

Microsoft Dynamics NAV 2013 Reporting*

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Microsoft®
Partner Network

* Level Beginner to Intermediate

AGENDA

- Reports
- Charts

Overview

Describes basic concepts to develop simple and intermediate reports for Microsoft Dynamics NAV 2013.

Introduces the Report Dataset Designer in CSIDE Development Environment.

Explains how to work with the new Report Designer in Visual Studio 2010.

Report Changes

Section Designer

Replaced by Report Dataset Designer

Classic Client Report fallback enablement

No longer supported

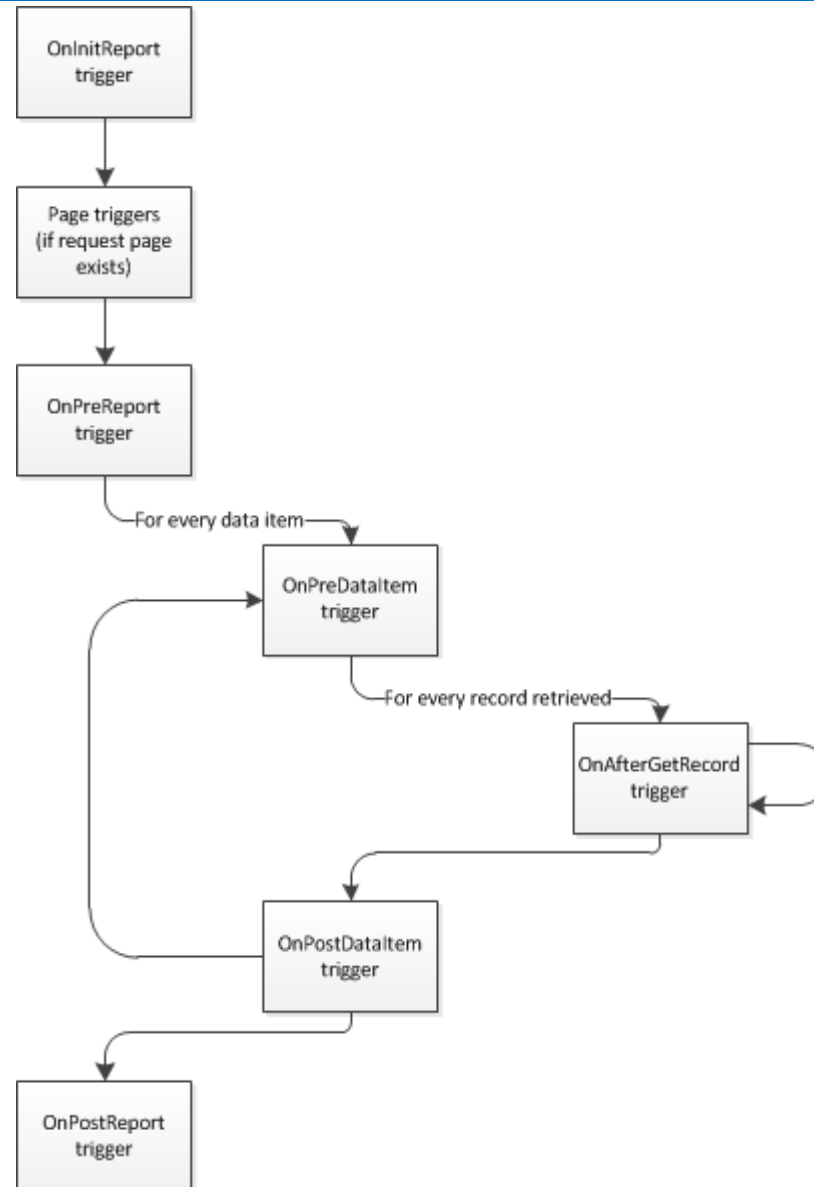
Report Paradigm

Uses RDLC 2008 source syntax with the layout designed using Visual Studio 2010 and rendered into Report Viewer 2010 control

RDLC Development

Add more user interactions with an enhanced user experience

Report Triggers



Creating the Dataset

Introduces the new Dataset design development concept with CSIDE Development Environment.

