

# MODIFYING THE CONTRACT REPORT

## CONTRACT LAYOUT AND MAIN COMPONENTS

The Standard Contract as shipped in SI5 is constructed of the following main components:

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)

The screenshot displays a contract report layout within a design tool interface. The layout is organized into several sections:

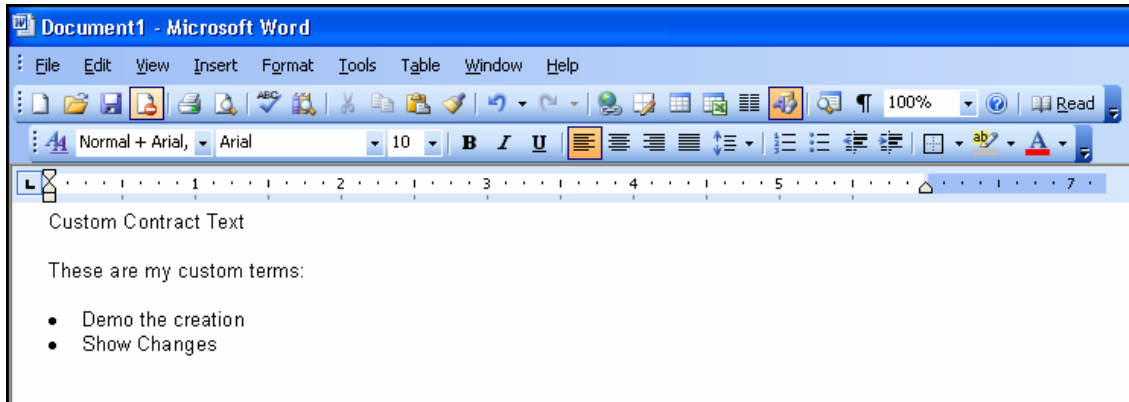
- PageHeader1:** Contains the word "Contract" in a large, bold font.
- GroupHeader1:** Features the "SI5" logo and fields for "Presented By:", "Company Name", and "Company Address".
- Detail1:** Contains two rich text sections:
  - 1st Rich Text Section:** A paragraph starting with "A. The general project description is contained in the attached document and related documents from herein".
  - 2nd Rich Text Section:** A paragraph starting with "1. Contract Documents and Details".
- Form Fields:** Includes fields for "Project Name", "Project Company", "Project Address", "Client", "Contractor", and "DATE".
- PageFooter1:** Contains fields for "Company Name" and "Page {PageNumber} of {PageCount}".

Arrows on the right side of the screenshot point to the "1st Rich Text Section", "Contract Phases Sub", "Contract Payments Sub", and "2nd Rich Text Section".

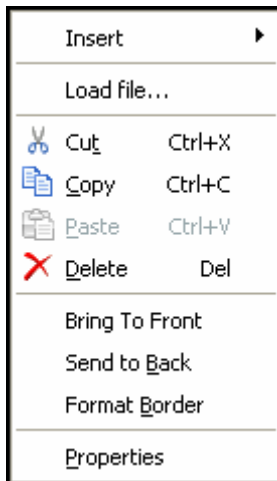
## MODIFYING THE RICH TEXT SECTIONS

If one would like to modify the Rich Text data contained in the standard contract, the following steps should be followed:

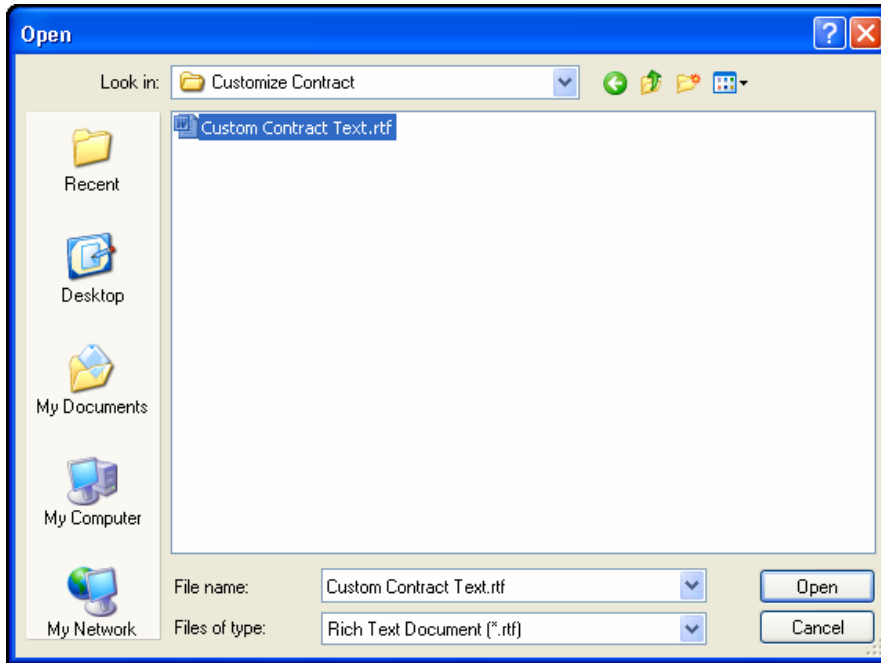
1. Open Word or some other text editor that will allow one to create a Rich Text File (.RTF extension)
2. Create the text to be inserted in the contract.



