Installation & User Manual

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 using the intuitive report designer and separation of code and layout, also end-users without technical knowledge can make changes to report layouts.

Designer - Easily edit document layouts yourself!

Document Creator includes an easy-to-use standalone report designer, based on proven technology, used in over 50 countries, by over 20,000 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, as you can see from 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 and HTML),

- Use advanced controls, including Scalable Vector Graphics (SVG), Subreports, Shapes, Charts and Rich Text.

apportunix

Apportunix

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IBAN	NL84 RABO 0395021731
SWIFT	RABONL2U
CoC	24 41 73 96
VAT	NL 818 388 559 B01

Sales Invoice

Bill-to Address

The Cannon Group PLC
Mr. Andy Teal
192 Market Square
Birmingham, B27 4KT
Great Britain

Invoice No.	103001	Bill-to Customer No.	10000
Document Date	24-01-22	VAT Registration No.	789456278
Invoice Date	24-01-22	Payment Terms	1 Month/2% 8 days
Due Date	24-02-22	Shipment Method	Ex Warehouse
Prices Including VAT	No	Salesperson	Peter Saddow

No.	Description	Shipment Date	Quantity	Unit of Measure	Unit Price	VAT Identifier	Amount
TIMOTHY	Assembling Furniture, January	24-01-22	25	Hour	54,00	VAT10	1.350,00
TIMOTHY	Assembling Furniture, January	24-01-22	120	Miles	54,00	VAT10	6.480,00

Subtotal	**7.830,00**
Invoice Discount Amount	391,50
Total GBP Excl. VAT	**7.438,50**
10% VAT	743,85
Total GBP Incl. VAT	**8.182,35**

VAT Amount Specification

VAT Identifier	VAT %	Line Amount	Invoice Discount Base Amount	Invoice Discount Amount	VAT Base	VAT Amount
VAT10	10	7.830,00	7.830,00	391,50	7.438,50	743,85
Total		**7.830,00**	**7.830,00**	**391,50**	**7.438,50**	**743,85**

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Create stunning document layouts!

Dataset Extensions - Easily add and use new fields in your document layouts!

With the Document Creator Dataset Extensions feature it is possible to add columns, labels and data items directly from the client. No need to develop any report(extension) objects just to add fields to existing reports.

Easily add fields to report objects yourself using the "Dataset Extensions" feature.

Report Translations - Label translations editable directly in Business Central!

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.

Export Profiles - Stationeries, interactive PDF forms, and more!

Edit report label translations yourself, directly in Business Central.

Export Profiles - Stationeries, interactive PDF forms, and more!

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 apply PDF stationeries or appendices to your PDF documents.

Apportunix Report Selection - All report and layout selections in one overview!

And finally, the Apportunix Report Selection page allows one to manage all document report selections in a single page. No more navigating through various pages and clicking through them to set up report selections.

Apportunix Report Selection - All report and layout selections in one overview!

Usage Type	Usage ID	Usage ↑	Sequence ↑	Report ID	Report Caption	Use for Email Attac...	Report Layout Selection	Use for Email Body	Email Body Layout Name
Sales	0	Sales Quote	1	11249660	Sales - Quote	☑	Document Creator - Sales Quote	☑	Document Creator - Sales Quote - Email Template
Sales	1	Sales Order	1	11249661	Sales - Order Confirmation	☑	Document Creator - Sales Order Confirmation	☑	Document Creator - Sales Order Confirmation - Email Te...
→ Sales	2	Sales Invoice	1	11249662	Sales - Invoice	☑	Document Creator - Sales Invoice	☑	Document Creator - Sales Invoice - Email Template
Sales	3	Sales Credit Memo	1	11249663	Sales - Credit Memo	☑	Document Creator - Sales Credit Memo	☑	Document Creator - Sales Credit Memo - Email Template
Sales	4	Sales Test	1	202	Sales Document - Test	☑	./SalesReceivables/Document/SalesDocumentTe...	☐	_
Purchase	5	Purchase Quote	1	11249680	Purchase - Quote	☑	Document Creator - Purchase Quote	☑	Document Creator - Purchase Quote - Email Template
Purchase	6	Purchase Order	1	11249681	Purchase - Order	☑	Document Creator - Purchase Order	☑	Document Creator - Purchase Order - Email Template
Purchase	7	Purchase Invoice	1	11249682	Purchase - Invoice	☑	Document Creator - Purchase Invoice	☑	Document Creator - Purchase Invoice - Email Template
Purchase	8	Purchase Credit Memo	1	11249683	Purchase - Credit Memo	☑	Document Creator - Purchase Credit Memo	☑	Document Creator - Purchase Credit Memo - Email Templ...
Purchase	9	Purchase Receipt	1	11249684	Purchase - Receipt	☑	Document Creator - Purchase Receipt	☐	_
Purchase	10	Purchase Return Ship...	1	11249686	Purchase - Return Shipment	☑	Document Creator - Purchase Quote	☐	_
Purchase	11	Purchase Test	1	402	Purchase Document - Test	☑	./PurchasesPayables/PurchaseDocumentTest.rdlc	☐	_
Bank Account	12	Bank Statement	1	1407	Bank Account Statement	☑	./BankMgt/BankAccountStatement.rdlc	☐	_
Bank Account	13	Bank Reconciliation T...	1	1408	Bank Acc. Recon. - Test	☑	./BankMgt/BankAccReconTest.rdlc	☐	_
Bank Account	14	Bank Check	1	1401	Check	☑	./BankMgt/Check.rdlc	☐	_
Reminder/Finance ...	15	Reminder	1	11249721	Reminder	☑	Document Creator - Reminder	☑	Document Creator - Reminder - Email Template
Reminder/Finance ...	16	Finance Charge	1	11249720	Issued Finance Charge Memo	☑	Document Creator - Issued Finance Charge Memo	☑	Document Creator - Issued Finance Charge Memo - Email...
Reminder/Finance ...	17	Reminder Test	1	122	Reminder - Test	☑	./SalesReceivables/ReminderTest.rdlc	☐	_
Reminder/Finance ...	18	Finance Charge Test	1	123	Finance Charge Memo - Test	☑	./SalesReceivables/FinanceCharge/FinanceCharg...	☐	_
Production Order	19	Production Order	1	11249770	Prod. Order - Job Card	☑	Document Creator - Prod. Order - Job Card	☐	_

View and edit all report and layout selections within a single page!

Watch the video and discover all the benefits of Document Creator in just 10 minutes!

Learn more about how to set up and use Document Creator:

- Installation Manual
- User Manual

Last update: August 3, 2023

Application Report Selection - All report and layout selections in one overview!

Application Report Selection - All report and layout selections in one overview!

Installing the Extension

> **Attention**
>
> The installation instructions on this page are for installing Document Creator in a Dynamics 365 Business Central **online (SaaS/Cloud)** environment. If you are looking for installation instructions for Dynamics 365 Business Central on-premise, then please follow the steps on the page Installing for On-Premise.

> **Tip**
>
> Already have the **Document Creator** extension installed, but looking to **update** the extension to a newer version? Then please see our F.A.Q.-item: "How can we update an app for our Business Central environment?"

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

1. Go to **Setup & Extensions** > **Extensions** (i.e., open the **Extension Management** page).

2. Open the extension marketplace (AppSource) for the current environment via: **Manage** > **Extension Marketplace**.

Extension Management | Work Date: 1/25/2024
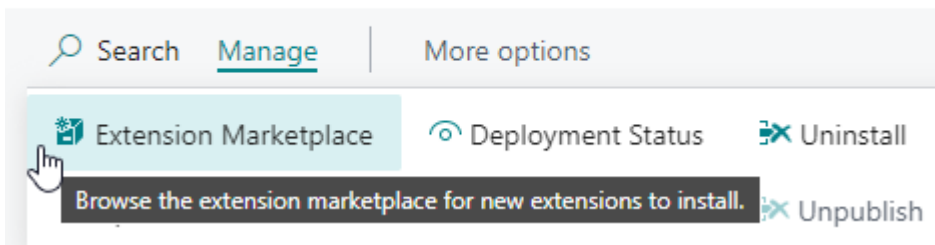
3. Search for "Document Creator" (By Apportunix).

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.

   (Note: Document Creator is **free** to use in Sandbox environments.)

6. Use the **Tell Me** search feature in Business Central, search for and open the **Document Creator Setup Wizard** page. You can also find the setup wizard in the **Assisted Setup** page (where you will also find setup wizards for other applications and features).

Tell me what you want to do   ⤢ ✕

document creator setup

Go to Pages and Tasks

> Document Creator Setup   Administration

> Document Creator Setup Wizard 🖱   Administration   🔖

7. Follow the **Document Creator Setup Wizard** to set up the extension.

Document Creator Setup Wizard   ⤢ ✕

⚙️

Welcome to the Document Creator Setup

The app that allows you to easily edit your document report layouts, translate your reports and extend reports with new columns, data items and labels; all by yourself!

This setup guide helps you to set up your subscription, configure your preferences and help you get started quickly!

Let's go!

Choose Next to get started.

Back   **Next** 🖱   Finish

8. Assign the "Apportunix Document Creator" permission set to your users. Please see Permission Configuration.

9. **Import the Customizable Label Translations Package**

   If you have not imported the translations yet, then please follow the installation instructions on the Import Translations Template page.

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

Last update: November 3, 2022

Permission Configuration

Once the Document Creator extension has been installed, an `Apportunix 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.

Permission Sets | Work Date: 1/25/2024

🔍 Document Creator	✕	+ New	📝 Edit List	🗑 Delete	🖥 Permissions

	Permission Set ↑		Name
→	WSB_DCR	⋮	Apportunix Document Creator

> **ℹ Info**
>
> The following permission sets are available:
>
> - `Apportunix Document Creator` - A permission set that allows for full access to all features of the Document Creator app (e.g., editing layouts, dataset extensions, conditional layout selections)
>
> - `Apportunix Doc. Creator User` - A permission set for restricted access to Document Creator, i.e., allows for running reports with a Document Creator report layout.

To assign the `Apportunix 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 `Apportunix Document Creator`.

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

Installation & User Manual

License Activation

> **■ Attention**
>
> If you do not have an active subscription in your **Production** environment yet, then note that you can use the **free** demo version of Document Creator in a **Sandbox** environment. For **Sandbox** environments, you can skip the instructions in this section of the installation manual. Please find more information on the licensing and pricing on our website.
>
> To activate the full version of Document Creator, for a **Production** environment, please start a subscription via the **Apportunix Subscriptions** page as described in this chapter.

> **■ Tip**
>
> You can also follow the **Document Creator Setup Wizard** under **Setup & Extensions** > **Assisted Setup**, where you will be guided through the setup for the app, including how to set up a subscription to activate Document Creator in your **Production** environment.

