LAB 1 – CREATING A CUSTOM CONTRACT

OBJECTIVE

Walk through the main steps of creating a contract document tailored to a companies specific terms and branding.

OVERVIEW

SI 5 ships with a "Contract" as one of the standard report documents. While this may act as valid contract, the terms and text defined in the document are fairly boiler plate and do not necessarily properly reflect the terms, policies, needs, brand, etc for a your company.

This lab highlights the main components in the standard contract and details how to create a custom report based on the standard version that more accurately reflects the terms and conditions required by your company.

CREATING CUSTOM STATIC TEXT FOR A REPORT

If one would like to modify the formatted text of the contract or add large sections of formatted text to a report, the following steps should be followed:

1. Open Word or some other text editor (WordPad that will allow one to create a Rich Text File (.RTF extension)

2. Create the text to be inserted in the report.
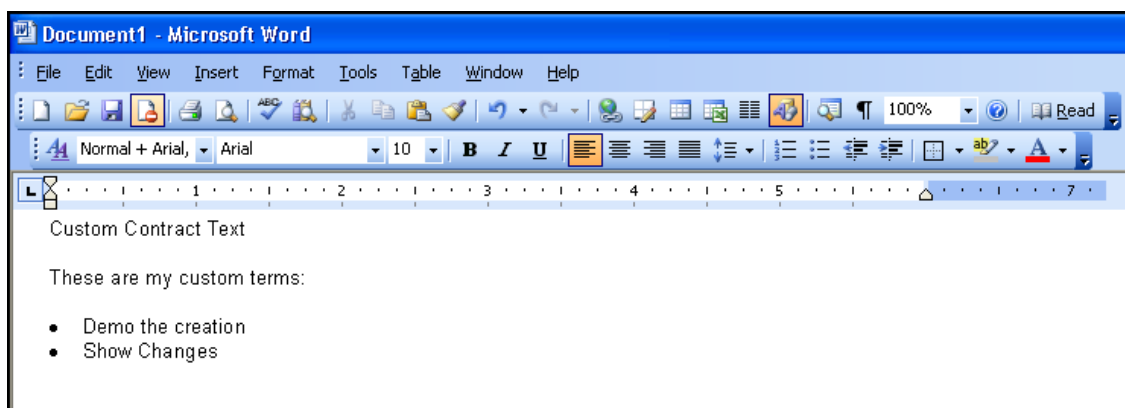
3. Save the document to disk as a Rich Text File (remember the file location). It is key that upon saving the document the first time to select "Save As" and select "Rich Text Format" from the "Save as type:" drop
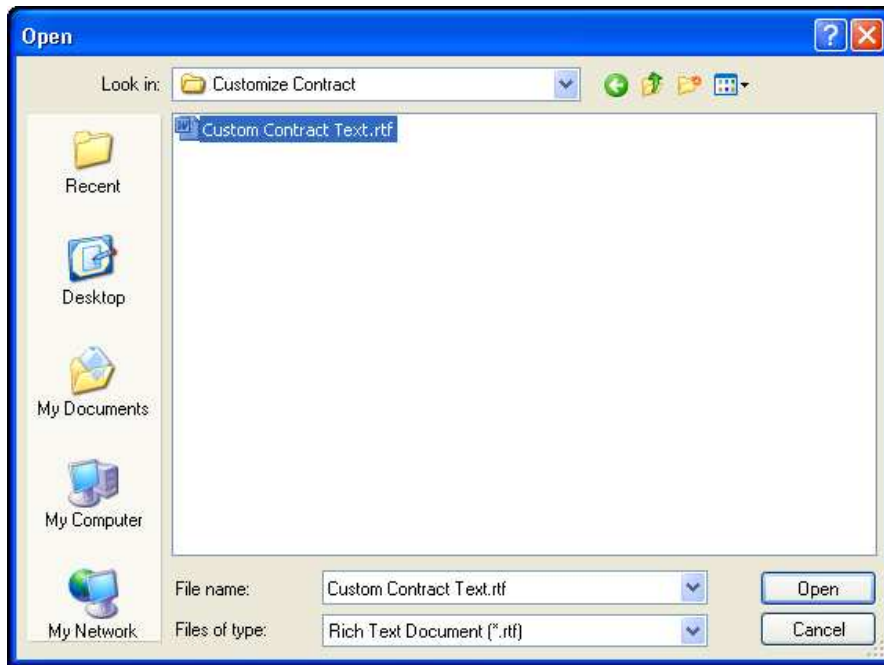
down.
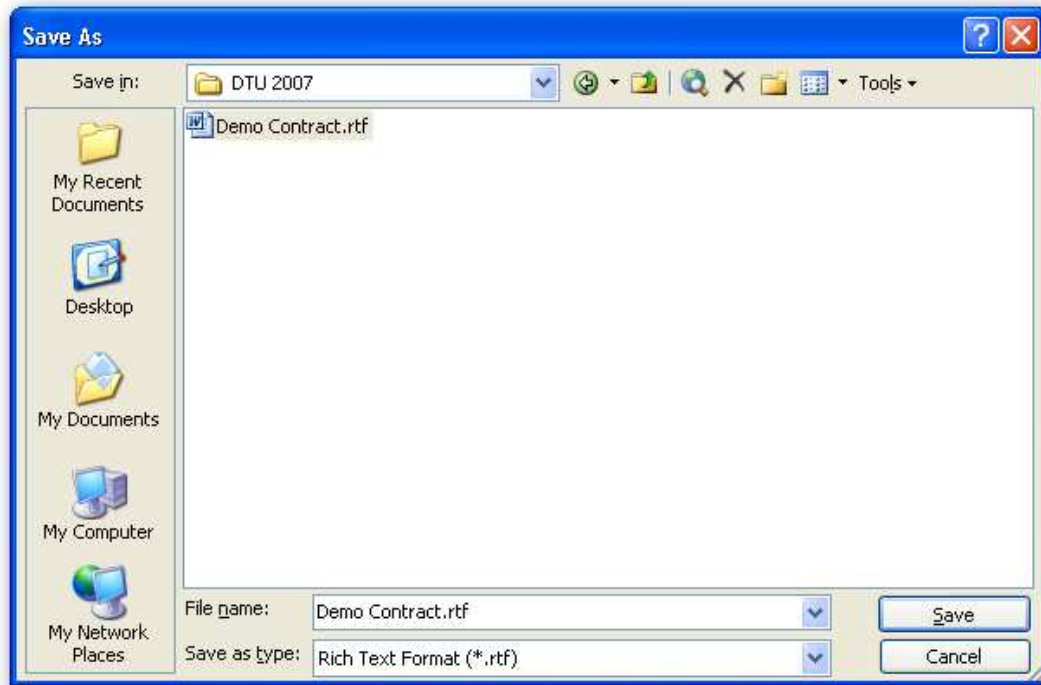
4. In the Report Designer, select an existing Rich Text Control or add a Rich Text Control to the report. When the Rich Text Control is selected in the report, and right-click on the control. The following context menu will appear:
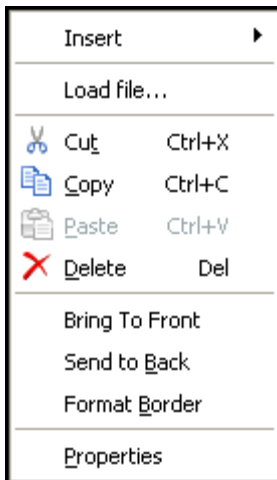
5. Click the "Load File" menu. Browse to the saved RTF file (created in step 3).

