

Adding Logos to an Epicor Report

Background

Some standard reports already have been built to use images from the Epicor Image gallery in Kinetic. The list of reports can be found in [KB0050698](#) on EpicCare, these being:

- Packing Slip
- Purchase Order
- Sales Order Acknowledgement
- AR Invoice
- Customer Statements
- Supplier Statements
- Reminder Letter
- Debit Memo

Important note: Logos are company specific. To add a logo to a report style for a specific company you need to be logged into the specific company at the time to add the correct logo.

How to add a logo

To add logo functionality onto additional reports the following steps need to be performed.

1. If the Logo does not exist in the image gallery, use Image Maintenance to import the image. Images are company specific. You must import the image into the specific company/report style you wish the Logo to appear on.
2. Take an existing RDL that has the logo functionality and copy the ReportImages Dataset identically to the RDL of the report you wish to add the logo to.
3. Copy the Image object from the source rdl to the destination rdl
4. Upload the modified RDL to the related report style
5. Click on the company/images tab
6. Select the current company from the company list
7. Click on the retrieve button to display the logo entry
8. Double click on the empty image preview cell. This will open up the image search
9. Search for and select the image required. (note the image needs to be imported prior to searching)
10. Save the Report Style
11. Test the report

12. A good indication things are configured correctly is that in the Reporting database there will be a new table `dbo.ReportImages_` with the GUID of the executed report. And the logo will appear on the report.

Steps with images. (Classic)

Add your logo. If the logo has already been added then it does not need to be added again, unless you are adding logos for a different company.

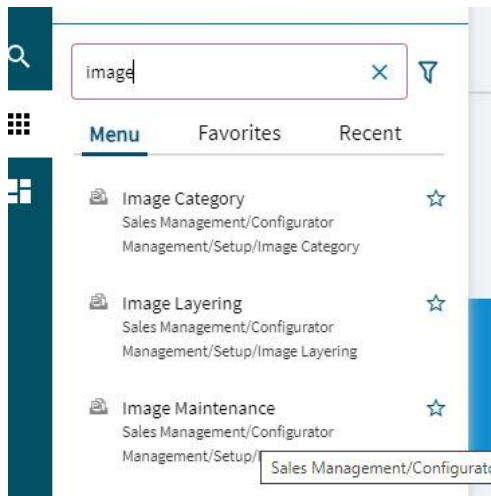


Figure 1. Open Image Maintenance

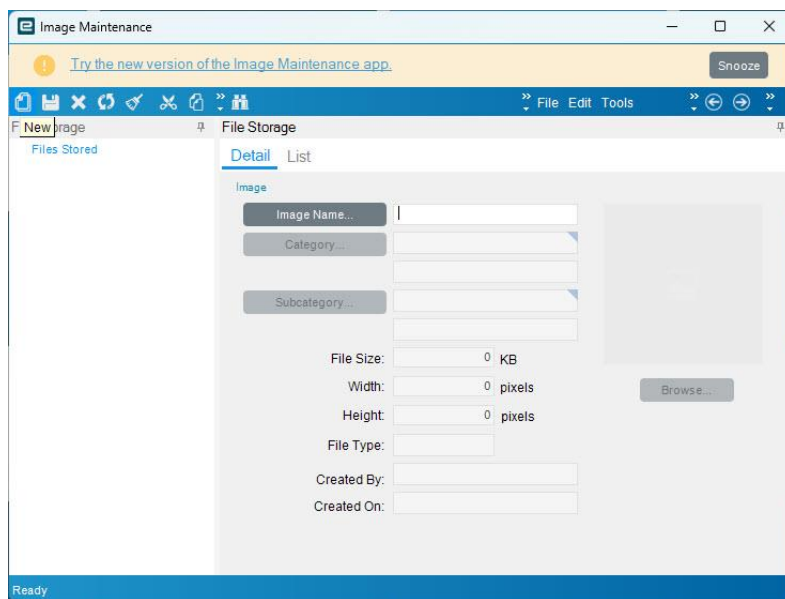


Figure 2. Image Maintenance opened.

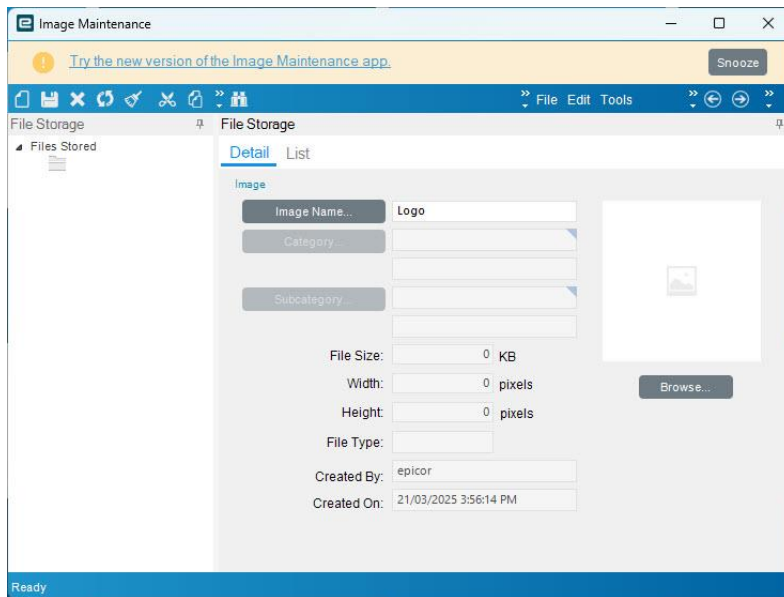


Figure 3. Add new Image. Provide name and Image Category (Optional), click browse

