# Deciding on the best layout for a report

- **Excel**

- Excel layouts are the easiest to modify as the features for summarising data, adding graphics and changing styles are all common Excel features. However, not all reports have a dataset (the fields chosen from Business Central for the report) that is conducive for working with an Excel layout. For example, complex calculations work best with RDLC or Word Layouts.

- **Word**

- Word layouts are perfect if you're only wanting to make style changes like font type, size or colour. There are also more options with Word layouts when it comes to adding and rearranging data fields. Finally, word layouts are a great choice for reports that will eventually be printed.

- **RDLC**

- Much like with Word layouts, RDLC layouts provide more options when it comes to adding and rearranging data fields. They are also a great option for reports that will be printed.
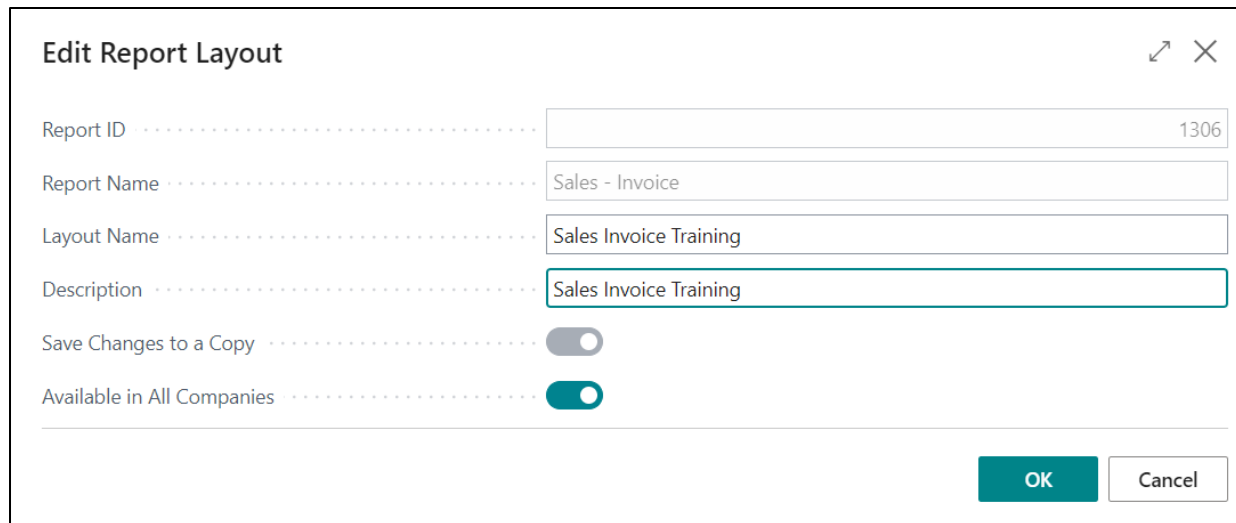
tecman
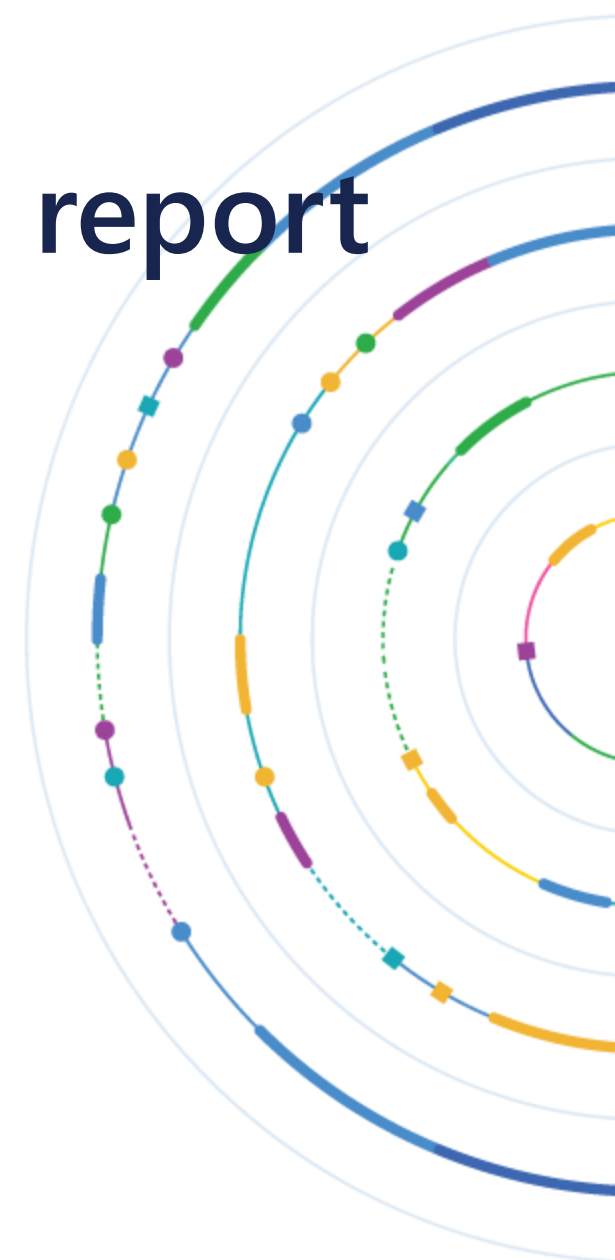
Report Layouts