Before you can run reports with a Document Creator layout in a Production environment, you will need to set up an active subscription for the "Document Creator" app first, for this there are two options:

- Create an Apportunix Subscription (Recommended, includes a 14-day free trial in your Production environment)
- Activate using a Product Key (Legacy)

Create a Subscription

To set up a subscription for the **Document Creator** app, please follow these steps:

1. Open the **Apportunix Subscriptions** page.
2. Invoke the **Create Subscription** action, which will open the **Create Subscription** wizard.
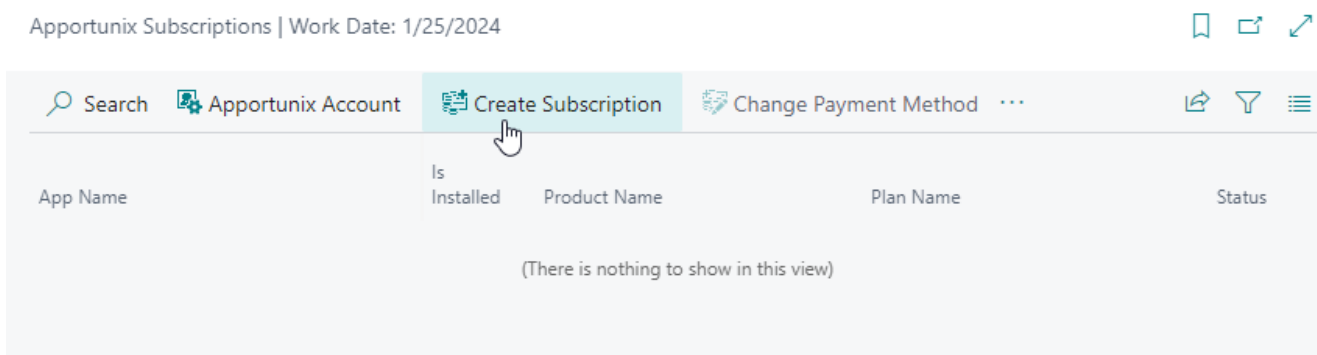
3. In the **Create Subscription** wizard, select the product for the **Document Creator** app. Then, choose **Next**.
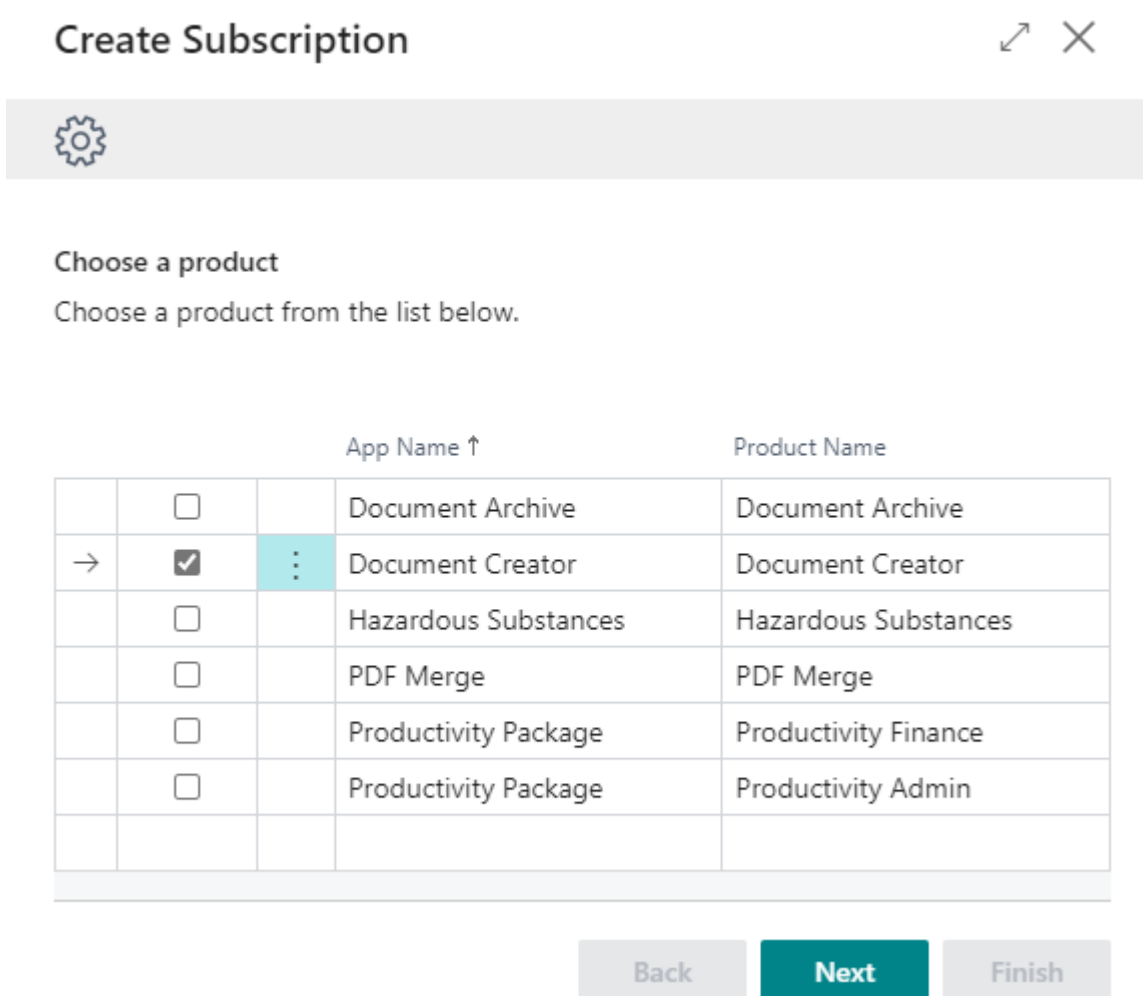
4. Next, select the plan/pricing for the product that applies for you. Choose **Next**.

Note: You can find more information about a plan, using the **View** action.

5. Take note of the information in the next step. Note that you only need a subscription for **Production** environments. You can use the app for free in a **Sandbox** environment.

   Choose **Next**.

6. Enter your company information. Make sure to enter a correct **Tax ID** and **Tax ID Type** combination.

7. Also, choose a strong password and store/remember it well, so that you can activate the designer with this account later as well.

Create Subscription

Authentication (Apportunix Account)

Your details for authenticating with the subscription service.

Environment Identification

AAD Tenant ID · · · · · · · · · · · · · · ·   00000000-0000-0000-0000-000000000000

Environment · · · · · · · · · · · · · · · · ·   CRONUS-PRD

Password

Choose a strong password of at least 16 characters long for your Apportunix account. You can use this account to authenticate with our services and access your subscriptions again in the future. We recommend to store the password in a password vault so that you can easily retrieve it in the future!

Password (Min. 16 chars) · · · · · ∗

Confirm Password · · · · · · · · · ∗

[Back] [Next] [Finish]

8. Follow and finish the remainder of the wizard.

   When you are done you will be met with the final step of the wizard that informs you that the subscription was set up successfully and you are ready to go.

Create Subscription   ⤢ ✕

✓

All Done
Your subscription has been created successfully!

                                                Back   Next   **Finish**
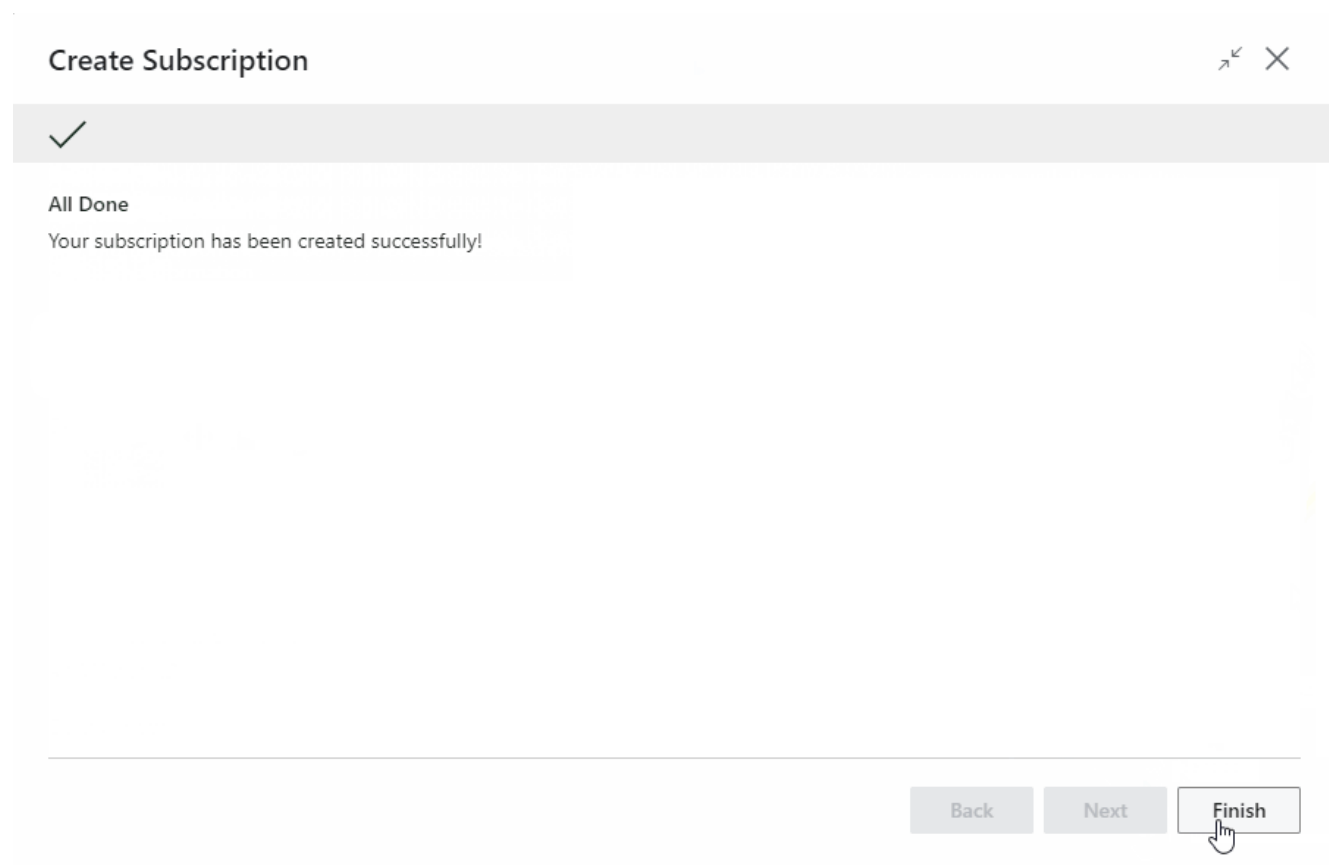
> 🟦 **Info**
>
> Even more detailed information on creating a subscription in your Production environment can be found in the following document: Monet | User Documentation which can be downloaded from the Apportunix Downloads drive (from the *Monet | Docs* folder).

Activate using a Product Key

To activate Document Creator using a Document Creator product key, please follow these steps:

1. Let your **Apportunix reseller** fill in the online Order Form. Your reseller will receive the product key within 0 - 2 business days. Your reseller will be invoiced periodically.

2. Open the **Document Creator Setup** page and enter your product key in the **Product Key** field. Make sure you use the Document Creator product key that matches the displayed **AAD Tenant ID** (online) or **BC Serial No./** VOICE ID (on-premise).

3. Use the **Check License** action to verify that you have successfully activated the product. If you run into any issues with the activation, then please check our F.A.Q.-item "We are getting a message that our license is invalid. What should we do?".

> **Note**
>
> The option to enter a product key will not be available if you have already set up an active subscription for Document Creator in the **Apportunix Subscriptions** page.

License Status

Note that you can find more information about the licensing and pricing on our website.

