for the past 90 days.

   Which Microsoft Dynamics GP module will this report be used with?

   – List the significant words and phrases in the above paragraph
   – List the nouns within these significant words and phrases
   – Translate these nouns into prospective fields

2. Review existing Microsoft Dynamics GP reports to determine if there is one that can be modified.

   You will create a custom report rather than modifying an existing one, but in many circumstances there may be an existing Microsoft Dynamics GP report that can be modified.

   Where can you find the sample reports for most modules?

3. Plan the report layout.

   Review the following report output; this is the report you will plan. Use this sample report output when completing the remaining steps in the report planning process.

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System Date: 8/6/07

Salesperson Report

Salesperson ID	First Name	Last Name
CHARLES E.	Charles	Erickson

Customer Name	Aging Periods	Customer Name	Aging Periods
World Enterprises		Westside Cable Service	
	$39,259.08		$9,265.48
	$3,078.65		$0.00
	$4,561.29		$0.00
	$46,899.02		$9,265.48
Unified Wire and Cable Systems		Super Foods Plus	
	$7,782.76		$1,266.39
	$0.00		$3,452.01
	$0.00		$15,589.16
	$7,782.76		$20,308.16
S&S Properties		Reynolds State College	
	$11,958.80		$29,406.12
	$15,154.67		$0.00
	$0.00		$0.00
	$27,113.47		$29,406.12
Octagon Marketing Org.		North College	
	$10,500.00		$14,870.88
	11,384.66		$0.00
	$0.00		$2,717.03
	$21,884.66		$17,587.91

XXXXXXX has xx customers with a total balance of $xx,xxx.xx.

Total number of salespeople: xx

4. Determine which tables contain the information needed on the report and, within those tables, which fields are needed.
   - Use Field Descriptions to locate the table where the **Salesperson ID** and **Customer Name** fields are stored. List the possible tables.
   - Use Window Descriptions to locate the table where the aging amounts for each customer are stored. List the possible tables.

HINT: *In Microsoft Dynamics GP, this information is found in* CARDS→SALES→SUMMARY.

   - Use Table Descriptions to locate the field within the table identified above that stores the aging amounts.
   - What is the name of this field?
   - Identify the tables to be used in this report, and within each, the main fields to be used.

5. Determine which table is the report's main table and how table linking is done.
   - List the main table for the report.
   - What tables will you link to the main table?

6. Identify how the information is grouped in the report.
   - Identify any additional headers and footers you need in the report.

7. Determine how the report should be sorted and restricted.
   - How will the fields on the report be sorted?
   - How will the report be restricted?

8. Determine whether any user-defined fields are required and how they are created.
   - List the totals you need to see on the report.
   - Using Table Descriptions, determine if any of the totals needed on the report currently exist in Microsoft Dynamics GP. List any totals you find.
   - List the totals that need to be created within Report Writer.

9. Create and save the report.

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Tips When Planning a Custom Report

This section lists some advanced report writing tips.

Designing a Report

1. Build a tree diagram to document the layers of table access.
2. Build a tree diagram to document the table relations between required tables.
3. Examine the diagram to determine if the desired report can be generated with all the data.
4. Examine the diagram to make sure the relation structure between tables can be created with Report Writer.
5. If relationships can be created between tables, determine if the proper keys are included for the tables that will be related.
6. Build a diagram to document the corresponding additional headers and footers needed for the report and the fields they will break on.
7. Determine if all report totals can be calculated based on the report layout.
8. Use the following guidelines:
   - At any table relationship level, only one "one-to-many" relationship is allowed.
   - When establishing a one-to-one relationship between a primary table and a secondary table, verify that each of the key segments from the secondary has corresponding fields of the same type in the primary table (only the data types need to be the same, the field names do not).
   - When establishing a one-to-many relationship, if corresponding fields in the primary table are assigned to each of the key segments in the secondary table, the key being used for the relationship must allow duplicates.
   - When establishing a one-to-many relationship and assigning corresponding fields in the primary table to key segments in the secondary table, verify that the key segments being used are consecutive.