- Before we can begin with working with the report layouts, we must first work with the **Report Layouts** screen

- Selecting **Copy** will allow us to create a copy of the line highlighted

- Selecting **Export Layout** will export the existing layout which will allow you edit it and use the **Import Layout** option to bring the changes back in.

tecman

Edit Report Layout

- The **Edit Report Layout** option allows you to change the name of the report and description as well as being able to save the report across all of the companies by selecting the **Available in All Companies** option
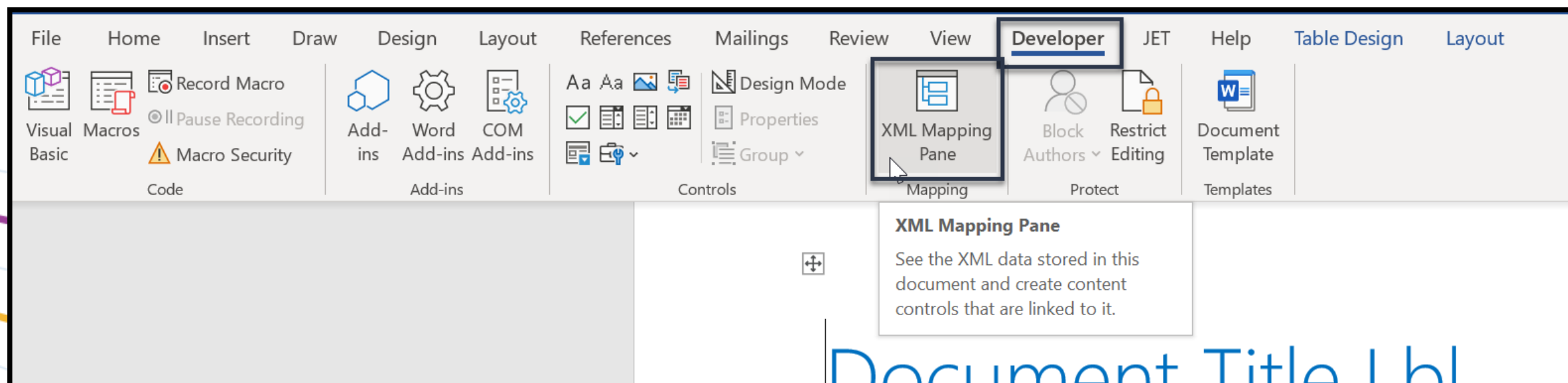
Word Reports

tecman
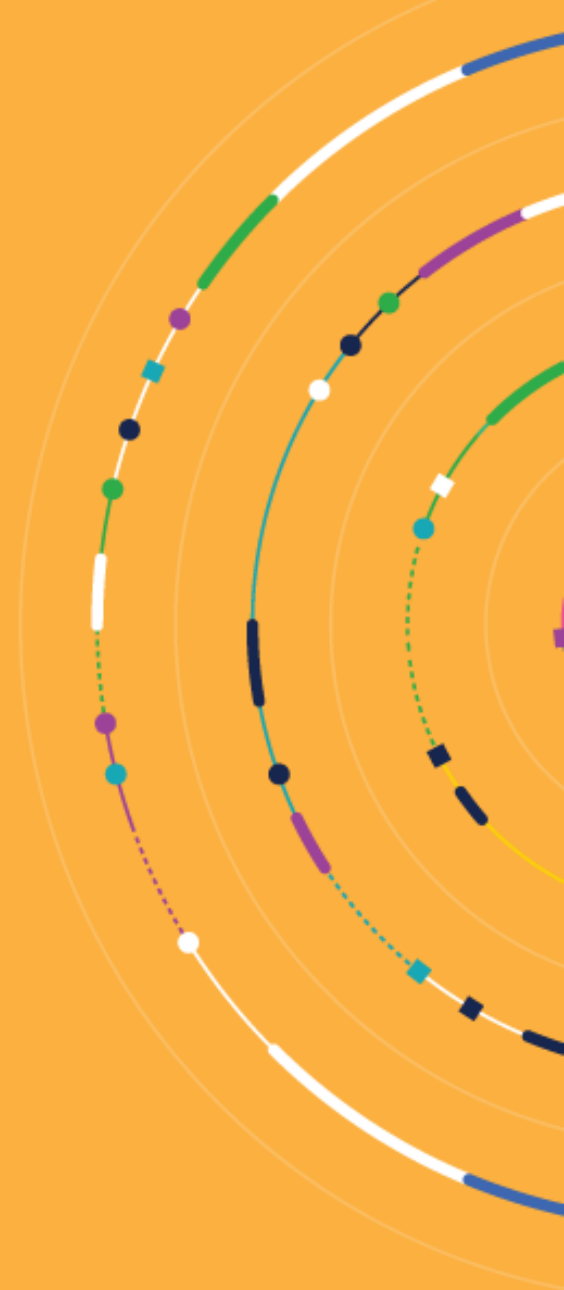
Getting started with Word Reports

