LAB 2 – CREATING A “COMBINED” PROPOSAL

OBJECTIVE

Walk through the main steps of creating a single report that contains the contents of a number of reports (Contract, Proposal, Scope of Work, and Project Contact Information).

OVERVIEW

Users may want to run a single report that contains components from multiple reports. This can be accomplished by creating a custom report. In the following exercise, one will modify the Proposal to contain the contract information, project scope of work, project contact information, along with the Proposal data.

The main concept to consider during this exercise is the use of sub reports within a main report. An important point to keep in mind is the fact that only the Page Header and Footer sections of the main report will be generated. When a report is consumed as a sub report within another report, these sections are suppressed by the Active Reports Engine.

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

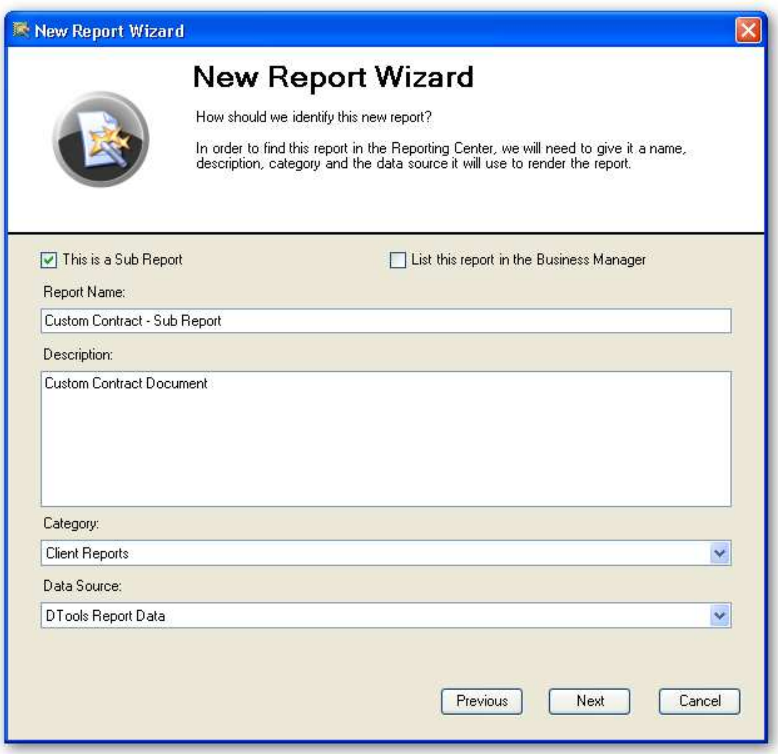
- Adding Group sections to a layout
- Reordering Group sections in a layout.
- Adding sub report controls to a layout
- Creating custom sub reports and binding them to a sub report control in the main report.
- Adding Data fields to a report.

CREATING A “COMBINED” PROPOSAL

1. Open the report designer.
2. Determine the reports that are to be combined. During this lab, you will be combining the Proposal, Contract, and Project Contact Information reports. Along with this, a section for the Scope of work will be added to the report.
3. Create a custom report based on the Contract. For the purposes of this lab, we will create a custom report based on the custom contract created in Lab 1.
    a. In Step 1 of the Report Wizard, select “New Report Based on Existing Report”.

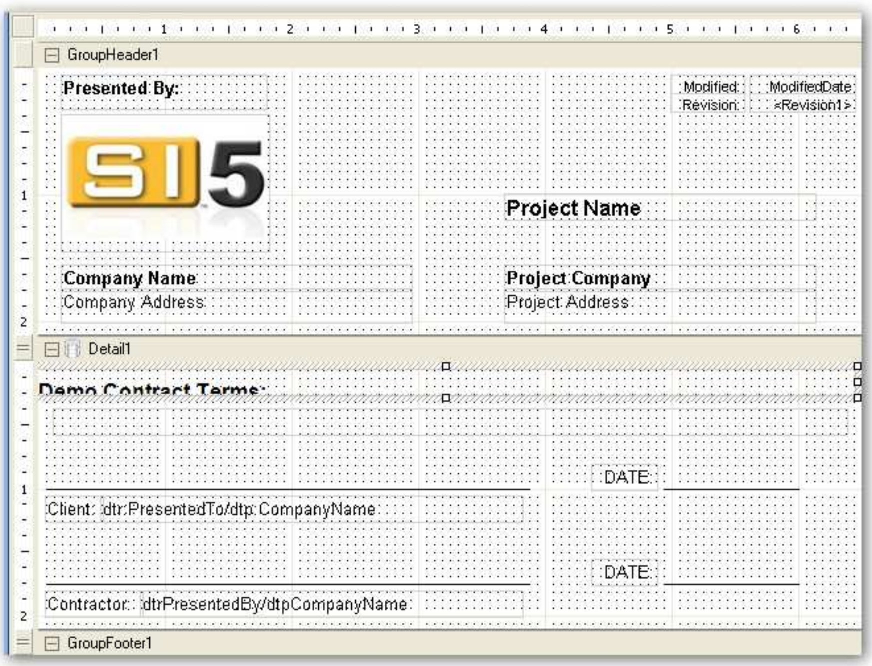
b. In Step2 of the Wizard, select the contract created in Lab 1.