You can also check the state of your license in the **Document Creator Setup** page, where you will find the **License Status** field:

← Work Date: 25.01.2024   ✎   ⬈   +   🗑   ✓ Saved   🔖 ⤢ ⤢

Document Creator Setup

⚙ Open Setup Wizard   📄 Apportunix Report Selection   ↓ Download Designer   📄 Import Default Layout   ⋯

General   Show more

Enabled · · · · · · · · · ⬤   Format Locale · · · · · · · · | English (United States) | ⋯

Default Export Profile · · | DEFAULT   ⌄ | Use Region-Indepen... · ⬤

Authentication

AAD Tenant ID · · · · · · · | 1p42900u-r1p1-3lec-r6oc-   Environment · · · · · · · · · Apportunix-PRD
                              542036d5ile |

                                                        License Status · · · · · · · Active (Subscription)

Last update: March 6, 2023

Installation & User Manual

Installing for On-Premise

> **Attention**
>
> The installation instructions on this page are for installing Document Creator in an **on-premise** Dynamics NAV or Dynamics 365 Business Central environment. If you are looking for installation instructions for Dynamics 365 Business Central online (SaaS/Cloud), then please follow the steps on the page Installing the Extension.

Prerequisites

Before installing the "Document Creator" app, please check if the following prerequisites are met:

- The Business Central/NAV license should have access to the **Apportunix Suite** ISV module. If you encounter any issues with missing permissions, please ensure you have downloaded a new Business Central/NAV license from Microsoft PartnerSource Business Center and that you have restarted your server instance(s) after uploading your license to the database.

- After the installation of the Business Central extension, you should set up your subscription via the **Apportunix Subscriptions** page (recommended), or via the **Document Creator Setup** page using a Document Creator product key registered for your Business Central/NAV license's Serial No./VOICE ID/PSBCID (legacy).

- For installation and activation instructions of the Document Creator stand-alone Designer for Dynamics 365 Business Central, please consult the Installing the Designer documentation page.

> **Attention**
>
> If you do not meet these prerequisites but would like to try out Document Creator, then we advise to install Document Creator into a Business Central *online* Sandbox environment, from Microsoft AppSource, in which you can use the app without any restrictions.

For additional support, please visit our Support page to get in contact with our support engineers.

Supported Versions

With the latest Document Creator release the following *minimum* on-premise target versions are officially supported:

Folder	Dynamics NAV/BC Version
NAV 8.0.0.0 (CU01)	2015: W1 8.00 Build 38457 (Cumulative Update 1)
NAV 9.0.0.0	2016: W1 9.00 Build 42815
NAV 10.0.0.0	2017: W1 10.0 Build 13682
NAV 11.0.0.0	2018: W1 11.0 Build 19394
NAV 13.0.0.0	BC13: W1 13.0 Build 24623 (Fall '18)
NAV 14.3.0.0	BC14: W1 14.3 Build 34444 (Spring '19, Cumulative Update 2)
BC 15.0.0.0	BC15: W1 15.0 Build 36510 ('19 release Wave 2)
BC 16.2.0.0	BC16: W1 16.2 Build 13779 ('20 release Wave 1)
BC 17.0.0.0	BC17: W1 17.0 Build 16993 ('20 release Wave 2)
BC 18.0.0.0	BC18: W1 18.0 Build 23795 ('21 release Wave 1)
BC 19.0.0.0	BC19: W1 19.0 Build 30693 ('21 release Wave 2)
BC 20.2.0.0	BC20: W1 20.2 ('22 release Wave 1)
BC 21.0.0.0	BC21: W1 21.0 ('22 release Wave 2)
BC 22.0.0.0	BC22: W1 22.0 ('23 release Wave 1)

> **Attention**
>
> Missing runtime packages (.app files) for a new, specific minor release? Reach out to our Support team, and we will add the required packages.

Installation

This chapter describes the installation procedure for the following NAV/BC target versions:

- Dynamics 365 Business Central 2019 release Wave 2 and up (BC15+)

- Dynamics 365 Business Central Spring '19 Release (BC14)
- Dynamics NAV 2015 – 2018 and Dynamics 365 Business Central Fall '18 Release (BC13)

Dynamics 365 Business Central 2019 release Wave 2 and up (BC15+)

The installation files are grouped into a directory for each target version (e.g., `BC 15.0.0.0` corresponds to Dynamics 365 Business Central 2019 release Wave 2). Make sure to use the files from the directory that matches your target. You will need to install both the **Document Creator** and **Document Creator On-Premise** app.

- The **Document Creator** app contains all the features available for both On-Premise and SaaS installations, i.e., creating/editing/importing/exporting/archiving layouts, export profiles, reports, etc.
- The **Document Creator On-Premise** app is an extension on the Document Creator app which makes it use an on-premise installation of the report engine. It also includes the features that are only available on-premise, e.g., the RDLC layout converter and direct printing to printers installed on the server. *(Optional, starting from Document Creator, version 2.0 (BC20.0))*

For Microsoft Dynamics 365 Business Central on-premise the extension can be installed using the *Business Central Administration Shell*. Please follow the instructions that can be found on the How to: Publish and Install an Extension v2.0 - Business Central | Microsoft Docs page. If you are upgrading from a previous version, then please see Upgrading Extensions - Business Central | Microsoft Docs for instructions on how to perform an upgrade with the cmdlets of the *Business Central Administration Shell*.

To install Document Creator, please follow these steps:

1. **Publishing and installing the dependencies**

   Download and install the dependencies: "System Library", "Monet" and "PDF Merge".

2. **Publishing the "Document Creator" extension**

   Open the Business Central Administration Shell (as admin) and run the following command to publish the new extension to your database:

   ```
   Publish-NAVApp -ServerInstance $ServerInstance -Path "...\App\Apportunix_Document
   Creator_$version.app"
   ```

   (With `$version` being the version of the app you are going to install and `$ServerInstance` being the name of the target BC server instance.)

3. **Installing the "Document Creator" extension**

   If you are *not* upgrading from a previous version of the extension, see 2.A.

   If you are upgrading from a previous version of the extension, see 2.B.

   A. Install the extension either through the **Install** action on the **Extension Management** page, or run the following command(s):

```
Sync-NAVApp -ServerInstance $ServerInstance -Name "Document Creator"
Install-NAVApp -ServerInstance $ServerInstance -Name "Document Creator"
```

B. At this point you will have two versions published to the database. In the **Extension Management** page you will see the old version is Installed, while the new version is only Published/Not installed.

Please, first uninstall the Document Creator On-Premise app.

Run the following commands to sync the app and start the data upgrade:

```
Sync-NAVApp -ServerInstance $ServerInstance -Name "Document Creator" -Version $version
Start-NAVAppDataUpgrade -ServerInstance $ServerInstance -Name "Document Creator" -Version $version
```

At this point, you will still have two versions of the extension published, but now the new version is installed and the old version only published.

4. **Publishing and Installing the "Document Creator On-Premise" extension** *(Optional, starting from Document Creator, version 2.0 (BC20.0))*

> ■ **Important**
>
> If you would like to adhere to the new "**Universal Code**" initiative from Microsoft, then you should NOT install this extension. Installing the "Document Creator On-Premise" requires the "Implemented code is not cloud-optimized" extension for Business Central licenses acquired after 2022-10-03. Please find more information on the "Universal Code" initiative on aka.ms/BCUniversalCode.
>
> For your considerations on whether to install the extension, the "Document Creator On-Premise" extension applies the following extensions to the "Document Creator" app:
>
> • A control add-in is used instead of the API for rendering reports.
>
> • The **Redirect Printers** feature, to allow for direct printing to printers installed on the server.
>
> • The **RDLC Layout Converter** feature, to convert built-in RDLC layouts to Document Creator layouts.

Please make sure that the .NET 6.0 Desktop Runtime for Windows is installed on the machine on which the Business Central server instance(s) is/are running.

Please, follow the same instructions from step (2) and (3) to publish and install the **Document Creator On-Premise** app.

5. **Open the Setup Wizard**

Use the **Tell Me** search feature in Business Central, search for and open the **Document Creator Setup Wizard** page. You can also find the setup wizard in the **Assisted Setup** page (where you will also find setup wizards for other applications and features).

Tell me what you want to do   ⤢ ✕

document creator setup

Go to Pages and Tasks

❯   Document Creator Setup   Administration

❯   Document Creator Setup Wizard 🖑   Administration   🔖

6. **Follow the Setup Wizard**

Follow the **Document Creator Setup Wizard** to set up the extension.

Document Creator Setup Wizard   ⤢ ✕

⚙

Welcome to the Document Creator Setup

The app that allows you to easily edit your document report layouts, translate your reports and extend reports with new columns, data items and labels; all by yourself!

This setup guide helps you to set up your subscription, configure your preferences and help you get started quickly!

Let's go!

Choose Next to get started.

| Back | **Next** 🖑 | Finish |

7. **Assign the "Apportunix Document Creator" permission set(s) to your users**

Please see Permission Configuration.

8. **Import the Customizable Label Translations Package**

If you have not imported the translations yet, then please follow the installation instructions on the Import Translations Template page.

Document Creator is ready for use!

Dynamics 365 Business Central Spring '19 Release (BC14)

The installation files can be found in the `NAV 14.3.0.0` directory, which corresponds to the Dynamics 365 Business Central Spring '19 Release. The installation set contains the following directories:

Folder	Contents
`DOCUMENT CREATOR`	The Document Creator extension/app.
`DOCUMENT CREATOR UTILS`	The Document Creator Utilities extension/app + C/AL version.
`TEMPLATE`	Files for template reports, layouts and translations.

• The *core* features of Document Creator are included in the "Document Creator" extension, i.e., creating/editing/importing/exporting/archiving/converting layouts, export profiles, etc.

• The *translation* features and report utility functions that can be used in report objects are provided within a separate "Document Creator Utilities" extension. A C/AL version of the objects from this extension are available as well, which you may prefer if you still want to be able to use these features in C/AL report objects again as well.

- The *template* report objects are provided with a "Document Creator W1 Templates" extension. You can use the source code of the report objects from this extension as a starting point for your own reports. A C/AL version of the template report objects are available as well.

To install Document Creator, please follow these steps:

1. **Publishing the "Document Creator" extension**

   Open the Business Central Administration Shell (as admin) and run the following command to publish the new extension to your database:

   ```
   Publish-NAVApp -ServerInstance $ServerInstance -Path "...\DOCUMENT
   CREATOR\Apportunix_Document Creator_$version.app"
   ```

   (With `$version` being the version of the app you are going to install and `$ServerInstance` being the name of the target BC server instance.)

2. **Installing the "Document Creator" extension**

   If you are *not* upgrading from a previous version of the extension, see 2.A. If you are upgrading from a previous version of the extension, see 2.B.

   A. Install the extension either through the **Install** action on the **Extension Management** page, or run the following command(s):

   ```
   Sync-NAVApp -ServerInstance $ServerInstance -Name "Document Creator"
   Install-NAVApp -ServerInstance $ServerInstance -Name "Document Creator"
   ```

   B. At this point you will have two versions published to the database. In the **Extension Management** page you will see the old version is *Installed*, while the new version is only *Published/Not installed*.

   Run the following commands to sync the app and start the data upgrade:

   ```
   Sync-NAVApp -ServerInstance $ServerInstance -Name "Document Creator" -Version $version
   Start-NAVAppDataUpgrade -ServerInstance $ServerInstance -Name "Document Creator" -Version
   $version
   ```

   At this point, you will still have two versions of the extension published, but now the new version is installed and the old version only published.

3. **Publishing and Installing the "Document Creator Utilities" extension**

   If you want to use translation features and report utility functions from AL only, see 3.A. If you want to use translation features and report utility functions also from C/AL, see 3.B.

