

## Overview

The page contains information about using the Report Designer to change the appearance of the report layout, as well as building the report design by previewing, printing, saving, and exporting outputs. The report layout is comprised of bands and controls. A band represents a specific area on a report page (e.g., report header, page header, detail, footer, etc.), whereas, controls are the various elements found on a report (e.g., picture box, line, chart, gauge, label, etc.).

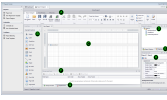
The Report Designer supports advanced customization and configuration of reports. For information on report customizations, viewDynamics documentation and a comprehensive list of Automatic report views, please refer to [Advanced Report Editing](#).

**Note:** Support for editing reports is limited to changes in appearance. While the Report Designer allows you to create new reports from scratch and bind them to data, this functionality is considered to be advanced customization and falls outside of the scope of support.

Media, frame, embed and object tags are not supported inside of a PDF.

## Navigating the Report Designer

Nested inside of the Report Center, the Report Designer allows you to make changes to reports or build your own custom reports. In addition to report editing capabilities, it allows you to preview, print and send the report output to a printer or export it as a file on disk.



The Ribbon is comprised of the menu bar and toolbar to provide quick access to commonly used tasks within the Report Designer. The menu bar contains three different options: Report Designer, Print Preview and HTML View. Each of these options and their features are described in the following sections.

- The Report Designer tab provides the ability to create new reports, load previously saved reports, save reports, edit data sources, and publish report configurations into the Report Center.
- The Print Preview tab displays a print preview of the open report.

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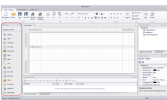
- The HTML View tab displays the report as a web page.

## A. Report Designer Ribbon

The ribbon is comprised of the menu bar and toolbar to provide quick access to commonly used tasks within the Report Designer tab, as well as take you to the Print Preview or HTML View tabs.

## B. Toolbox

The Tool Box lists all available controls that can be added to your report. These controls are generally dragged from the Tool Box and dropped into the report that is currently open in the Report Designer.



The following table lists the available controls and their descriptions in the order that they appear in the Tool Box.

Icon	Control	Description
	Pointer	Show the mouse pointer.
	Label	The most basic Label control is intended to display text in your report. It can represent static or dynamic text, or both. In addition, it can be used to calculate standard summary functions across a data field. The Label text can only be formatted as a whole. So, if it's required to format parts of the text differently, use the Rich Text control.
	Check Box	The Check Box control is intended to display True/False or Checked/Unchecked/Indeterminate states in a report, by displaying (or not) a checkmark, which can be accompanied by a text description.
	Rich Text	The Rich Text control allows you to display formatted text in your report. It can represent static or dynamic text, or both. You can load content to the Rich Text control from an external TXT or RTF file (which can also contain images) and then format any part of it. The formatting options include font face, styles and sizes, and color.
	Picture Box	The Picture Box control is intended to display images of numerous formats in a report. An image can be loaded from an external file, from a bound data source, or from a web location using the specified URL.
	Panel	The Panel control is a container that frames separate report controls to allow them to be easily moved, oriented and pasted, and visually unites them in the report's preview (with borders or a uniform color background).

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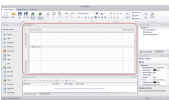
Icon	Control	Description
	Table	The Table control is designed to arrange information in a tabular layout. It may contain any number of rows comprised of individual cells. Both rows and cells can be selected and customized individually. In most reports, a cell is similar to a Label, but can also contain other controls in a Pivot Grid or Line control.
	Line	The Line control draws a line of a specified direction, style, width and color. It can be used for both decoration and visual separation of a report's sections. The Line cannot cross bands, as reported in the Cross-Band Line control.
	Shape	The Shape control allows you to embed simple graphic objects into your report. You can choose one of multiple predefined shapes (e.g., rectangles, ellipses, arrows, polygons, crosses and brackets of various kinds).
	Bar	The Bar Code control transforms its content into a bar code of the specified type. Multiple standard bar code symbologies are supported.
	Zip Code	The Zip Code control transforms its content into a zip code. The width of a zip code's segment is adjustable.
	Chart	The Chart is a sophisticated control used to embed graphs into your report. It graphically represents a series of points using numerous 2D or 3D chart types. A Chart can be populated with points both manually by specifying arguments and values for each point and dynamically (by connecting to the report's data source, or binding it to a separate one).
	Gauge	The Gauge chart, also known as dial charts or speedometer charts, use needles to show information as a reading on a dial. Gauges are used for showing where a value sits within a set range. Gauges are useful for comparing values between a small number of variables either by using multiple needles on the same gauge or by using multiple gauges.
	Sparkline	The Sparkline charts are simple line charts without specific axes and coordinates. This line graph displays the shape of variation in values usually represented over time. Sparklines are not used to show a list of data or to show existing values. They are succinct, memorable and serve as a concise summary of where values are heading. Use these controls for displaying trending data.
	Pivot Grid	The Pivot Grid control represents dynamic data (obtained from an underlying data source) in a cross-tabulated form to create cross-tab reports, similar to pivot tables in Microsoft Excel. Column headers display unique values from one data field, and row headers - from another field. Each cell displays a summary for the corresponding row and column values. By specifying different data fields, you can see different totals. This allows you to get a compact report for a complex data set.
	Page Info	The Page Info control is intended to add summary information and system information (the current date and time, or the report's name) into your report. As with many other controls, you can format this control's content.
	Page Header	The Page Header control's sole purpose is to insert a page identifier at any point within a report.
	Cross-Band Line	The Cross-Band Line control allows you to draw a line through several bands. This can be useful if it is required to visually emphasize a section consisting of multiple band areas. In other aspects, it is similar to a regular Line.

