## **Document Creator**

Document Creator is an add-on for developing report layouts in Microsoft Dynamics 365
Business Central. It makes report layouts easy to edit, saving a lot of time on report
development. By the intuitive report designer and separation of code and layout, also end-users
without technical knowledge can make changes to report layouts.

Document Creator includes an easy-to-use standalone report designer (based on proven technology, used since 1998, in >50 countries, by >20K users) enhanced with various features tailored to support natural and efficient report development for Dynamics 365 Business Central. The report designer is rich in functionality, think of the following features:

- · Easily add fields and controls via drag & drop,
- Generate barcodes from a field/expression, with support for a large number of barcode types (including, but not limited to, Code39/93/128, EAN-8/13/128, UPC-A/E0/E1 and QR codes)
- Preview changes directly with data from Dynamics 365 Business Central,
- Export to various output file formats (including PDF, Word, Excel),
- Render HTML embedded in Text-objects,
- Use advanced controls, including Scalable Vector Graphics (SVG), Subreports, Shapes,
   Charts and Rich Text.

Document Creator includes a Report Translations feature which supports the development of multilingual reports adding translations as data. Running reports that utilize this feature will automatically populate the translation table with new records for missing translations. Report translations can be flexibly edited by end-users on the Document Creator Translations page.

On top of that, Document Creator Export Profiles can be used to fine-tune export settings for reports with a Document Creator layout. Export reports as interactive PDF forms, change the quality of images and vector graphics, or specify whether Excel exports of a report should include the headers and footers.

Watch the video and discover all the benefits of Document Creator in less than 15 minutes.

Learn more about how to install and use Document Creator:

- Installation Manual
- User Manual

# Changelog

### Extension

### 1.14.0 (2020-03-20)

- Updates to target application 16.0 (Dynamics 365 Business Central 2020 release Wave 1)
- Added action "Check License" to Document Creator Setup page for Production environments
- On-premise only: License check now also reports mismatch of the active and licensed BC Serial No.

### 1.12.0 (2020-02-14)

- The demo/trial version is now active in Sandbox environments, also without a product key.
   Reports generated from a Sandbox environment will have a **DEMO** watermark.
- A new setting "Format Locale" is available on the Document Creator Setup page. With this setting you can specify regional settings, such as date and numeric format, that Document Creator should use.
- Show a message to on-premise users to inform about the requirement to install the additional "Document Creator On-Premise" extension for on-premise usage.

### 1.10.0 (2019-12-13)

- When a Product Key is entered on the Document Creator Setup page, new-lines and spaces are stripped from the entered string.
- Overriding report actions via a Document Creator Export Profile has been deprecated and removed.

## 1.8.0 (2019-11-28)

· Initial public release.

## Report Engine

### 1.17.0 (2020-02-13)

- Added a demo/trial version of the report engine that will produce reports with a **DEMO** watermark.
- Added option to change the format culture that will be used by the report engine.
- Fixed issue with the **PrintOnBottom** property not working as expected in some cases, e.g., in combination with **RepeatOnEveryPage** property.
- The standalone designer now properly refreshes datasources, relations and parameters and also sorts the columns in alphabetical order again.

### 1.16.0 (2020-01-20)

 Fixed an issue with decimals not being parsed correctly when reports were printed under a region with decimal formatting different from the report engine server.

### 1.15.0 (2019-11-20)

· Initial public release (for BC SaaS).

## **Templates**

### 1.6.0 (2020-02-13)

- Added a variety of columns and labels to the report objects.
- Fixed an issue with the Format-property of the TotalAmountInclVAT TextObject.
- Applied the LineHeightAuto property to a majority of the layout TextObjects.

### 1.4.0 (2019-10-22)

· Initial public release

# Installing the Extension

To install the **Document Creator** extension for Dynamics 365 Business Central, please follow the following steps:

- 1. Go to Setup & Extensions > Extensions
- 2. Open the extension marketplace (AppSource) via: Manage > Extension Marketplace
- 3. Search for "Document Creator" (By WSB Solutions BV)
- 4. Take note of the End-User License Agreement and Privacy Statement
- 5. Choose "Free Trial", enter your details, and follow the further steps in the Extension Installation page



#### **Attention**

After the installation, all active users must sign out and sign in again to see the navigation changes from the Document Creator extension.

# Permission Configuration

Once the Document Creator extension has been installed, a DOCUMENT CREATOR permission set will have been added automatically. This permission set (or a customized/derived one) should be assigned to the relevant users or user groups.

To assign the DOCUMENT CREATOR permission set to users:

- 1. Use the *Tell Me* search feature ('magnifier-button in the top-right') to search for and open up the **Users** page.
- 2. Select the user that you want to assign permissions to. Any permission sets that are already assigned to the user are displayed in the **Permission Sets** factbox.
- 3. Invoke the **Edit** action to open the **User Card** page.
- 4. On the **User Permission Sets** FastTab, add a new record with **Permission Set** set to DOCUMENT CREATOR.

For more information on how to configure permissions, please refer to the Dynamics 365 Business Central documentation - Managing Users and Permissions.

# Setting up your Product Key



#### Attention

If you do not have a product key for your tenant, then you can use the Demo/Trial version of Document Creator in a Sandbox environment. Please find more information on the licensing and pricing on our website.

To order a product key for the full version of Document Creator, please contact us providing your Tenant ID, which can be copied from the alike named field on the Document Creator Setup page.

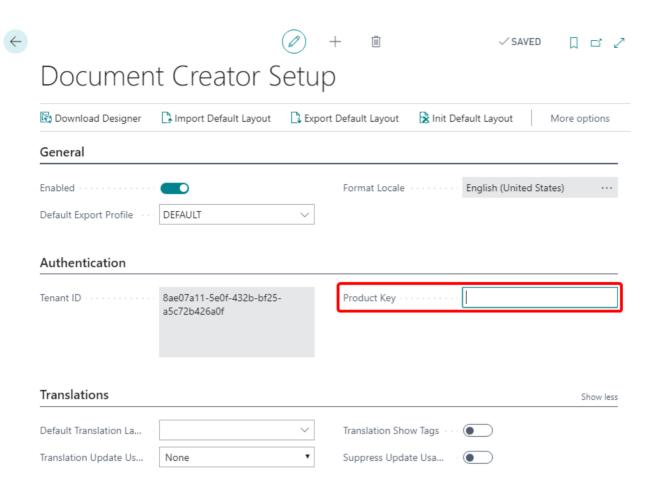
Before you can run reports with a Document Creator layout in a Production environment of your tenant, you will need to configure your product key in the **Document Creator Setup** page.



#### Note

You can find the Document Creator Setup page under Setup & Extensions > Manual Setup, or you can search for the page using the Tell Me search feature in Dynamics 365 Business Central.

You can enter the product key that you received for your tenant in the Product Key field of the Authentication group:



# Installing the Designer

To edit Document Creator layouts you can use the Document Creator Designer. This is a standalone application that can be installed locally on a Windows PC. Every time the application is started it will automatically check for and install updates when they are available.

# Document Creator Setup



#### To install the designer:

- 1. Invoke the **Download Designer** action on the **Document Creator Setup** page.
- 2. Download the .application file and wait for the download to complete.
- 3. Run the .application file to start the installation, and follow the steps in the installer.



#### Attention

Depending on the configurations on your workstation/PC, you may initially be blocked from installing the application, e.g., due to restrictions implied by the configuration of the ClickOnce Trust Prompt or Windows Defender SmartScreen. Please contact your system administrator if you need help to resolve any issues of this nature.



#### Note

The Document Creator Designer is not included in the Demo/Trial version of Document Creator on Microsoft Dynamics 365 Business Central (SaaS). To explore the features of the Designer you can also check out the Document Creator Designer Demo.

# Default Layout

When you create a new Document Creator custom report layout, the **Default Layout** will be used as the initial contents of the layout. The *standard* default layout includes a page header with the report title, company name, date, page numbering and user ID, and contains a set of styles that can be applied to controls in the report layout.