This can alternately be done by selecting "Load File" from the Properties Window:
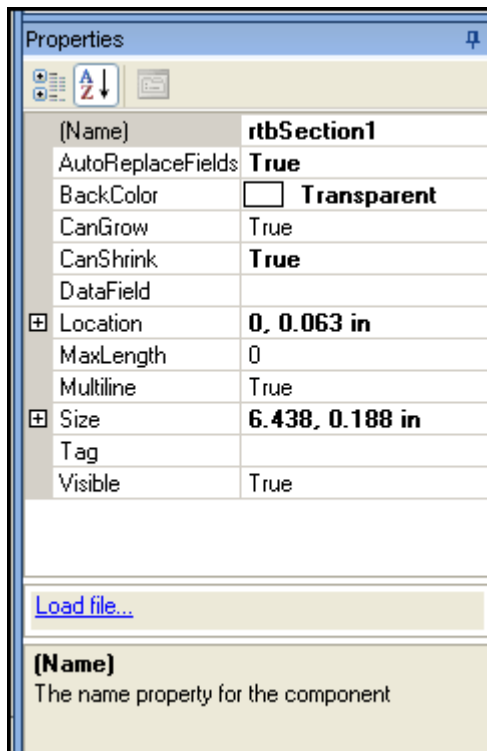
6. Click Open.

CONTRACT LAYOUT AND MAIN COMPONENTS

The Standard Contract as shipped in SI5 is constructed of the following main components (Figure 1):

1. The main report (the contract report)

2. Two sections of Rich Text (one before the payments and phases breakdown and one after)

3. Two sub reports (Contract Phases and Contract Payments)


Figure 1

CREATING A CUSTOM CONTRACT

This section will step through the process of creating a custom contract. Through this process users will focus on the following concepts:

- Removing existing controls from a layout.

- Loading custom formatted text content into a Rich Text Control

- Creating a custom sub report and binding a Sub Report Control in the new Contract to the modified sub report.

1. Open the report designer.

2. Create a new report based on the existing Standard contract.

3. Remove the sub Rich Text Control named "rtbSection2".
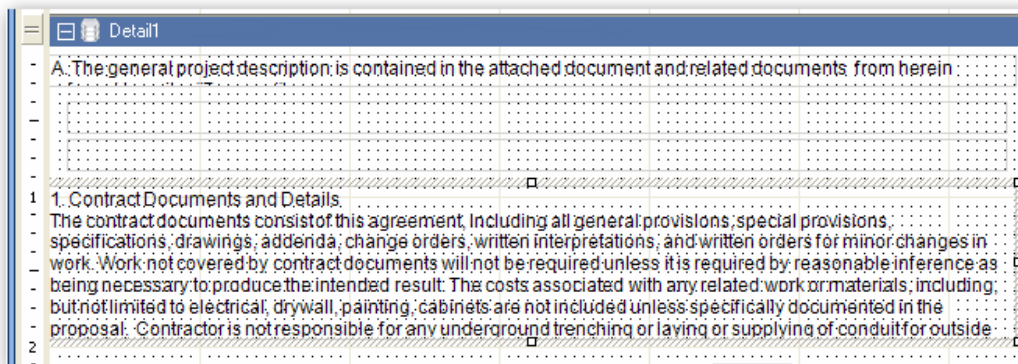


4. Remove the sub report control named "subPhases".
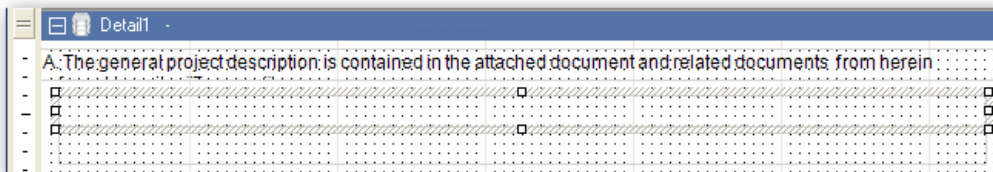
5. Adjust the layout of the remaining controls in the "Detail1" section of the report. In the case of the lab, you are moving a number of controls higher on the designer canvas. This can be accomplished by selecting all the controls one wishes to move (click on the canvas, hold the left mouse button down and