c. In Step 3, enter a name for the report and check the "This is a Sub Report" checkbox since this report will designed to only run in the context of the new report, we do not want it to show up in the Reports List Window.



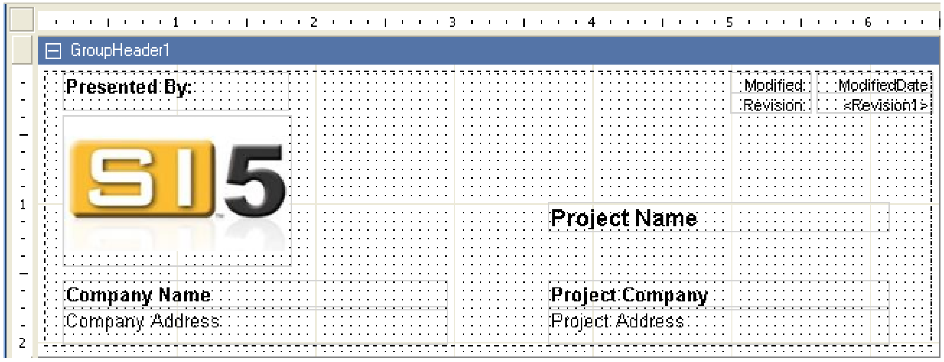
d. Finish stepping through the Wizard and click "Save". The layout will then load.

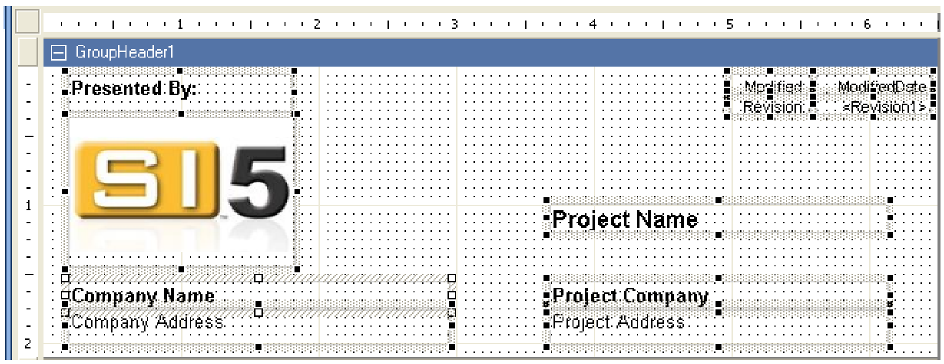
4. Right click on the PageHeader1 section of the report layout and select "Delete" from the context menu. This will remove the page header and page footer sections from the layout. As noted above, page header and footer sections are not printed for sub reports so these sections can be removed.



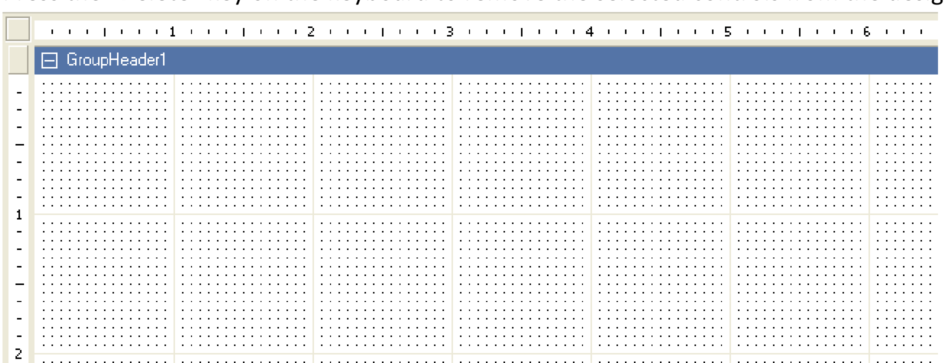
5. Delete all of the controls from the GroupHeader1 section of the report. Again, since this report is going to be a sub report of a main report that contains this information, we can remove it

6. Click and hold the left mouse button on the design canvas in the upper left hand corner of the GroupHeader1 section and drag the mouse to the lower right hand corner of the section and release.