- Before working with word reports you must first ensure that they are enabled by selecting the **Developer** option with the **Word Options** page.
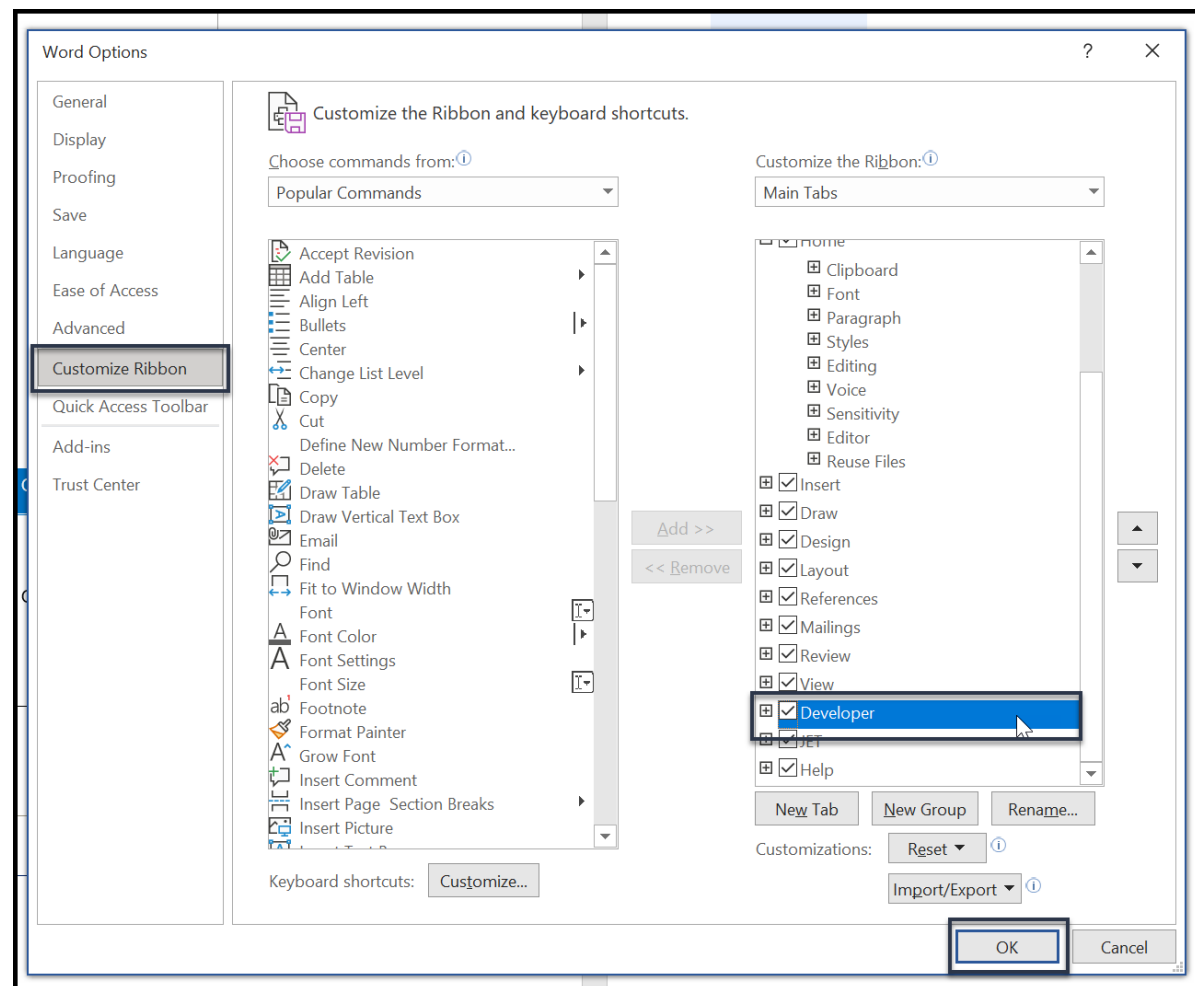
Getting started with Word Reports