Creating the Dataset

Dataset concept

Table with Columns and Rows

Report Dataset Designer

Columns

Labels

Include Caption column property

- Design considerations
 - Performance

Expanded	Data Type	Include Caption	Data Source	Name
▶	DataItem		Item Ledger Entry	<Item Ledger Entry>
	Column	✓	"Item Ledger Entry". "Item No."	ItemNo_ItemLedgerEntry
	Column	✓	"Item Ledger Entry". "Posting Date"	PostingDate_ItemLedgerEntry
	Column	✓	"Item Ledger Entry". "Entry Type"	EntryType_ItemLedgerEntry
	Column	✓	"Item Ledger Entry". "Source No."	SourceNo_ItemLedgerEntry
	Column	✓	"Item Ledger Entry". "Document No."	DocumentNo_ItemLedgerEntry
	Column	✓	"Item Ledger Entry". "Description"	Description_ItemLedgerEntry
	Column	✓	"Item Ledger Entry". "Location Code"	LocationCode_ItemLedgerEntry
	Column	✓	"Item Ledger Entry". "Quantity"	Quantity_ItemLedgerEntry
	Column		COMPANYNAME	COMPANYNAME

Creating a simple RDLC Layout

Introduces the basics of RDLC Report
design with Visual Studio 2010

Creating a simple RDLC Layout

RDLC basic concepts

Header/Footer and Body sections

Controls (Toolbox)

Properties

[@NavReportName]		[&ExecutionTime]	
[COMPANYNAME]		[&PageNo]bar	
		[&UserID]	
			Header
			Data

Print Preview

CRONUS International Ltd.

RDLC Course

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Demo Test Item Ledger Entry
CRONUS International Ltd.

7/6/2012 3:18:15 PM
Page 1
EUROPE\idtaoconi

Item No.	Posting Date	Source No.	Document No.	Description	Location Code	Quantity
1100	6/1/2013		START-MANF			200
1110	6/1/2013		START-MANF			400
1120	6/1/2013		START-MANF			10,000
1150	6/1/2013		START-MANF			200
1151	6/1/2013		START-MANF			200
1155	6/1/2013		START-MANF			200
1160	6/1/2013		START-MANF			200
1170	6/1/2013		START-MANF			200
1200	6/1/2013		START-MANF			200
1250	6/1/2013		START-MANF			200
1251	6/1/2013		START-MANF			10,000
1255	6/1/2013		START-MANF			200
1300	6/1/2013		START-MANF			200
1310	6/1/2013		START-MANF			100
1320	6/1/2013		START-MANF			100
1330	6/1/2013		START-MANF			100
1400	6/1/2013		START-MANF			200
1450	6/1/2013		START-MANF			200

Grouping

Explains grouping is typically used to print out aggregates of values in specific report sections.

Grouping

Groups

Used to aggregate data inside the Report Layout

[&NavReportName]		[&ExecutionTime]	
[COMPANYNAME]		[&PageNo]ber	
		[&UserID]	
[&ItemNo_]	[&PostingDa]	[&SourceNo_It	[&DocumentNo_It
[&Description_ItemL	[&LocationCode	[&Quantity]	
edgerEntry]			
		emLedgerEntry]	
edgerEntry]	nLedgerEntry]	emLedgerEntry]	_ItemLedgerEntry]
			on_ItemLedgerEntry]
			emLedgerEntry]
			dgerEntry]
			gerEntry]]

Print Preview

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Demo Test Item Ledger Entry 7/6/2012 5:03:18 PM
CRONUS International Ltd. Page 1
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Item No.	Posting Date	Source No.	Document No.	Description	Location Code	Quantity
1000						
		1000				
1000	9/5/2014	1000	1011001			5
1000	9/6/2014	1000	1011002			27
						32
1100						
1100	6/1/2013		START-MANF			200
		1000				
1100	9/5/2014	1000	1011001			-5
1100	9/6/2014	1000	1011002			-27
1100	9/7/2014	1000	1011003			-16
						152
1110						