# Document Creator Setup



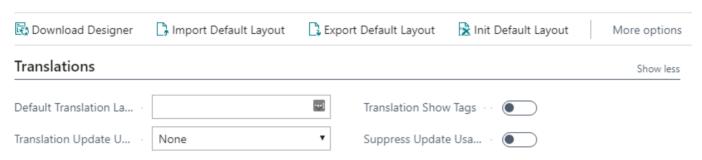
The default layout can be changed using the actions in the **Document Creator Setup** page:

- Export Default Layout: Export the layout that is currently in use as the default layout to a Document Creator Layout File (.dcrx).
- Import Default Layout: Import a new Document Creator layout to use as the default layout from a Document Creator Layout File (.dcrx).
- Init Default Layout: Initialize/reset the default layout to the standard default layout.

# **Translation Settings**

Document Creator offers its own Report Translations feature, which helps to create multilanguage reports and customizable labels. It ensures that labels can be customized by the enduser/customer and not just Dynamics 365 Business Central extension developers. That is, the translations are stored in a table and can be edited in the **Document Creator Translations** page.

# Document Creator Setup



The behaviour of the Document Creator translation feature can be configured in the **Document Creator Setup** page through the settings available in the *Translations* group. The following settings are currently available to adjust how tags are translated:

## Default Translation Language

The **Default Translation Language Code** field specifies which language will be treated as the default language. This means that if the default language is set to a language  $X <> \ ' \ '$ , then if a **Default Translation** is provided for a **Tag**, then this translation will also be used as the translation for the language with code X.

## Update Usage Method

The **Translation Update Usage** field specifies whether the *Last Used* and *Last Used by Report ID* fields are updated. The following options can be selected for this setting:

| Option                       | Explanation  |
|------------------------------|--|
| None                         | The "Last Used" field of translation records is NOT updated.   |
| Last Used                    | Only the "Last Used" field of a translation record is updated when the translation of its tag is requested.                              |
| Last Used & Last<br>ReportId | Both the "Last Used" and "Last Used by Report ID" field of a translation record is updated when the translation of its tag is requested. |



#### Caution

Setting the **Translation Update Usage** field to anything other than "None" may affect performance. By default you will receive a warning message when a translation is requested and codeunit wDCR\_TranslationMgt still needs to be initialized, which can be surpressed by enabling the **Suppress Update Usage Warnings** setting.

# **Show Tags**

When the **Translation Show Tags** setting is checked, the Document Creator Translations module will return tag names (surrounded by angle brackets, e.g., <Amount>) instead of translations when they are requested. This can be particularly useful for debugging.

# Templates

Document Creator provides a set of templates for reports, layouts and translations which can be downloaded via the following link:

Document Creator Templates

The Document Creator Templates package includes the following files:

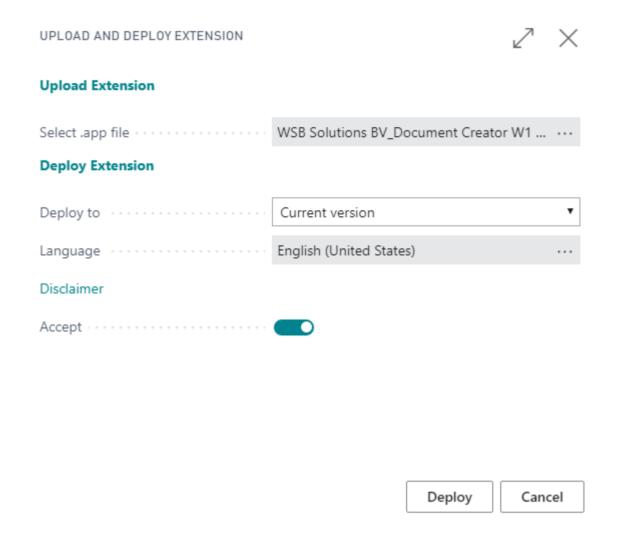
| Filename  | Description   |
|---|---|
| DCR_Translations.rapidstart                           | A RapidStart configuration package with report label translations for the W1-based report templates for language codes $$ DEU , $$ ENG , $$ ENU , $$ FRA , $$ NLD . |
| Document Creator W1<br>Templates.Source.zip           | A ZIP file containing the source code of the Document Creator W1 Templates extension.   |
| LayoutPackage_W1.dcr                                  | A Document Creator Layout Package for the reports in the Document Creator W1 Templates extension.   |
| WSB Solutions BV_Document Creator<br>W1 Templates.app | The Document Creator W1 Templates extension.  |

## W1 Templates Installation

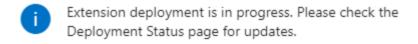
To install the W1 Template reports and corresponding layouts, please follow these steps:

- 1. On the Home Page, select the **Setup & Extensions** dropdown
- 2. Select **Extensions**, this will open the **Extension Management** page.
- 3. Invoke the **Manage** > **Upload Extensions** action, this will open the **Upload and Deploy Extension** page.
- 4. Select the WSB Solutions BV\_Document Creator W1 Templates\_<version>.app file via the AssistEdit-button of the **Select.app file** field.
- 5. Enable the **Accept** toggle.

## 6. Select **Deploy**.

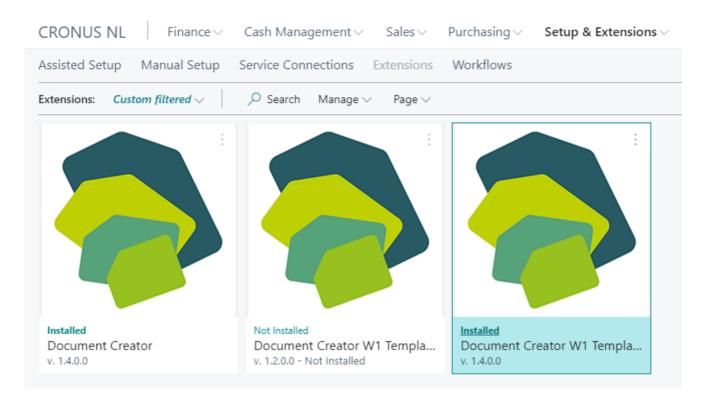


7. Wait for the extension to be deployed. A message should show up to inform you that the extension deployment is in progress.



OK

8. Once the deployment has finished, the *Document Creator W1 Templates* extension will show up in the **Extension Management** page. If a previous version was installed, you will see the previous version has been uninstalled and the new version is now installed.

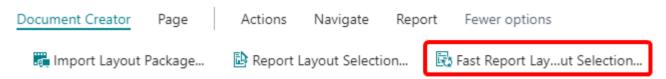


- 9. Use the Tell Me search feature to search for and open up the Custom Report Layouts page.
- 10. Invoke the **Document Creator** > **Import Layout Package...** action and select the LayoutPackage\_W1.dcr file to import the layouts. See Layout Packages.

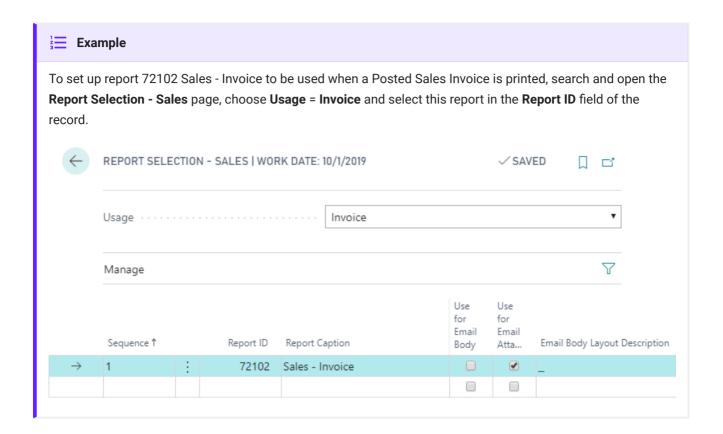
CUSTOM REPORT LAYOUTS - 117 REMINDER | WORK DATE: 10/1/2019



11. Select the newly imported layouts and use the **Fast Report Layout Selections...** action to configure the layout selections for the reports. See Fast Report Layout Selection Action.



12. To have the W1 Template reports used when your documents are printed, you need to configure *Report Selections* for each document type. You can configure report selections in the **Report Selection -** \* pages in Dynamics 365 Business Central.