- Next, select the XML Mapping Pane which will allow you to add additional fields to the report.

tecman

Adding fields to Word Reports

- Let's start with an easy example of adding a field to a Word Report, here I've taken the Sales Invoice report and exported the layout, then I've selected **XML Mapping Pane.**

- To make it easier add a border which makes it clearer to see where the fields can be added

tecman

Adding fields to Word Reports

- After finding the space for the field, and finding the appropriate field, in this case **SalesPerson_Lbl** right click and choose **Insert Content Control > Plain Text.**

- Then find the **SalesPersonName** field to add below it.

- The **Lbl** fields are used as headers, whereas those without the **Lbl** are pieces of information that will be automatically updated.

tecman
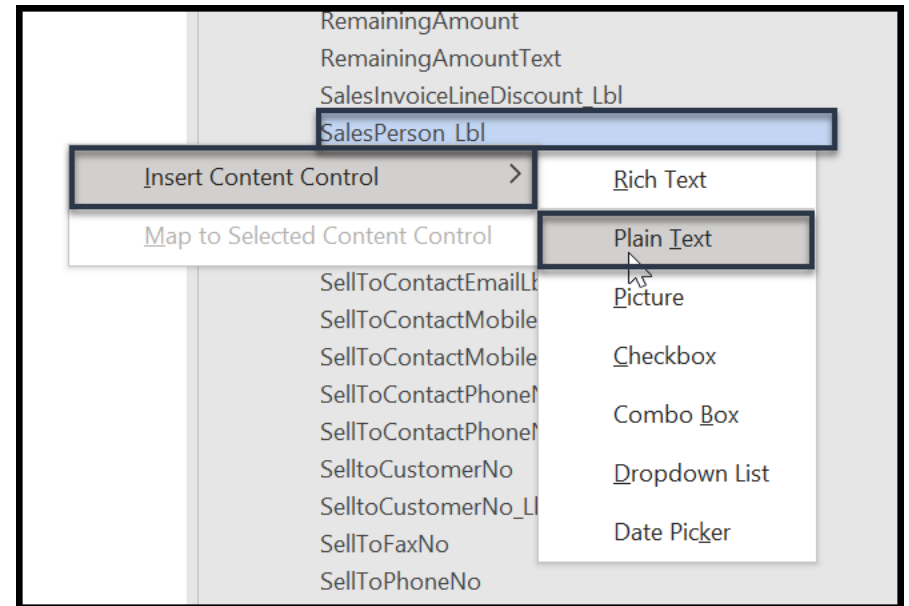
Repeating?

- When using **Word Reports** to populate the **lines area** of the report you must ensure that the **Repeating** option is selected as it means that if multiple lines are required it means that every line of the report is printed

- To use the repeating content control, highlight the line that will be repeated and then right click choose **Insert Content Control** and **Repeating**
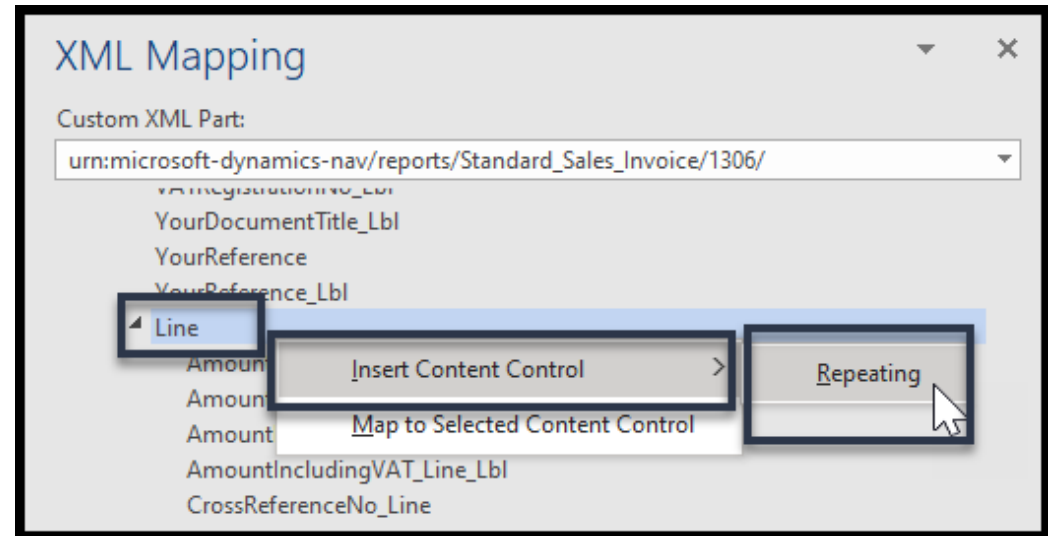
Format changes