Toggle Visibility

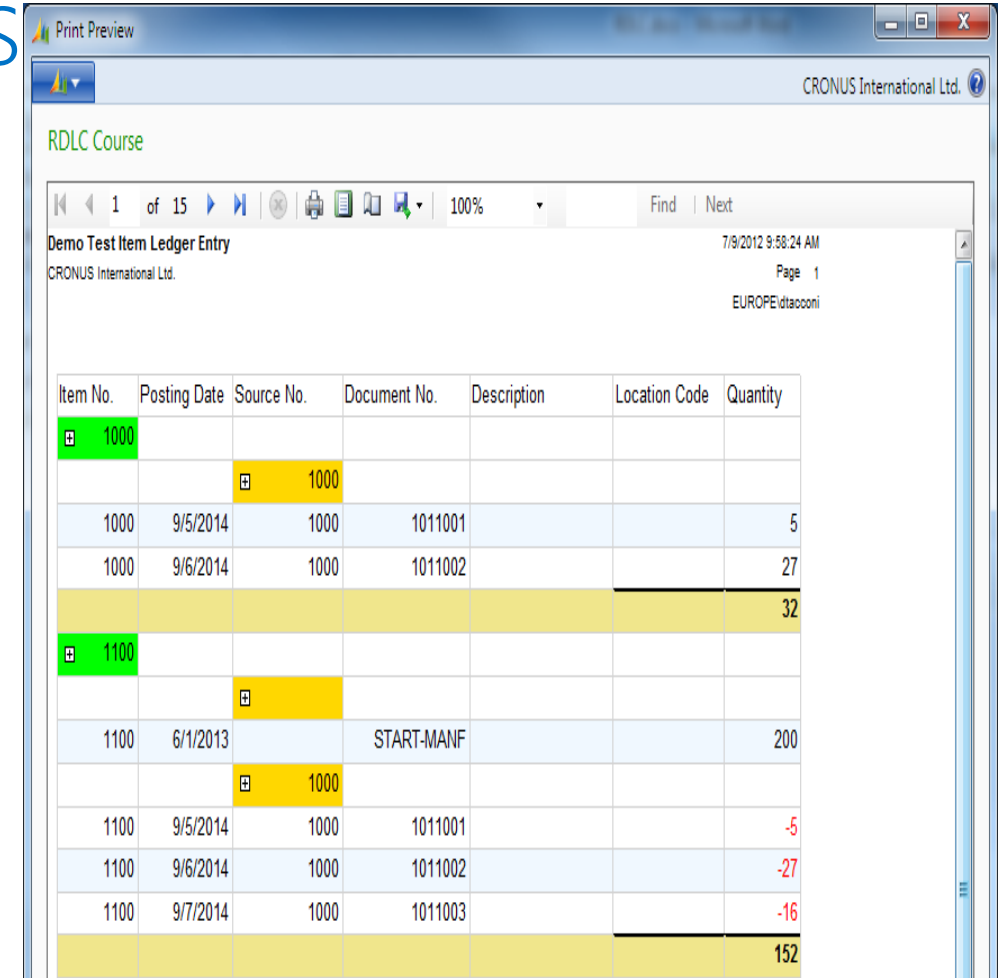
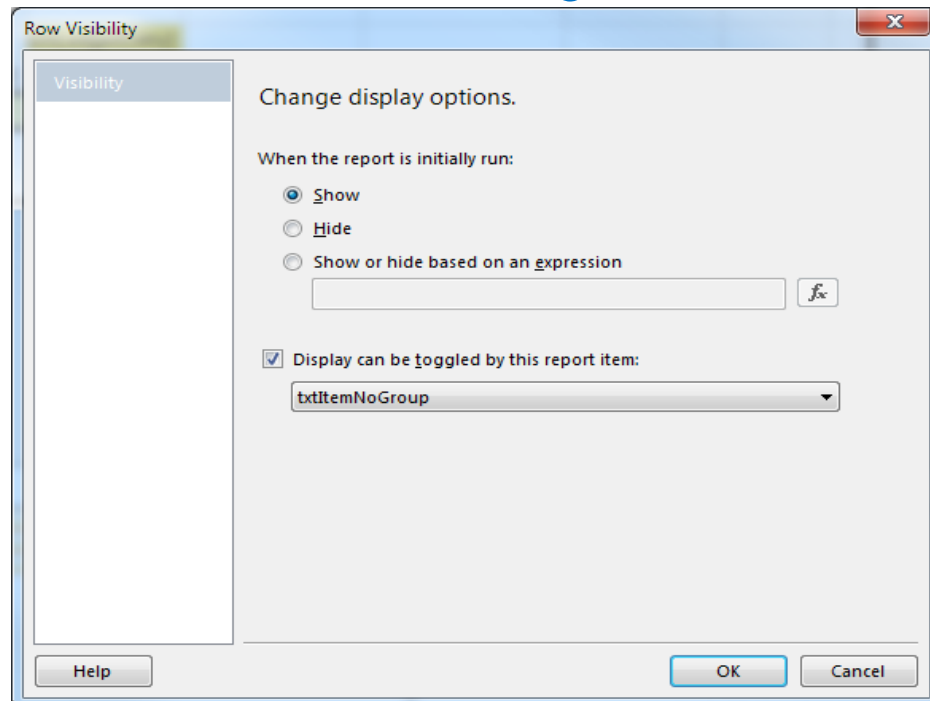
Explains how report layout controls may be toggled for visibility by other controls.

Toggle Visibility

Toggle Visibility with Controls

Add more interactivity to Reports

Maintained in several rendering extensions



The screenshot shows a 'Print Preview' window for a report titled 'Demo Test Item Ledger Entry' by CRONUS International Ltd. The report is dated 7/9/2012 9:58:24 AM, Page 1, and is for 'EUROPEIdtaooni'. The table below shows item ledger entries with columns for Item No., Posting Date, Source No., Document No., Description, Location Code, and Quantity.