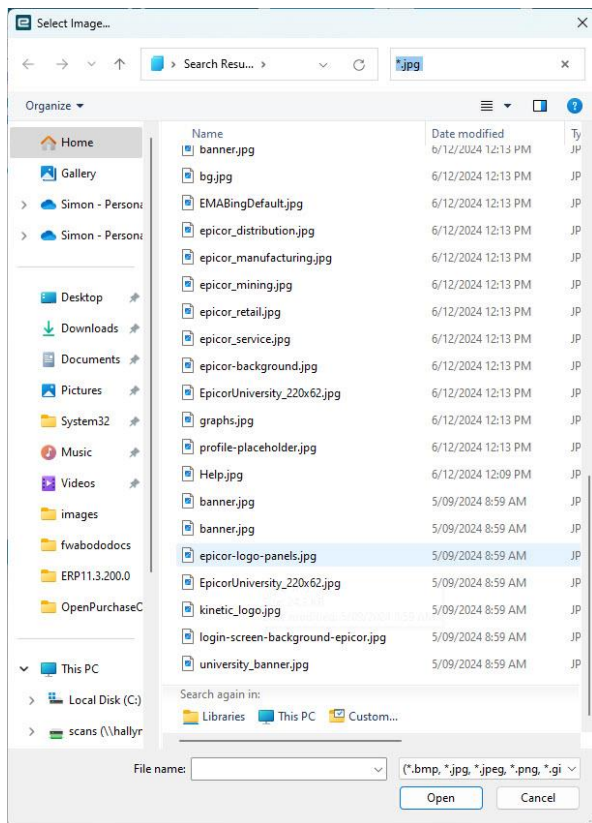


Figure 4. Select Image file

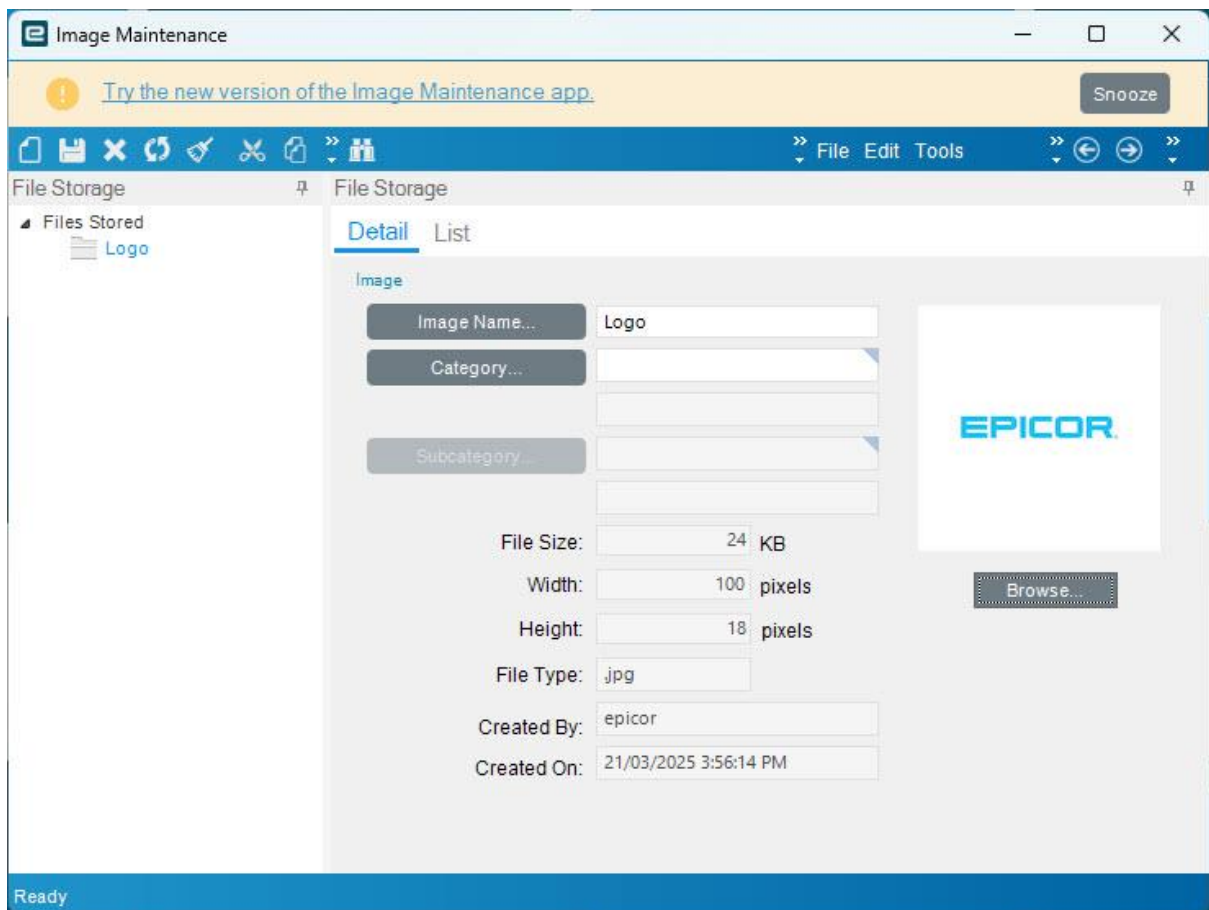


Figure 5. Selected Image file loaded, Save and Exit

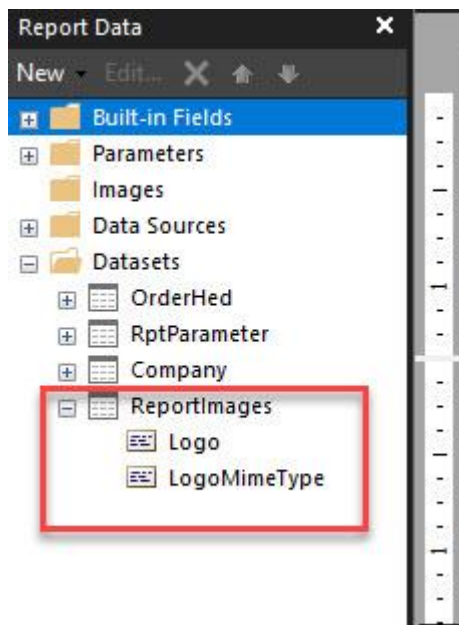


Figure 6. Example ReportImages dataset from OrderAck

Dataset Properties

Query

Fields

Options

Filters

Parameters

Choose a data source and create a query.

Name:
ReportImages

☐ Use a shared dataset.
☒ Use a dataset embedded in my report.

Data source:
dsSOForm New...

Query type:
☒ Text ☐ Table ☐ Stored Procedure

Query:
«Expr»

Query Designer... Import... Refresh Fields

Time out (in seconds):
0

Help OK Cancel

Figure 7 Source RDL Dataset Properties

Dataset Properties

Query
Fields
Options
Filters
Parameters

Choose a data source and create a query.

Name:
ReportImages

☐ Use a shared dataset.
☒ Use a dataset embedded in my report.

Data source:
dsOpenPO New...