- Further changes can be made to the report by changing the colours, table design and fonts in line with specific themes to stay consistent with branding

Changing Images

- A common request is to change the images visible on the reports, as the logo in the top right corner of the report is driven from the Company Information page
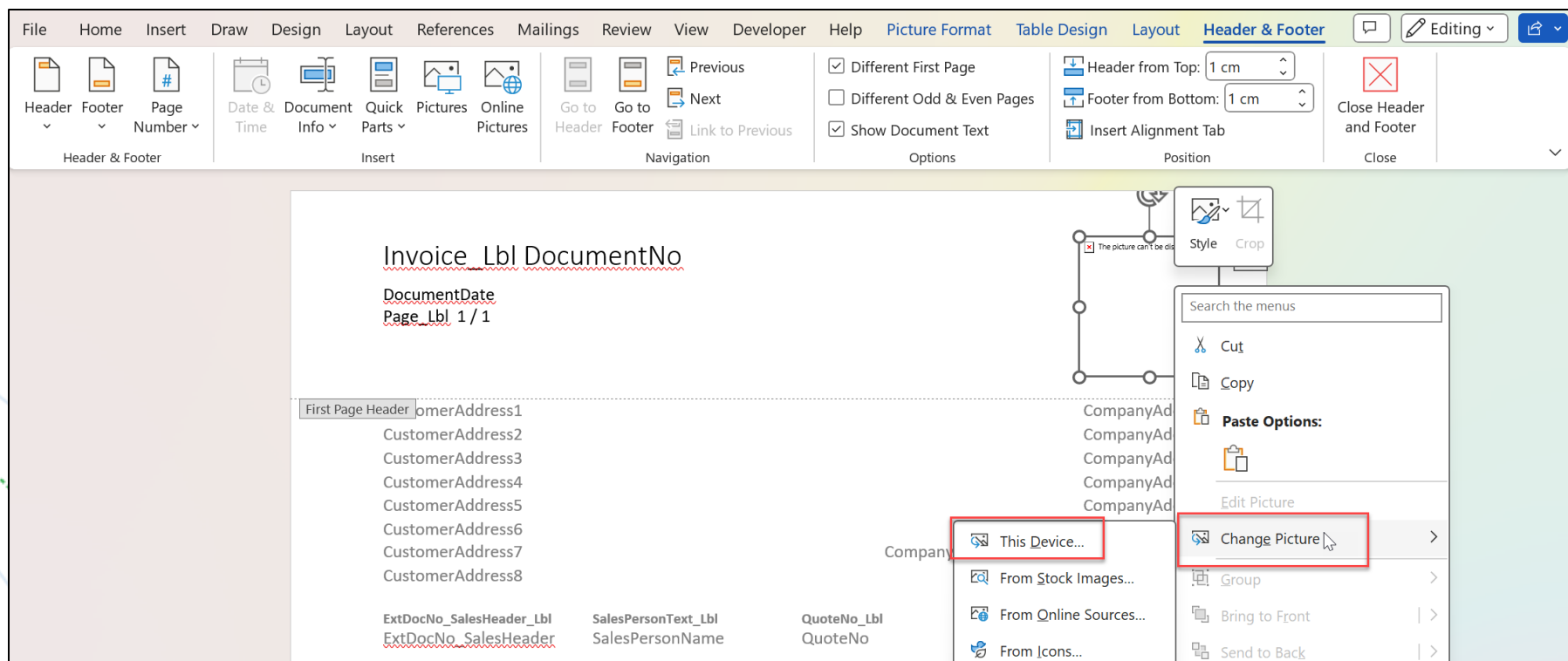
Changing Images