     For example, if a key has four segments, you can assign corresponding fields for the first two segments, but not for the first and third segments without also assigning a field to the second segment.

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Building a Report

1. Using your tree diagram, look at all of the table relationships that you need.
2. If an existing table relationship is already available, determine if it is acceptable for your report. As a general rule, it should be assumed that a table relationship needs to be created since most tables can relate to each other in more than one way. However, it is good to look for an already-existing relationship in case there may be one that works correctly for the report being built.
3. Set up table relationships that do not exist. Look at the key being used for the relationship to determine the correct fields to insert.
4. In the Report Definition window, link the tables on your report.
5. In the Report Layout window, add the additional headers and footers.
6. Add all calculated fields. If the calculated expressions include other calculated fields, remember to create the calculated fields from the lowest level first.
7. Drag required fields onto the layout for the report.
8. Print the report.

Troubleshooting a Report

1. Before continuing, make sure that the tables being used contain the desired data and that all of the fields are populated properly. This can be accomplished by using a data browser or by dumping the contents of each table directly to a report using the Report Writer. Much time could be wasted if this step is not completed. Typically, fields in drop-down lists or option button options are stored differently than what users expect.
2. If a section of a report is not working properly, move that section to a new report. This can be accomplished by including only the two tables on the new report that are not providing the desired output.
3. If multiple relationships are available for the linked tables, make sure the correct relationship was selected.
4. Verify the relationship that was used in the table definition, including the key used for the relationship.
5. If you are having problems with calculated fields, verify that the Field Type is correct. Do this by double-clicking on the field in the Report Layout window.

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Tips for Using Report Writer

1. When creating your table relationship tree, do not forget about the key master tables for each module. These tables can be valuable because they contain information from work, open, and history transactions. They are also valuable when accessing the same information at different levels of a relationship string.
2. Remember that a predefined relationship in Microsoft Dynamics GP may not be the relationship needed for your report. Some tables can relate to each other in more than one way.
3. If you need to break on a particular field in a table and a key is not available, add custom sorts to the report that allow you to change your break fields.
4. If you need to sort a report in a particular order, use an existing key before adding sorts. The report generates much faster when printed using a key.
5. Globals often include useful information for reports and can be used in calculated fields also.
6. The "Suppress when Empty" functionality can often be used to create unique reports that many would consider impossible.
7. When using the Suppress when Empty functionality, report information that is suppressed can still be used to calculate other report information. This can include totals that may be printed in another section of the report.
8. Consider using conditional expressions to get the desired output. Conditional expressions combined with the Suppress when Empty functionality can be very powerful.
9. Keep in mind that calculated fields that have been assigned certain field options cannot be used in building another calculated expression.
10. Since the concatenate (CAT) operator can be used to combine fields, it is often helpful in preparing reports. The STRIP function should then also be used within the calculations to remove blank spaces.
11. If you need a different format for a field on a report, you can define formats by selecting **Formats** from the Resources menu in Report Writer. These formats can be accessed for a field by double-clicking a field in the Report Layout window and then clicking on the lookup button next to the **Format** field.

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12. When adding restrictions to a report, try combining multiple restrictions into one restriction. This usually results in a faster report.
13. To speed up testing, remember to take advantage of the **Max Records** field in the Report Definition window. This field can be used to print a certain number of records to verify that your report is working properly rather than taking the time to print the entire report.

Complete the Case Study

There is a case study for this chapter found in the Case Study appendix of this manual. The case study is titled "Planning a Report" and should be completed prior to moving to the next chapter.

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Conclusion

Planning a Report

Some key points to remember from this chapter include:

- Determine a reports needs by requiring a written description or sketching of the report.
- Prior to creating custom reports, determine that an existing report does not exist or could not be easily modified to meet the needs of the requested report.
- Plan the report layout by determining the tables needed, sorts required, restrictions needed, additional headers and footer requirements and any user-defined fields.
- Table, Field and Window Descriptions can be used to locate where data is stored in Microsoft Dynamics GP.

Quick Interaction: Lessons Learned

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

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