Query type:
☒ Text ☐ Table ☐ Stored Procedure

Query:
fx

Query Designer... Import... Refresh Fields

Time out (in seconds):
0

Help OK Cancel

Figure 8 New DataSet Properties in destination RDL

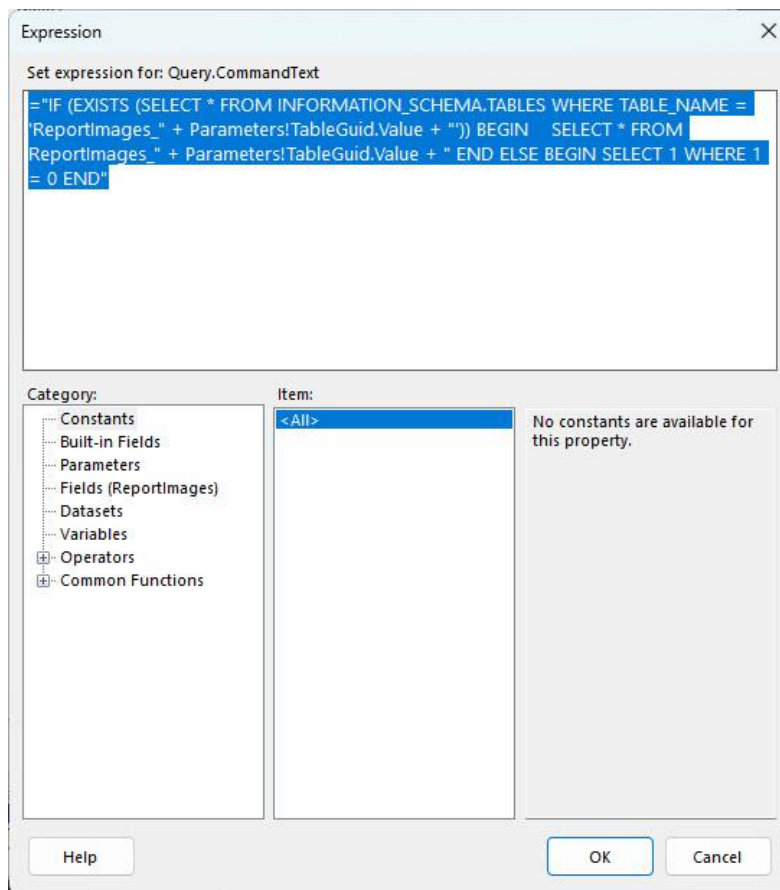


Figure 9. copy the Expression from the Source RDL Dataset to the Destination RDL

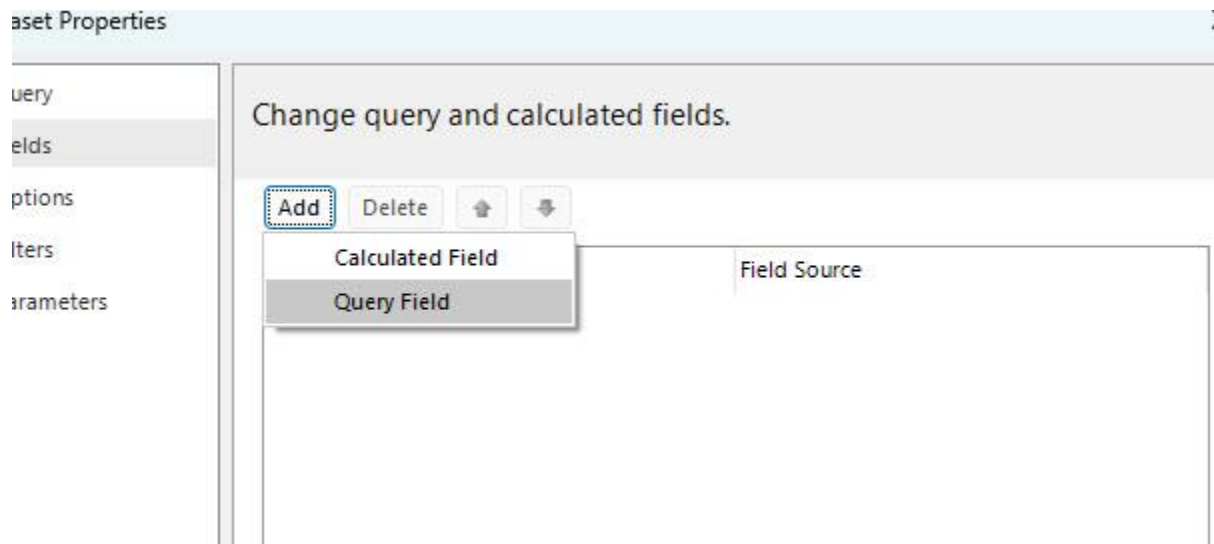


Figure 10 Add the Logo and LogoMimeType fields

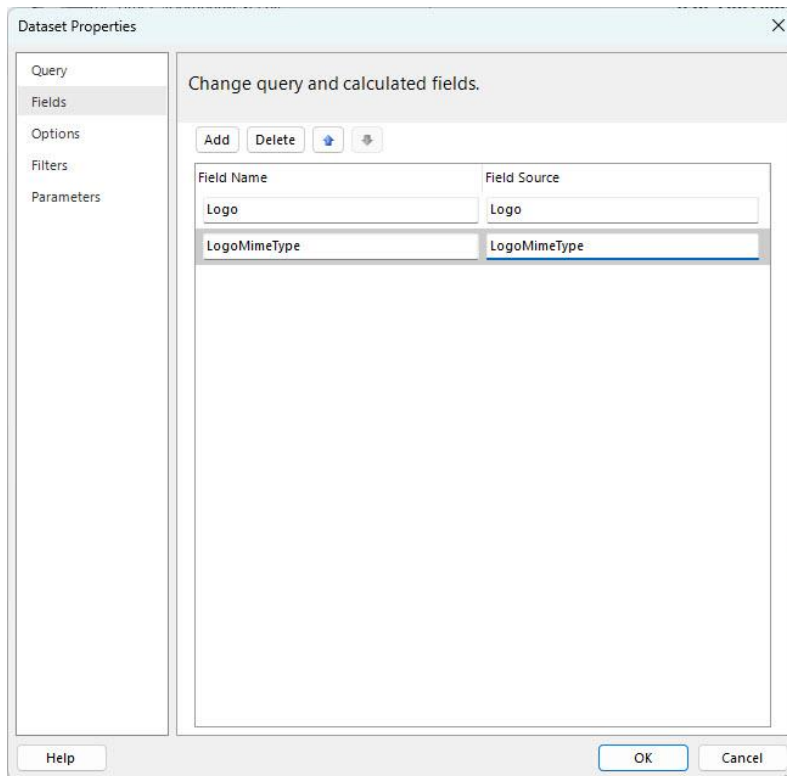


Figure 11 Newly created Query Fields

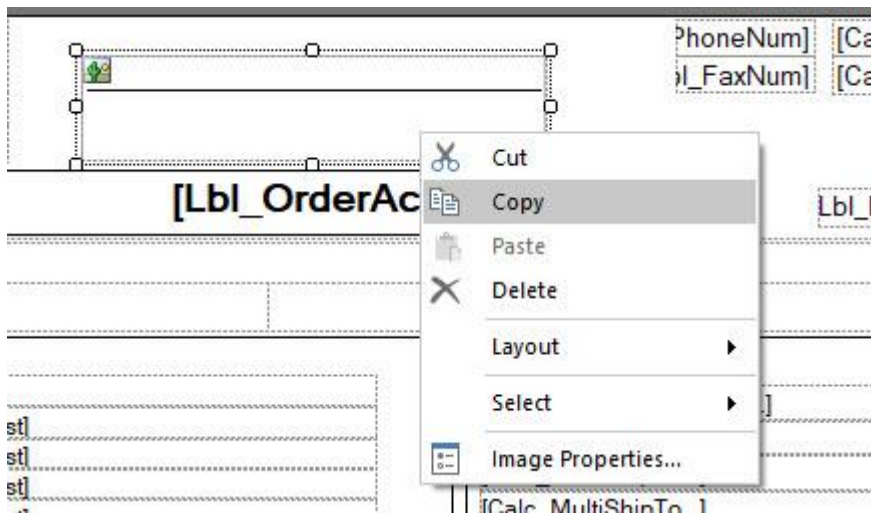


Figure 12. Copy the Image Object from Source RDL

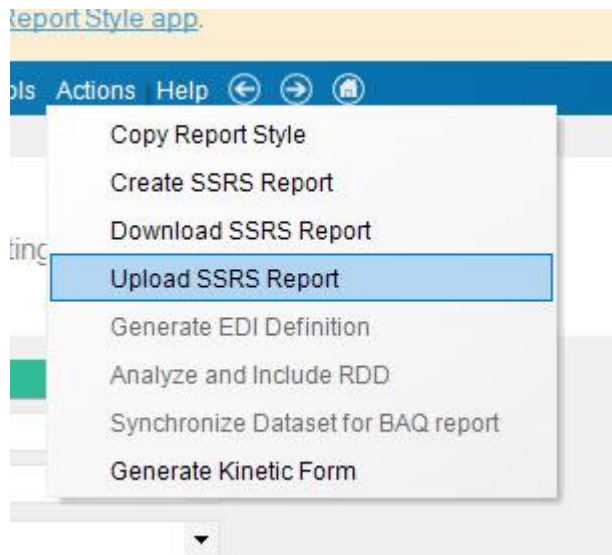


Figure 15. Upload the RDL to the report style.

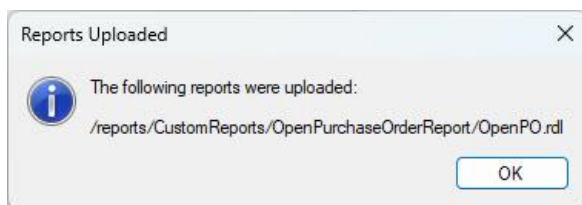


Figure 16. RDL Uploaded.

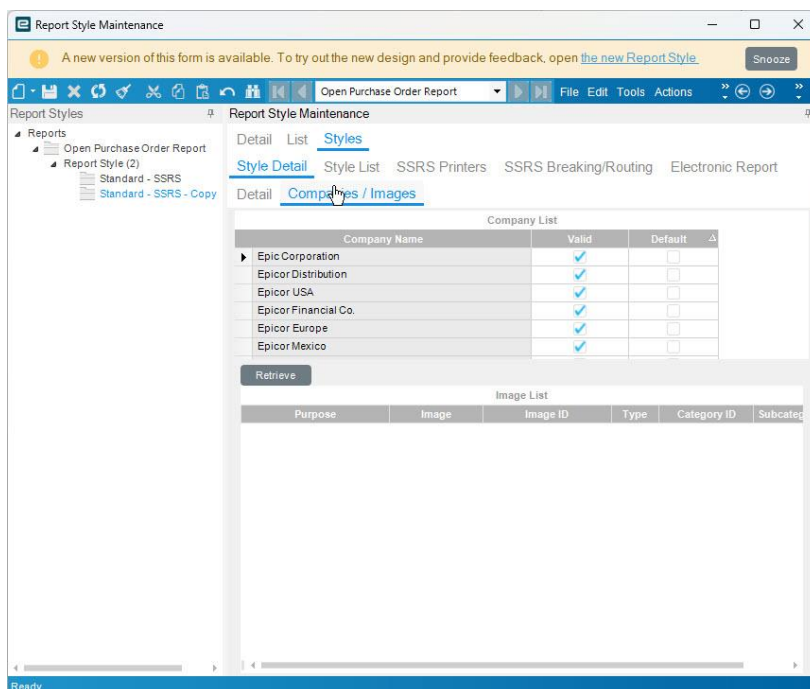


Figure 17. In the Report Style, Select the report style, click on Companies/Images. Select the currently logged in company. Click on Retrieve.

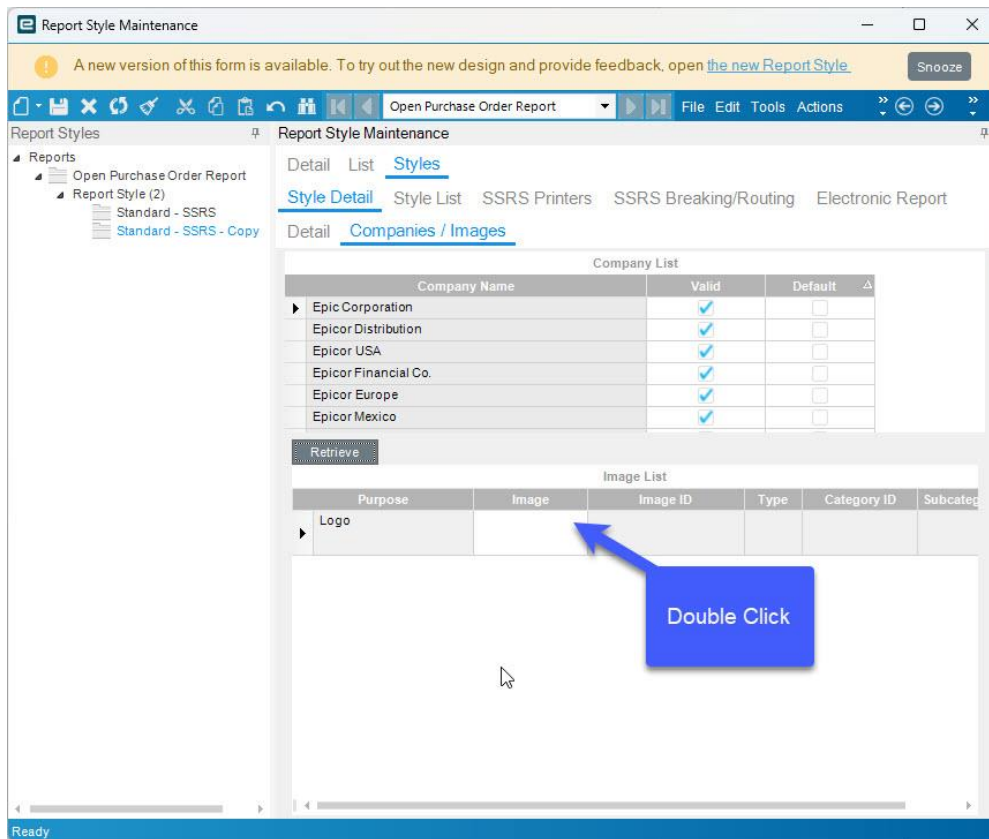


Figure 18. Double click on the empty image cell

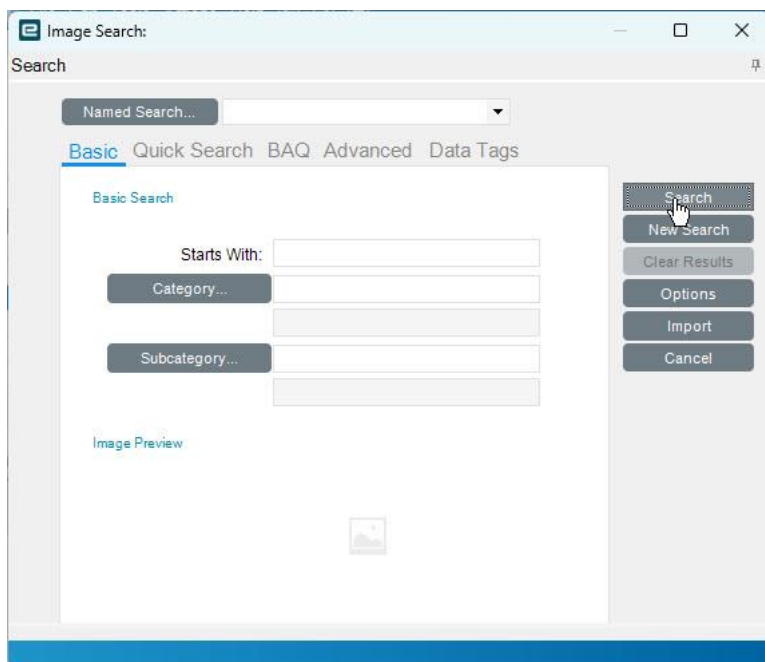


Figure 19. Image Search appears.

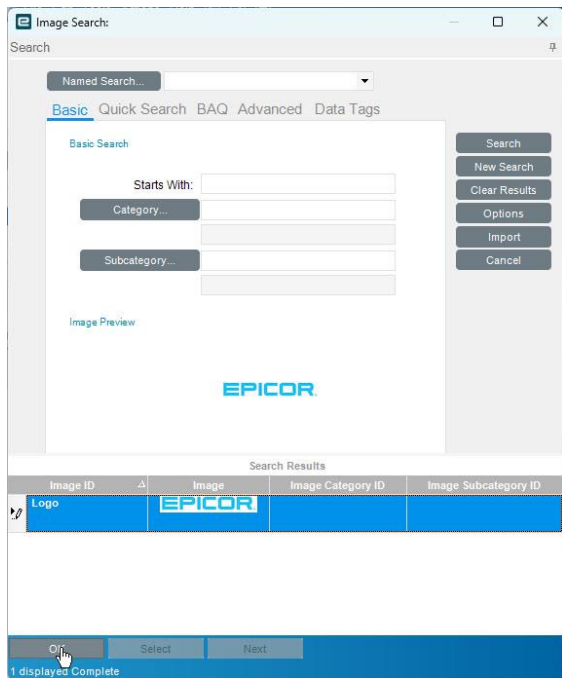


Figure 20. Select the Logo image.

