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

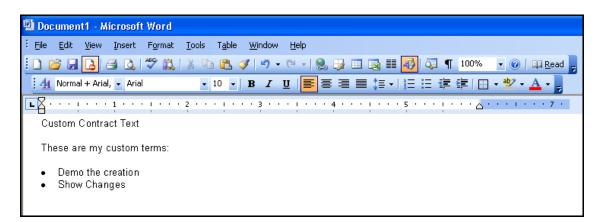
SI 5 ships with a "Contract" as one of the standard report documents. While this may act as valid contract, the terms and text defined in the document are fairly boiler plate and do not necessarily properly reflect the terms, policies, needs, brand, etc for a your company.

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.

Save As			? 🛛
Save in:	🛅 DTU 2007	7 🕑 🌚 🕶 🚺 💐 🗙 📷 🕶 Tools	•
My Recent Documents	Demo Cont	ract.rtf	
Desktop			
My Documents			
My Computer			
My Network	File <u>n</u> ame:	Demo Contract.rtf	Save
Places	Save as <u>t</u> ype:	Rich Text Format (*.rtf)	Cancel

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:

	Insert		۲				
	Load file						
Ж	Cu <u>t</u>	Ctrl+X					
Þ	⊆ору	Ctrl+C					
Ê	<u>P</u> aste	Ctrl+V					
×	<u>D</u> elete	Del					
	Bring To	Front					
	Send to	<u>B</u> ack					
	Format <u>B</u>	lorder					
	Propertie	es					

5. Click the "Load File" menu. Browse to the saved RTF file (created in step 3).

Open						? 🛛
Look in:	눱 Customize C	Contract	*	00	•	
0 Recent	Custom Cont	ract Text.rtf				
Desktop						
My Documents						
My Computer						
	File name:	Custom Contract Text.rtf			~ (Open
My Network	Files of type:	Rich Text Document (*.rtf)			- (Cancel

This can alternately be done by selecting "Load File" from the Properties Window:

F	Pro	perties	д
		2↓ 🖻	
		(Name)	rtbSection1
		AutoReplaceFields	True
		BackColor	Transparent
		CanGrow	True
		CanShrink	True
		DataField	
			0, 0.063 in
		MaxLength	0
		Multiline	True
	÷	Size	6.438, 0.188 in
		Tag	
		Visible	True
	Lo	oad file	
	-	lame) ne name property for	the component

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)

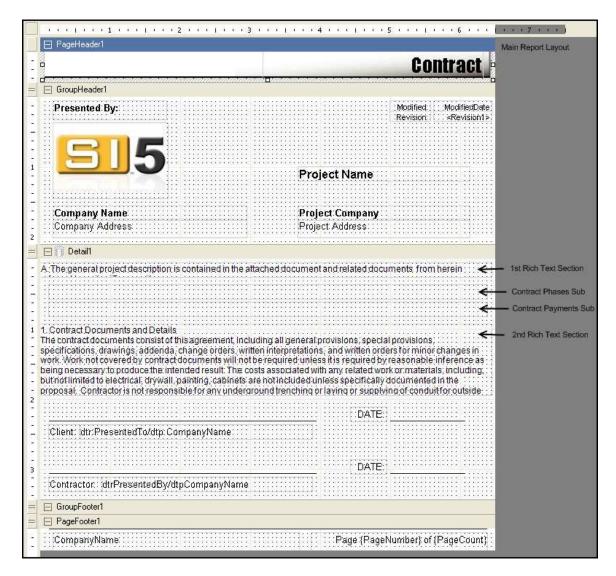


Figure 1

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".