drag over the canvas until the controls are selected (much like selecting text in a Word Document).
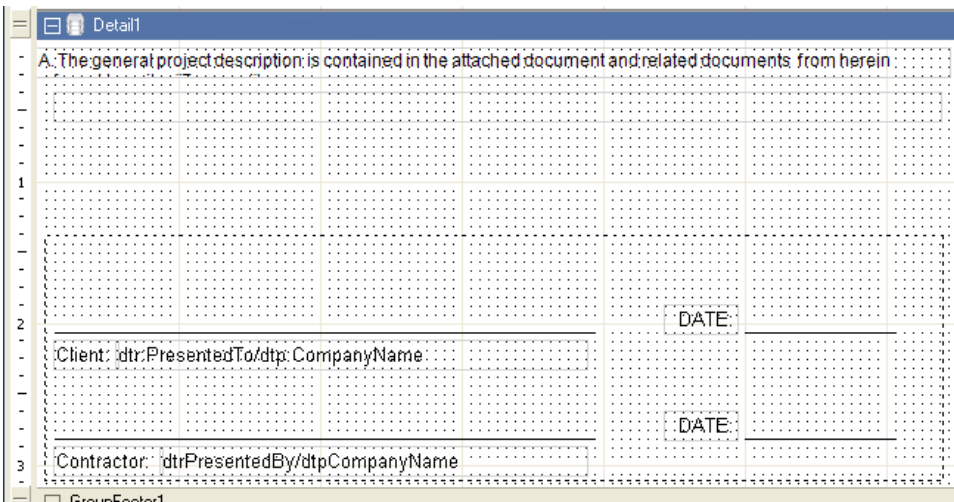
6. Once all of the controls are contained in the dotted rectangle, release the mouse button and all of the controls will be selected.
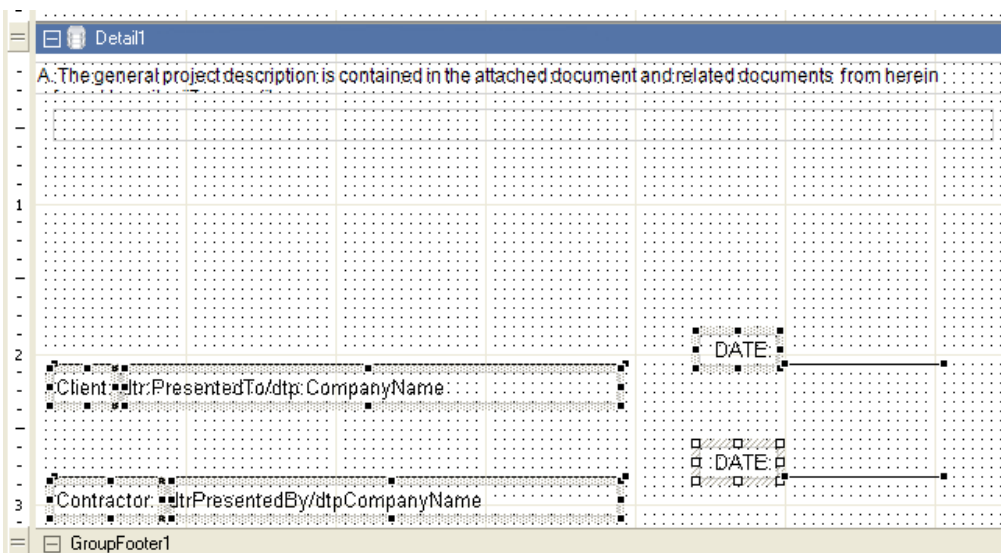
7. Click and hold the left mouse button on one of the selected controls