Item No.	Posting Date	Source No.	Document No.	Description	Location Code	Quantity
1000						
		1000				
1000	9/5/2014	1000	1011001			5
1000	9/6/2014	1000	1011002			27
						32
1100						
1100	6/1/2013		START-MANF			200
		1000				
1100	9/5/2014	1000	1011001			-5
1100	9/6/2014	1000	1011002			-27
1100	9/7/2014	1000	1011003			-16
						152

Document Map

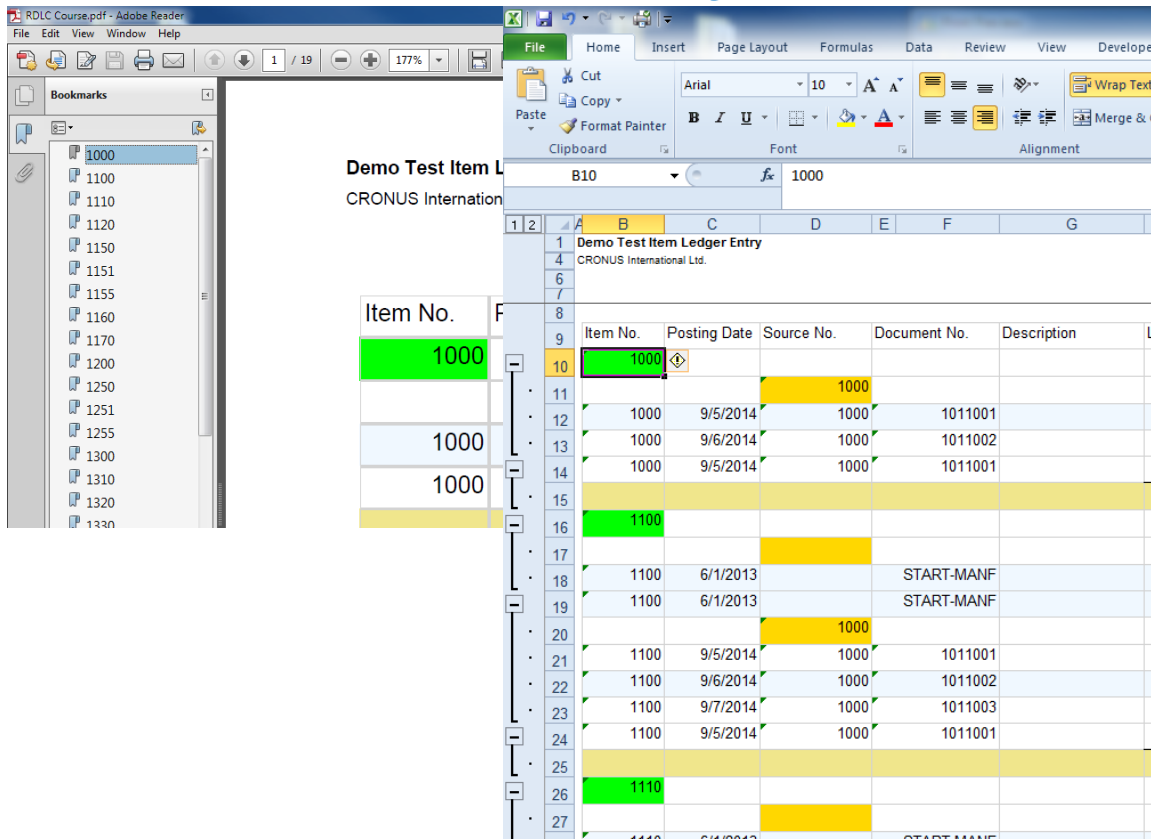
Explains how to create a Table Of Contents in the report to easily locate bookmark positions inside the report with a simple RDLC development.