   A. Open the Business Central Administration Shell (as admin) and run the following command to publish the extension to your database:

   ```
   Publish-NAVApp -ServerInstance $ServerInstance -Path "...\DOCUMENT
   CREATOR\Apportunix_Document Creator Utilities_$version.app"
   ```

Then, install the extension either through the **Install** action on the **Extension Management** page, or run the following commands:

```
Sync-NAVApp -ServerInstance $ServerInstance -Name "Document Creator Utilities"
Install-NAVApp -ServerInstance $ServerInstance -Name "Document Creator Utilities"
```

If you are upgrading from a previous version of the extension, follow the instructions as described in the previous step to run the data upgrade in the same way for this extension.

B. Start the Dynamics NAV development environment and import the `NAV<version>_NewObjects.fob` file.

Import the menu-suite from the `NAV<version>_MenuSuite1056.fob` file or edit the menu-suite object ID in the `NAV<version>_MenuSuite1056.txt` file.

4. **Installing the Control Add-In**

Open the client, the first time you will get this message:
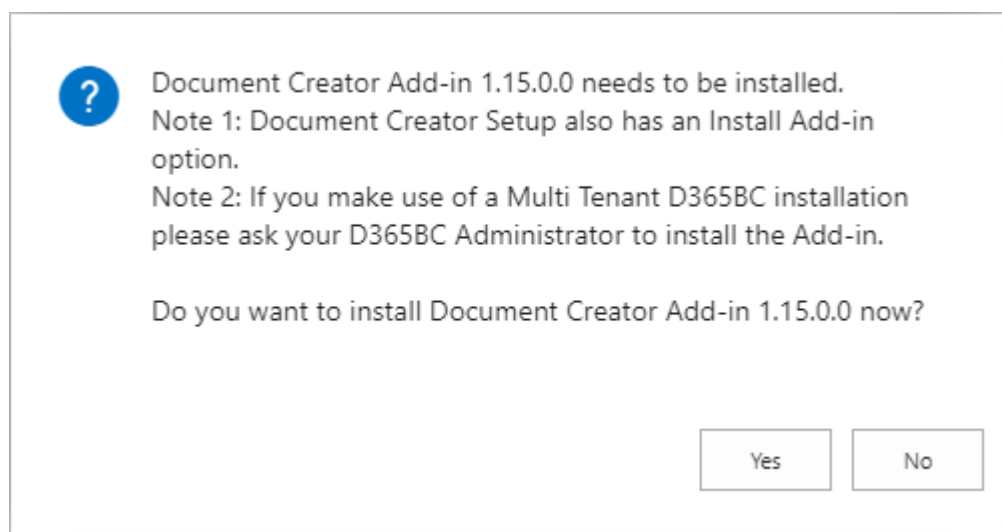
Choose "Yes"; Read and agree with the license agreement and enter your e-mail.

EDIT - DOCUMENT CREATOR LICENSE AGREEMENT CONFIRMATION

I have read and agree to the ter...

E-mail Product Updates · · · · · · · · · ·   info@document-creator.com

Read the License Agreement here.

OK   Cancel

You will see a message once the installation has completed successfully.

5. **Setting up your Product Key**

   To set up your product key, open the **Document Creator Setup** page:

   a. Paste the product key in the "Product Key" field.

   b. Invoke the **Check Product Key** action to validate the product key.

   c. Invoke the **License Information** action for more information about the license.

6. **Assign the "Apportunix Document Creator" permission set to your users.**

7. **Installing the W1 Template Reports**

   If you want to use the AL version of the W1 template reports, see 6.A. If you want to use the C/AL version of the W1 template reports, see 6.B.

   A. First publish and then install the extension from the following file:

   ```
   Apportunix_Document Creator W1 Templates_<version>.app
   ```

   Then, search for and open the **Report Layouts** page, choose 'Import Report Package' and import the following file:

   ```
   LayoutPackage - W1 – DCR_Release_<version>.dcr
   ```

   B. Search for and open the **Custom Report Layouts** page in the Windows client, choose 'Import Report Package' and import the following file:

```
ReportPackage - W1 – DCR_Release_<version>.dcr
```

Then, compile the Document Creator objects (filter on versionlist `@*DCR*`).

8. **Importing the Template Translations**

   Search for and open the **Configuration Packages** page (RapidStart):

   a. Choose **Import Package** and select the RapidStart package from the `TEMPLATE` directory.

   b. Select the imported DCR package, choose **Apply Package**, then confirm. This imports a set of default translations for the Document Creator layouts.

Document Creator is ready for use!

Dynamics NAV 2015 – 2018 and Dynamics 365 Business Central Fall '18 Release (BC13)

The installation files are grouped into a directory for each target version (e.g., `NAV 8.0.0.0 (CU01)` corresponds to Dynamics NAV 2015). Make sure to use the files from the directory that matches your target. The installation set for each target version contains the following directories:

Folder	Contents
`APPLICATION OBJECTS`	New and Merge NAV Objects.
`TEMPLATE`	Files for template reports, layouts and translations.

To install Document Creator, please follow these steps:

1. Start the Dynamics NAV development environment and import the `NAV<version> - New Objects.fob` file.

2. Merge the following NAV objects with the objects in file `NAV<version> - Merge Objects.txt`:

Type	ID	Name	Applicable for NAV Version
Codeunit	40	LogInManagement	NAV2015
Table	9650	Custom Report Layout	NAV2015 / NAV2016 / NAV2017 / NAV2018 / BC13
Codeunit	9651	Document Report Mgt.	NAV2015 / NAV2016 / NAV2017 / NAV2018

3. Import the menu-suite from the `NAV<version> - MenuSuite - 1056.fob` file or edit the menu-suite object ID in the `NAV<version> - MenuSuite - 1056.txt` file.

4. Compile the merged objects.

5. Open the Windows Client, the first time you will get this message:
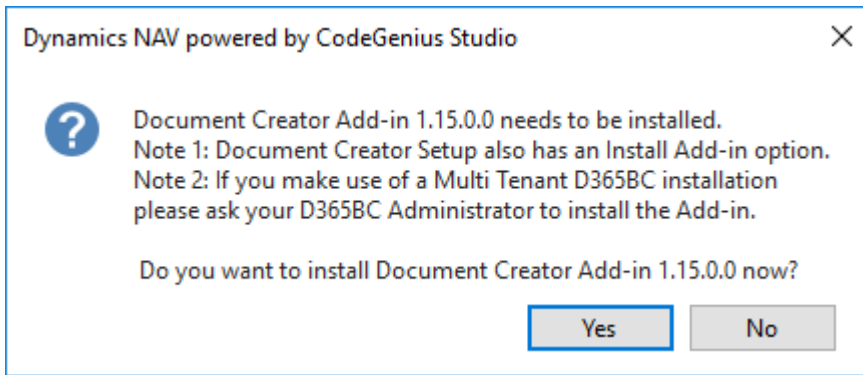
Choose "Yes"; Read and agree with the license agreement and enter your e-mail.
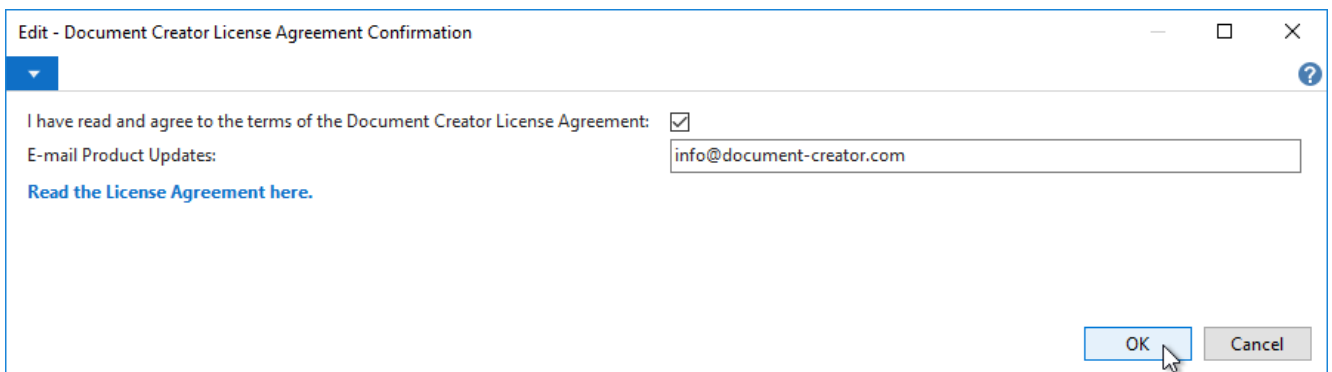
You will see a message once the installation has completed successfully.

6. Navigate to (or search for) 'Departments | Document Creator | Document Creator Setup':

   a. Paste the product key in the "Product Key" field.

   b. Choose **Check Product key** to validate the "Product Key".

   c. Choose **License Information** for more information about the license.

7. Navigate to (or search for) 'Departments | Document Creator | Custom Report Layouts':

   a. Choose 'Import Report Package...' and select the `ReportPackage - DCR_Release_<version>.dcr` file from the `TEMPLATE` directory. This imports a default set of layouts and *also* the report objects (from the FOB file in the package).

   b. Compile Document Creator objects (filter on versionlist `@*DCR*`).

8. Navigate to (or search for) 'Administration | Application Setup | RapidStart Services for Microsoft Dynamics NAV | Configuration Packages:

   a. Choose **Import Package** and select the RapidStart package from the `TEMPLATE` directory.

   b. Select the imported 'DCR' package, choose **Apply Package**, then confirm. This imports the default translations for the Document Creator layouts.

Document Creator is ready for use!

Data Upgrades during BC Upgrades

This chapter describes how you can migrate data stored by Document Creator while upgrading to a newer version of Dynamics 365 Business Central.

- From BC15 and up to the latest BC version

- From BC14 to BC15 and up

- To newer Dynamics NAV versions

From BC15 and up to the latest BC version

When upgrading to a new major or minor update of Business Central, make sure to publish the latest available runtime package for your platform. Also, make sure to sync the extension (`Sync-NAVApp`), and run a data-upgrade (`Start-NAVAppDataUpgrade`) if necessary (i.e., in case you install a newer version of Document Creator than the version that was installed in your current environment). For more information, please consult the Publishing, Upgrading, and Installing Extensions During Upgrade page.

From BC14 to BC15 and up

> **Tip**
>
> Instead of following this data migration guide, you can also choose to only export the data you need (i.e., typically only the translations), uninstall and purge the data from the old app, and install the new app after the upgrade. Considering a Business Central upgrade is not easy to follow/execute for just anyone, this is also a recommended upgrade path.

To migrate Document Creator table data during an upgrade from Business Central 14.x to newer Business Central versions (15.x and up), please follow these steps:

In the Current Environment (Before the BC Upgrade)

1. Have the latest version of the "Document Creator" (and "Document Creator Utilities") app installed.

2. Publish, sync and install the "Document Creator Upgrade Data" app.

3. Publish, sync and install the "Document Creator Source Data Migration" app. Code for migrating data will be run automatically.

4. Uninstall the "Document Creator Source Data Migration" and "Document Creator" (and "Document Creator Utilities") app.

5. Finally, upgrade the environment to the new Business Central release.

In the Upgraded Environment (After the BC Upgrade)

1. Publish, sync and install the "Document Creator" and "Document Creator On-Premise" app.

2. Publish, sync and install the "Document Creator Target Data Migration" app. Code for migrating data will be run automatically.