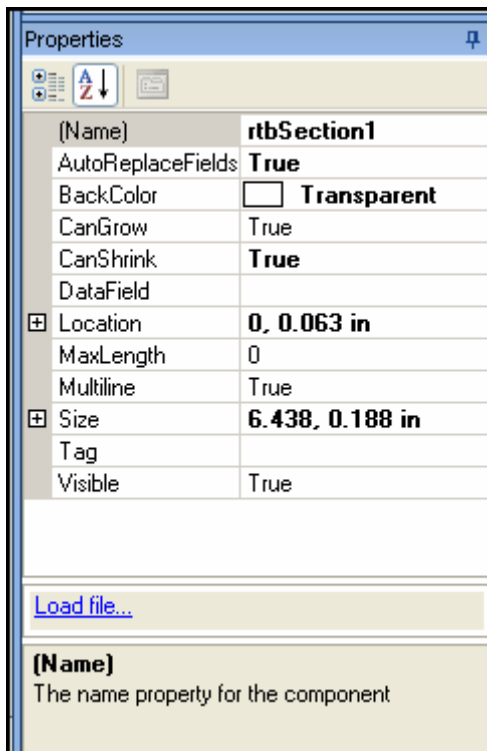
3. Save the RTF file to disk (remember the file location).
4. Open the report designer.
5. Create a new report based on the existing contract.
6. Select one of the Rich Text Controls in the report, and right click. The following context menu will appear:



7. Click the "Load File" menu. Browse to the saved RTF file.



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



8. Click Open.
9. Save and Publish the Report.

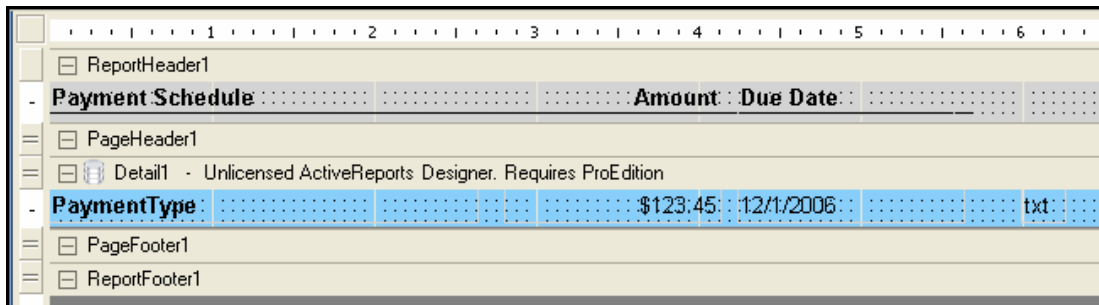
10. Run report from reporting center, and see changes:

1850 Gateway Blvd. Suite 1060 Concord, CA 94520 US 925.681.2326	D-Tools CEDIA 2006 Denver, CO
Custom Contract Text	
These are my custom terms:	
<ul style="list-style-type: none"> <li>• Demo the creation</li> <li>• Show Changes</li> </ul>	
<b>Phase</b>	<b>Amount</b>
Trim	\$838.75
Finish	\$18,809.95
<b>Grand Total:</b>	<b>\$19,648.70</b>