Document Map

Document Map

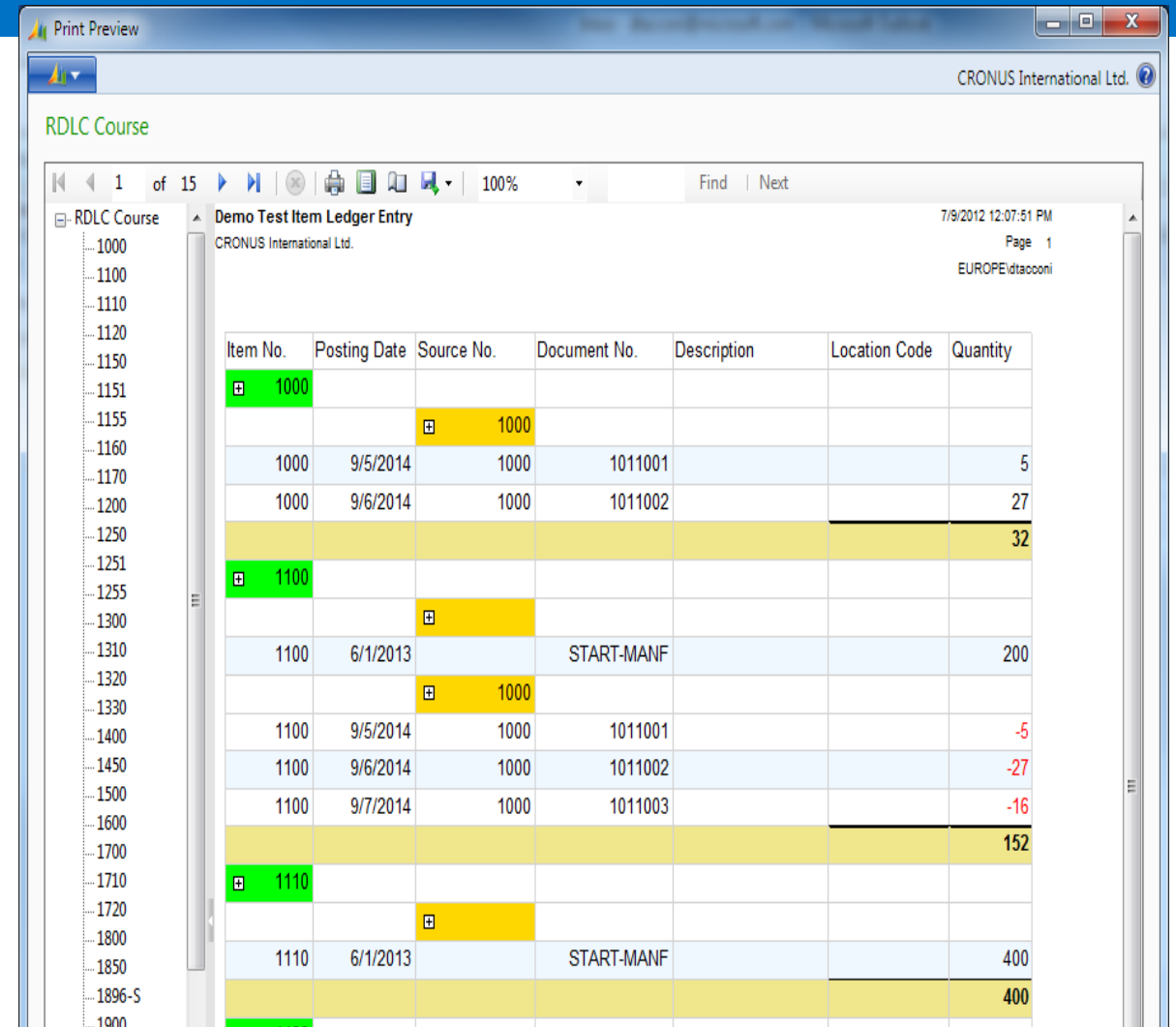
Equivalent to a Table Of Contents

Maintained in several rendering extensions



Item No. Posting Date Source No. Document No. Description Location Code Quantity

Item No.	Posting Date	Source No.	Document No.	Description	Location Code	Quantity
1000						
1000	9/5/2014	1000	1011001			5
1000	9/6/2014	1000	1011002			27
						32
1100						
1100	6/1/2013		START-MANF			200
1100	9/5/2014	1000	1011001			-5
1100	9/6/2014	1000	1011002			-27
1100	9/7/2014	1000	1011003			-16
						152
1110						
1110	6/1/2013		START-MANF			400
						400



Item No. Posting Date Source No. Document No. Description Location Code Quantity

Item No.	Posting Date	Source No.	Document No.	Description	Location Code	Quantity
1000						
1000	9/5/2014	1000	1011001			5
1000	9/6/2014	1000	1011002			27
						32
1100						
1100	6/1/2013		START-MANF			200
1100	9/5/2014	1000	1011001			-5
1100	9/6/2014	1000	1011002			-27
1100	9/7/2014	1000	1011003			-16
						152
1110						
1110	6/1/2013		START-MANF			400
						400

Interactive Sorting

Introduces interactive sorting for almost any of the fields used in the report layout.

Interactive Sorting

Sorting in Report Preview

Can be done roughly on every Column

No need to have SQL Indexes (consider performance)

Item No.	Posting Date	Source No.	Document No.	Description	Location Code	Quantity
.....						

Hyperlink

Explains how embedding a hyperlink to report controls, Microsoft Dynamics NAV Ppages and/or report objects increases interactivity and usability.