#### 1 Info

The **Document Creator W1 Templates** extension includes reports for the following documents:

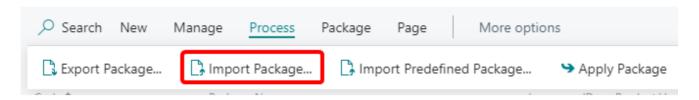
- · Sales
  - Quote
  - Order Confirmation
  - Invoice
  - · Credit Memo
  - Shipment
  - Return Order
  - Return Receipt
  - · Draft Invoice
- Purchase
  - Quote
  - Order
  - Invoice
  - · Credit Memo
  - Receipt
  - Return Order
  - Return Shipment
- Reminder

## Translation Package Installation

To import the template translation package, please follow these steps:

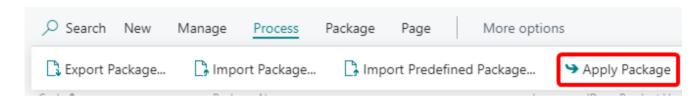
- 1. Use the Tell Me search feature to search and open the Configuration Packages page
- 2. On the page, invoke the **Process** > **Import Package...** action and select the DCR\_Translations.rapidstart file.

#### CONFIGURATION PACKAGES | WORK DATE: 10/1/2019



- 3. Wait for the package to be imported.
- 4. On the page, invoke the **Process > Apply Package** action and confirm.

#### CONFIGURATION PACKAGES | WORK DATE: 10/1/2019



- 5. Wait while the package is being applied. You should receive a message that the records are inserted/modified without errors.
- 6. Open the **Document Creator Translations** page. Here you can verify that the translations from the package are now indeed added.

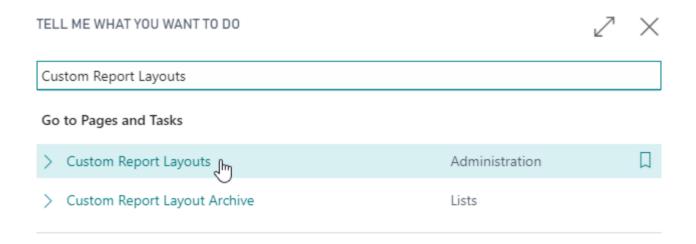
# **Getting Started**



#### Attention

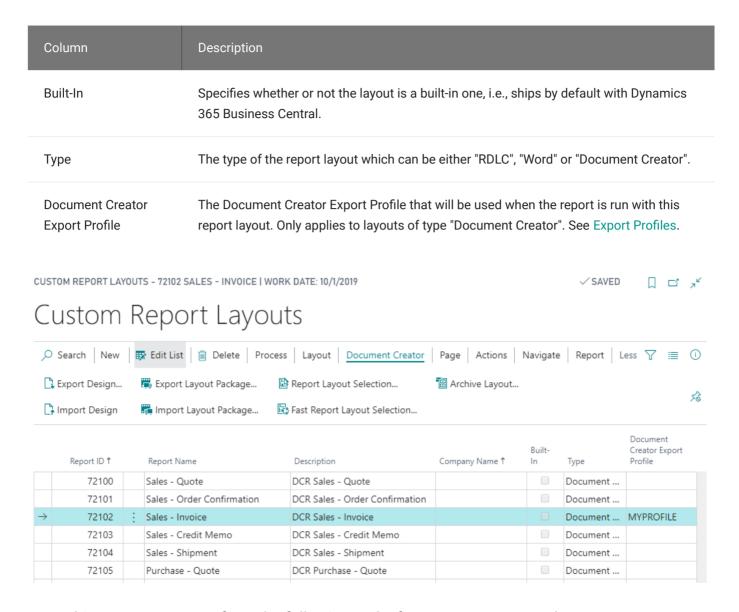
Before you start using Document Creator, please make sure you have completed the steps in the Installation Manual. The **Product Key** needs to be set up to run reports with a Document Creator layout.

In the Dynamics 365 Business Central client use the *Tell Me* search feature to navigate to the **Custom Report Layouts** page as follows:



The **Custom Report Layouts** page shows a list of all the custom report layouts in your Dynamics 365 Business Central environment. By default, the page shows the following columns for the layout records:

| Column       | Description  |
|--------------|--|
| Report ID    | The ID of the target report object. The report object defines how the report dataset is generated in code. |
| Report Name  | The name of the target report object.  |
| Description  | A description of the report layout.  |
| Company Name | The Dynamics 365 Business Central company that the report layout applies to.                               |



From this page you can perform the following tasks for Document Creator layouts:

- Creating and Copying Layouts
- Editing Layouts using Design Files
- Importing and Exporting Layout Packages
- Archiving and Restoring Previous Versions of Layouts
- Configuring Layout Selections
- Creating Support Files

# Creating and Copying Layouts

## Creating a New Layout

A Dynamics 365 Business Central report is made up of the following two components:

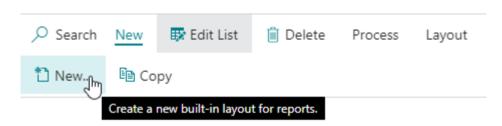
- Report Object: A report object defines the report dataset (i.e., based on the report schema, which include the dataitems, fields/columns and parameters) and request page. Its definition is found in the code of a Dynamics 365 Business Central (AL) extension.
- Layout: A layout defines how the report dataset should be presented when printed or exported to a file. You can use a report designer to edit the layout of a report.

To create a new report layout, you first need to have a report object that the layout will target. You can use one of the report objects from the Microsoft Base Application, use a report object from our W1 Report Templates extension (see Templates), or from any other extension.

If you have a report object, then you can create a new *Document Creator* layout for the report on the **Custom Report Layouts** page as follows:

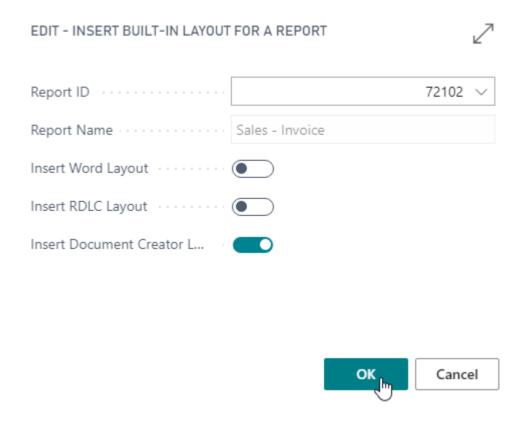
1. Invoke the New... action.

#### CUSTOM REPORT LAYOUTS - 117 REMINDER | WORK DATE: 10/1/2019



- 2. Enter/Select the **Report ID** of the target report object.
- 3. Enable Insert Document Creator Layout.
- 4. Select OK.

The figure below shows the inputs on the **Insert Built-In Layout** page to create a new Document Creator layout for report 72102 Sales – Invoice:



A new record will have been created with "Document Creator Layout" as the default description. You can change this description to a more descriptive name of your liking.



## Copying a Layout

To copy a layout from an existing Document Creator custom report layout record to a new record on the **Custom Report Layouts** page, follow these steps:

- 1. Select a custom report layout record from which to copy the layout.
- 2. Invoke the **Copy** action
- 3. By default the **New Layout Description** will be set to "Copy of <Original Description>". You can freely change this description. (Optional)
- 4. You can also change the target report object for the new layout if you enable the **Change Dataset** option. If this option is enabled, you can enter/select the **Report ID** of the new target report object. (Optional)
- 5. Select **OK**.

## 

A new record will have been created containing a copy of the layout of the earlier selected record.



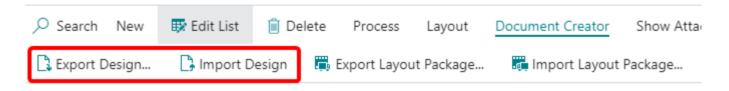
#### Caution

If you enable the **Change Dataset** option and change the target report object, then please take into account that the schema of the report objects might be different. Therefore, the layout may not work directly, which means you will need to edit it first to make sure it matches the new schema.

# **Editing Layouts**

## Editing Layouts using Design Files

On the **Custom Report Layouts** page you will find an **Export Design** and **Import Design** action (within the *Document Creator* category). These actions can be used to export and import a "Document Creator Design File (.dcrd)" for the record selected on the page.