=	🖃 🗊 Detai	11																								
:	A. The gene	ralpro	oject de	escript	ion is	cont	aine	d in	the a	ittac	hed	doc	um	ent	anc	Inel	ateo	l do	cur	nent	s fi	om	he	reir		
1	:															:::			::		::					
1																										
- 1	1. Contract [(11/11) 		⊐ /7//	7 <i>111</i> 			2422 • • • •					<i>auau</i> •••••	<i>aµ</i> 				<i>040</i> , ••••	
-	The contract specification			consis , addei															ial der	prov s for	isic mi	ins, nor	ch	ang	es ii	n i l
-	work. Work i being neces	nột cộ	vered	by con	tracto	locu	men	ts w	ill no	t be	requ	iire	dun	les	i iti	sre	quir	edt							ice Idir	as C Iq:
:	but not limite proposal. C	ed to e	léctric	al, dryv	vall, p	ainti	ing, c	tabii	nets:	are i	hotii	nclu	ided	un	less	sisp	ecif	call	ý d	ocun					tsid	
2											-////							1110	<i>111</i> • •				in			<i>™/</i>

4. Remove the sub report control named "subPhases".

=	😑 🖂 📳 Detail1 -	
-	A. The general project description is contained in the	attached document and related documents from herein
-		
-		
		· · · · · · · · · · · · · · · · · · ·

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

A. The general project description is contained in the a	ttached document	and related docu	nente from herein	
A the general project description is contained in the a				• •
				• •
				• • •
				111
				• • •
				• • •
L				•••
· · · · · · · · · · · · · · · · · · ·				:::
(
§				
				• • •
· · · · · · · · · · · · · · · · · · ·				:::
· · · · · · · · · · · · · · · · · · ·		DOTE:		
		DAIE:		
				• • •
				:::
Client: Idtr:PresentedTo/dtr:CompanyName::::				
· · · · · · · · · · · · · · · · · · ·				• • •
				• • •
· · · · · · · · · · · · · · · · · · ·				
L				
····· · · · · · · · · · · · · · · · ·		D'ATE:		• • •
				• • •
ì				:::
Contractor: dtrPresentedBy/dtpCompanyName				111
 Cuntractur, utreresentedby/dtbCompanyName. 				

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.

ļ] 📳 Detail1	
	The general project description is contained in the attached document and related documents from herein :	
	•••••••••••••••••••••••••••••••••••••••	
1		
1		
1		
1		
	······································	
	Client 💵tr:PresentedTo/dtp:CompanyName:	
	alar oli 🕶 ala da	
1		
1		
	Contractor Filty Provide ADV (Sto Consumer Manager Construction St. Constr	
	Contractor. Sur resented by dtp Company Name	
	Contractor: utrPresentedBy/dtpCompanyName	
	//////////////////////////////////////	

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.

А	The gener	al pro	iect desc	ription is	contair	ned in t	he a	ttache	ed doo	cumen	tandr	elate		ments		hereir	111
		1210	4		11111						11.0				0101	1000	
:																	
1																	
·												rh i⊡⁄2	ATE-1-				
1										<u></u>	11111	: C.M.	218-11				1111
Ē																	
h	Client: Mtr/	Presi	onter/Tra/	dtr: Com	ipanγN	ame``											
Ľ	shem. du.i		childror or	arp. con	panjia	anne .											
•																	
•																	
:																	
·												1121				\cdots	
												: L: D#	ATE::/:				
1										<u> </u>			21 H O 1				
E.		1101.															
ľ	Contractor:	: tdtrf	Presente	idBW/dtp	Comoa	invNat	me:										1
Ľ.																	
·																	
г	- GroupFool	lor1															
Ľ	_ аючргоо	len															
-																	
E	PageFoote	or1															

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
 Client: SI5 Sample Projects	DATE:

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.

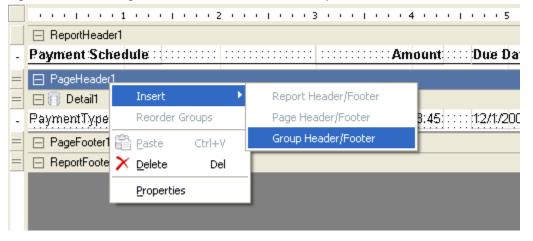
The exercise below will step through adding a "Grand Total" to the sub report.