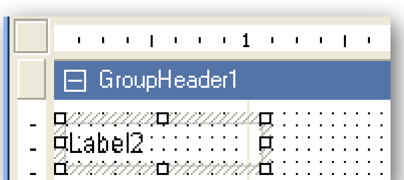




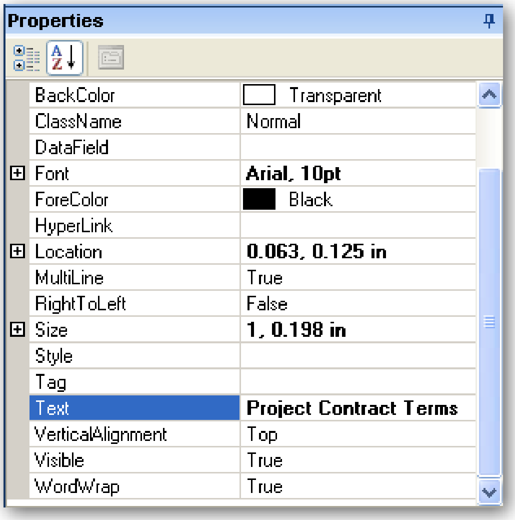
7. Press the “Delete” key on the keyboard to remove the selected controls from the design canvas.



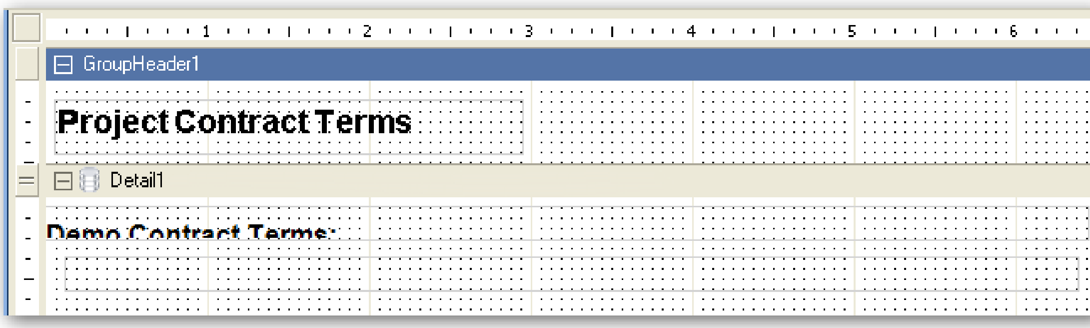
8. Add a Label to the GroupHeader1 section by selecting the Label control in the Toolbox and dragging it onto the design surface.



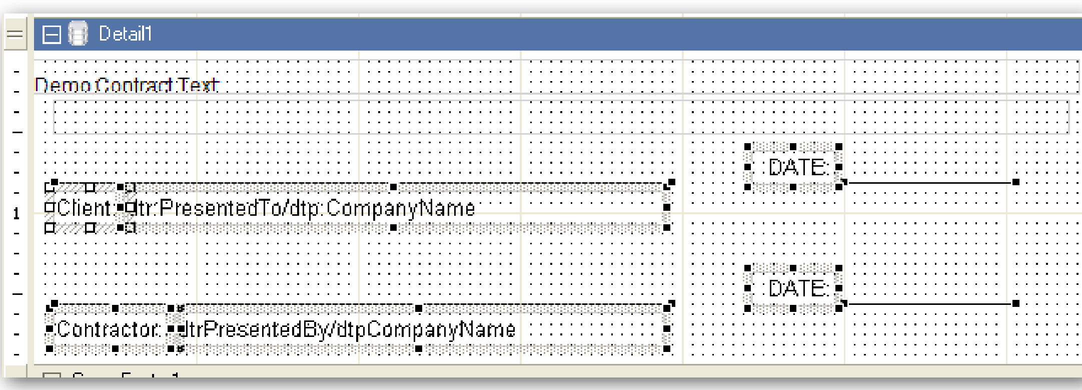
9. Set the “Text” Property of the newly added Label to “Project Contract Terms”