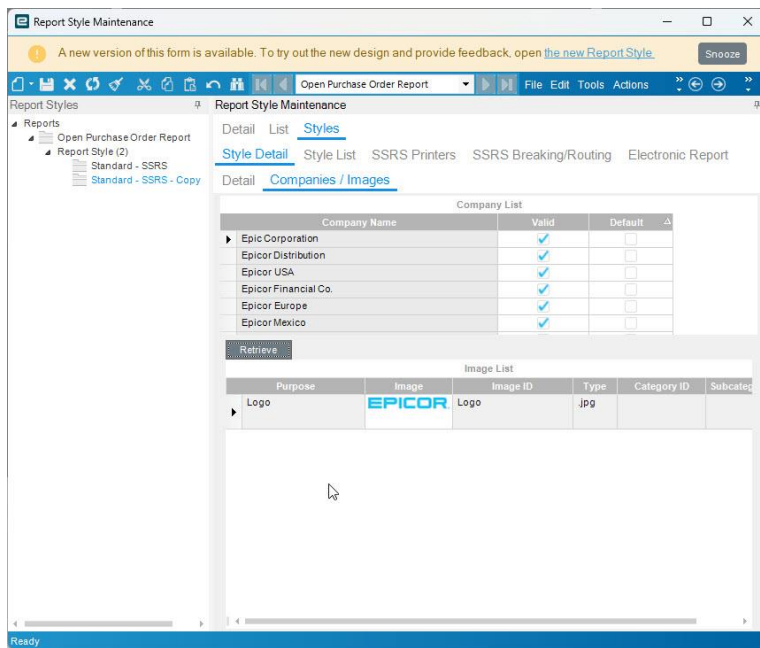


Figure 21. Image should appear in the Image Cell. Save the Report Style

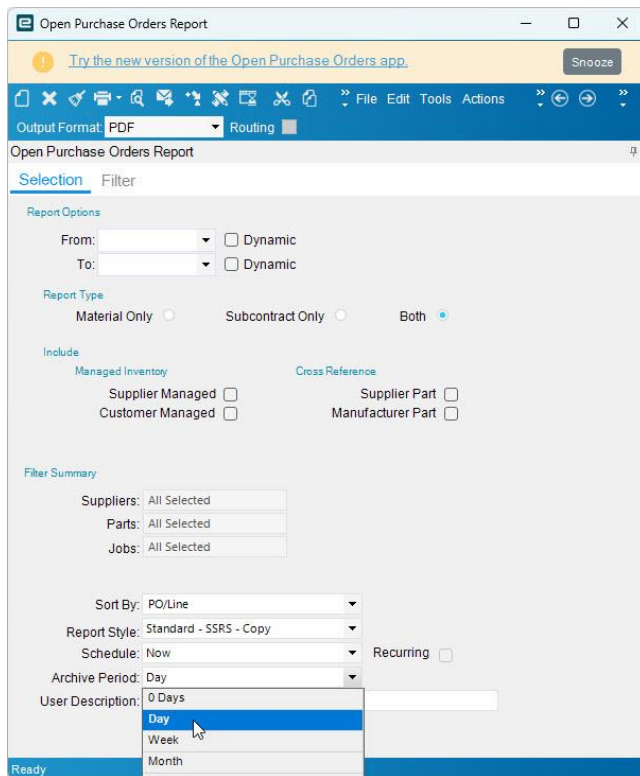


Figure 22. Run the report to test, ensure the correct style and the archive period is set.

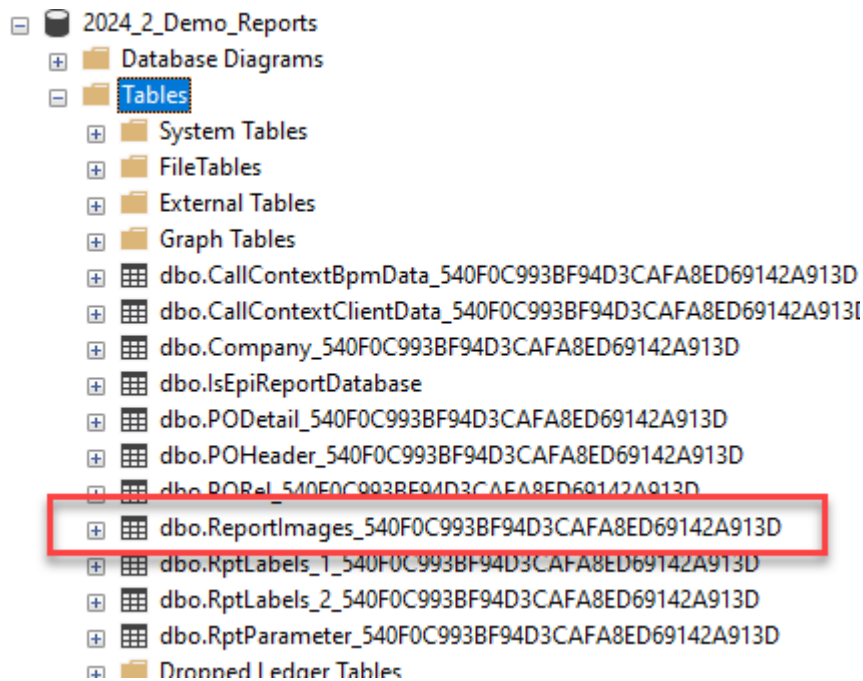


Figure 23. If you are On-Prem and you have access to the Reports Database you will see the ReportImages table created

User: epicor
Time: 4:01 pm

EPICOR

Epicor Education
Open Purchase Order Report
(By PO/Line For Materials & SubContracting)

P.O.: 4027 **PO Type: Standard PO**

P.O.	Line	Part Number	Supplier ID	Unit Cost	Rel Status	Due Date	Promise Date	Job / Asm / Seq
4027	1	DSS-1012	ABE	19.00 /1	1 Open	4/04/2024	4/04/2024	
4027	1	DSS-1012	ABE	19.00 /1	2 Open	11/04/2024	18/03/2024	
4027	1	DSS-1012	ABE	19.00 /1	3 Open	19/04/2024	26/03/2024	
4027	1	DSS-1012	ABE	19.00 /1	4 Open	3/04/2024	19/04/2024	

----- 4 -----

4027 - PO Totals:

P.O.: 4029 **PO Type: Standard PO**

P.O.	Line	Part Number	Supplier ID	Unit Cost	Rel Status	Due Date	Promise Date	Job / Asm / Seq
4029	1	DCD-100-SP	HADES	5.25 /1	1 Open	29/02/2024	29/02/2024	2121 / 0 / 50(S)
4029	1	DCD-100-SP	HADES	5.25 /1	2 Open	21/02/2024		2115 / 0 / 50(S)
4029	1	DCD-100-SP	HADES	5.25 /1	3 Open	5/02/2024		2141 / 0 / 50(S)
4029	2	ML-Q250986	HADES	2.85 /1	5 Open	29/02/2024		2124 / 2 / 40(S)

Figure 24. Example of updated report with logo.

User: epicor
Time: 4:02 pm

Epicor Education
Open Purchase Order Report
(By PO/Line For Materials & SubContracting)

P.O.: 4027 **PO Type: Standard PO**

P.O.	Line	Part Number	Supplier ID	Unit Cost	Rel Status	Due Date	Promise Date	Job / Asm / Seq
4027	1	DSS-1012	ABE	19.00 /1	1 Open	4/04/2024	4/04/2024	
4027	1	DSS-1012	ABE	19.00 /1	2 Open	11/04/2024	18/03/2024	
4027	1	DSS-1012	ABE	19.00 /1	3 Open	19/04/2024	26/03/2024	
4027	1	DSS-1012	ABE	19.00 /1	4 Open	3/04/2024	19/04/2024	

----- 4 -----

4027 - PO Totals:

P.O.: 4029 **PO Type: Standard PO**

P.O.	Line	Part Number	Supplier ID	Unit Cost	Rel Status	Due Date	Promise Date	Job / Asm / Seq
4029	1	DCD-100-SP	HADES	5.25 /1	1 Open	29/02/2024	29/02/2024	2121 / 0 / 50(S)
4029	1	DCD-100-SP	HADES	5.25 /1	2 Open	21/02/2024		2115 / 0 / 50(S)

Figure 25 Example of Original report with no logo.