Please note that these actions are only supported for Document Creator layouts. If you attempt to use these actions for any other layout type, such as RDLC or Word, an error message will be shown.

### **Export Design**

To start editing a layout, you will need to export the layout in a Design file that you will open in the Document Creator standalone report designer. If you do not have the designer installed yet, then please follow the installations instructions at the Installing the Designer page.

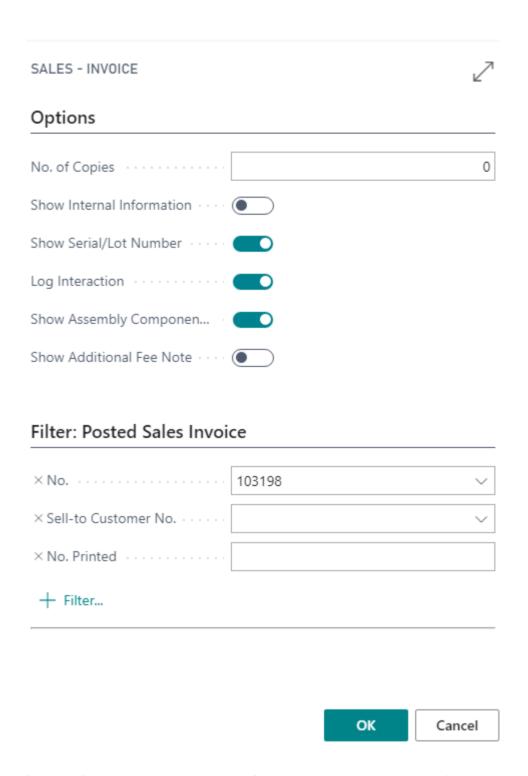
To export a layout to edit it in the designer, follow these steps:

- Select the Custom Report Layout record.
- 2. Invoke the **Export Design...** action.
- 3. The **Export Design** dialog page opens.

On this dialog page you will find the option *Edit with Data* (which is enabled by default). If you enable this option, the Design file will be exported with a dataset, which can be filtered using the report's request page that will be shown.

| EDIT - EXPORT DESIGN - 72102-000001 DCR SALES - INVOICE | 2      |
|---|--------|
| Edit with Data · · · · · · · · ·                        |        |
|   |        |
|   |        |
|   |        |
|   |        |
|   |        |
| ОК  | Cancel |

- 4. Choose **OK**.
- 5. If you made the choice to *Edit with Data* earlier, the report's request page will open, where you can define filters and further options for the dataset to be included in the Design file.



After configuring the options and filters, choose **OK** and wait for the report to complete.

6. Save the Design file to a location of your choice.

You can now open the file and use the Document Creator Designer to edit the layout.



#### Note

In case you enabled the *Edit with Data* option earlier, you can **Preview** (Ctrl+P) your layout from the report designer with the data from your Dynamics 365 Business Central database. In case you disabled the option earlier, the preview will use a sample dataset with a single record per data source containing the label-/column-names and/or default values for the columns.

After you are satisfied with the changes to the layout, you can save and close the designer.

### **Import Design**

When you are done editing the layout in an earlier exported Design file, you need to import the Design file to apply the changes to the layout in your Dynamics 365 Business Central database. The **Import Design** action allows you to select a Design file and import the contained layout into the record selected on the **Custom Report Layouts** page.

To import a layout from a Design file, follow these steps:

- 1. Select the target custom report layout record.
- 2. Invoke the **Import Design...** action.
- 3. Click **Choose...** and select the Design file in the Open File dialog that appears.



#### Info

During the import of a Design file, the previous version of the layout is automatically added to the Custom Report Layout Archive, along with a comment that reads "Design Import". This allows you to restore the previous version of the layout, e.g., in case you made a mistake and want to revert your changes.

# Configuring Layout Selections

To make sure your report uses the correct custom report layout for each company (and does not use a different layout or print a blank page) you will need to configure the **Layout Selections** for your company. One way of doing this is going to the **Report Layout Selections** page and configuring the layout selections as described in Change the Current Report Layout.

You can also (more easily) change the layout selections using the Document Creator actions directly from the **Custom Report Layouts** page.

### Report Layout Selection Action



The **Report Layout Selection...** action can be used to specify **per company** whether the report should use the layout selected in the **Custom Report Layouts** page.

- 1. On the **Custom Report Layouts** page, select the custom report layout record to configure the report layout selections for.
- 2. Invoke the Report Layout Selection... action.
- 3. The **Report Layout Selection** page will open for the selected custom report layout record.

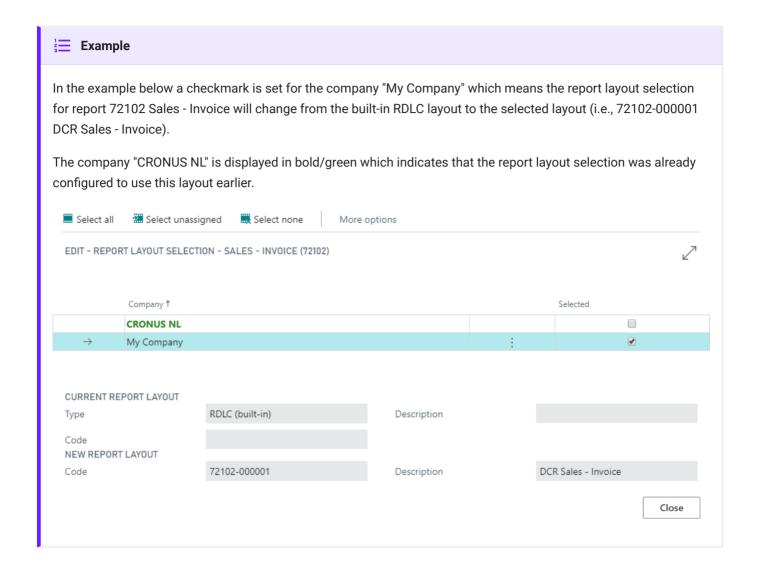
Select the companies where you wish to use the layout when the report is executed. You can do this by marking the checkbox in the **Selected** column for those companies.

At the bottom of the page you will see which layout the report is currently using in the selected company (in group **Current Report Layout**) and which layout it will use after closing the page (in group **New Report Layout**).

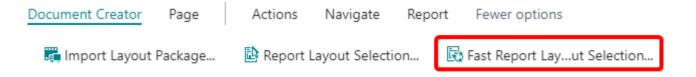
Companies that are displayed in bold-green are already using the layout for the report.

4. Close the page.

The layout selections for the report will be updated after closing the page. If you run the report, it will now use the layout in the companies you selected.

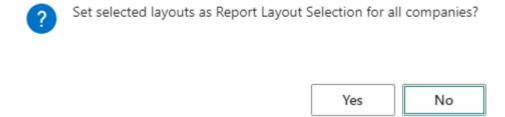


## Fast Report Layout Selection Action

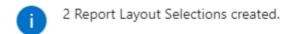


The **Fast Report Layout Selection...** action can be used to specify that the report(s) should use the layout(s) selected in the **Custom Report Layouts** page **in all companies**.

- On the Custom Report Layouts page, select the custom report layout records that should be used for the report layout selections.
- 2. Invoke the Fast Report Layout Selection... action.
- 3. The action will prompt you to confirm that the layout selection of the corresponding reports should be changed to the selected custom report layout(s) for all companies.



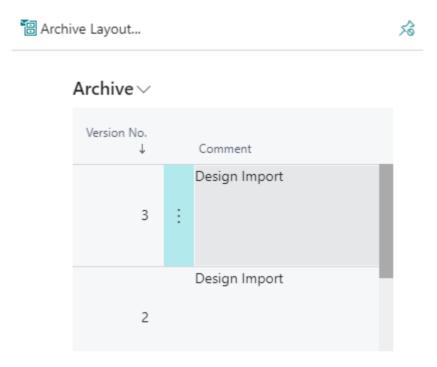
4. If you confirm, then the report layout selections for the reports will be updated to the selected custom report layout(s) for all companies. A message will inform you about the number of changed report layout selections.