and drag the controls into position. Notice all the controls have now been shifted upward on the canvas.
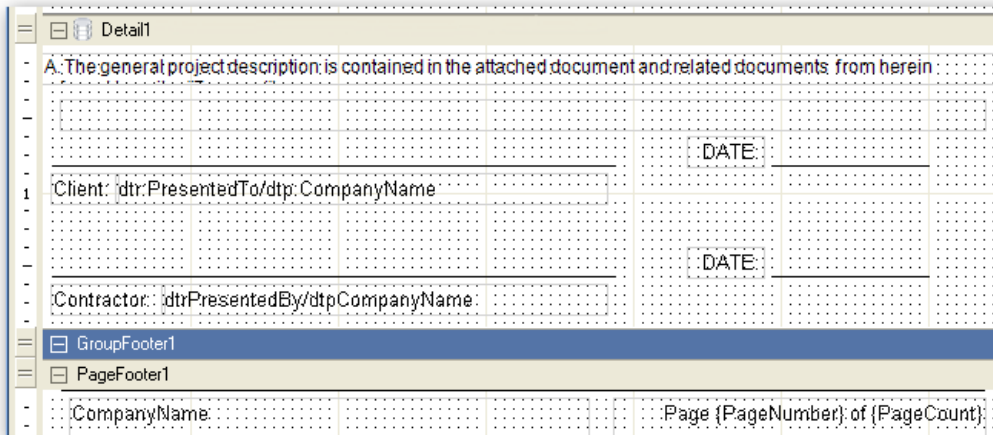
8. Select the Rich Text Control named "rtbSection1" and follow the directions in for "Creating Custom Static Text for a Report" to insert your custom contract text.
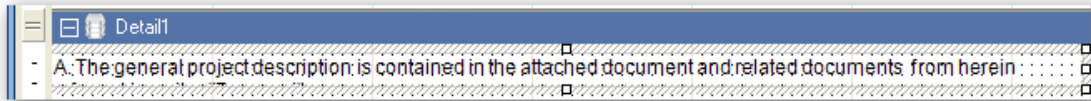
9. Save and Publish the Report.