Steps with images (Kinetic)

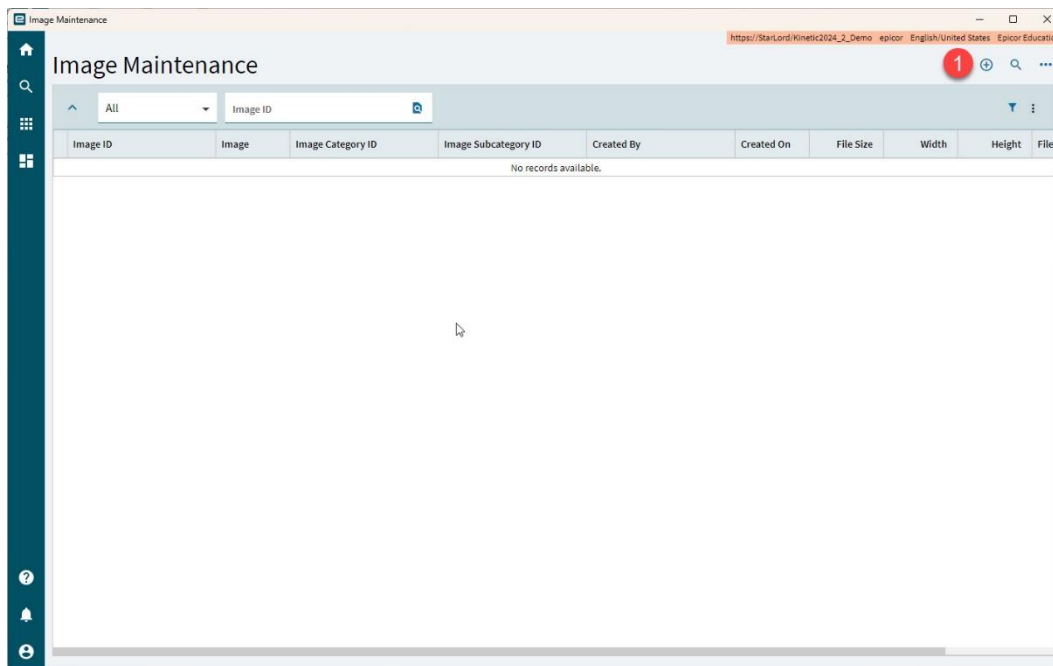


Figure 26. Open Image Maintenance

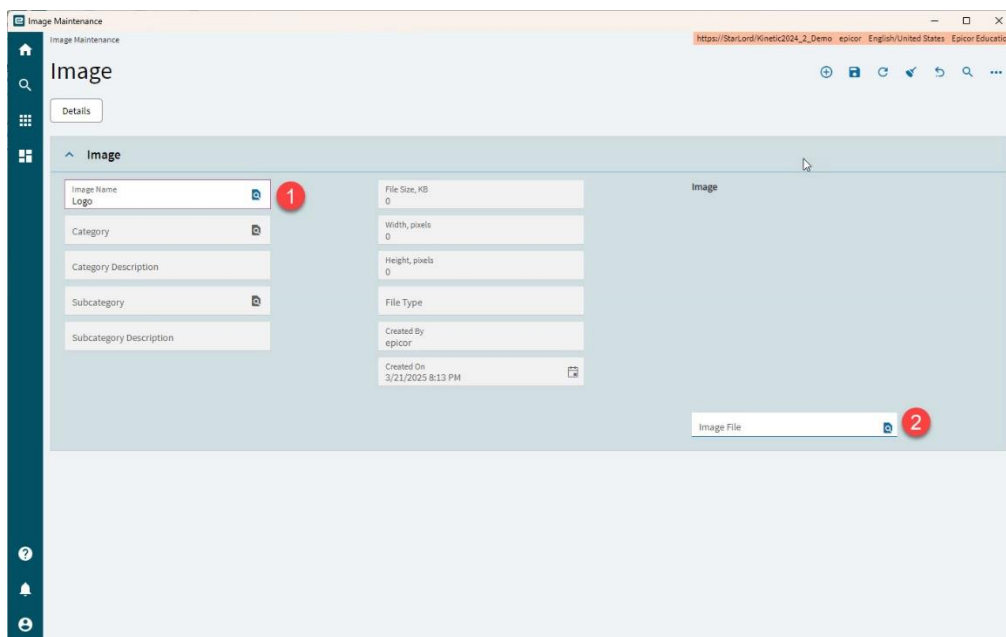


Figure 27. Enter the Image Name, and search for the image file to add

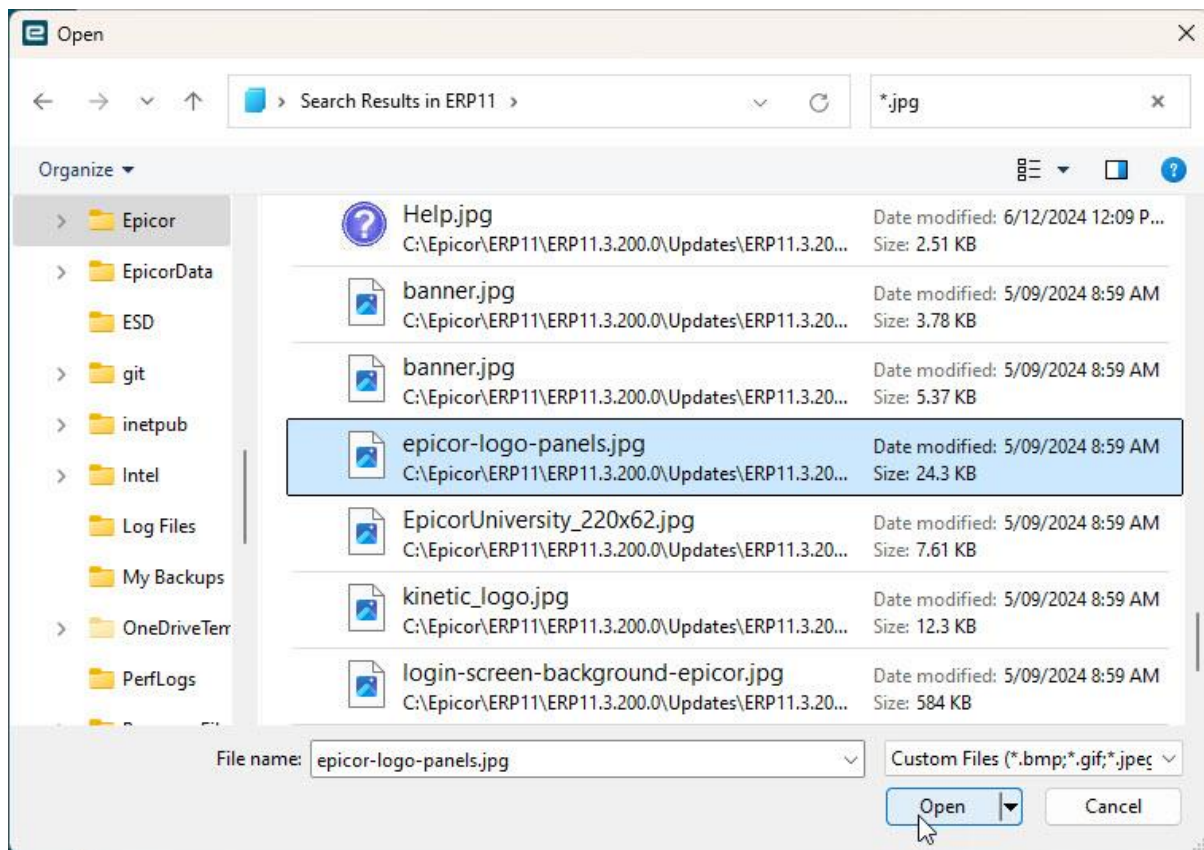


Figure 28. Select File.