3. Uninstall the "Document Creator Target Data Migration" and "Document Creator Upgrade Data" app. You can run a `Sync-NavApp` with `-Mode Clean` to purge all upgrade extension data from the database.

4. Follow the further installation instructions from the Dynamics 365 Business Central 2019 release Wave 2 and up (BC15+) section.

You can download the (source code of the) Data Upgrade Extensions from the Apportunix Downloads drive.

To newer Dynamics NAV versions

The table schemas of Document Creator for Dynamics NAV are upwards compatible, meaning that if you want to upgrade to a newer NAV version you can simply use the existing table definitions in the upgrade process. Please make sure that you install the latest version of Document Creator for the applicable target version as described in the Dynamics NAV 2015 – 2018 and Dynamics 365 Business Central Fall '18 Release (BC13) installation instructions.

Last update: July 24, 2023

Installation & User Manual

Installing the Designer

To edit Document Creator layouts you can use the Document Creator Designer. This is a stand-alone 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.

Installation

To install the designer:

1. Invoke the **Download Designer** action on the **Document Creator Setup** page.

Document Creator Setup

🛠 Open Setup Wizard	📄 Apportunix Report Selection	⬇ Download Designer

Or, use the following button to download the designer directly:

Download Designer

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.

> **Important**
>
> The Document Creator Designer includes a 14-day unrestricted, free trial. Simply click on the **Start Trial** button to start using your free Designer trial period!
>
> To explore the features of the Designer you can also check out the Document Creator Designer Demo.
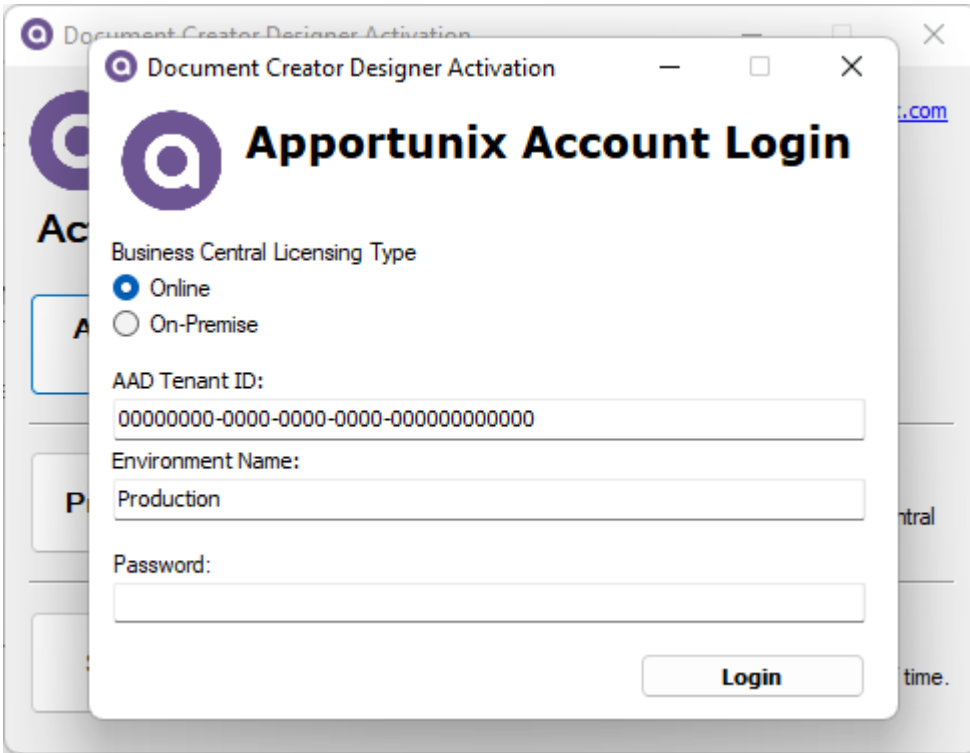
Product Activation

The first time you open the Document Creator Designer the "Product Activation" form is shown.
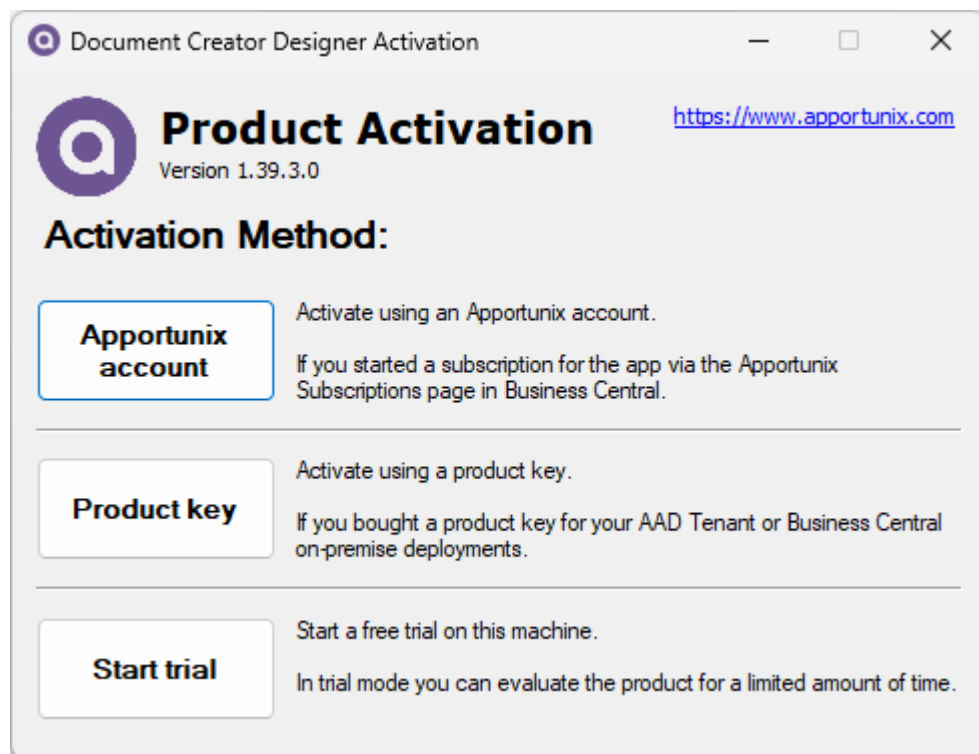

On this page, you have three methods for activation to use the designer:

- **Apportunix account** - If you have started a subscription for Document Creator for one of your Production environments via the Apportunix Subscriptions page, then you will have registered an **Apportunix Account** that is linked to that **Production environment**. You can activate the designer by entering the credentials for your Production environment and then clicking on the **Login** button.

- **Product key** - Activate the designer by entering your **AAD Tenant ID** (online) / **BC Serial No.** (on-premise) and **Product Key**, and then clicking on the **Validate** button.
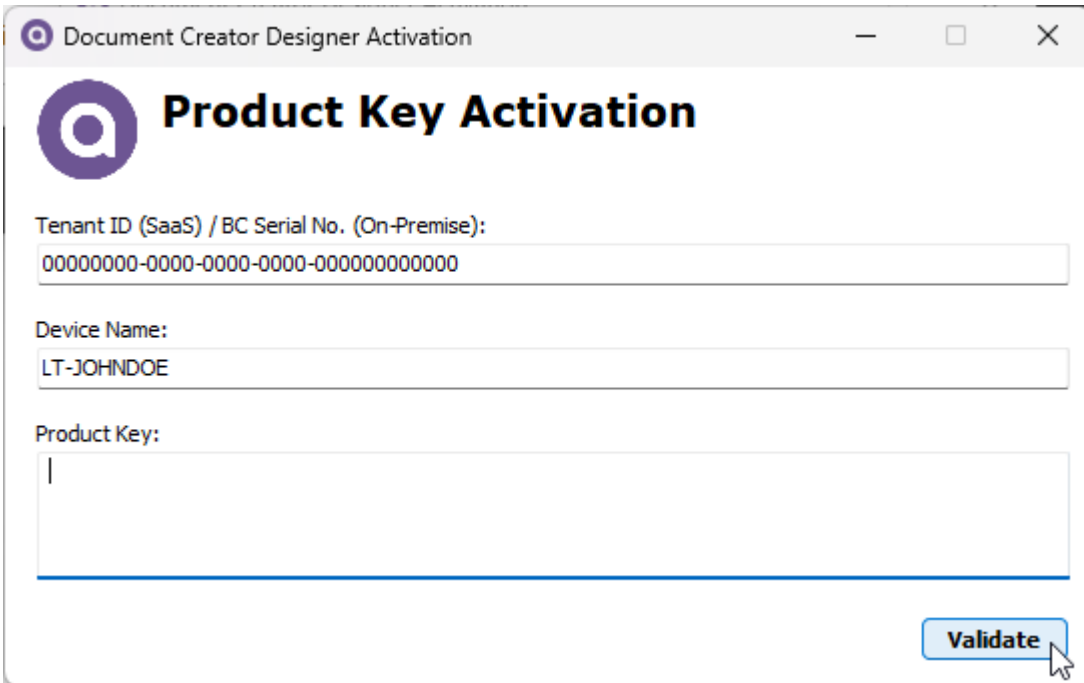
> ⬛ **Attention**
>
> The Document Creator Designer can only be activated with a product key for licenses in the new license model (S/M/L/XL). Please see the Pricing page for an overview of the available editions. Please contact us if you require a new product key for the new license model.

- **Start trial** - The first time you select **Start trial** a 14-day free trial will start. In the trial mode you can use all features of the designer, without any restrictions. You can continue using the trial in this period, but will need to select **Start trial** everytime you open the designer. After the trial period, you can no longer use this method.

Last update: March 22, 2023

Default Layout

When you create a new Document Creator 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.
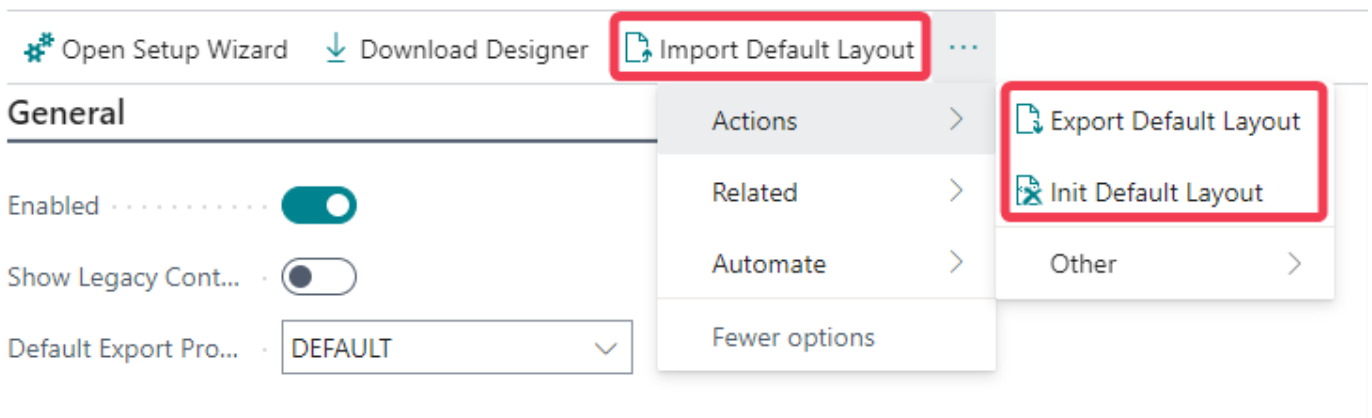
The default layout can be changed using the actions in the **Document Creator Setup** page:

- **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.