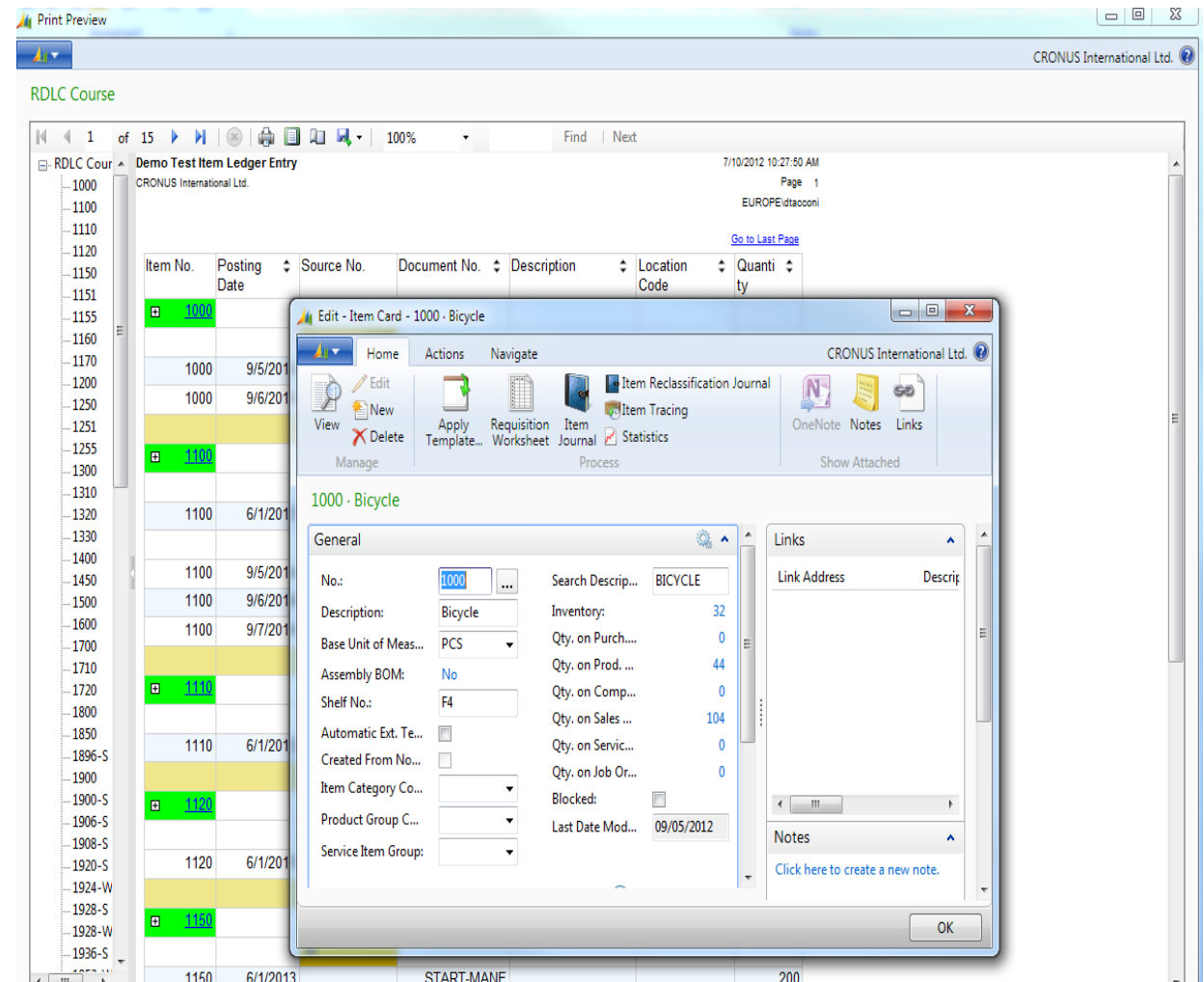
Hyperlink

Hyperlink

Controls, Pages, and Reports

EnableHyperlink Report property

Respected in other rendering extensions



Working with Images

Explains the differences between database, embedded and external image handling.

Working with Images

Images

Database, Embedded and External

EnableExternalImages Report property

Performance considerations

1968-W	12/31/2013		START	YELLOW	10
1968-W	12/31/2013		START	RED	6
1968-W	12/31/2013		START	GREEN	4
1968-W	1/9/2014	30000	105001		-40
1968-W	1/20/2014	35963852	102023	RED	-1
1968-W	1/21/2014	35963852	102027	RED	-1
					-22

Print Preview

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Item No.	Posting Date	Source No.	Document No.	Description	Location Code	Quantity
1100						
1110						
1120						
1150						
1151						