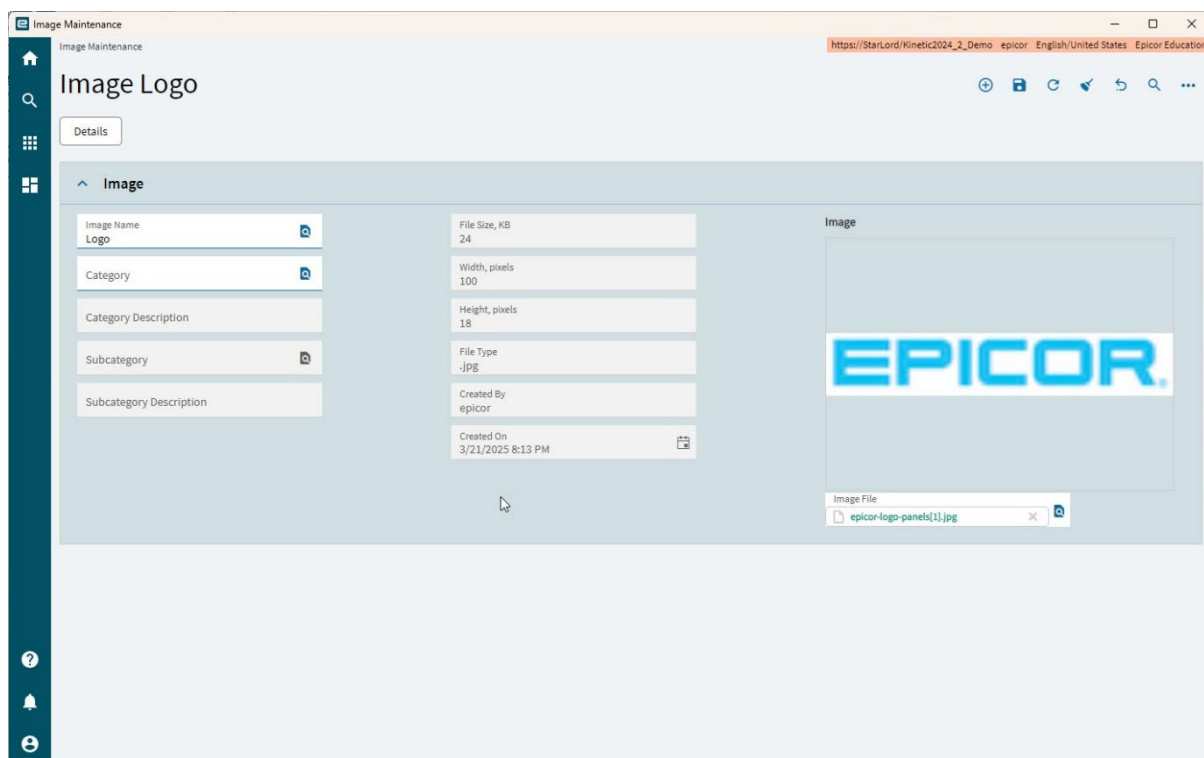


Figure 29. Image Added

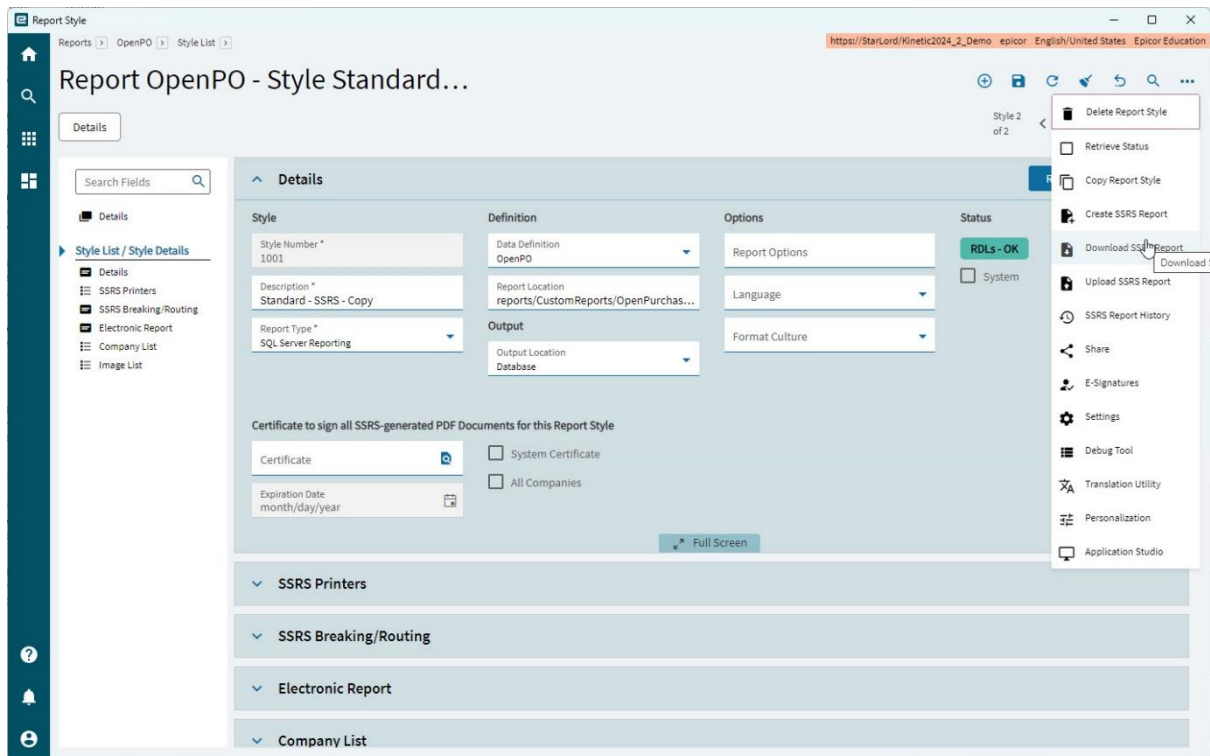


Figure 30. Open the report style to add the logo to and download the RDL

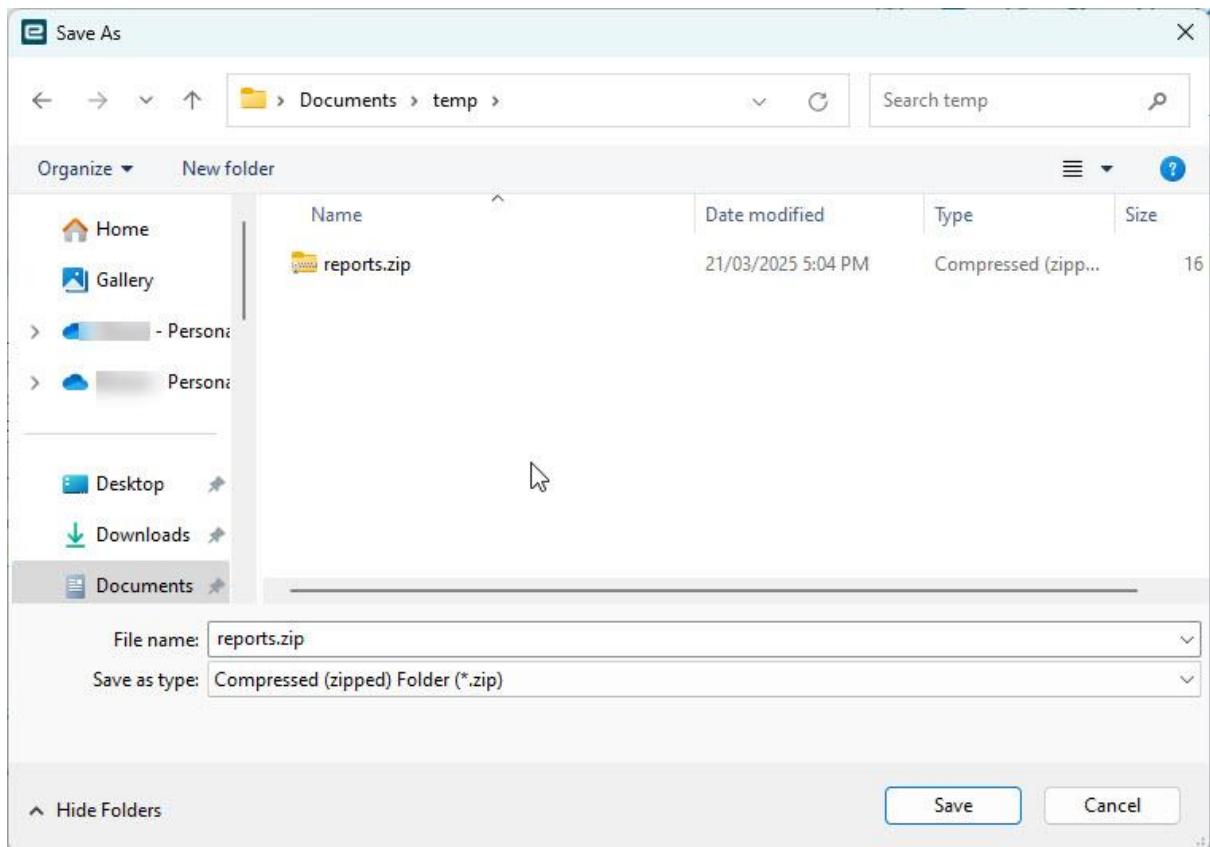


Figure 31. Select a location to store the Zip file

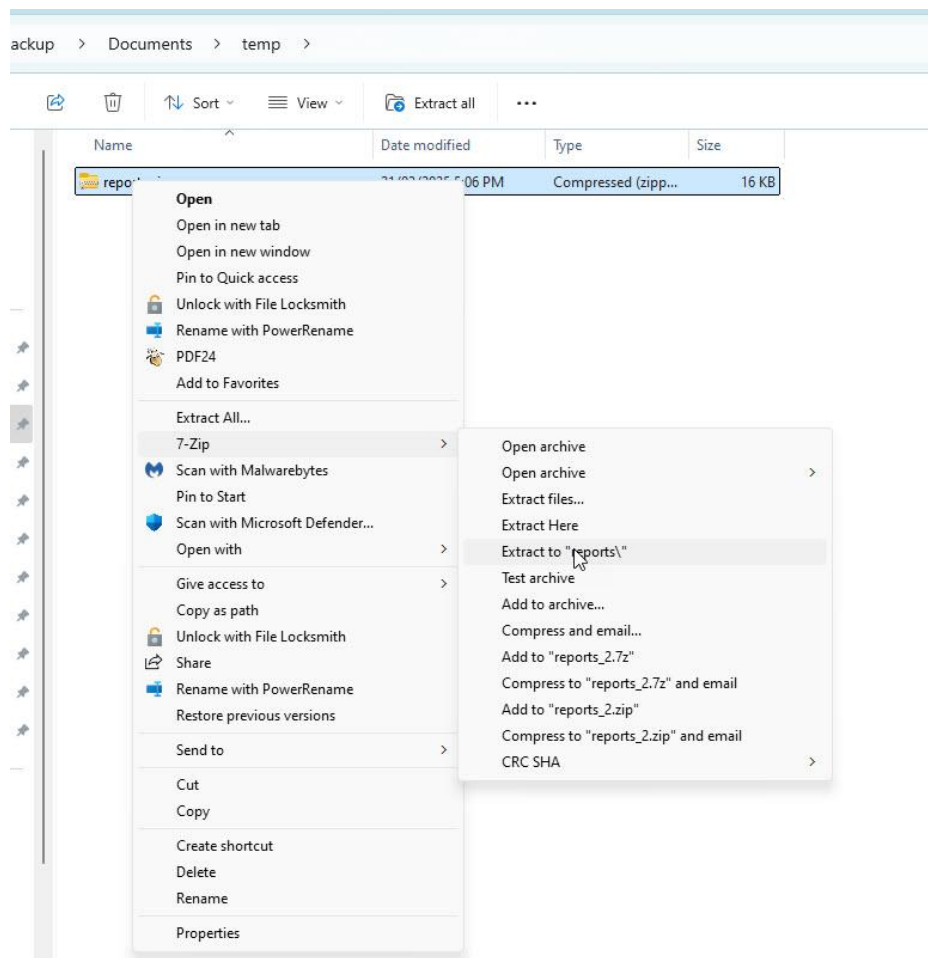


Figure 32. Extract the zip file to an appropriate location, keep the folder structure. Using 7Zip here, if using standard windows extract all pay close attention to the path.

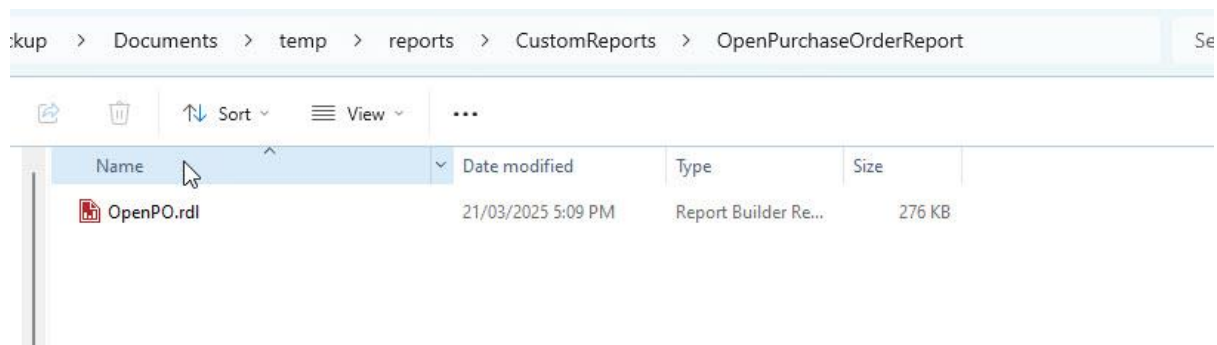


Figure 33. Modify the RDL in the same way as in the Classic instructions.