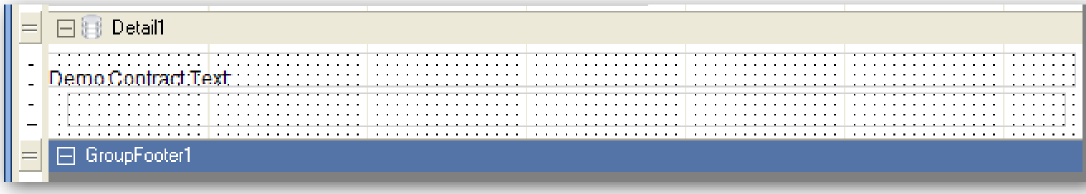
10. Adjust the width of the label control (if necessary), set its “Font” properties as desired, and adjust the height of the GroupHeader1 section.



11. Select the signature labels in the “Detail” section of the report and delete them.



12. Resize the detail section of the report.

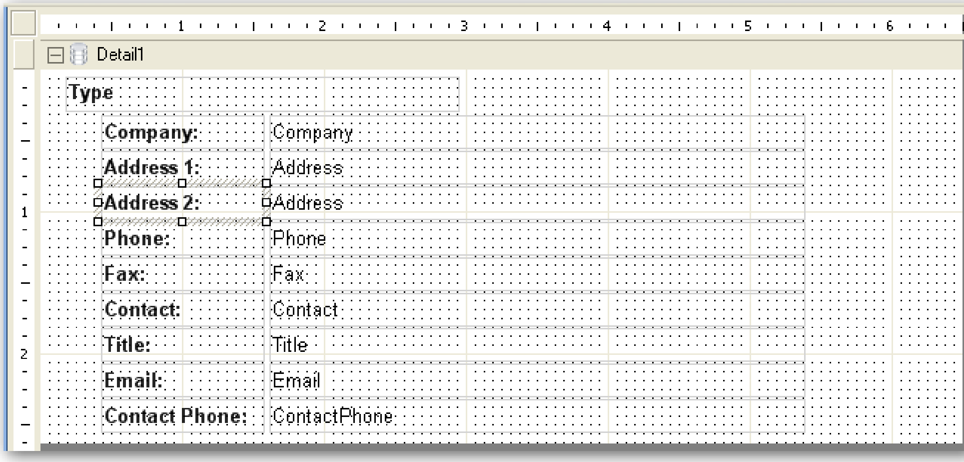


13. Save and publish the report. Click “No” when prompted to return to the reporting center.

14. Follow step 3 above to create a custom “Project Contact Information Report”. In sub-step “B”, ensure the correct report is selected (“Project Contact Information”). In sub-step “C”, ensure you name the report and check the “This is a Sub Report” checkbox.

15. Follow Step 4 and remove the section “PageHeader1” from the report.

16. Repeat Step 4. However, this time, remove the section “GroupHeader1”. Again, since this is a sub report, this header information is not needed. The difference between this step and simply deleting the controls as in the contract is that we will not be adding any controls back to this section.



17. Save and publish the report. Click "No" when prompted to return to the reporting center.

18. Create a new report based on a Proposal (New Report Wizard).

19. Select the section "GroupHeader2" in the report layout.

20. In the Properties window, set the following properties.

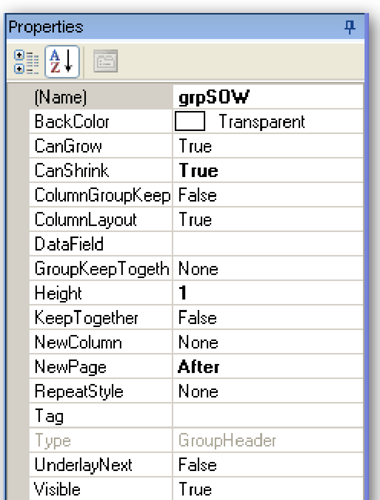
    a. Name = grpSOW

    b. Visible = True (Ensure the section will be printed)

    c. CanShrink = True (Ensure the section can shrink)

    d. NewPage = After (Ensure a new page is started in the report after this section)

    e. Height = 1 (Give us some vertical space for now…)

