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.
- 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.

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Net	w Report Wizard			
We will	create a new report based on an existing report			
Please begin n	select a report below that you want to base this addituing the new report	new report on ar	nd click 'Ne)	ď t
Reports available to base your ne	ew report on			
Report Name	Description	Category	Data	1
_Custom - Contract Payments	Subreport for payment periods		DTools	
_proposal Description test	Proposal that allows showing of package	Client Reports	DTools	
Avery WalkThru - 5263	Avery Labels	Installation R	DTools	
Change Order	Business Manager Change Order Report.		DTools	
Check List	Equipment Checklist	Management	DTools	
Contract	DTools Standard Contract Document	Client Reports	DTools	
Contract Payment	Subreport for payment periods		DTools	1
Contract Phases	Subreport for price by phase periods	384 Sec. 1990, 2014, 1997, 1974	DTools	
Cover Page	DTools Standard Cover Page	Client Reports	DTools	
Custom Contract	Custom Contract Document	Client Reports	DTools	
Custom Contract Payment	Custom subreport for payment periods	1111	D I ools	
Detail Cost Summary	Project Cost Summary	Management	D I ools	
Gross Profit	Gross profit of project.	Management	D Lools	
Line Item Detail	Line Item Detail Report that supports Dyna	Client Reports	D Lools	
List Blank Items In Project	Items in a project with values of zero for u	Management	DTools	
Misc. Losts	Subreport for Project Misc, Losts	Client Reports	DT ools	
Pick List	Pick List	Management	DT ools	
Project Contact Information	List of all contacts for a project.	Ulient Reports	DT ools	
Project Hours	Estimated Hours for a Project Tubis includ	Management	1) I nois	184
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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.

New Report Wizard	
	New Report Wizard How should we identify this new report? In order to find this report in the Reporting Center, we will need to give it a name, description, category and the data source it will use to render the report.
This is a Sub Report Report Name:	List this report in the Business Manager
Custom Contract - Sub F	eport
Description:	
Lustom Lontract Docum	erik
Category:	
Client Reports	×
Data Source:	
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d. Finish stepping through the Wizard and click "Save". The layout will then load.

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GroupFooter1				
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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.

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

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

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RightToLeft False	
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Style	
Tag	
Text Project Contract Terms	
VerticalAlignment Top	
Visible True	
WordWrap True	

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

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

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1	Client #Gtr:PresentedTo/dtp:CompanyName
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12. Resize the detail section of the report.

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- 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.

We will a View will a Please s begin mo	A Report Wizard reate a new report based on an existing report elect a report below that you want to base this difying the new report.	t. : new report on a	nd click 'Ne	ď to
Report Name	Description	Category	Data	^
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Project Contact Information Project Hours Project Install Summary Detail Project Summary Detail ProjectTaxDetail	List of all contacts for a project. Estimated Hours for a Project. This includ Installation price summary for a project Breakdown of labor price for a project Summary of taxes for a project	Client Reports Management	DTools DTools DTools DTools DTools	2000
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- 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.

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- 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...)

Properties	Д
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(Name)	grpSO₩
BackColor	Transparent
CanGrow	True
CanShrink	True
ColumnGroupKeep	False
ColumnLayout	True
DataField	
GroupKeepTogeth	None
Height	1
KeepTogether	False
NewColumn	None
NewPage	After
RepeatStyle	None
Tag	
Туре	GroupHeader
UnderlayNext	False
Visible	True

- 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.

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- 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...)

Properties	4
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(Name)	grpContract
BackColor	Transparent
CanGrow	True
CanShrink	True
ColumnGroupKeep	False
ColumnLayout	True
DataField	
GroupKeepTogeth	None
Height	1
KeepTogether	False
NewColumn	None
NewPage	After
RepeatStyle	None
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Туре	GroupHeader
UnderlayNext	False
Visible	True

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

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- 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)

Pr	operties	4
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	(Name)	subContract
	CanGrow	True
	CanShrink	True
	DataField	
	Location	0.125, 0.063 in
	X	0.13
	Y	0.06
	ReportName	SubReport1
	Size	6.5, 1 in
	Width	6.5
	Height	1
	Tag	
	Visible	True

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

=	🖃 grpContract	
:		
-	P	Bind To D-Tools Report
-		Insert •
-	<i>⊟</i> grpHeading: →	Cut
_		Сору
-		Delete

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

Published Reports Check List Contract Contract Payment Contract Phases Cover Page Custom Contract - Sub report DEtail Cost Summary DTU - Project Contact Information Su Gross Profit Line Item Detail List Blank Items In Project Misc. Costs Project Contact Information Project Contact Information Project Hours Project Hours Project Install Summary Detail	Select Report to Bind	×
OK Cancel	Published Reports Check List Contract Contract Payment Contract Phases Cover Page Custom Contract - Sub report Detail Cost Summary DTU - Project Contact Information Sugress Profit Line Item Detail List Blank Items In Project Misc. Costs Pick List Project Contact Information Project Lontact Information Project Install Summary Detail Project Install Summary Detail	Preview

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

			_
	Insert	Report Header/Footer	
t/dtrSc	Reorder Groups	Page Header/Footer	:::: ::::
	Paste Ctrl+	+V Group Header/Footer	
	🗙 <u>D</u> elete D	Del 😳 😳	:::
	Properties		

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.

=	🖂 GroupHeader1
-	
=	🖂 🕕 Detail1
=	GroupFooter1
-	

- 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

Properties	д
8≣ 2↓ 📼	
(Name)	grpHidden
BackColor	Transparent
CanGrow	False
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

- 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

Properties	4
₿ ₽ ↓ 🖻	
(Name)	grpContactInfo
BackColor	Transparent
CanGrow	True
CanShrink	True
ColumnLayout	True
Height	1
KeepTogether	False
NewColumn	None
NewPage	Before 🛛 🔽
PrintAtBottom	False
Tag	
Туре	GroupFooter
Visible	True

- 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.

Select Report to Bind	
Published Reports Detail Cost Summary DTU - Project Contact Information St Gross Profit Line Item Detail List Blank Items In Project Misc. Costs Pick List Project Contact Information Project Hours Project Install Summary Detail Project TaxDetail Project Install Price) Proposal Proposal Level2 Items Proposal Level2 Items (Install Price) Pronosal Level2 Items With Images	Preview
	OK Cancel

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

🐄 Group Order	X								
Groups: grpContract grpHeadings GrpDynamicHeader1 GrpDynamicHeader2 GrpDynamicHeader3 grpItemHeader grpHidden	OK Cancel								
Drag and Drop Groups to Reorder									

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

🐄 Group Order	
Groups: grpHidden grpSOW grpContract grpHeadings GrpDynamicHeader1 GrpDupamicHeader2	OK Cancel
GrpDynamicHeader3 grpItemHeader Drag and Drop Groups to Reorder	

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.