## MODIFY THE SUB REPORTS

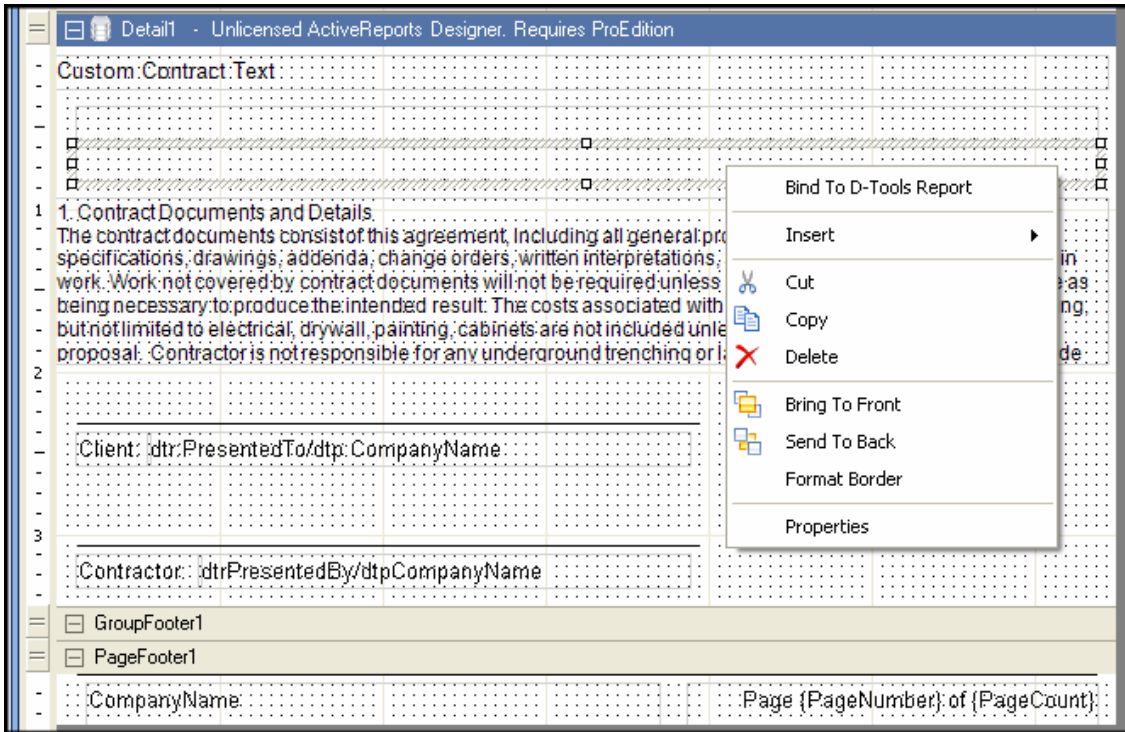
If one chooses to change the layout of the sub reports, the steps below should be followed:

1. Open the report designer.
2. Create a new report based on the existing sub report (Contract Payment or Contract Phases).
3. When stepping through the new report wizard, give the report a unique name ("Custom Contract Payment").
4. Modify the layout of the report as desired. In the image below, the Contract Payment has been modified by simply changing the background colors and some font settings.

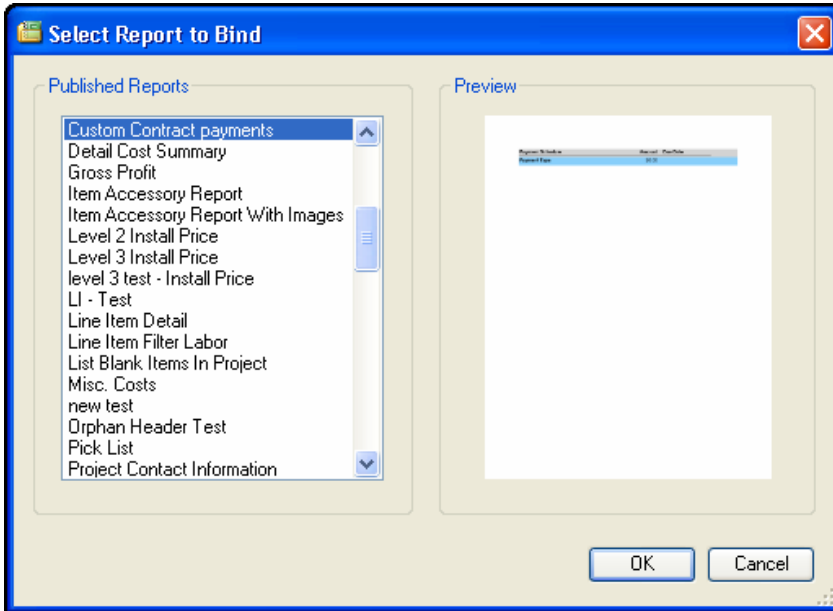


5. Save and publish the new sub report. When prompted to return to the reporting center, click "No".
6. Create a new report based on the existing contract or open a previously customized version.
7. Select the sub report control on the main contract report. Note: These controls appear as a grey box on a report. They can be hard to see.

8. Right Click on the sub report control. The following menu will appear.



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



10. Save and publish the new Contract. When prompted, click “Yes” to return to the reporting center.

11. Run the report and see the changes.

1850 Gateway Blvd. Suite 1060 Concord, CA 94520 US 925.681.2326	D-Tools CEDIA 2006 Denver, CO
Custom Contract Text	
These are my custom terms:	
<ul style="list-style-type: none"><li>• Demo the creation</li><li>• Show Changes</li></ul>	
<b>Phase</b>	<b>Amount</b>
Trim	\$838.75
Finish	\$18,809.95
<b>Grand Total:</b>	<b>\$19,648.70</b>
<b>Payment Schedule</b>	<b>Amount</b> <b>Due Date</b>
<b>Initial Deposit</b>	\$1,964.87
<b>Progress Payment</b>	\$1,964.87
<b>Start Rough In</b>	\$1,964.87
<b>Start Trim</b>	\$4,912.18
<b>Start Finish</b>	\$7,859.48
<b>Final</b>	\$982.44
1. Contract Documents and Details The contract documents consist of this agreement, including all general provisions, special provisions, specifications, drawings, addenda, change orders, written interpretations, and written orders for minor changes in	

## 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" textbox 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).