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Icon	Control	Description
	Cross-Band Box	The Cross-Band Box control allows you to draw a rectangle through several bands. This can be useful if it is required to visually encompass a section consisting of multiple band areas.
	Subreport	The Subreport control allows you to include other reports in your current report.
	Table of Contents	The Table of Contents control allows you to generate a table of contents that displays page numbers and links to the elements contained in the document page. This can only be done after bookmarks have been assigned to specific report elements.
	LTBar	The LTBar is a custom control that displays a calculated value on a bar graph. This can be useful if it is required to visually compare information for a series, or group (e.g., average client health status for all locations to a client).

## C. Document Designer

The Document Designer is the main workspace where a report is constructed and previewed. In this workspace control field pairings can be arranged that result in a report.



**Note:** The Document Designer allows multiple reports to be opened at once (each in its own tab).

## D. Report Explorer

The Report Explorer displays a report's structure in tree form, providing easy access to report elements. Once an element has been selected in the Report Explorer, the Property Grid is updated to display the properties available for that element. Additionally, the Report Explorer displays non-visual report components, such as data sources, inside its component nodes.

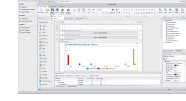
Media, frame, embed and object tags are not supported inside of a PDF.

## Make a Backup Copy of a Report

Before making changes, a backup copy should be created. In the event applied changes break the report, the backup copy allows you to return to the original state of the report.

To save a copy of your report:

- In the Report Center or the Report Designer, click **Report List**.
- Highlight the desired report, and click **Edit Report - Mostly Report**. The report opens in the Report Designer.



- Expand the **Save** options and click **Save As...**
- Specify the location and the name for the saved copy and click **Save**.
- Proceed with making changes to the report.

**Note:** Refer to [Restore a Backup Copy of a Report](#) for more information on restoring from backup.

## Change the Layout of a Report

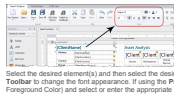
The layout of a report can consist of a variety of bands and each band can consist of a variety of controls. The layout of a report can be changed easily by dragging and dropping the selection into the new position. This only requires the layout and does not change the content. For more information about changing the appearance of a report or its elements, please refer to [Change the Appearance of the Report](#).

This section covers basic operations available for changing the layout of a report, which consists of making selections, moving controls, resizing elements, aligning and positioning controls, and deleting elements.

## Move Controls

To move a control:

- Open the desired report in the **Report Designer**.
- Select and hold the desired control in the report.
- Using your mouse, drag the control to the new location in the report and release.



## Use Styles

Using the Style Editor is practical when changing one or two properties, but it is inconvenient when a series of reports or a collection of elements need the same settings. The appearance of all reports can be quickly modified using styles. Styles, which are governed by style priority and style inheritance, contain all property settings for the selection, and can be used to alter the appearance of your reports.

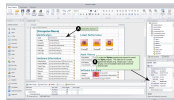
There are styles currently applied to the default report templates. These can be modified or new styles can be created. The best method is to modify the existing styles and then save the style sheet and apply it to all report templates. If you want the same styles for all reports. In the event that Automatic updates the report, you can then reapply the saved style sheet with renewed effect.

**Edit an Existing Style**  
When you open the Style Editor, it loads all of the styles previously saved in the report. If a different style sheet containing other styles needs to be used for the report, you can load that style sheet into the Style Editor. For more information about loading a stored style sheet, please refer to [Load a Stored Stylesheet](#). Otherwise, use the styles available in the Style List, make the needed changes in the Property View, and save the style.

While there are a few ways to access the Style Editor, the preferred method is to go through the Property Grid, since all styles pertain to how the report and/or elements appear, and appearance properties are located in the Property Grid.