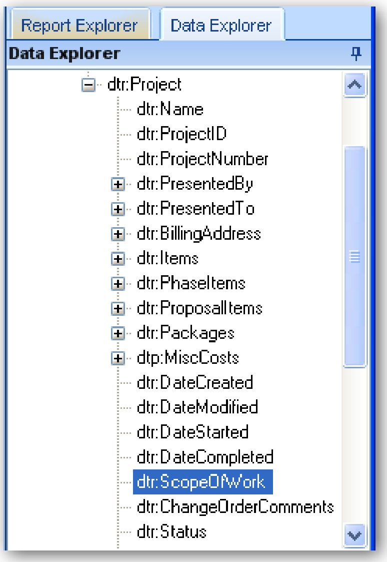


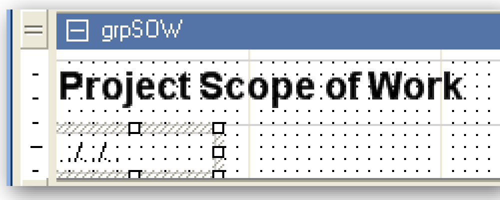
21. Add a label to the grpSOW Section.

22. In the Properties Window, set the labels text to “Project Scope of Work”. Adjust the font formatting as desired.

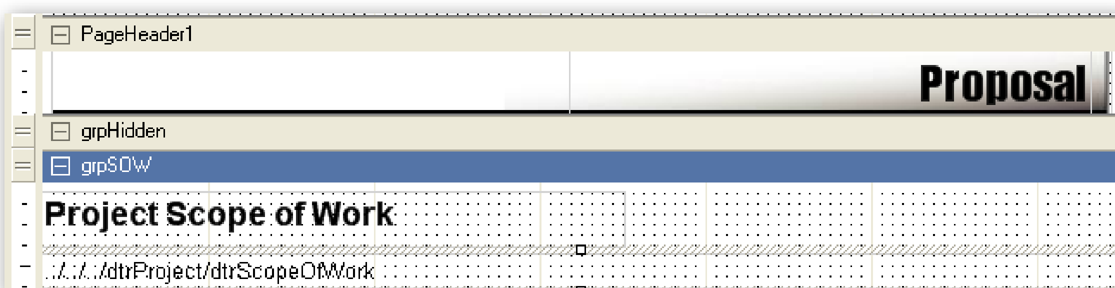
23. Select the “Data Explorer” tab on the right of the designer.

24. Expand the “dtr:Project” node, select the “dtr:ScopeOfWork” node, and drag it onto the report designer canvas into the grpSOW group. This will add the Projects “Scope of Work” text to the report.





25. Adjust the width of the new textbox to fill the canvas width and adjust the size of the grpSOW section.



26. Select the “GroupHeader1” section of the report in the report layout.

27. In the Properties window, set the following properties:

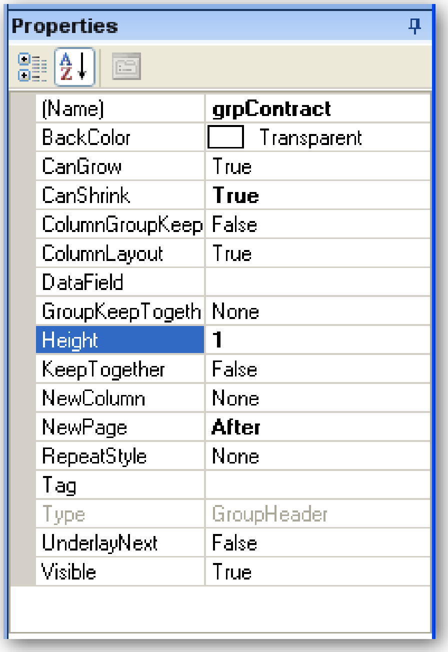
    a. Name = grpContract

    b. Visible = True (Ensure the section will be printed)

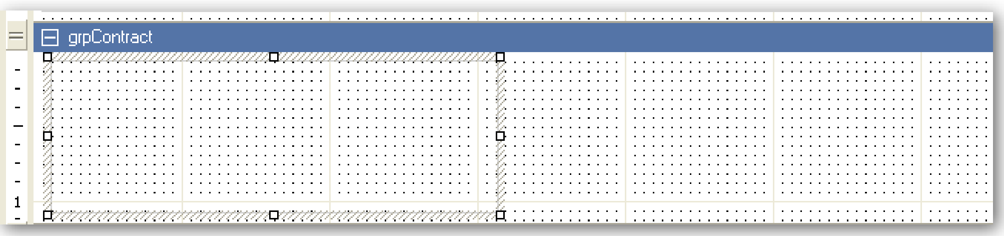
    c. CanShrink = True (Ensure the section can shrink)

    d. NewPage = After (Ensure a new page is started in the report after this section)

e. Height = 1 (Give us some vertical space for now…)