OK

# Custom Report Layout Archive

After modifying a Document Creator layout, there is always the possibility to revert your changes to a previous version of your report layout. On the **Custom Report Layouts** page you will find an **Archive** factbox that shows the archived versions of the selected layout. Every time a report layout is changed by an import, an archive version is automatically created.



It is also possible to view all archived custom report layouts by opening the **Custom Report Layout Archive** page.

CUSTOM REPORT LAYOUT ARCHIVE | WORK DATE: 10/1/2019

#### C Edit Comment Export Layout Restore Layout Search Manage Page ··· Version No. Report ID Report Name Company Name Description 1 72100 Sales - Quote DCR Sales - Quote 1 72102 Sales - Invoice DCR Sales - Invoice 2 72102 Sales - Invoice DCR Sales - Invoice 3 72102 Sales - Invoice DCR Sales - Invoice 4 72102 DCR Sales - Invoice Sales - Invoice 5 72102 Sales - Invoice DCR Sales - Invoice



The **Custom Report Layout Archive** page can be opened using the *Tell Me* search feature, or invoking the **Navigate** > **Document Creator** > **Archive** action on the **Custom Report Layouts** page.



Custom Report Layouts are archived automatically when the following events take place on the record: Layout Import, Layout Package Import, Layout Restore, Design Import

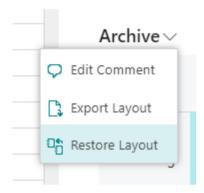
## **Archiving Layouts**

You can *manually* archive the current version of a layout using the **Archive Layout...** action on the **Custom Report Layouts** page. A new archive record will be created with the current version of the selected layout record. By default, the archive comment will be empty, but you can enter your own comment using the **Edit Comment** action in the **Archive** factbox/page.

🔠 Archive Layout...

## **Restoring Layouts**

You can restore a previous version of a layout using the **Restore Layout** action on the **Archive** factbox of the **Custom Report Layouts** page, or the like-named action on the **Custom Report Layout Archive** page.

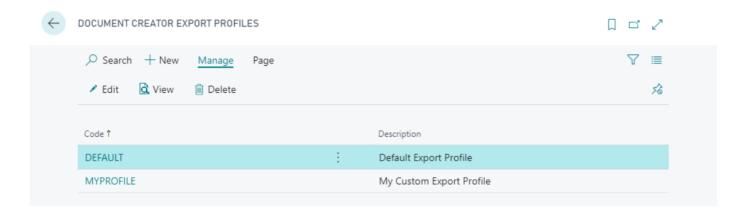


You will be asked to confirm the restore, and the current version will be archived before the selected previous version is restored.

# **Export Profiles**

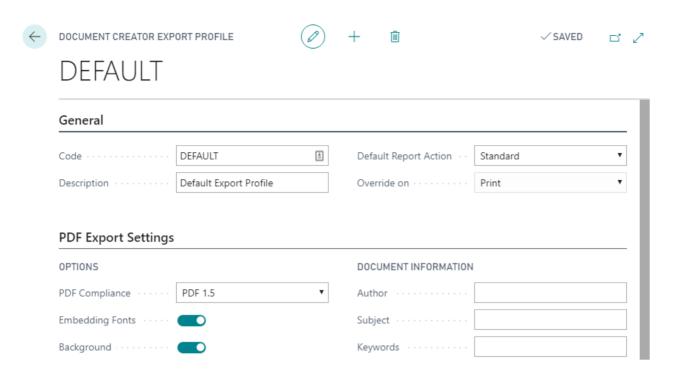
## Managing Export Profiles

Reports in Dynamics 365 Business Central can be exported to different file formats, e.g., they can be exported to a **PDF**, **Word** or **Excel** file. The Document Creator Export Profiles feature can be used to configure how reports with a Document Creator layout are exported to these file formats. You can find and manage all export profiles from the **Document Creator Export Profiles** page.



# Changing Export Profile Settings

Selecting one of the export profiles on this page will open the **Document Creator Export Profile** page in which you can view and/or edit the settings for the export profile.



The available settings are grouped into the following categories.

### **General Settings**

In the General group you will find settings to enter a Code and Description for the export profile.

### **PDF Export Settings**

In the *PDF Export Settings* group you can change how reports with a Document Creator layout are exported to PDF. For example, the **PDF Compliance** of the document can be changed, reports can be set up to be exported as **Interactive Forms**, or the quality of images and vector graphics in the resulting document can be changed in various ways. You can get more information about the purpose and impact of each of the the available settings from their respective tooltips, or from the "Export to Adobe Acrobat (PDF)" section in the designer manual.

### **Word Export Settings**

In the *Word Export Settings* group you can change how reports with a Document Creator layout are exported to Word. For example, you can change the export method, or use the **Wysiwyg** setting to make the output as close to the report layout as possible. You can get more

information about the purpose and impact of each of the the available settings from the "Export to Word (RTF)" section in the designer manual.

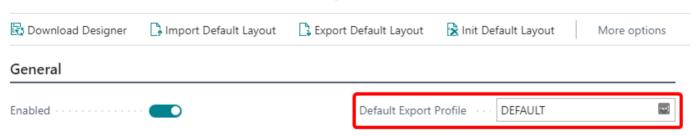
### **Excel Export Settings**

In the *Excel Export Settings* group you can change how reports with a Document Creator layout are exported to Excel. For example, with the **Data Only** setting you can specify that only the data and not the headers/footers should be exported, or use the **Seamless table** setting to enable/ disable the export of page footers and next page headers without table breaks. You can get more information about the purpose and impact of each of the the available settings from the "Export to Excel 2007" section in the designer manual.

## **Using Export Profiles**

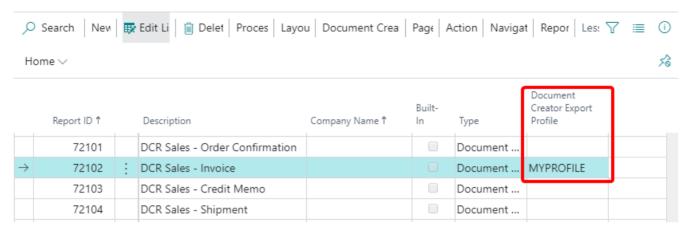
By default each Document Creator layout will use the **Default Export Profile** configured in the **Document Creator Setup** page. The default value for this field is **DEFAULT**, which corresponds to the automatically generated standard export profile.

# Document Creator Setup



You can change which export profile is used by a Document Creator layout by specifying an export profile code in the **Document Creator Export Profile** field on the **Custom Report Layouts** page.

# Custom Report Layouts - 117 Reminder





If the **Document Creator Export Profile** field of the layout record is left empty, then the **Default Export Profile** will be used when the report is exported with that Document Creator layout in use.

#### 1 Info

On the very first run of a report with a Document Creator layout, the DEFAULT export profile will be generated automatically if it does not exist yet.

# Report Translations

Document Creator includes a Report Translations feature which helps to create multilingual reports adding translations as data. The report developer can simply add label placeholders in the report object which automatically populate the Document Creator Translation table. You can configure the settings of the Report Translations feature in the **Translations** group of the **Document Creator Setup** page, see Translation Settings.