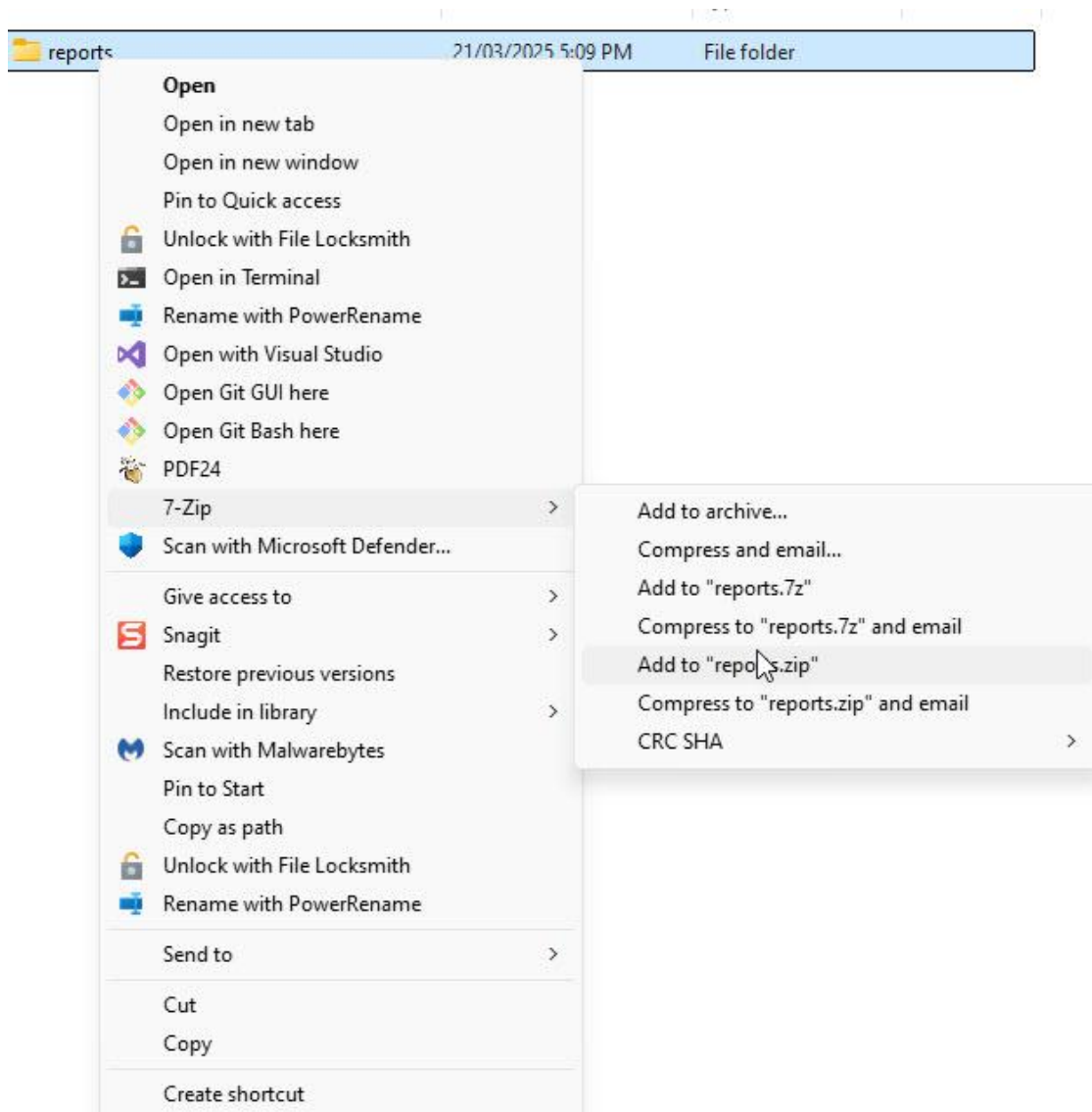


Figure 34. Zip the reports folder up again ensuring to maintain the folder structure. Epicor expects the Zip file to have the same relative path as in the SSRS report server folder structure.