28. In the Toolbox, select the "SubReport" control and drag it onto the report designer canvas and drop it into the grpContract section

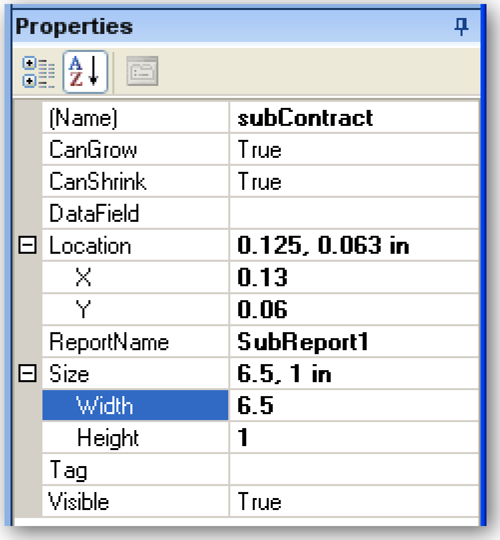


29. In the Properties Window, set the following values:

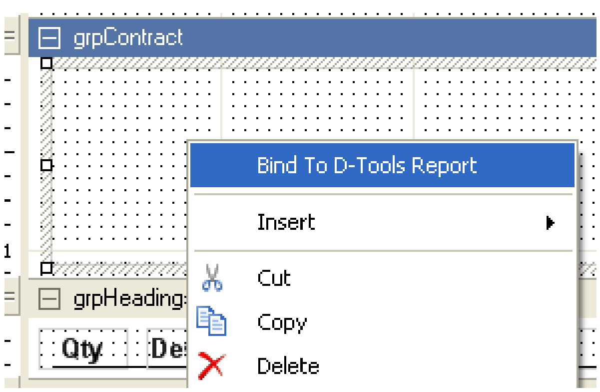
a. Name = subContract

b. Location.X = 0 (position it on the left edge of the canvas)

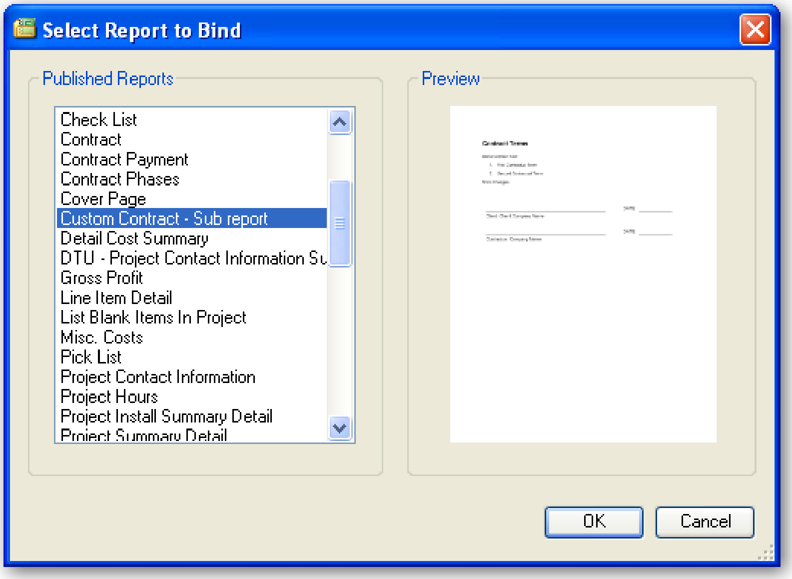
c. Size.Width = 6.5 (make the control equal to the width of the canvas. This is 6.5 by default in all standard reports)



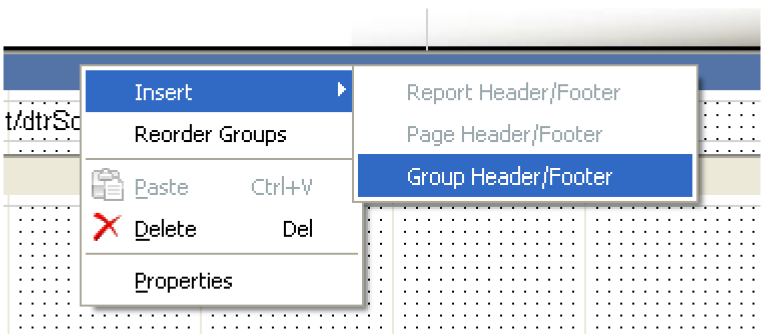
30. Right-click on the subContract control and select “Bind to D-Tools Report”.