#### Benefits:

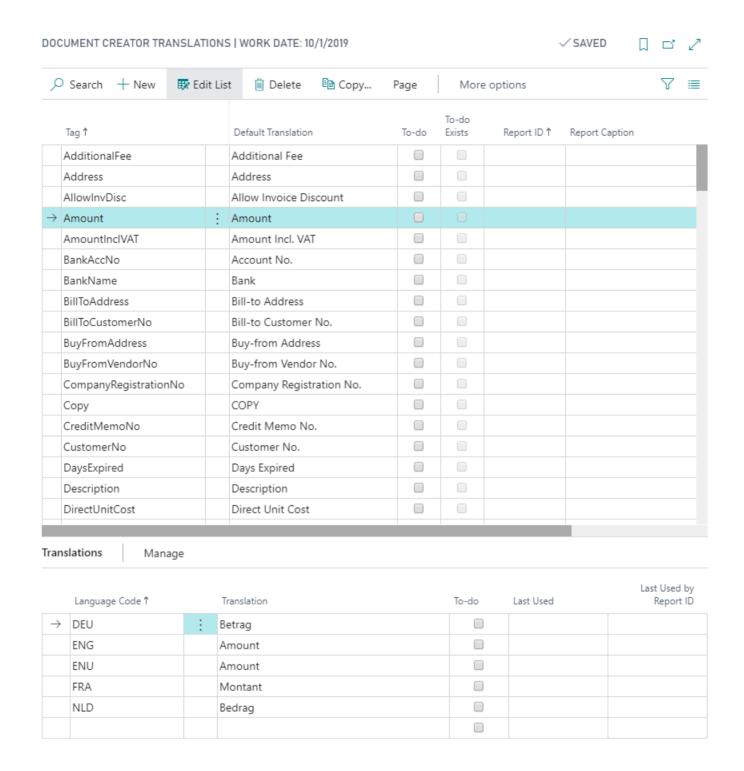
- Translations are no longer in code, but have become data
- Non-existing translation records will automatically be created
- Translation is no longer restricted to the (AL) extension developer
- Translations can be created or modified by the end-user as well

### **Editing Translations**

On the **Document Creator Translations** page you can view, create and edit translations that can be used by reports. By default, the page shows the following columns in the main page:

| Column                 | Description   |
|------------------------|---|
| Tag                    | The source text/label placeholder to translate.   |
| Default<br>Translation | The translation for language code 🗀 .   |
| To-do                  | Specifies whether the Tag still needs a Default Translation.  |
| To-do exists           | Specifies whether there is a translation record with a To-do for any language for the Tag. The translations of the Tag can be found in the Document Creator Translations subpage. |
| Report ID              | If empty, the translations will be used by all reports. If not empty, the translations will be used as report-specific translations for the report object with the specified ID.  |

| Column                    | Description  |
|---------------------------|--|
| Report Caption            | The report caption of the report to which the translations apply.  |
| Last Used                 | Specifies when the translation was last used. Whether or not this field is updated depends on the Update Usage setting.                  |
| Last Used by<br>Report ID | Specifies the ID of the report that last used the translation. Whether or not this field is updated depends on the Update Usage setting. |



The subpage can be used to enter translations for any language you wish to support.



The Document Creator Translations page also features a **Copy...** action that can be used to copy translations as report-specific translations or copy translations for one language code to translations for another language code.



Document Creator ships with a RapidStart package that already provides you with a set of translations for multiple languages. This package also provides the translations for the W1 Report Templates. See Templates.

### Adding Translatable Labels to Report Objects



#### Warning

The following section provides details on how an (AL) extension could utilize the Report Translations feature in the report object definition. Some prior knowledge on extension development is expected.

Many document types in Dynamics 365 Business Central have a "Language Code" in the document header. To translate report labels to the document language and automatically retrieve the translations and/or populate the **Document Creator Translation** table with To-do's you can use the wDCR\_TranslationMgt codeunit in your report object. For an example, please see the report objects in the W1 Report Templates extension.

First add the following needed global variables:

```
var
    Language: Codeunit Language;
    wDCR_TranslationMgt: Codeunit wDCR_TranslationMgt;
    ReportId: Integer;
```

Add the following code in the OnAfterGetRecord trigger of the document header dataitem, which updates the current report language and passes the "Language Code" of the document to the wDCR\_TranslationMgt codeunit:

```
trigger OnAfterGetRecord()
   CurrReport.Language := Language.GetLanguageIdOrDefault("Language Code");
   wDCR_TranslationMgt.wgFncSetLanguageCode("Language Code");
end:
```

Add the following local procedure that can be used to retrieve translations for the report:

```
local procedure Trl(pLblName: Text[50]): Text
begin
    if ReportId = 0 then begin
        Evaluate(ReportId, DelChr(CurrReport.ObjectId(false), '=',
DelChr(CurrReport.ObjectId(false), '=', '1234567890')));
    wDCR_TranslationMgt.wgFncSetReportId(ReportId);
    end;
    exit(wDCR_TranslationMgt.wgFncTranslate(pLblName));
end;
```

You can then use the Trl local procedure in the expression of a report column to add a translatable label to the dataset, e.g.:

```
column(lblAllowInvDisc; Trl('AllowInvDisc')) { }
column(lblAmount; Trl('Amount')) { }
column(lblBankAccNo; Trl('BankAccNo')) { }
column(lblBankName; Trl('BankName')) { }
// ...
```

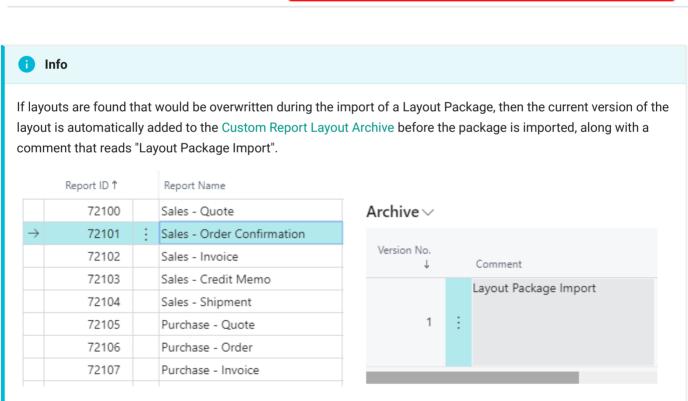
# Layout Packages

A *Document Creator Layout Package (.dcr)* is a file that contains multiple layouts. Layout packages can be used to easily export/import multiple layouts from one Dynamics 365 Business Central database to another. Layouts that are imported from a layout package always add new layout records, rather than replacing any existing layout records.

You can export and import layout packages from the **Custom Report Layouts** page. The **Export Layout Package...** and **Import Layout Package...** can be used for this purpose.

#### CUSTOM REPORT LAYOUTS - 117 REMINDER | WORK DATE: 10/1/2019







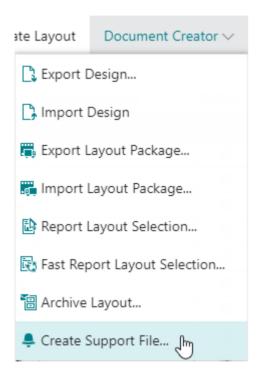
Document Creator ships with a set of W1 Report Templates. This comprises the source code of the report objects and a layout package. See Templates.

# Support Files

A *Document Creator Support File* (.dcrz) is a file containing the Document Creator layout, schema and a dataset for a report. Therefore, a support file can be used to run reports independent from the Dynamics 365 Business Central database from which the report was originally generated.

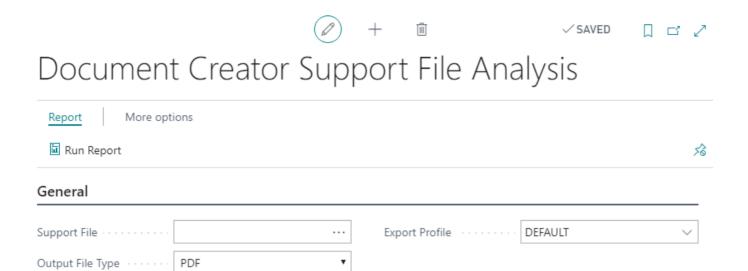
## Creating Support Files

A support file can be created from the **Custom Report Layouts** page invoking the **Create Support File...** action. This action will open the request page of the report for setting filters and options for the dataset.



#### **Analyzing Support Files**

A support file can be analyzed on the **Document Creator Support File Analysis** page. You can upload the support file via the AssistEdit-button of the **Support File** field. After uploading the support file and configuring settings on the page, you can use the **Run Report** action to run the report with the specified parameters and download the output file for analysis.



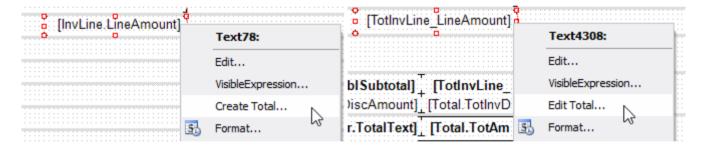
## Report Designer Highlights

The Document Creator Report Designer includes the *FastReport.Net User's Manual*, which can be opened from the designer via **Help > Help Contents**. This manual is also available online.