Last update: March 24, 2022

Translation Settings

Document Creator offers its own Report Translations feature, which helps to create multi-language reports and customizable labels. It ensures that labels can be customized by the end-user/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

| 🧩 Open Setup Wizard | 📄 Apportunix Report Selection | ⬇ Download Designer | 📄 Import Default Layout | Actions ⌄ | Related ⌄ |

Translations

Default Translation Language Code · ·	ENU ⌄	Translation Show Tags · · · · · · · · · ·	◯
Fall Back on Default Language · · · · ·	◯	Suppress Update Usage Warnings · · ·	◯
Translation Update Usage · · · · · · · ·	None ⌄		

> **Important**
>
> Document Creator ships with a **Translations package** that already provides you with a set of translations for multiple languages. See Import Translations Template.

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`.

Default Translation Language Code · · ENU ⌄

Default Translation Language Code

Specifies the default language which is used when translations are retrieved with a blank language code.

Learn more

The **Fall Back on Default Language** setting can be used to change how to act when a translation could not be found. When this setting is enabled, Document Creator will fall back on the translation for the configured default language code if a translation for a language could not be found. That is, when there is no translation record or when the **To-Do** checkmark is enabled for the translation record.

Fall Back on Default Language · · · · · · ⬤

Fall Back on Default Language

Specifies whether to fall back on the translation for the default language if no translation could be found.

Learn more

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 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.

Last update: August 22, 2023

Installation & User Manual

Getting Started: Report Layouts

> **Attention**
>
> Before you start using Document Creator, please make sure you have completed the steps in the Installation Manual. An active **Apportunix Subscription** or **Product Key** (legacy) needs to be set up to run reports with a Document Creator layout in a *Production* environment.

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

Tell me what you want to do   ↗ ✕

report layouts

Go to Pages and Tasks   Show all (6)

   >   Report Layouts   Administration

> **Tip**
>
> Alternatively, you may want to use the **Document Creator User-Defined Report Layouts** page to more easily manage the user-defined layouts in your Business Central environment.

The **Report Layouts** page shows a list of all the report layouts in your Dynamics 365 Business Central environment, both **User-Defined** ('Tenant') and extension-provided report layouts. By default, the page shows the following columns for each report layout record:

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 caption of the target report object.
Layout Name	The name of the report layout.

Column	Description
Description	A description of the report layout.
Extension	The extension that provides the report layout. Only applies to extension-provided report layouts. For user-defined/tenant report layouts this field will be blank.
Type	The type/layout format of the report layout which can be either "RDLC", "Word", "Excel", or "External". "Document Creator" layouts have type/layout format "External" and MIME type `reportlayout/dcrx`.
User Defined	Whether the report layout is a user-defined one, i.e., a tenant report layout created by a Dynamics 365 Business Central user.
Export Profile Code	The Document Creator Export Profile that will be used when the report is run with this report layout. Only applies to Document Creator report layouts. See Export Profiles.

> ### Tip
>
> Note that you can switch between **Views** to change what is displayed on the page. The following views will be available when Document Creator is installed:
>
> - **All** - Show all report layouts.
> - **Document Creator** - Show all Document Creator report layouts.
> - **External** - Show all report layouts of type/layout format "External".
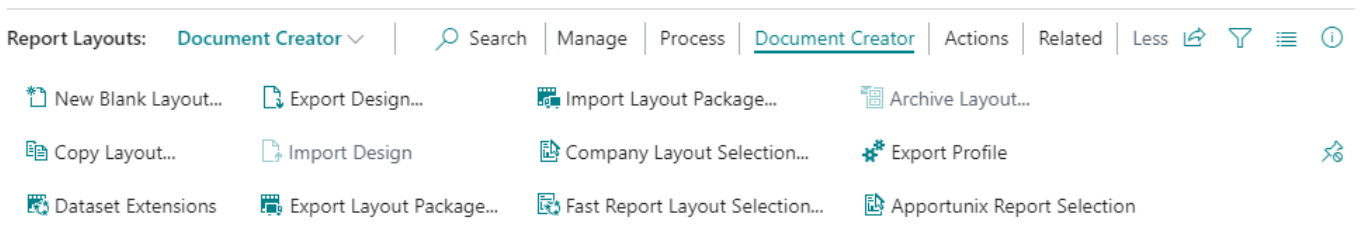> - **User-Defined** - Show all user-defined report layouts.
> - **Extensions** - Show all extension-provided report layouts.
>
>
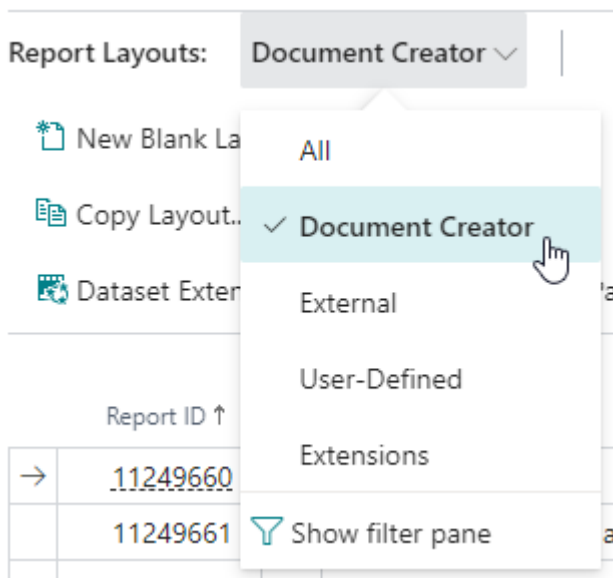
All page actions added by the Document Creator extension can be found under a "Document Creator" group, and accordingly all promoted actions can be found under the promoted category named **"Document Creator"**.

The Document Creator extension also adds two new factboxes to the Report Layouts page:

- **Archive**

  A factbox which shows the archived versions for the selected user-defined report layout.

- **Layout Selection**

A factbox which shows the report layout selections for the selected layout's report for all companies.

From this page you can perform the following tasks for report 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

Last update: March 20, 2023

Installation & User Manual

Reports and Report Selection

Document Creator ships with various document reports, built-in/extension-provided layouts and a template label translations package. These reports can be easily set up using the **Apportunix Report Selection** page.

Apportunix Report Selection

The **Apportunix Report Selection** page allows you to manage all report selections in a single page:

Note that you can sort on the **Usage Type** field on this page to group everything from the same category together (e.g., Sales, Purchase, ...). The report usages that are added by extensions get the **"Extension"** usage type (at least, by default).

> **Tip**
>
> You can use the **Email Body Layout Name** field to choose a **Document Creator** or **Word** layout from the **Report Layouts** page to use as template for the email body of your emails.
>
> | Report ID | Report Caption | Use for Email Atta... | Use for Email Body | Email Body Layout Name |
> |---|---|---|---|---|
> | 11249660 | Sales - Quote | ☑ | ☐ | _ |
> | 11249661 | Sales - Order Confirmation | ☑ | ☑ | Mail Body 1 |
> | 11249662 | Sales - Invoice | ☑ | ☐ | _ |
>
> N.B. Selecting layouts from the **Report Layouts** page is not possible by default in Business Central. The Microsoft Base Application still uses the legacy/deprecated **Custom Report Layout** table for selecting layouts and e-mail body layouts in (custom) report selections. This is a major inconsistency that is solved with the **Apportunix Report Selection** page.

> **Tip**
>
> Please follow the Tour for instructions on how to use this page. You can retake the tour by clicking on the title of the page.
>
> ← Apportunix Report Selection | Work Date: 23/01/2025
>
> **Manage all report selections in one page** ✕
>
> In the "Apportunix Report Selection" page you can view and edit all report selections in a single page.
>
> Show Help   **Take a tour**
>
> Document Creator Defaults...   ⚞ Business Rel. Layout Selections   ⟳
>
> | | | Sequence ↑ | | Report ID | Report Caption | Use for Email Atta... |
> |---|---|---|---|---|---|---|
> | | | 1 | | 11249660 | Sales - Quote | ☑ |
> | | | 1 | | 11249661 | Sales - Order Confirmation | ☑ |
> | | | 1 | | 11249662 | Sales - Invoice | ☑ |
> | Sales | 3 | Sales Credit Memo | 1 | 11249663 | Sales - Credit Memo | ☑ |
> | Sales | 4 | Sales Test | 1 | 202 | Sales Document - Test | ☑ |
> | Purchase | 5 | Purchase Quote | 1 | 11249680 | Purchase - Quote | ☑ |
> | Purchase | 6 | Purchase Order | 1 | 11249681 | Purchase - Order | ☑ |
> | Purchase | 7 | Purchase Invoice | 1 | 11249682 | Purchase - Invoice | ☑ |

Some additional clarification on the most important actions can be found in the following sub-sections.

Set Document Creator Defaults
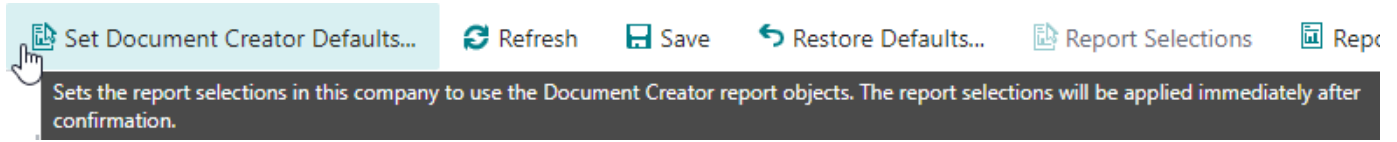
You can use the **Set Document Creator Defaults** action to set the available Document Creator report objects to their respective report selection. This allows for a very quick setup, i.e., in this way the current company will use all report objects provided with Document Creator and their respective default layout or usser-selected layout.

Refresh
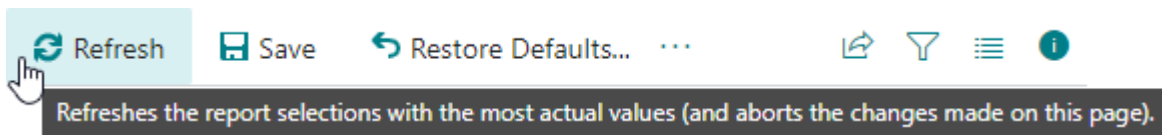
You can use the **Refresh** action to refresh the page with the most recent settings. However, please note that the changes you made on this page will be aborted.

Save
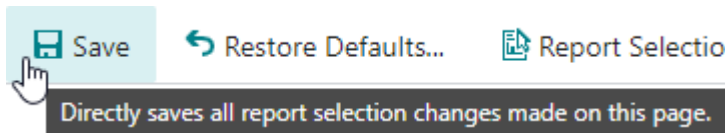
You can use the **Save** action to save your changes manually. Your changes will be saved automatically when you close this page.

Restore Defaults
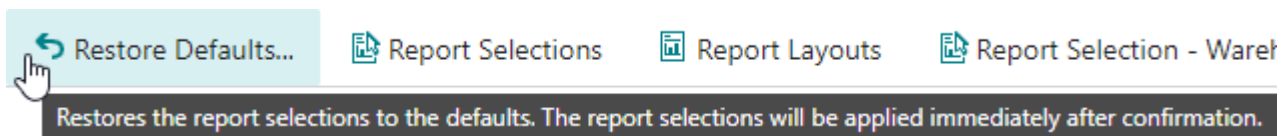
You can always choose to restore the report selections back to the Business Central defaults using the **Restore Defaults** action. This will delete all report selections and return the report selections to their defaults.