To edit a style:

- Open the desired report in the **Report Designer**.
- Select the desired report or the element (control or band) you wish to work with.



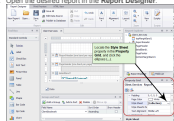
Save the report.

## Load a Stored Stylesheet

Report appearance can be changed simply by applying a different stylesheet that has been saved.

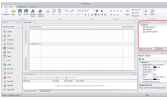
To apply a saved stylesheet:

- Open the desired report in the **Report Designer**.



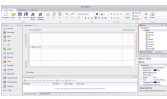
The stylesheet can also be accessed by using the **Smart Tag** in the upper left-hand corner of the workspace.

- From the **Property Grid**, click on the **Style Sheet** options.



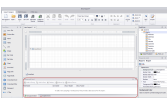
## E. Field List

The Field List window displays the list of all available data fields (attributes you can show in your report) and allows you to create report elements that show information from these fields. When applicable, it allows you to create calculated fields by building expressions based on the values of data fields, report parameter values, etc., and shows existing report parameters, and allows you to add parameters to your report.



## F. Group and Sort

The Group and Sort panel allows you to quickly apply grouping and sorting to your report data. For more information regarding grouping and sorting report data, please refer to [Change the Sort Order of Data](#).

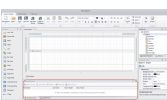


## G. Script Errors

The Scripts Errors panel displays the validation results of any scripts that have been written for a report or any of

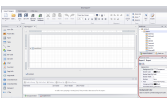
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its elements. To get the corresponding line of code, click the corresponding item in the panel's list. While the Report Designer allows you to create scripts, this functionality is considered to be advanced customization and falls outside of the scope of support.



## H. Property Grid

The Property Grid allows you to change the settings of the currently selected report element. For more information about making changes to properties, please refer to [Change Appearance of the Report](#).



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## Report Band Basics

A report is comprised of bands and the controls they contain. A report band represents a specific area on the page of the report. It is used to define how to render report controls that belong to a Report band. Bands are represented by parts of the design service, divided with colored strips that display the band names. By default, every report starts with three basic bands: TopMarginBand, DetailBand and BottomMarginBand. Refer to the following table for the different types of bands that are available.

Band	Description
TopMarginBand	Located on the top margin of every page above the PageHeaderBand and ReportHeaderBand.
DetailBand	Located at the beginning of a report. This band is intended to display introductory information about the report (e.g., cover page for a report).
PageHeaderBand	Located at the top of every page, below the TopMarginBand or ReportHeaderBand. This band is intended to display page numbers or a table header, continued from the previous page.

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To align controls:

- Open the desired report in the **Report Designer**.
- Select the desired controls and then select the desired formatting option from the **Alignment** section of the **Toolbar**.

**Tip:** Hover over each of the alignment options for a description.

## Position Controls

Control width, height and spacing between controls can be changed quickly make the controls consistent throughout your report layout, using the Layout options in the **Toolbar**.

To change the width, height or spacing of controls:

- Open the desired report in the **Report Designer**.
- Select the desired controls and select the desired layout option from the **Layout** section of the **Toolbar**.

**Tip:** Hover over each of the layout options for a description.

## Delete Elements

Deleting a report element removes the element from the report.

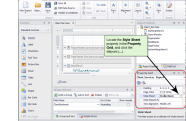
**Note:** Certain elements cannot be deleted (e.g., detail bands).

- Open the desired report in the **Report Designer**.

## Create a New Style

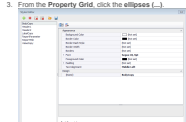
To create a new style:

- Open the desired report in the **Report Designer**.
- Select the desired **Report** or the **Element** (control or band) you wish to work with.



The stylesheet can also be accessed by using the **Smart Tag** in the upper left-hand corner of the workspace.

- From the **Property Grid**, click the ellipses ( ... )



Click on the **Add Stylesheet** button. A new style, **contentType1**, is added to the list of styles.

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Band	Description
GroupHeaderBand	Located at the beginning of every group or at the top of the page. In case it is split across pages, this band specifies grouping criteria and is used to display information at the beginning of a group of records.
DetailBand	Located on a page between all other bands. This band displays a single record (from the bound data source) at a time, or simply holds unbound controls that there is no data source assigned to a report.
DetailReportBand	Located between the <b>DetailBand</b> and is intended to hold the detail report when creating a master-detail report. The master-detail relationship for this detail report is specified by the <b>MasterDetailRelationship</b> property.
GroupFooterBand	Located at the end of every group or at the bottom of the page. If a group is split across pages, this band is primarily intended to show summary information for a group.
ReportFooterBand	Located at the end of the report. This band is intended to display page information (e.g., report totals).
PageHeaderBand	Located at the bottom of every page, below the ReportFooterBand and above the BottomMarginBand. This band is intended to display page numbers or a table header, which has been continued on the following page.
BottomMarginBand	Located at the bottom margin of every page, below the PageHeaderBand.
Subband	Provides a hierarchical copy of the source band. Any number of subbands can be added to the report band of any type, except for the <b>MarginBand</b> and the <b>Subband</b> itself.