- To change the image, first right click on the image and then select **Remove Content Control**
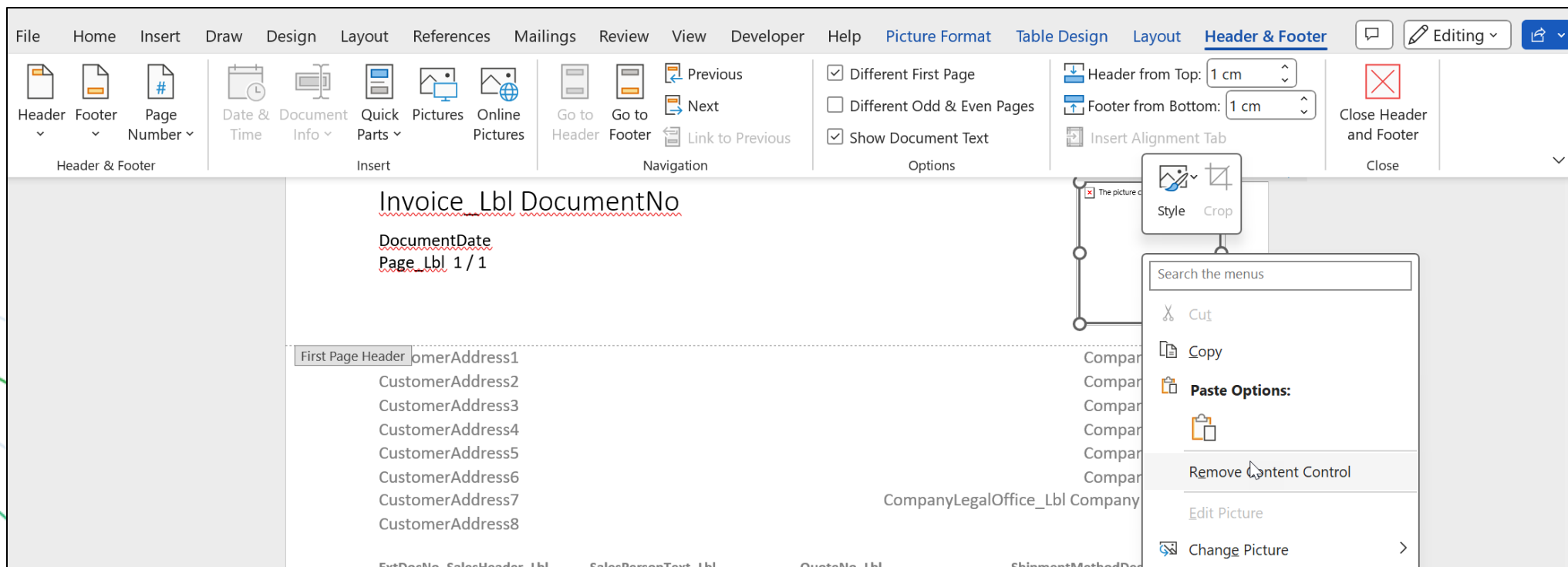
Changing Images

- Next, right click on the image and select **Change Picture,** choosing **This Device…** to open the file explorer and view saved images.

Uploading the Report

- Once the report has been amended, save the file.

- Next, within the **Report Layouts** screen of Business Central, highlight the appropriate report and select **New Layout.**

Uploading the Report

- The **Report ID** and **Report Name** fields, will be automatically populated

- Set the **Layout Name** and **Description** fields as needed, and ensure that **Format Options** has been set to **Word** and select **OK.**

Add New Layout for a Report

Report ID	1305
Report Name	Sales - Confirmation
Layout Name	Sales - Confirmation Training
Description	Sales - Confirmation Training
Format Options	Word
Available in All Companies	
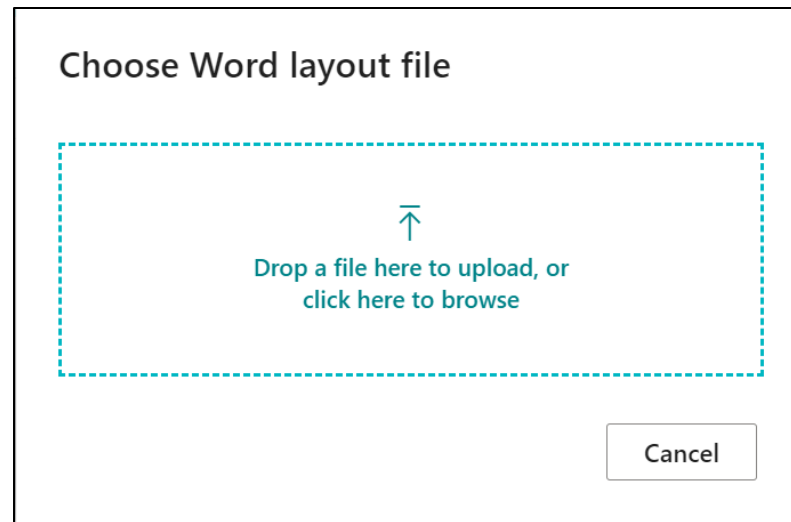
OK   Cancel