In this section some of the most useful Document Creator Designer features will be highlighted. These are some of the features that are added on top of the standard FastReport.Net designer to support even faster and more efficient layout development.

### Automatically Generating Totals

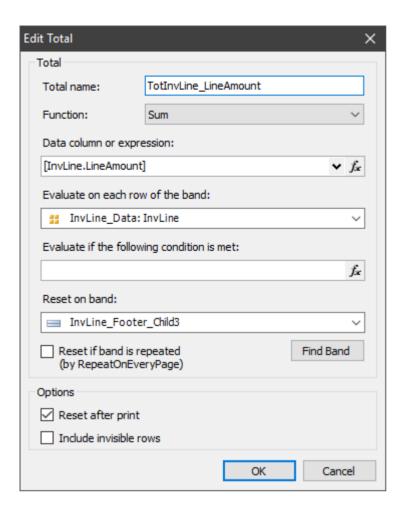
For any TextObject on a Data band that contains a numeric field from your dataset, you can automatically generate a total by right-clicking the TextObject in question, and subsequently selecting the **Create Total...** option. This will create a new TextObject under your cursor which will contain a newly created total.





Placing the new *TextObject* on a Footer-band will automatically set the **Reset on band** property to the last child band of the Footer band, to reset the running value back to 0 each time the band is reached.

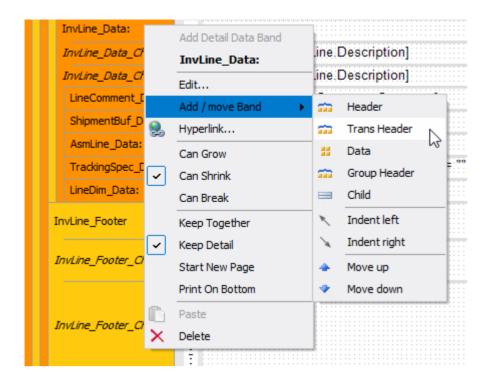
With the new TextObject under your cursor, you can place the TextObject containing the total on a Footer Band (or any other band of your choosing). You can also edit the total by right-clicking the newly created TextObject, and selecting the **Edit Total...** option, which will open the total editor:



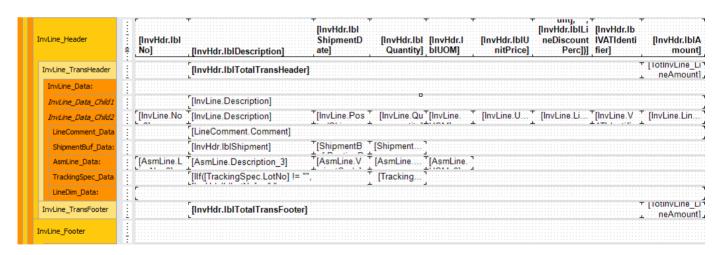
For more information on the parameters of a total, see the documentation on Totals.

### Transheader and Transfooter Bands

To display transport-totals at the top and/or bottom of a page, you can create Transheader and TransFooter bands. To create a new Transheader-footer pair, right-click on a Data band, and select **Add / move Band > Trans Header** in the appearing context-menu.



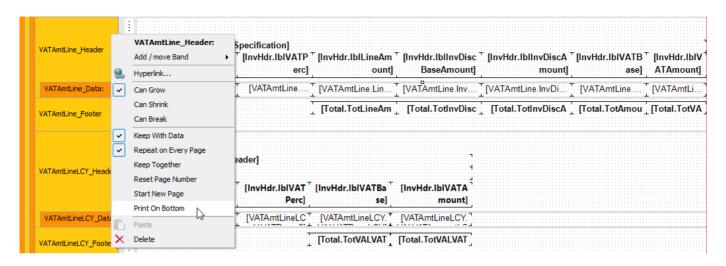
On these bands you can put any earlier-created totals in TextObject controls, whose running value will be shown on the bottom and top of the pages where needed. In the image below an example usage of the Transheader and Transfooter band is shown for a Sales Invoice report layout to show the running value of the total line amount.



## Printing Bands on the Page Bottom

To have one or more bands of your report layout shown always at the bottom of the (last) page, you can use the **PrintOnBottom** property that is available on bands. For example, if you always want to show the VAT Specification at the bottom of an invoice, you can right-click the first band

of the collection of bands to be displayed at the bottom, and select the **Print On Bottom** option in the appearing context-menu.





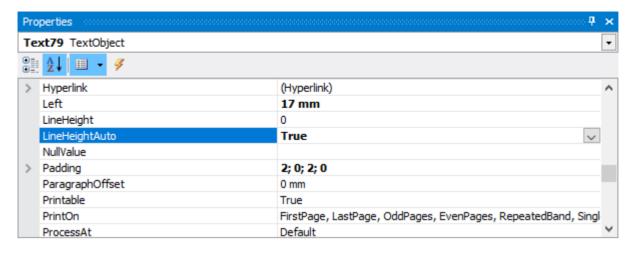
Enabling the **PrintOnBottom** property for a band will also enable the property for any bands that are displayed below. Similarly, disabling the property will disable it for any bands that are displayed above.

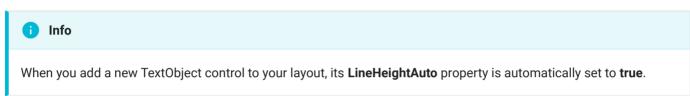


The **PrintOnBottom** property might not work when used in combination with the **RepeatOnEveryPage** property on a band. That is, if the band contents do not fit in the remaining free space of the page.

### Automatic Text Line Height

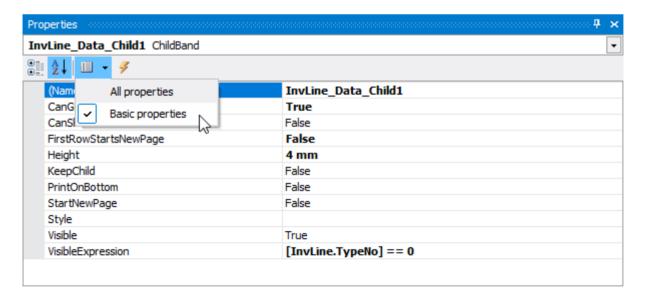
In a report layout a TextObject control may contain multiple lines of text. To change the height of a single line of text in a TextObject, you can use the **LineHeight** property. The default value of this property is 0, which means that the line height will be the same as that of the font used. To make the line height equal to the height of the TextObject you can set the **LineHeightAuto** property to **True**.



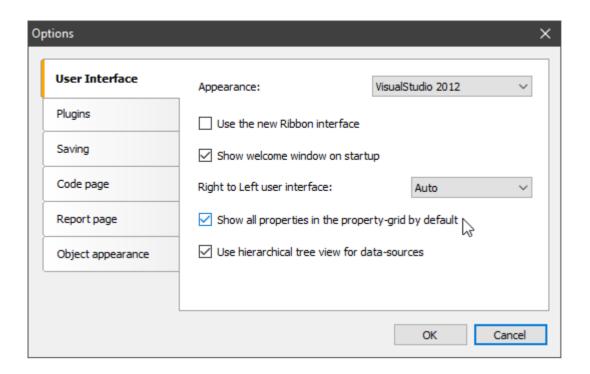


### Switching between Basic and All Properties

In the property grid, you have the option to switch between showing **Basic Properties** and **All Properties**. Selecting the **Basic Properties** will show you the most common properties and the properties whose values are different from the default value for the selected object.



You can change the default value of the setting by navigating to **View > Options... > User Interface**, which will open the **View Options** menu. In this menu you can enable or disable the
"Show all properties in the property-grid by default" setting to change the default filtering of the property grid.