SPK-100	1/23/2014		START	WHITE	78
					78

Demo

- Create RDLC Reports

Charts

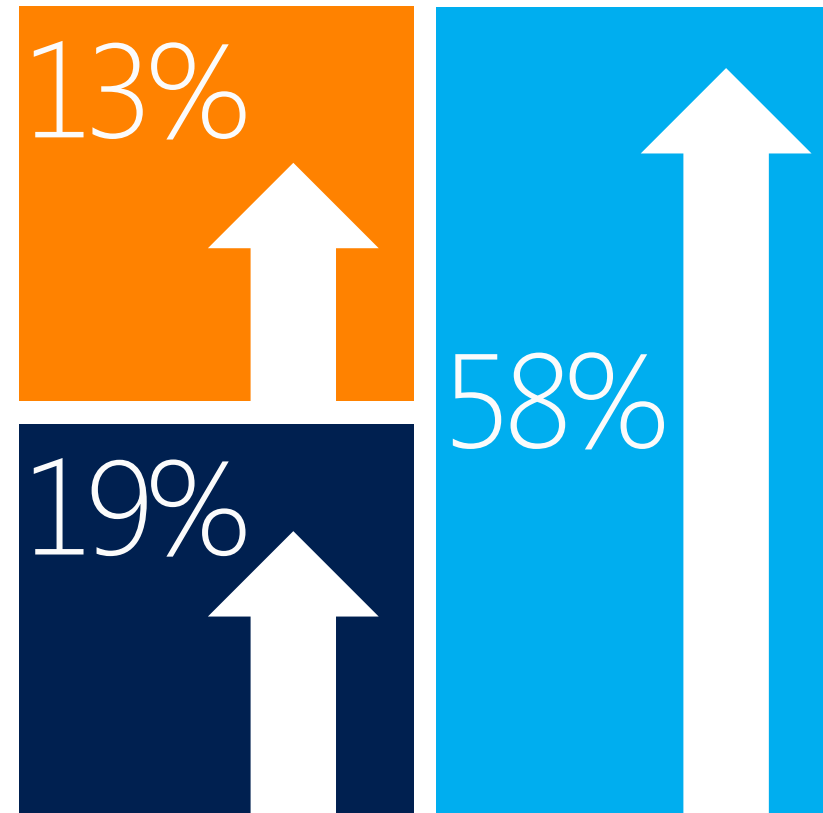
This module discusses how to modify and create charts in Microsoft Dynamics NAV 2013.