Report Selections
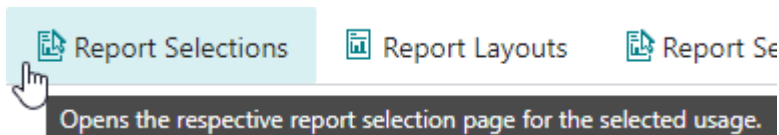
The **Report Selections** action is a record-scoped action that allows you to open the respective report selection page for the usage of the selected report selection. For example, if you have selected a **"S.Invoice"** report selection record, then this action will open the **Report Selection – Sales** page and will also set the usage filter to **"Invoice"** when the page is opened. On that page you can edit the detailed settings for the report selection.

> **Note**
>
> This **Report Selections** action will open the respective page, initialized with/filtered on the selected usage, only if the page supports this.
>
> Also, the action can only open the respective report selection page for extension-provided usages when this is implemented by the extension publisher.

Business Rel. Layout Selections

The **Business Rel. Layout Selections** action is a record-scoped action that allows you to open the **Business Rel. Layout Selections** action for the usage of the selected report selection.

1. In this page you have an overview of all business relations that have custom report/layout selections for a specific usage! (In the screenshot you see the custom sales order selections.) Normally you would need to first navigate to the customer/vendor card to view the selections per customer.

2. This page has a **Copy from Report Selection** action to easily copy the 'main' settings to the selected record.

3. You can specify an **Email Body Layout Name** and **Layout Name** for a customer/vendor specifically. You can also select **Document Creator** layouts for both of these, just like on the **Apportunix Report Selection** page.

Report Layouts
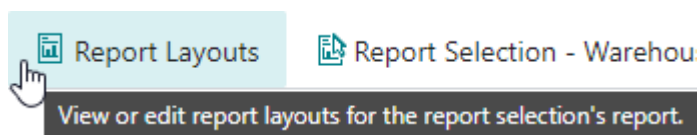
This is a record-scoped action that opens the Report Layouts page filtered to the report object of the selected report selection record. For example, if the report selection record specifies that report 11249662 "Sales – Invoice" should be used, then this action will open the Report Layouts page only showing the layouts for this report object:
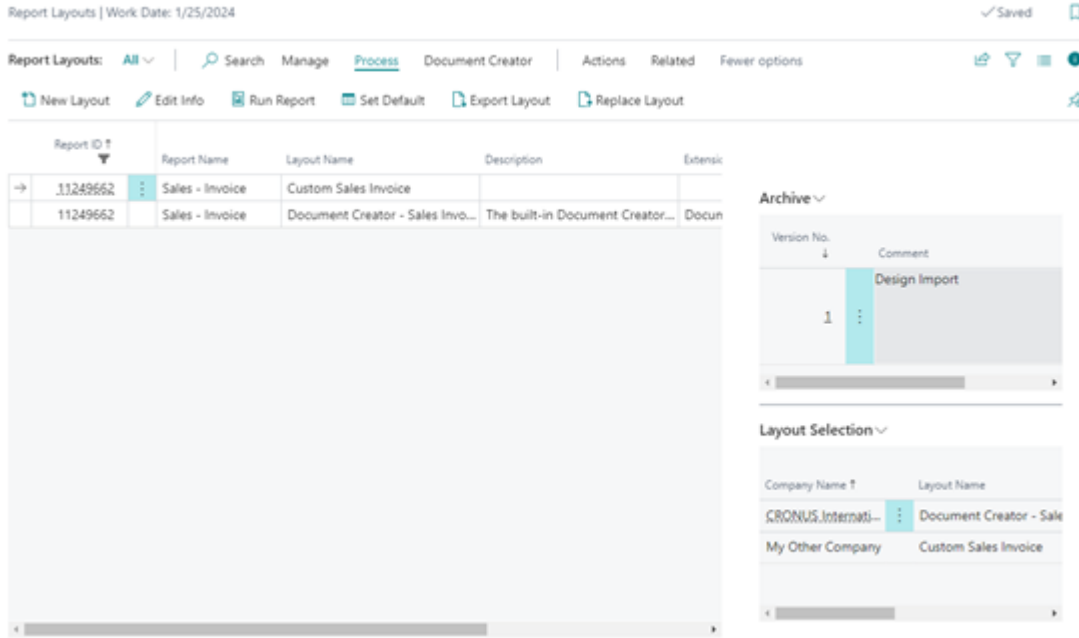
Reports

Document Creator provides a set of reports and layouts which cover the requirements of Small- to Midsized Businesses significantly better than the standard reports. These include reports for sales, purchase, reminders/ finance charge, transfer, service, assembly, warehouse, and many more documents.

The reports already offer a complete dataset that cover the needs for most users and even then, you can use the Dataset Extensions feature to add new columns, data items and translatable labels, all by yourself, *directly* from the Business Central web client, using data from any table, without developing additional report or reportextension objects.

The extensions provides reports for the following documents/usages in Microsoft Dynamics 365 Business Central:

Usage Type	Document	Usage ID	Usage	Report ID	Report Caption
Sales	Sales - Quote	0	Sales Quote	11249660	Sales - Quote
Sales	Sales - Order Confirmation	1	Sales Order	11249661	Sales - Order Confirmation
Sales	Sales - Invoice	2	Sales Invoice	11249662	Sales - Invoice

Usage Type	Document	Usage ID	Usage	Report ID	Report Caption
Sales	Sales - Credit Memo	3	Sales Credit Memo	11249663	Sales - Credit Memo
Sales	Sales - Blanket Order	20	Sales Blanket Order	11249667	Sales - Blanket Order
Sales	Sales - Return Order Confirmation	36	Sales Return Order	11249665	Sales - Return Order Confirmation
Sales	Sales - Shipment	38	Sales Shipment	11249664	Sales - Shipment
Sales	Sales - Return Receipt	39	Sales Return Receipt	11249666	Sales - Return Receipt
Sales	Sales - Work Order	40	Sales Work Order	11249670	Sales - Work Order
Sales	Sales - Picklist	53	Sales Order Pick Instruction	11249669	Sales - Picklist
Sales	Sales - Draft Invoice	88	Sales Invoice Draft	11249668	Sales - Draft Invoice
Sales	Sales - Pro Forma Invoice	89	Pro Forma Sales Invoice	11249671	Sales - Pro Forma Invoice
Purchase	Purchase - Quote	5	Purchase Quote	11249680	Purchase - Quote
Purchase	Purchase - Order	6	Purchase Order	11249681	Purchase - Order
Purchase	Purchase - Invoice	7	Purchase Invoice	11249682	Purchase - Invoice
Purchase	Purchase - Credit Memo	8	Purchase Credit Memo	11249683	Purchase - Credit Memo

Usage Type	Document	Usage ID	Usage	Report ID	Report Caption
Purchase	Purchase - Receipt	9	Purchase Receipt	11249684	Purchase - Receipt
Purchase	Purchase - Return Shipment	10	Purchase Return Shipment	11249686	Purchase - Return Shipment
Purchase	Purchase - Blanket Order	21	Purchase Blanket Order	11249687	Purchase - Blanket Order
Purchase	Purchase - Return Order	37	Purchase Return Order	11249685	Purchase - Return Order
Reminder/ Finance Charge	Reminder	15	Reminder	11249721	Reminder
Reminder/ Finance Charge	Issued Finance Charge Memo	16	Finance Charge	11249720	Issued Finance Charge Memo
Inventory	Transfer Order	26	Transfer Order	11249740	Transfer Order
Inventory	Transfer Shipment	27	Transfer Shipment	11249742	Transfer Shipment
Inventory	Transfer Receipt	28	Transfer Receipt	11249741	Transfer Receipt
Inventory	Assembly Order	51	Assembly Order	11249730	Assembly Order
Inventory	Posted Assembly Order	52	Posted Assembly Order	11249731	Posted Assembly Order
Job	Job Quote	87	Job Quote	11249750	Job Quote

Usage Type	Document	Usage ID	Usage	Report ID	Report Caption
Production Order	Job Card	22	Job Card	11249770	Prod. Order - Job Card
Production Order	Mat. & Requisition	23	Mat. & Requisition	11249771	Prod. Order - Mat. Requirements
Production Order	Shortage List	24	Shortage List	11249772	Prod. Order - Shortage List
Service	Service - Quote	29	Service Quote	11249700	Service - Quote
Service	Service - Order Confirmation	30	Service Order	11249701	Service - Order Confirmation
Service	Service - Invoice	31	Service Invoice	11249702	Service - Invoice
Service	Service - Credit Memo	32	Service Credit Memo	11249703	Service - Credit Memo
Service	Service - Contract	34	Service Contract	11249707	Service - Contract
Service	Service - Shipment	42	Service Shipment	11249704	Service - Shipment
Service	Service - Draft Invoice	N.A.	N.A.	11249708	Service - Draft Invoice
Service	Service Item Worksheet	N.A.	N.A.	11249706	Service Item Worksheet
Service	Service - Pick List	N.A.	N.A.	11249709	Service - Picklist
Service	Service - Pro Forma Invoice (Posted Shipment)	N.A.	N.A.	11249705	Service - Pro Forma Invoice (Posted Shipment)

Usage Type	Document	Warehouse Usage ID	Warehouse Usage	Report ID	Report Caption
Warehouse	Put-Away List	0	Put-away	11249766	Warehouse Activity Put-Away List
Warehouse	Pick List	1	Pick	11249764	Warehouse Activity Pick List
Warehouse	Movement List	2	Movement	11249765	Warehouse Activity Movement List
Warehouse	Inventory Put-away	3	Invt. Put-away	11249766	Warehouse Activity Put-Away List
Warehouse	Inventory Pick List	4	Invt. Pick	11249764	Warehouse Activity Pick List
Warehouse	Inventory Movement List	5	Invt. Movement	11249765	Warehouse Activity Movement List
Warehouse	Receipt	6	Receipt	11249762	Warehouse Receipt
Warehouse	Shipment	7	Shipment	11249760	Warehouse Shipment
Warehouse	Posted Receipt	8	Posted Receipt	11249763	Posted Warehouse Receipt
Warehouse	Posted Shipment	9	Posted Shipment	11249761	Posted Warehouse Shipment

Import Translations Template

The translations template package can be found under the Downloads for "Document Creator" (in the dedicated folder "Document Creator" | "Downloads" | "Translations") that can be accessed via the Apportunix website.

To import the translations for the Document Creator reports, please follow these steps:

1. Open the **Document Creator Translations** page.
2. Invoke the **Import Translations** action.
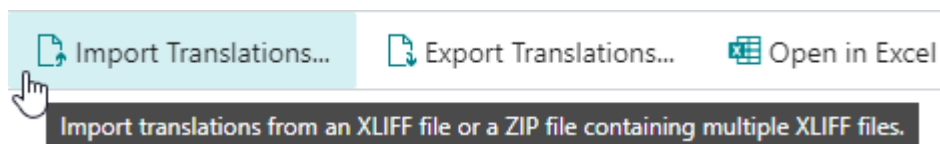
3. Select the `Document Creator Translations - TEMPLATE.zip` file, and wait for the import to complete.

4. The template translations have now been imported.

Report Settings

On the **Document Creator Setup** page there is a *Reports* section available with settings for the Document Creator reports.