tecman

Uploading the Report

- Drag and drop the file into the below box or select **click here to browse** to open the **File Explorer** and choose the appropriate file.
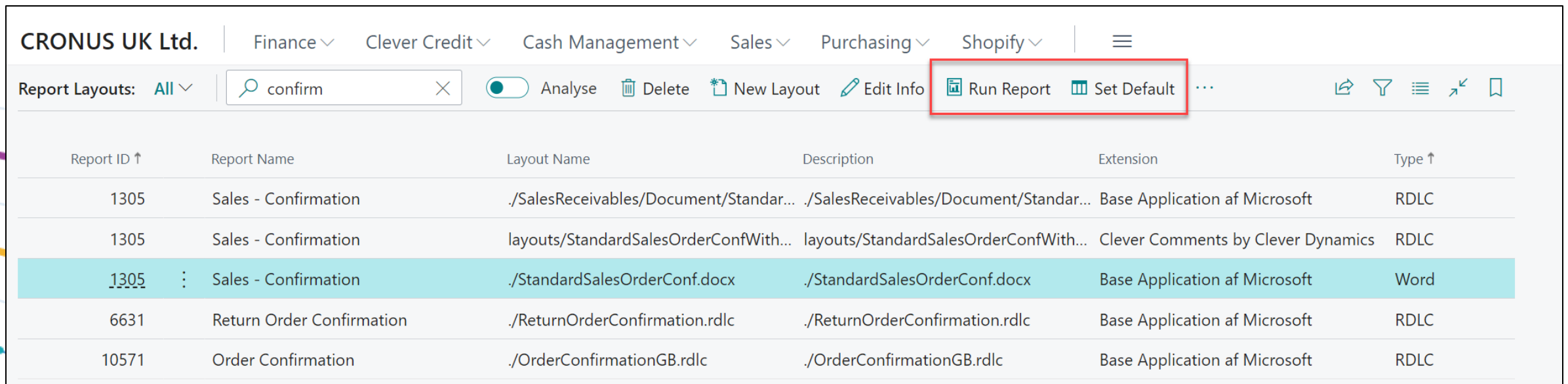
tecman

Uploading the Report

- Finally, highlight the report and select **Run Report** to check that all of the changes have worked and that you're happy with the layout.

- Selecting **Set Default** will ensure that the newly created layout will be the default option selected.

Tips

- If a field is required but is not available in the dataset it will need developer modifications to achieve the report change

tecman

Excel Reports

tecman

Working with Excel Reports

- Microsoft Excel report layouts can be used to create reports that include Excel features such as **formulas, PivotTables** and **PivotCharts.**

tecman

Getting started with Excel Reports

- To begin, first navigate to the Reports Layout screen and then find the appropriate report and then select **Run Report**

Getting started with Excel Reports

- Next, apply a filter if needed to reduce the time the report will take to run, this won't affect the excel layout from using other filters going forward