Generic charts

Create and modify generic charts
Add charts to the client

Extended charts

The Business Chart add-in Control
Advanced charts

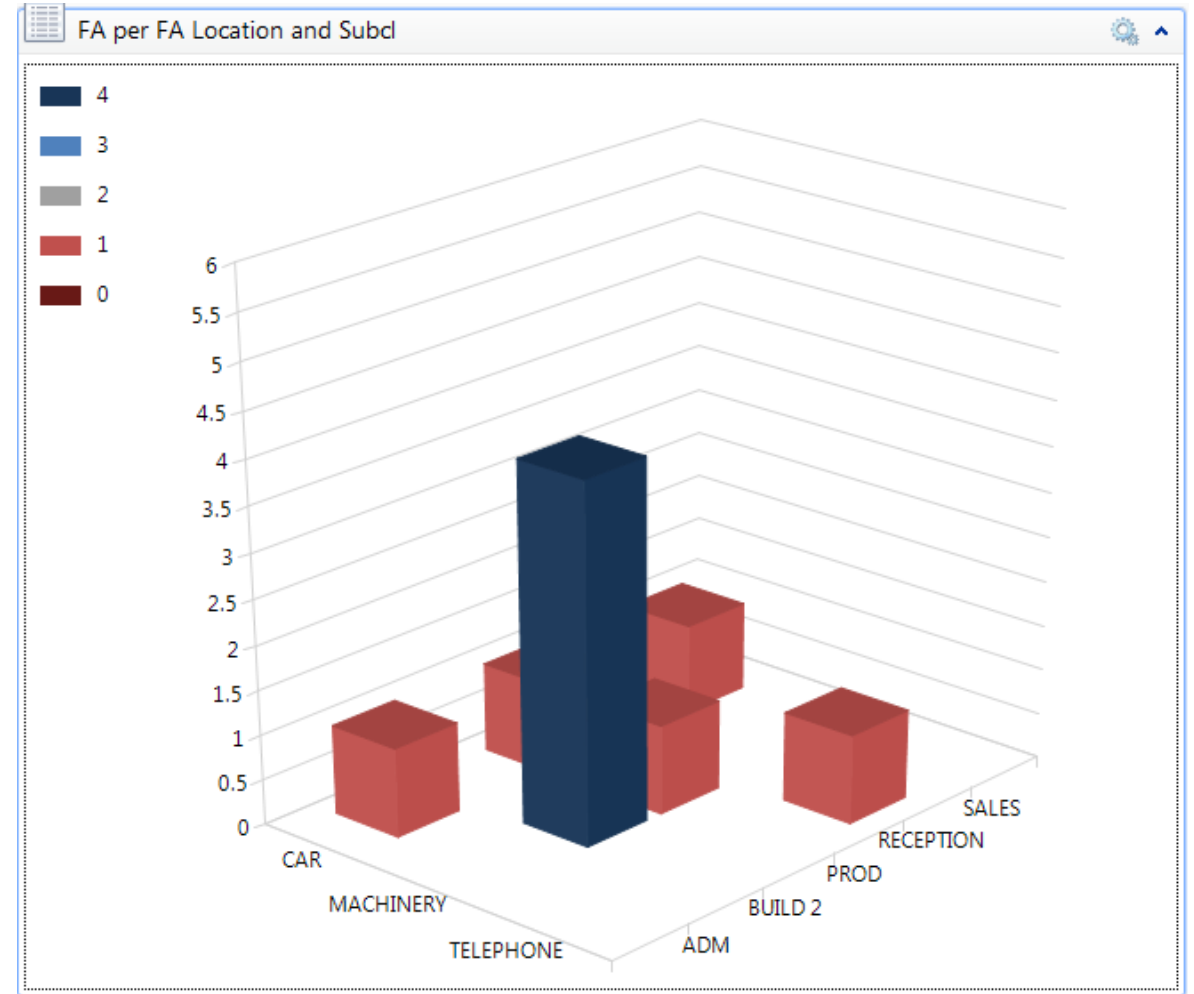


Generic Charts

Simple charts

Automatic coloring

XML definition



Standard Application



Add Chart Parts

Select from approximately 45 charts:

[CRONUS International Ltd./Departments/Administration/Application Setup/RoleTailored Client/Charts](#)

Export as XML

UI to change charts

New in Microsoft Dynamics NAV 2013

Minimum Chart

Must have at least:

One X-Axis – typically a Code field

One or more Measure(s) (=Y-Axis) – typically a Numeric field

Measures either a total field or an aggregate

Balance = Total field

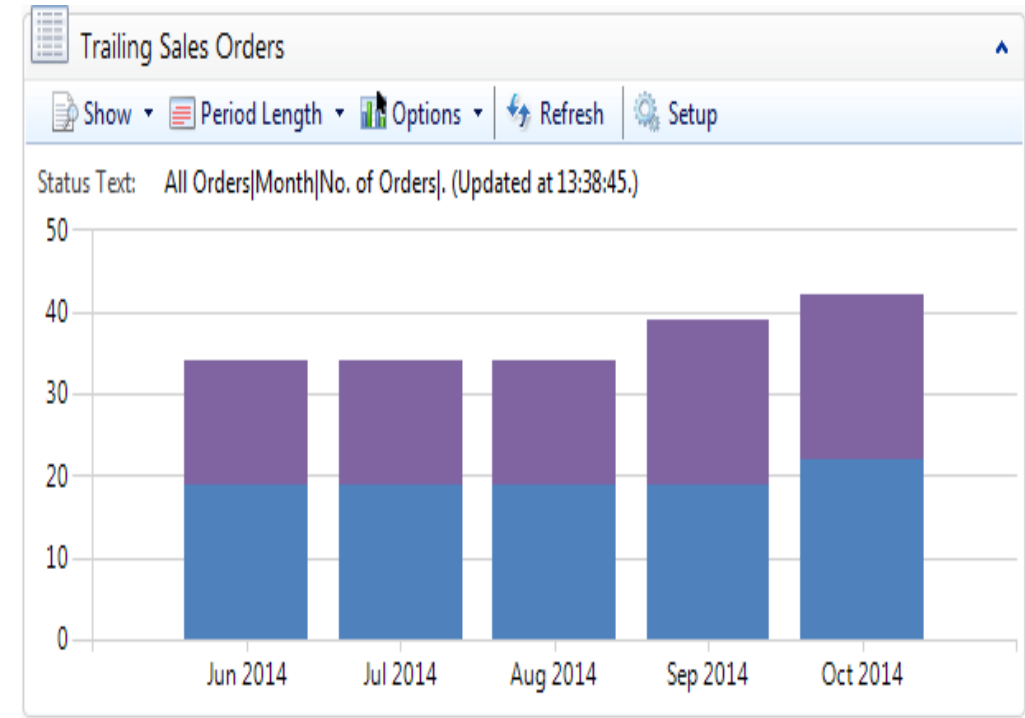
Count = Aggregate field

Demo

- Chart Designer

Extended Charts

Business chart add-in
Trailing Sales Orders
Flexible but Advanced



Summary

Generic charts:
Simple

Business chart add-
in: More options
but complex

Make charts part of
a user friendly RTC



Questions?



Thank

You

Microsoft[®]

Your potential. Our passion.[™]