10. Run report from reporting center, and see changes:

Company Name
1850 Gateway Blvd.
Suite 1060
Concord, CA 94520 US
925.681.2326

SI5 Sample Projects
1959 Ohana St
Wailea, Hawaii 96753
808-875-0518

Demo Contract Terms:

1. First Contractual Term

2. Second Contractual Term.

Show Changes.

Payment Schedule	Amount	Due Date
Initial Deposit	$5,467.92	
Progress Payment	$5,467.92	
Start Rough In	$5,467.92	
Start Trim	$13,669.79	
Start Finish	$21,871.67	
Final	$2,733.95	

DATE: _____

_____

Client: SI5 Sample Projects

MODIFY THE SUB REPORTS

The ability exists to create a custom version of any report that exists. This includes the ability to create custom versions of reports that exist as only sub reports of other reports in the Reporting Center. The following exercise steps through creating a custom Contract Payment report and binding it to the custom Contract created in the steps above.

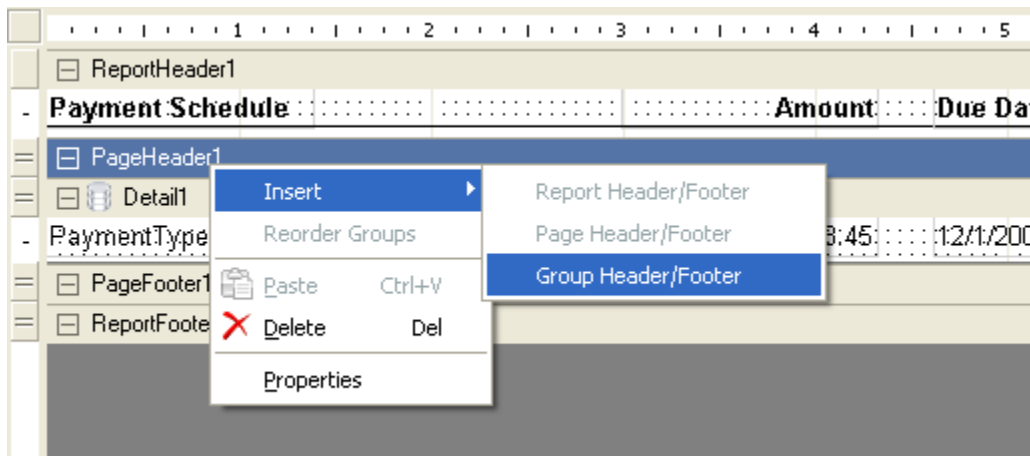The exercise below will step through adding a "Grand Total" to the sub report.
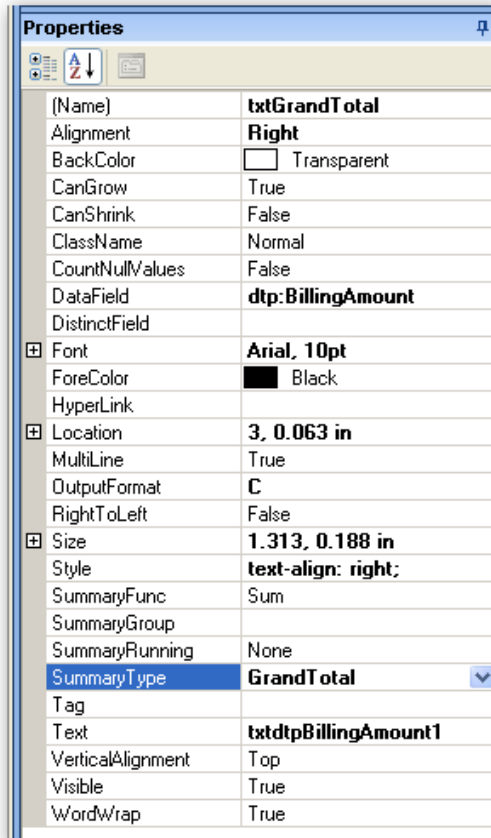
1. Open the report designer.

2. Create a new report based on the existing sub report (Contract Payment).

3. When stepping through the new report wizard, give the report a unique name ("Custom Contract Payment").

4. Right-click on the Designer Canvas and select Insert > Group Header / Footer from the context menu.

5. Set the Height of the new Groupheader to 0 and the visible property to False. These steps are taken as this group header need not be shown for the purposes of the customization.

6. Open the Data Explorer (on the Right), drill down into the data structure to the "dtp:ContractPercentage" section (this is the section the report iterates over). Select the dtp:BillingAmount Node and drag and drop it onto the GroupFooter1 section.

7. Set the following properties on the newly added TextBox control:

   a. **Name** – txtGrandTotal (optional, but makes locating the control easier in the Report Explorer)

   b. **Alignment** – Right (since it's numeric, right align the value)

c. **OutputFormat** – "C" (Setting this property to C ensures the value is formatted properly as currency based on the settings of the computers operating system.)

d. **SummaryType** – GrandTotal (Setting the SummaryType property to GrandTotal ensures that the values for the BillingAmount datafield (bound to the control via the drag and drop) will be totaled with the total being displayed in this control.


8. Add a line above the newly added textbox control.

9. Make any other layout modifications that are desired.

10. Save and publish the new sub report. When prompted to return to the reporting center, click "No".

11. Open the Custom Contract designed in the Creating a Custom Contract section of the document.

12. Select the sub report control on the main contract report. Note: These controls appear as a grey box on a report. They can be hard to see.