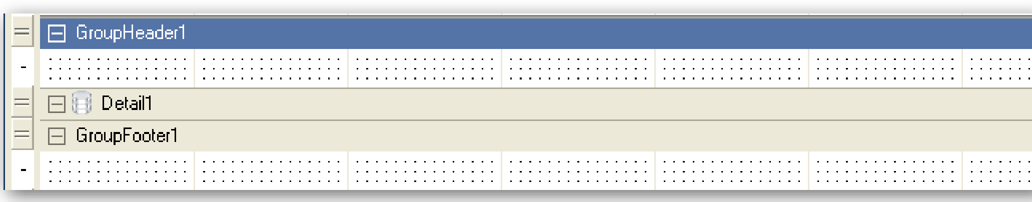
31. Select the report created in steps 1 through 13 and Click OK



32. Right-click anywhere on the designer surface and select Insert > Group Header/Footer from the context menu.



This will insert a new Group Header and Footer section into the report. By default these sections are inserted just above and below the "Detail" section of the report.



33. Select the new GroupHeader1 section. In the properties window, set the following values:

a. Name = grpHidden (can be anything, we just want to visually note it as not printing)

b. CanGrow = False

c. Height = 0

d. Visible = False

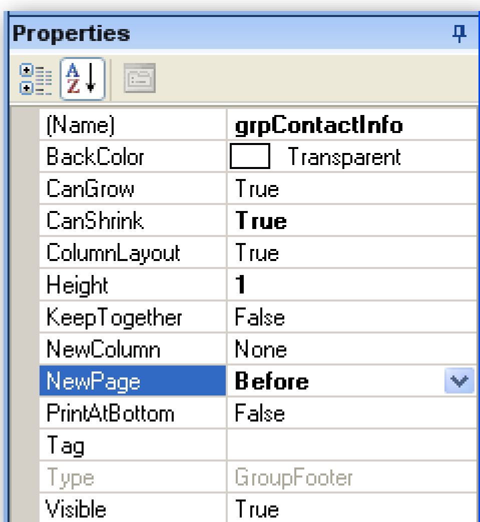
34. Select the new Group Footer section of the report.

    a. In the properties window, set the following values:

    b. Name = grpContactInfo

    c. CanShrink = True

    d. NewPage = Before



35. Add a sub report control to this section.

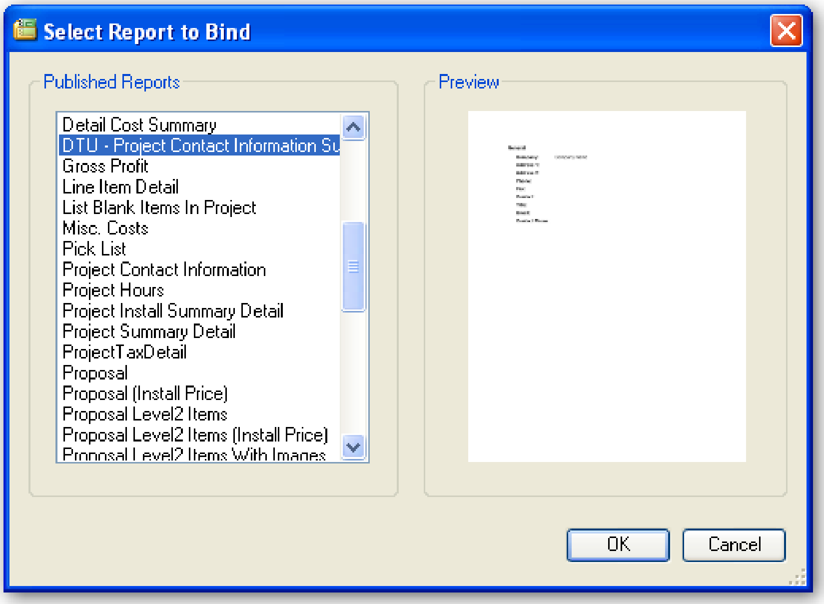
36. In the Properties Window, set the following values:

    a. Name = subContactInfo

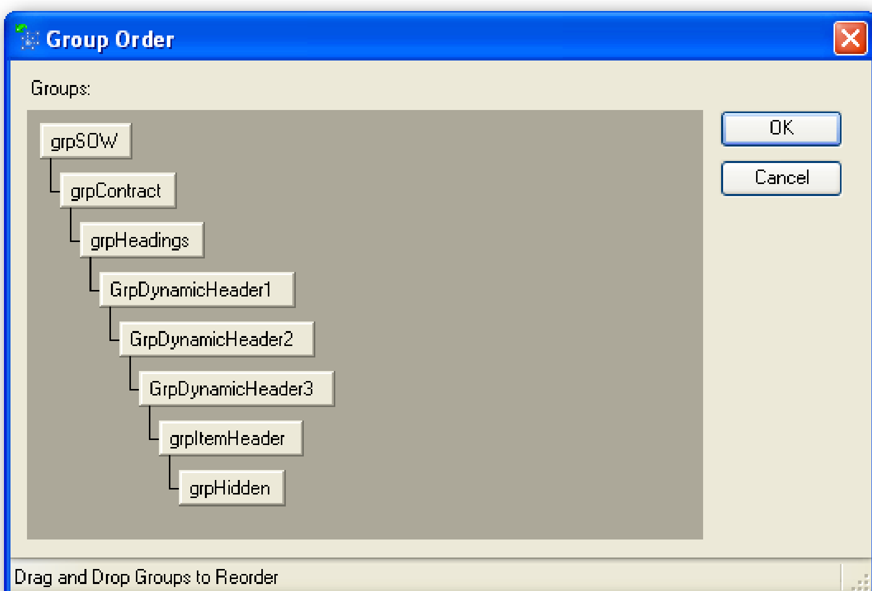
b. Location.X = 0 (position it on the left edge of the canvas)

c. Size.Width = 6.5 (make the control equal to the width of the canvas. This is 6.5 by default in all standard reports)

37. Right-click on the subContract control and select “Bind to D-Tools Report”. Select the report created in steps 14 through 17 and click OK.

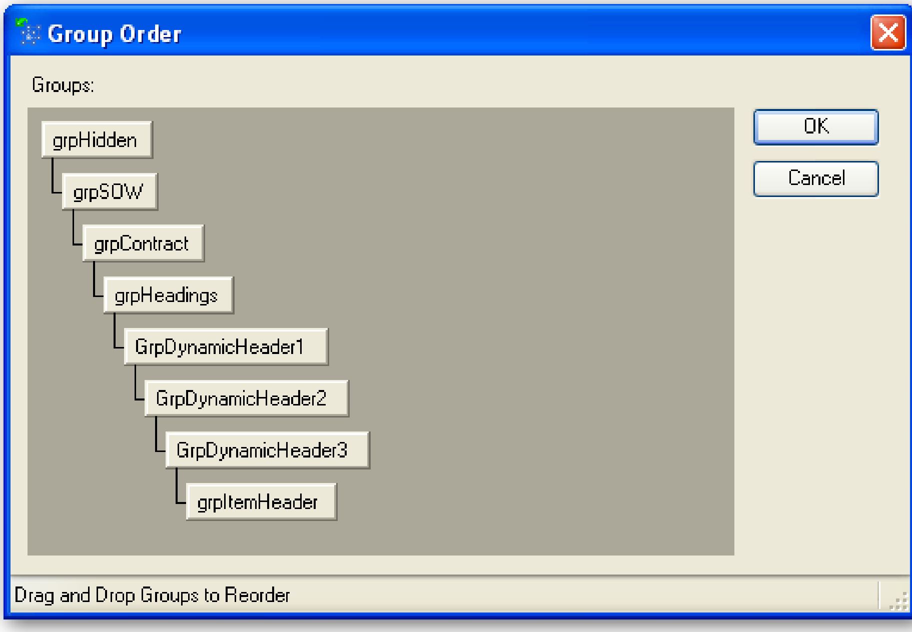


38. Right-click on a section on the report designer canvas and select “Reorder Groups”



39. Click on grpHidden and drag it to the top. Click OK. This will move the new header/footer section to the outside most section of the report (the detail section being the center). By doing this, it moves the ContactInfo section to the end of the report. By setting the NewPage property of the grpContractInfo

section = Before, now ensures that there is a new page break before the section is printed.



40. Save and publish the report. Click yes to return to the Reporting Center.

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

GENERAL NOTES ON THE REPORTS

- Another approach to this is to adding the “Project Contact” sub report is to expand the grpSummaryDetail section (the last section in the report before modifications), add a page break control to the section below the signature lines and add the sub report control below the added page break control.