- Then select **Send to...**

- Then choose **Microsoft Excel Document (data only)**
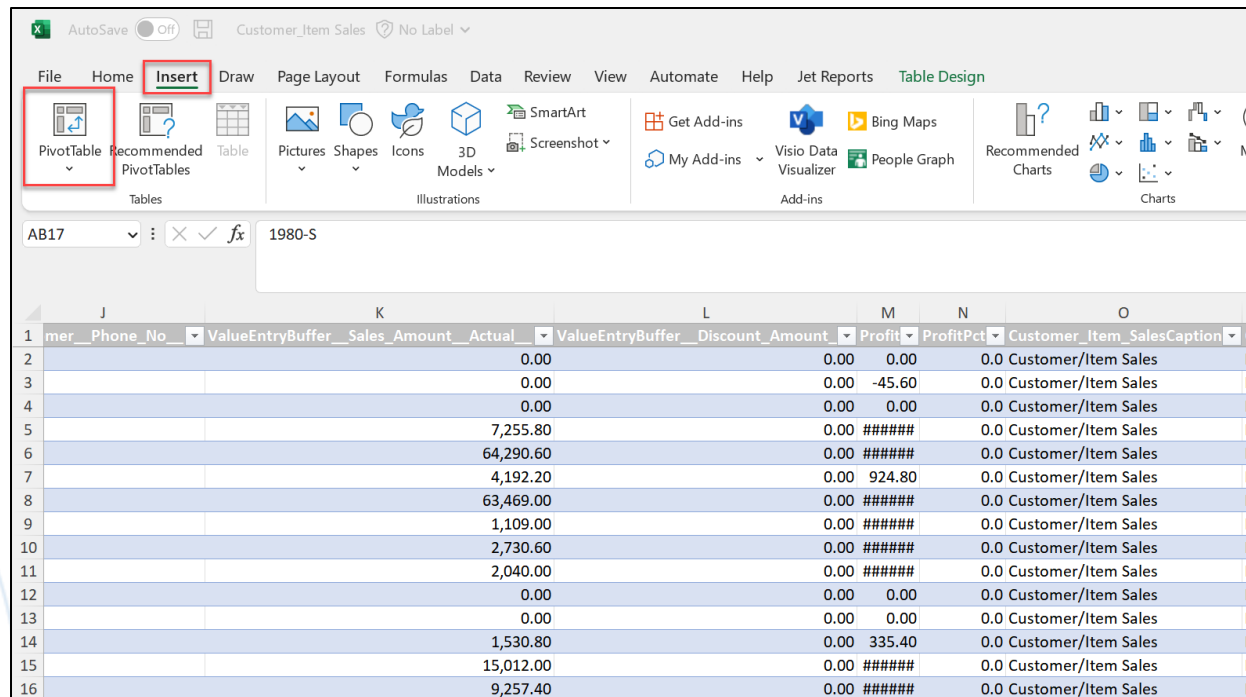
Working with Excel Reports

- This will download an Excel document with the raw data that is used to create the standard report

- To create a **PivotTable** to summarise the data select **Insert > PivotTable**

Working with Excel Reports

- In this example I created a Pivot to compare the average profit and Average Sales Amount for each item. To do this, I placed the **Item Description** and **Item No.** fields into the **Rows** and then the **Profit** and **Sales Amount Actual** fields into the **Values.** Next, I amended both of the values to show as **Averages** rather than **Sums**.

tecman

Working with Excel Reports

- Next, I've added a slicer on the **Customer Name** field to make the report more interactive by selecting **Insert > Slicer**

tecman

Working with Excel Reports

- Next, I've added a slicer on the **Customer Name** field to make the report more interactive by selecting **Insert > Slicer**

tecman

Do's

- Columns **can** be deleted or hidden as needed
- Sheets can be placed in any order, with the **Data** sheet first or last

Don'ts

- Don't change the name of the **Data Sheet**, **Data Table,** or **Columns**
- Don't add any columns unless they're included in the report dataset

tecman

Adding the Layout to a Report

- This works in much the same way across both word and excel layouts

- Selecting New Layout from the appropriate report and this time ensure that the appropriate Format option has been selected

Running the new report layout

- Once the new report has been added it can be selected manually when running the report by selecting the three dots within the **Report Layout** field

tecman

Defaulting the Report Layout

- Alternatively, on the **Report Layouts** screen selecting the **Set Default** option on the new report layout will mean it will become the new default layout for all users of that report

Report Layouts

Report Layouts: All ⌄ | 🔍 Search | Manage | ⊞ New Layout | ✏ Edit Info | 🖼 Run Report | ▭ Set Default | ⬀ Export Layout | ⬀ Replace Layout | More options

	Report ID ↑		Report Name	Layout Name	Description	Extension
→	1306	⋮	Sales - Invoice	Sales Invoice	Sales Invoice Training	
	1307		Sales - Credit Memo	./SalesReceivables/Document/StandardSalesCreditMemo.rdlc	./SalesReceivables/Document/StandardSalesCreditMemo.rdlc	Base Application by Microsoft
	1307		Sales - Credit Memo	./StandardSalesCreditMemo.docx	./StandardSalesCreditMemo.docx	Base Application by Microsoft
	1308		Sales - Shipment	./SalesReceivables/Document/StandardSalesShipment.rdlc	./SalesReceivables/Document/StandardSalesShipment.rdlc	Base Application by Microsoft
	1308		Sales - Shipment	layouts/StandardSalesShipmentWithComments.rdlc	layouts/StandardSalesShipmentWithComments.rdlc	Clever Comments by Clever Dyna

tecman

QUESTIONS ?

tecman

THANK YOU

CUSTOMER DAY 2023