13. Right Click on the sub report control. The following menu will appear.
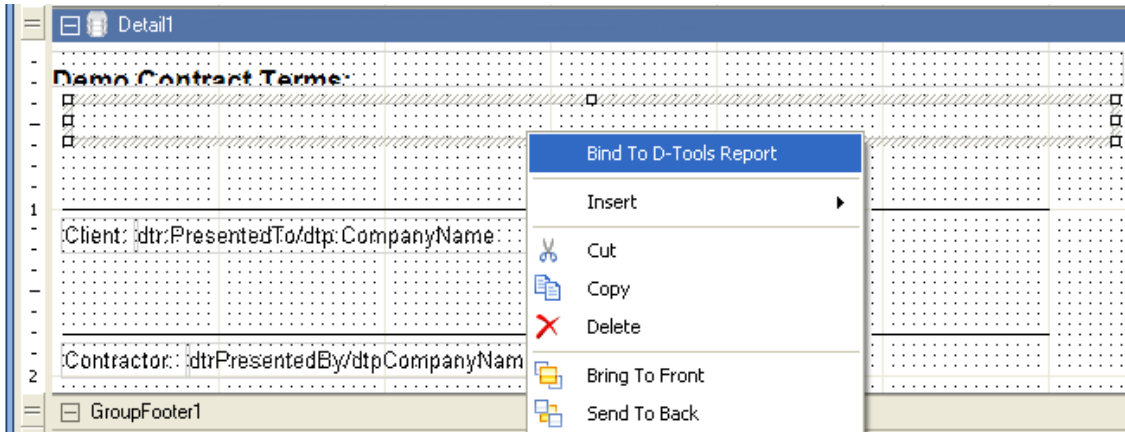
14. Click "Bind to D-Tools Report" and select the report that was created in steps one through five and click OK.
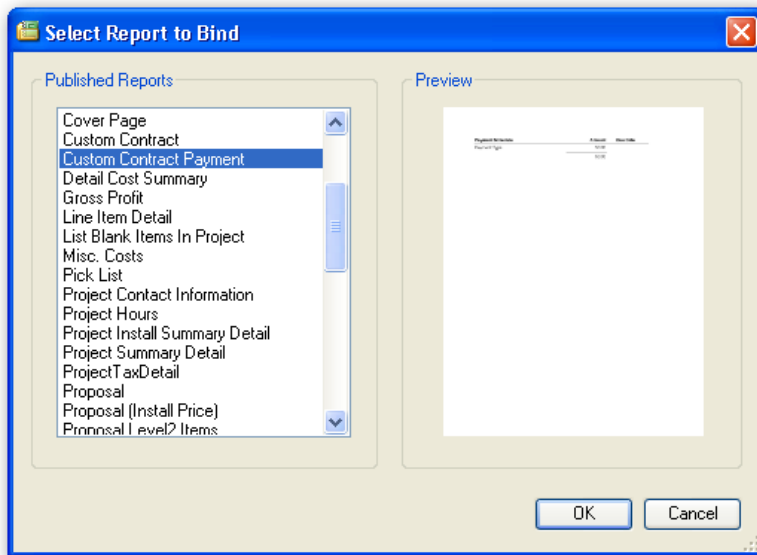
15. Save and publish the new Contract. When prompted, click "Yes" to return to the reporting center.

16. Run the report and see the changes.

GENERAL NOTES ON THE REPORTS

- Each of the reports (main report and two sub reports) has some minor scripting. Removing or renaming certain textbox controls may impact the proper behavior of these reports. For example, the Contract Payment sub report, has script that sets the sections "txtAmount" texbox value = total project price * the percentage for the payment schedule type. Removing or renaming the hidden textbox "txtPercent" will cause this report to fail.

- The sub reports or rich text sections can be moved or removed from the report. If one chooses to not show the breakdown by phase, then simply remove/delete the "subPhases" sub report control from the report.

- If one only wants a single section of boiler plate text, then remove/delete one of the rich text controls from the report and set the other to the custom text of choice (as described above).