The ReportHeader and ReportFooter bands are rendered in the report preview only once.

The GroupHeader and ReportFooter bands are rendered for every group of records in a report.

The number of times the Detail band is rendered in a report depends upon the number of records returned from the bound data source - one band per record.

## Create a Basic Computer Report

While creation of custom reports is considered to be advanced use and falls outside of the scope of support, a basic report has been provided for use with the computer report. The Computer Base Template is included in the solution and has the following features:

- Basic starting dataset
- Initial subreport linkage (SubReportHeader and SubPage Footer)
- Default Automatic style sheet
- Short summary of computer information in the Design panel.

Band	Description
TopMarginBand	Located on the top margin of every page above the PageHeaderBand and ReportHeaderBand.
DetailBand	Located at the beginning of a report. This band is intended to display introductory information about the report (e.g., cover page for a report).
PageHeaderBand	Located at the top of every page, below the TopMarginBand or ReportHeaderBand. This band is intended to display page numbers or a table header, continued from the previous page.

- Right-click on the desired element and select **Delete** to select the desired element and press the **[Delete]** key.

## Change the Appearance of the Report

Changes in the appearance of a report or elements are driven by properties. The most basic changes to appearance center around fonts, which can be adjusted using the Font section of the **Toolbox** or the **Property Grid**. User preference typically determines where basic changes are made. The **Property Grid** provides a way to change the appearance of the overall report, or elements within the report. The **Property Grid** is the most practical approach if you only need to change one or two properties. However, it is inconvenient when a series of reports or a collection of elements need to be changed. The appearance of all reports and/or elements can be quickly modified using styles. Styles take the guess work out of formatting the appearance of a report or element, because it applies a consistent configuration. These styles can be customized for whole reports, bands or controls, and saved within the report, or as an external file, known as a style sheet, that can be applied to multiple reports.

Each option is explained further in the following sections of this document.

## Change the Font Appearance

The font face, size, color, weight, etc. can be modified to alter the appearance of your report. The font appearance can be changed using the Font section of the **Toolbox** or using the **Property Grid**. Font appearance can also be changed using styles. Styles are recommended when a series of reports or a collection of elements require the same change. Styles allow you to make the change once. For more information on using styles, refer to the [Use Styles](#) section of this document.

**Note:** At default report templates have styles associated with each element (e.g., body, label, header, etc.) of the report. The font appearance can be changed manually; however, it is not recommended if you are making changes to multiple elements or multiple reports. It is recommended to change the style sheet so all instances of that style type are changed at once. If an element is changed manually and you update the style sheet, the element that you changed is not updated. If you are only changing one or two elements for a single report, it is recommended to use **Style Priority** instead. Refer to [Save Priority](#) for more information.

To change the font appearance:

- Open the desired report in the **Report Designer**.



- Select the new style in the **Style List** (e.g., **contentType1**).
- Locate the property you want to edit (e.g., **Foreground Color**) and select the setting from the available options in the **Property View**.
- Verify the appearance of the style configuration in the **Style Example View**.
- Repeat steps five and six for any other properties you want to change for the selected style.
- Change the Name property to a name to describe the style (e.g., **BodyCopy2**).
- Note:** When planning to make the same style changes to the appearance of many reports that are designed to look uniform, it is convenient to save the collection of styles to an external file, known as a style sheet, in the **RPSS** format. This file can be loaded into the Style Editor and applied to any report. For more information about loading a stored style sheet, please refer to [Load a Stored Stylesheet](#).
- Click the **Save** button to save the style collection as an external file (recommended), known as a style sheet or click **Close** to save the style changes to the report and return to the **Report Designer**.

## Apply a Style to an Element

All default Automatic report templates already have styles defined and it is not necessary to apply a style. The only time you need to apply styles is if you have created a new style and it needs to be associated with the element or if you want to change the style of a particular element.

To apply a style:

- Open the desired report in the **Report Designer**.
- Select the element(s) you want the new style to apply to.
- In the **Property Grid**, scroll down to the **Styles** property and expand to reveal the **Style** property. The style that is currently applied is displayed. Click on the style to display a list of available styles and then select the desired style.

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