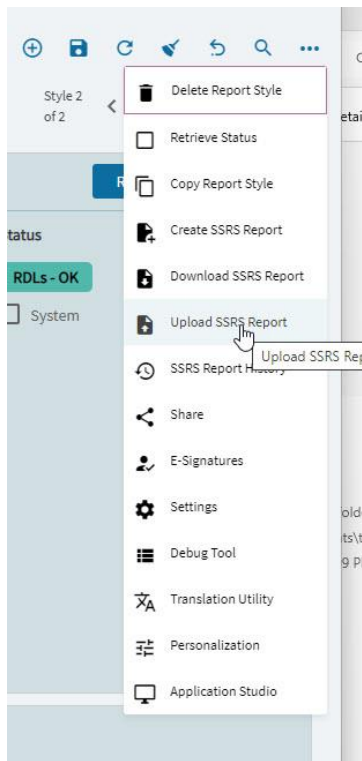


Figure 35. Upload the RDL file

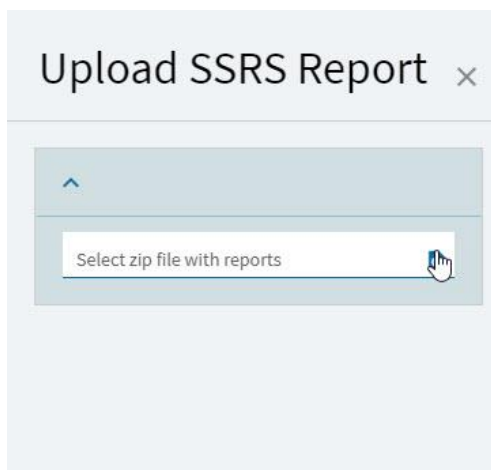


Figure 36. Reports.zip file that you just created

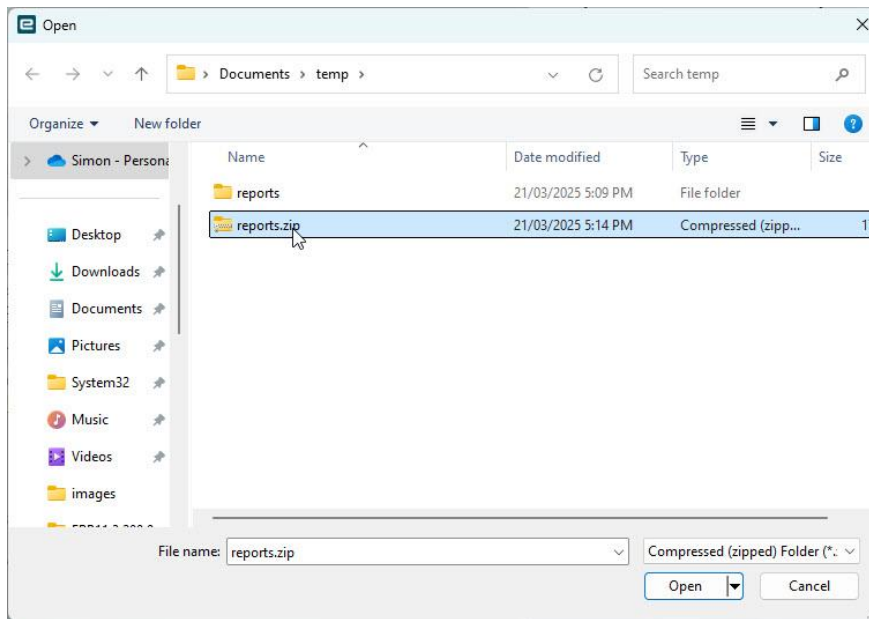


Figure 37. Example reports.zip

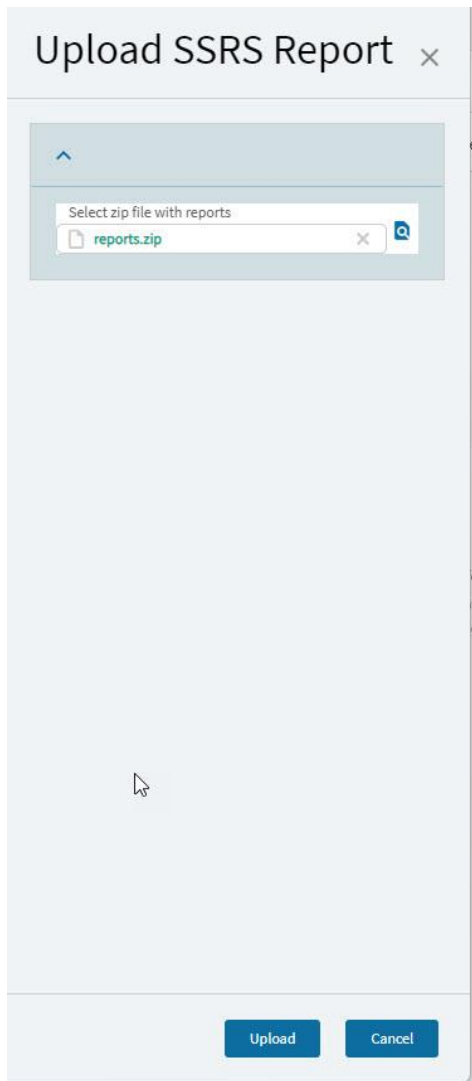


Figure 38. Click Upload

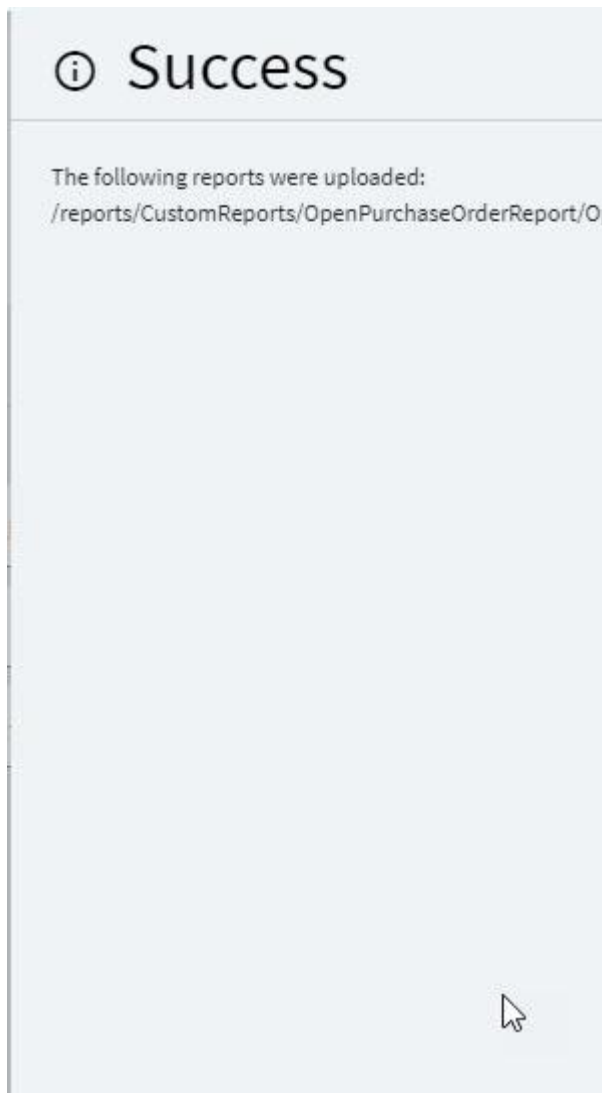


Figure 39. If all things have uploaded correctly, you will receive a success notification.

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Company List

	Company Name	Valid	Default
	Epic Corporation	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Epicor Distribution	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Epicor USA	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Epicor Financial Co.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Epicor Europe	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Epicor Education	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Epicor Mexico	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Epicor Perform	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Graphic Printing Co.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Full Screen

^

Image List

Retrieve

Purpose	Image ID	Image	Type	Category ID	Subcategory ID
No records available.					

Full Screen

Figure 40. In the report style Click the current company in the company list.

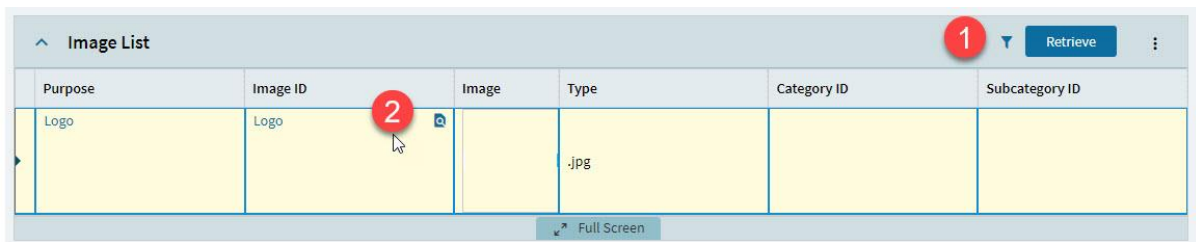


Figure 41. In the Image List Panel card click "Retrieve", then the search icon in the Image ID cell.

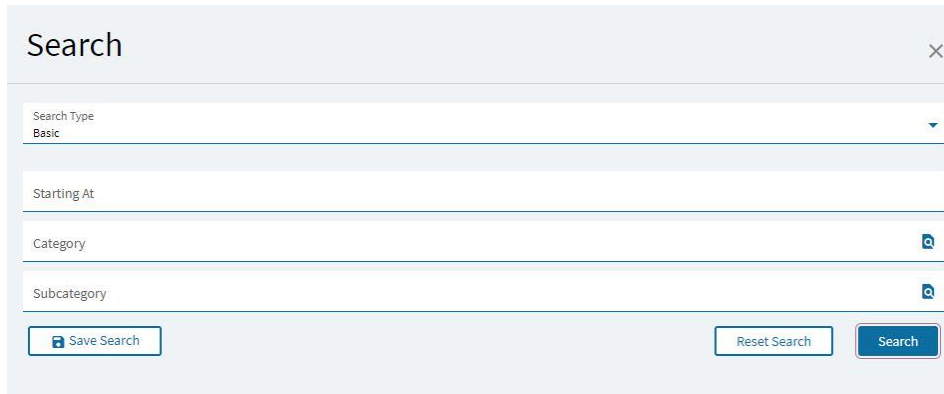


Figure 42. Image Search dialog appears.

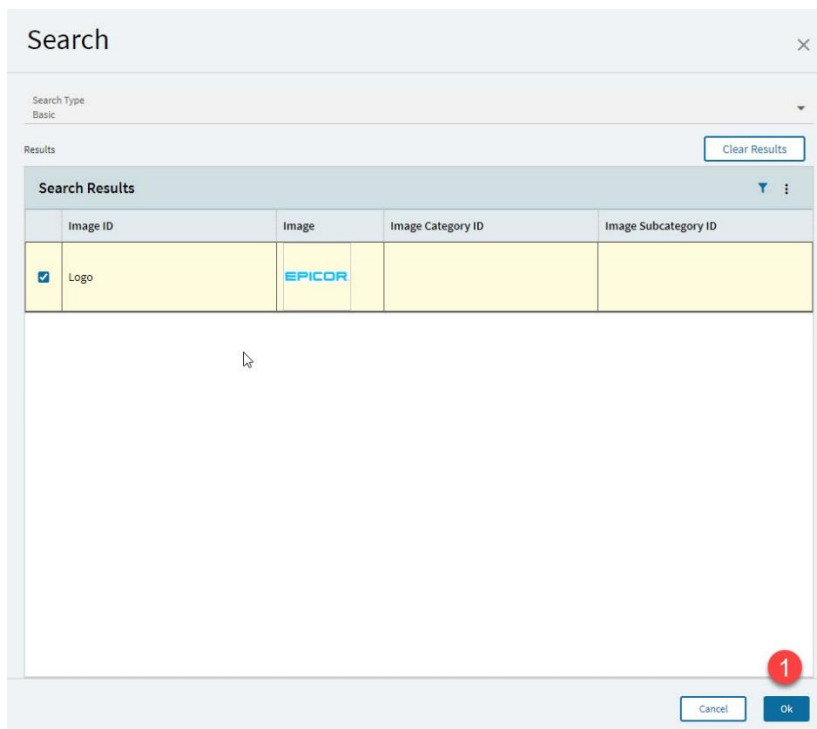


Figure 43. Select the image to use and click Ok.

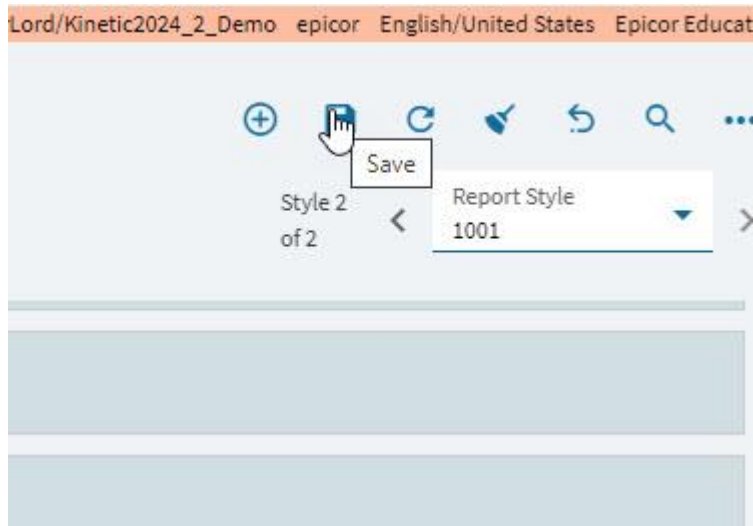


Figure 44. Save the report style.

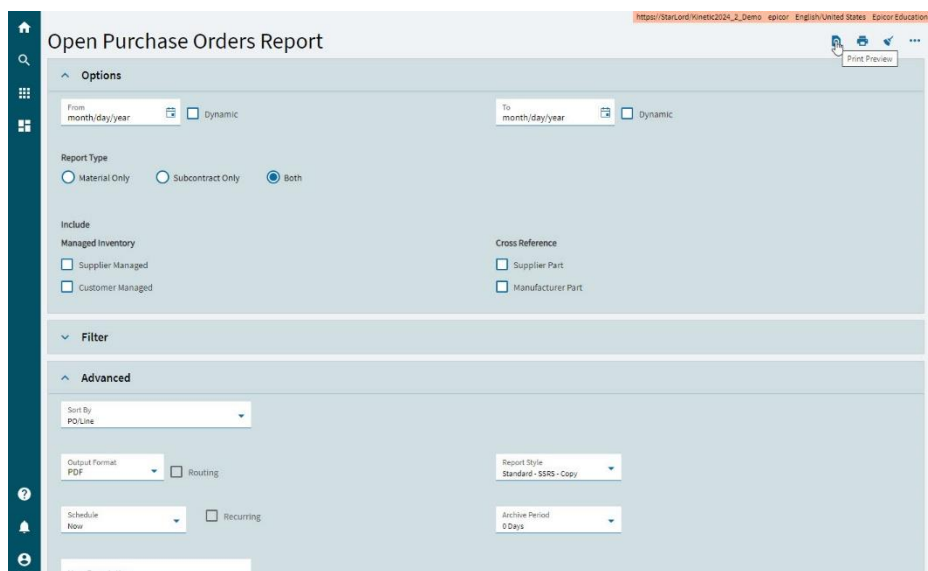


Figure 45. Open the related print App for the report style you modified. Select the relevant report style and any other parameters. Click Preview

Figure 46. Review the results of your work.