1. Open the report designer.

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

Please	I create a new report based on an existing repor select a report below that you want to base this			
<u> </u>	nodifying the new report.	s new report on a	nd click 'Nex	ť to
Reports available to base your n	ew report on			
Report Name	Description	Category	Data	^
Report Name _Custom - Contract Payments	Description Subreport for payment periods		DTools	^
Report Name _Custom - Contract Payments _proposal Description test	Description Subreport for payment periods Proposal that allows showing of package	Client Reports	DTools DTools	^
Report Name _Custom - Contract Payments _proposal Description test Avery Walk Thru - 5263	Description Subreport for payment periods Proposal that allows showing of package Avery Labels		DTools	<
Report Name _Custom - Contract Payments _proposal Description test	Description Subreport for payment periods Proposal that allows showing of package	Client Reports	DTools DTools DTools	

- 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.

Properties	म
₽ 2 ↓ □	
(Name)	GroupHeader1
BackColor	Transparent
CanGrow	True
CanShrink	False
ColumnGroupKeep	False
ColumnLayout	True
DataField	
GroupKeepTogeth	None
Height	0
KeepTogether	False
NewColumn	None
NewPage	None
RepeatStyle	None
Tag	
Туре	GroupHeader
UnderlayNext	False
Visible	False 🛛 🗸

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.

L	Report Explorer	Data Explorer		
0	Data Explorer			р
		rojectStaff4		^
		.ocations `ontrootPorcont		
		ContractPercent http:ContractPerc	-	
		dtp:Payment	-	
		dtp:BillingPe		
		dtp:BillingDa <mark>- dtp:BillingAm</mark>		
		dtp:Billingen dtp:Currency		
	🗉 · dtp:C			
l	i∎∘ dtp:Z			
l	i⊞⊸ dtp:F i⊞⊸ dtr:W	'hases /ireTerminals		
L				
				_
1	PaymentType			
1	🖃 GroupFooter1			
-	PageFooter1			
:	ReportFooter1			

- 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.

Рг	operties	д			
•	. 2 ↓ 🖻				
	(Name)	txtGrandTotal			
	Alignment	Right			
	BackColor	Transparent			
	CanGrow	True			
	CanShrink	False			
	ClassName	Normal			
	CountNulMalues	False			
	DataField	dtp:BillingAmount			
	DistinctField				
Ð	Font	Arial, 10pt			
	ForeColor	Black			
	HyperLink				
	Location	3, 0.063 in			
	MultiLine	True			
	OutputFormat	С			
	RightToLeft	False			
	Size	1.313, 0.188 in			
	Style	text-align: right;			
	SummaryFunc	Sum			
	SummaryGroup				
	SummaryRunning	None			
	SummaryType	🗧 GrandTotal 🛛 🗸 🗸			
	Tag				
	Text	txtdtpBillingAmount1			
	VerticalAlignment	Тор			
	Visible	True			
	WordWrap	True			

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.

Demo Contract Terme:	:: :::			
	innini.	•//////////////////////////////////////	aaaa	
- B Baaranananananananananananananananananan	4	Rind To D. Toola Depart		pararananananananananananananananananana
		Bind To D-Tools Report		: :::::::::::::::::::::::::::::::::::::
·····	Insert	<u> </u>	· · · · · · · · · · · · · · · · · · ·	
OKANA HUMANA SACATA MAS ON ANA MANA				
Client: dtr:PresentedTo/dtp:CompanyName		Cut	-	
Client: dtr:PresentedTo/dtp:CompanyName: : :	×	Cut	-	
Client: dtr:PresentedTo/dtp:CompanyName	ж РЪ	Cut Copy	-	
Client: dtr:PresentedTo/dtp:CompanyName:	∦ ⊫ ≻	Cut	-	
Client: dtr:PresentedTo/dtp:CompanyName: .	× >	Cut Copy Delete		
Client: dtr:PresentedTo/dtp:CompanyName:	× •	Cut Copy		

14. Click "Bind to D-Tools Report" and select the report that was created in steps one through five and click OK.

Published Reports Cover Page Custom Contract Detail Cost Summary Gross Profit Line Item Detail List Blank Items In Project Misc. Costs Project Contact Information Project Install Summary Detail Project Summary Detail Project Summary Detail Project Summary Detail Proposal [Install Price] Pronnsal I evel2 Items
OK Cancel

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.

1850 Gateway Blvd. Suite 1060 Concord, CA 94520 US 925.681.2326	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
	\$54,679.17
	DATE:
Client: SI5 Sample Projects	

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).