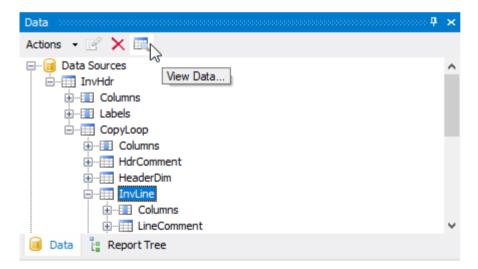
#### The **Basic Properties** consist of the following properties:

| Basic Properties |                 |                  |                |                   |
|------------------|-----------------|------------------|----------------|-------------------|
| Barcode          | Filter          | Left             | RowCount       | Style             |
| BottomMargin     | Font            | LeftMargin       | RowSpan        | Text              |
| CanGrow          | Format          | LineHeightAuto   | SegmentCount   | TextAlign         |
| CanShrink        | GroupBy         | MaxHeight        | SegmentHeight  | Тор               |
| CheckedSymbol    | Height          | MaxWidth         | SegmentWidth   | TopMargin         |
| ChildDataSource  | HidelfNoData    | Name             | Shape          | TotalType         |
| ColSpan          | HidelfUnchecked | NoDataText       | ShowErrorImage | VertAlign         |
| ColumnCount      | HideValue       | PaperHeight      | ShowGrid       | Visible           |
| Condition        | HideZeros       | PaperWidth       | ShowMarkers    | VisibleExpression |
| DataColumn       | HorzAlign       | ParentDataSource | ShowText       | Width             |

| Basic Properties |                      |                   |              |              |
|------------------|----------------------|-------------------|--------------|--------------|
| DataSource       | IncludeInvisibleRows | PrintOnBottom     | SizeMode     | WordWrap     |
| DataType         | KeepChild            | RepeatOnEveryPage | SortBy       | WordWrapType |
| Duplicates       | KeepTogether         | ResetAfterPrint   | SortOrder    | Wysiwyg      |
| Evaluator        | KeepWithData         | ResetPageNumber   | Spacing      |              |
| Expression       | Landscape            | RightMargin       | StartNewPage |              |

## View (and Edit) Data

It is possible to view the data that will be used in previews generated from the designer. You can view the data by selecting one of the Data Sources and then invoking the **View Data...** option.

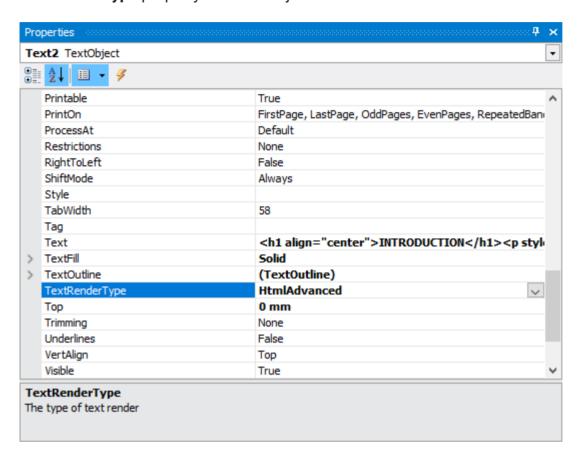


In the window that opens you can view the data of each record in the Data Source and even edit it by leaving a cell after changing its contents.



### Advanced HTML Rendering

The support for HTML in the TextObject has considerably been extended in the Document Creator Report Designer. You can enable Advanced HTML rendering by setting the **TextRenderType** property of a TextObject to **HtmlAdvanced**.



The extended functionalities comprise a larger set of HTML tags being supported, such as paragraphs, divisions, headers and lists, and support for the most-used CSS style attributes, which can be embedded in the supported HTML tags.

#### Supported HTML Tags

The table below presents a complete overview of the tags supported by the advanced renderer:

| Tag | Description   | Supported Attributes                    |
|-----|---|---|
|     | Paragraph with a default bottom-margin of 1 em and top-margin of 0. | align – left, right, center,<br>justify |
|     |   | style - (see below)                     |

| Tag  | Description   | Supported Attributes  |
|--|---|---|
| <div></div>  | Division/Section without any default margins or paddings.   | align — left, right, center,<br>justify<br>style — (see below)                                |
| <h1></h1> <h6></h6>  | Headings with default font-size of 2 em, 1.5 em, 1.17 em, 1 em, 0.83 em and 0.67 em respectively. | align — left, right, center,<br>justify<br>style — (see below)                                |
| <ol></ol>  | Ordered lists, default bottom margin of 1 em and left-padding of 40 px.                           | type - 1, A, a<br>start - [integer]<br>style - (see below)                                    |
| <ul></ul>  | Unordered lists, default bottom margin of 1 em and left-padding of 40 px.                         | type - disc, circle,<br>square<br>style - (see below)   |
| <li>:</li>   | List item.  | style - (see below)   |
| <span></span>  | Span (group of in-line elements).   | style - (see below)   |
| <font></font>  | Group of in-line elements with custom font face, color and size.                                  | <pre>color - [name]/#xxxxxx face - [font_family] size - [dimension] style - (see below)</pre> |
| <br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br> | Line break.   | -   |
| <img/>   | lmage.  | <pre>src =";base64," alt - [text]</pre>   |
| <body></body>  | Container with default margin of 8 px.  | style - (see below)   |
| <b></b> <strong><!--</td--><td>Bold text.</td><td>style - (see below)</td></strong>                  | Bold text.  | style - (see below)   |
| <i></i> <em></em>  | Cursive text.   | style - (see below)   |

| Tag  | Description      | Supported Attributes |
|--|------------------|----------------------|
| <u></u>  | Underlined text. | style - (see below)  |
| <s></s> <strike><!--</td--><td>Strikeout text.</td><td>style - (see below)</td></strike> | Strikeout text.  | style - (see below)  |
| <sub></sub>  | Subscript.       | style - (see below)  |
| <sup></sup>  | Superscript.     | style - (see below)  |

Other HTML tags will be ignored; the contents will be shown while the surrounding tags are hidden. The supported tags will be rendered with default margin and padding as defined by the standards, unless stated otherwise in the table above. If an attribute is specified more than once in a tag, the last specification will be applied by the renderer.

### Supported CSS Style Attributes

The following CSS style attributes are supported by the renderer:

| Attribute       | Description  | Supported for Tags |
|-----------------|--|--------------------|
| text-<br>align  | Text-alignment of the underlying paragraph. If both the align<br>and text-align CSS attribute are defined, the CSS attribute has<br>higher precedence. | p, div, h#, li     |
| text-<br>indent | Indent of the first line of a paragraph.   | p, div, h#, li     |
| font-<br>family | Font face of the underlying text.  | "all"              |
| font-size       | Font size of the underlying text.  | "all"              |
| color           | Font color of the underlying text, allows one to either specify a color name or hexadecimal code.  | "all"              |

| Attribute   | Description  | Supported for Tags           |
|---|--|------------------------------|
| padding<br>padding-<br>bottom<br>padding-<br>top<br>padding-<br>right<br>padding-<br>left | Padding of the container or paragraph.   | p, div, h#, li, ul, ol, body |
| margin margin- bottom margin- top margin- right margin- left                              | Margin of the container or paragraph, treated the same as padding.                             | p, div, h#, li, ul, ol, body |
| font-<br>weight   | Font-weight of the underlying text, restricted to the following options: bold, normal, initial | "all"                        |

#### Example

The following example shows some of the capabilities of the extended HTML renderer.

```
    Document Creator is a fully functional .NET report designer for Microsoft
Dynamics NAV, compatible with <strong>NAV2015</strong> and up.
    It is rich in functionality, e.g., Drag & Drop fields in reports, choose your
    own code per report (VB.NET | C#) and barcode usage, including various <i>QR
    codes</i>.

Your benefits:

    saves a <span style="font-weight: bold">hugh amount</span> of time
    li>Easy to use
    Rich in functionality
        An easy-to-use report designer with endless possibilities
    conversion of <i>Classic</i> and <i>RDLC</i> report layouts
```

The above will produce the following output in a TextObject with Advanced HTML rendering enabled:

Document Creator is a fully functional .NET report designer for Microsoft Dynamics NAV, compatible with **NAV2015** and up. It is rich in functionality, e.g., Drag & Drop fields in reports, choose your own code per report (VB.NET | C#) and barcode usage, including various *QR codes*.

#### Your benefits:

- · Saves a hugh amount of time
- · Easy to use
- · Rich in functionality
  - An easy-to-use report designer with endless possibilities
  - Conversion of Classic and RDLC report layouts
  - Fully integrated in Dynamics NAV
- Fantastic reports as outcome!