Default Date Text Format

The **Default Date Text Format** setting specifies the text format to use for the report columns containing *Date* fields. The default is set to format '4' which displays the date with the month fully written out.

In the Document Creator reports you will find both normal `Date` columns, but also `DateText` columns provided in the dataset. The `Date` columns contain the dates with the `DateTime` datatype while the `DateText` columns contain the dates as a string/text. You can use the `DateText` columns when you want dates as text and want them to be translated appropriately, e.g., a Sales Invoice for a French customer should have the dates as text translated to French.

Report-Specific Settings

In the **Report Settings** part, you can specify settings for individual Document Creator reports.

Report Settings	Manage			↑ ⤢
Report ID ↑	**Report Caption**	**Date Text Format**		**Load Item Pictures**
→ 11249662 ⋮	Sales - Invoice	7: 5. Apr 2021 | <Day,2><Filler Character, >. <Month Text,3> <Year4>		☑

First off, you can set the **Date Text Format** to use, which overrules the **Default Date Text Format** setting for a report specifically.

And secondly, you can enable the **Load Item Pictures** setting, to load the item pictures for the report, which is disabled by default for all reports due to performance considerations.

Report Substitutions

In the **Report Substitutions** part, you can specify report substitutions: this means that report X is to be replaced by report Y whenever report X runs.

Report Substitutions	Manage			↑ ⤢
Report ID (Original) ↑	**Report Caption (Original)**	**Report ID (Replacement)**	**Report Caption (Replacement)**	
→ 5936 ⋮	Service Item Worksheet	11249706	Service Item Worksheet	

This can be used to replace the reports for document types that do *not* have a document report selection in Business Central, such as the **Service Item Worksheet**. You can replace the original Service Item Worksheet report by the Document Creator Service Item Worksheet by setting up the appropriate report substitution.

> 🟧 **Caution**
>
> There are some exceptions to when reports can be substituted by another report, e.g., when a report is invoked via a page variable (which can be when a report requires initialization via (an) external procedure(s)). Please see Substituting Reports for an overview of the scenarios in which it is possible to substitute one report for another.

Adhering to Legal Requirements

Please note that the built-in/extension-provided report layouts are set up to meet global requirements as much as possible. However, depending on where you do business, you may need to adhere to additional legal requirements and adjust your report layouts accordingly.

Intra-Community Delivery (EU)

If your company sells and/or exports goods to companies settled in other countries in the European Union, then this is known as "Intra-Community Delivery/Supply" (N.B., the customer should have a valid EU VAT Registration number). For this type of delivery, the "Reverse Charge" VAT Calculation Type should apply, which means that a 0% VAT rate applies but will not be charged (i.e., please check your "VAT Posting Setup" in Business Central carefully). However, on your invoices it is required that you state that an "Intra-Community Supply" applies, e.g.:

> VAT zero-rated intra-community supply of goods following article 138 Directive 2006/112/EC

Additionally, both VAT Registration Nos. (from seller and customer) should be visible on the invoices as well.

To add the text for intra-community deliveries you can use the **VAT Clauses** functionality in Microsoft Dynamics 365 Business Central:

1. First set up your VAT clauses in the **VAT Clauses** page. Also, set up the required translations for the text accordingly.

VAT Clauses | Work Date: 25.01.2024

| | Search | + New | Edit List | Delete | Setup | Translation | ... |

	Code ↑	Description	Description 2
→	INTRACOM	Intracommunautaire levering artikel 138, lid ...	

2. Then, link the VAT clause in the **VAT Posting Setup** to the records where the intra-community supply applies, using the **VAT Clause Code** field.

VAT %	VAT Calculation Type	Sales VAT Account	Purch... VAT Account	Rev... Chrg. VAT Acc.	Valid from	Valid Until	Income Date VAT Post. Grp.	Shift Posti... Type Sales...	VAT Clause Code	
0	Reverse Charge VAT	1590	1590					☐	INTRACOM	
21	Reverse Charge VAT	1590	1555	1525				☐	INTRACOM	
9	Reverse Charge VAT	1590	1550	1520				☐	INTRACOM	

3. Ensure the **VAT Clause** descriptions are added and visible on your document layouts.

As an alternative, you can use the data columns that the Document Creator reports facilitate for this as well. Under the `InvHdr` dataitem, you can find an `IntraCommDeliveryTxt` column which contains the text to be shown when an intra-community delivery applies. You can add a TextObject to your report layout and set a condition so that the text is only shown when applicable (e.g., use the `VisibleExpression` property and set it to `[Total.ReverseChargeVATExists]`, or check the value of the `[InvHdr.VATBusPostingGroup]` instead).

VAT Rates on Invoices

Even if a 0% VAT rate applies when exporting your goods, your company may still need to show the VAT rate(s) even if a VAT amount of "0" is being charged. The Document Creator reports already facilitate this, i.e., if VAT applies, then the VAT rate(s) (N.B. one or multiple) will always be shown (together with their corresponding amounts). Of course, if you wish to change this, then you can edit the report layouts accordingly.

Last update: August 3, 2023

Installation & User Manual

Creating and Copying Layouts

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.

If you want to design a layout for one of your document reports, then it is best to get started by creating a copy of an existing, extension-provided report layout to create a new user-defined report layout that you can edit. However, if you want to, you can also choose to create an entirely new, blank Document Creator layout for your document reports.

Creating a New Layout

> **Tip**
>
> Use the **Document Creator User-Defined Report Layouts** page for creating and editing layouts in your Business Central Sandbox environment.

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 the Document Creator extension, or from any other extension.

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

Creating a New Blank Layout

1. Invoke the **New Layout...** action.
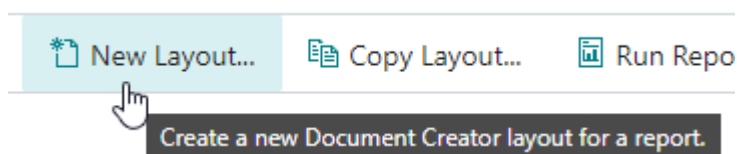
2. Choose **New blank layout** and choose **OK**.
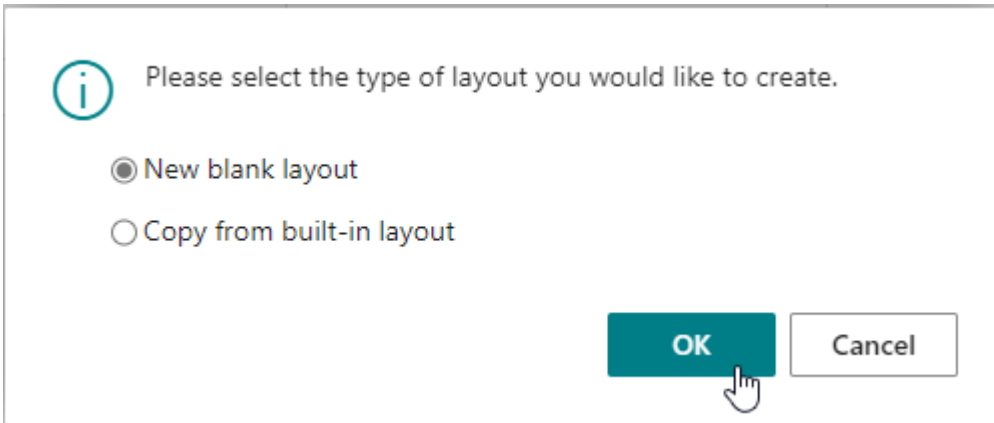
3. Enter/Select the **Report ID** of the target report object.

4. Enable **Insert Document Creator Layout**.

5. Select **OK**.

The figure below shows the inputs on the **Add New Blank Document Creator Layout** dialog page to create a new, blank Document Creator layout for report 11249662 "Sales – Invoice":

After pressing "OK", a new record will have been created for report 11249662 "Sales – Invoice" with layout name *"My Custom Sales Invoice Layout"*.

Note that you can always choose to rename the layout using the standard **Edit Info** action on the **Report Layouts** page.

Creating a New Layout based on a Built-In Layout

1. Invoke the **New Layout...** action.
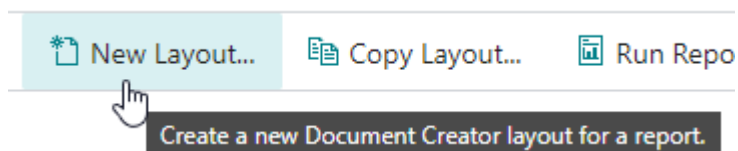
2. Choose **Copy from built-in layout** and choose **OK**.
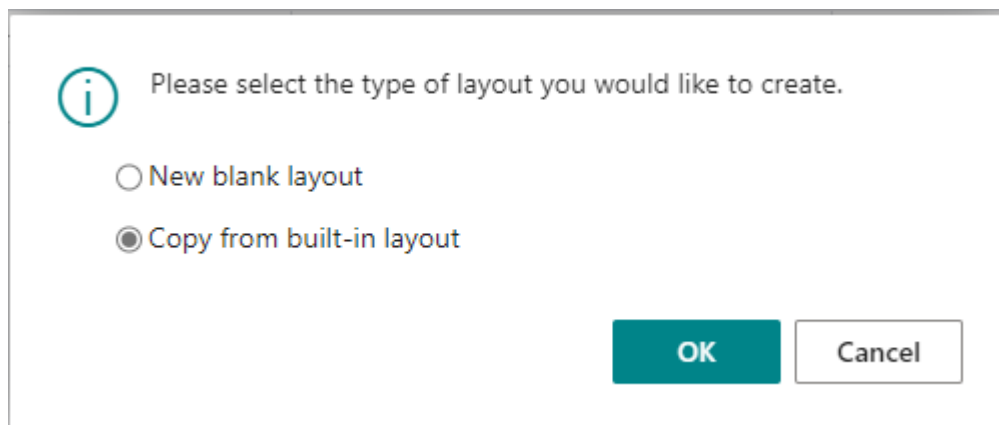
3. Select a built-in report layout from the list to copy as a new layout.

4. By default the **Layout Name** will be set to *"Copy of <Original Name>"*. You can freely change this name. (Optional)

5. You can also change the target report object for the new layout if you enable the **Change Report (Dataset)** option. If this option is enabled, you can enter/select the **Report ID** of the new target report object. (Optional)

6. Select **OK**.

Copying a Layout

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

1. Select a report layout record from which to copy the layout.

2. Invoke the **Copy** action.

3. By default the **Layout Name** will be set to *"Copy of <Original Name>"*. You can freely change this name. (Optional)

4. You can also change the target report object for the new layout if you enable the **Change Report (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 Report (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.

Extension-Provided Layouts

> ⚠️ **Caution**
>
> The information below is only relevant to **Business Central (AL) extension developers**. If you are not planning to develop a Business Central extension, then you can freely skip this section.

Starting from the Microsoft Dynamics 365 Business Central 2022 release wave 1 (April 1st, 2022, version 20.0) it is possible to have multiple extension-provided report layouts. This also means that you include one or more Document Creator layouts in an AL `report` or `reportextension` object in your Business Central extension.

In the `report` object definition or in a `reportextension` object it is possible to define the layouts that should be shipped with the app(s) that (collectively) define the report object that produces the dataset in a new `rendering` section of the object. A `reportextension` can add additional layouts for the report, but note that it cannot modify or remove the existing layouts provided by the original `report` object *or* other `reportextension` objects for the report.

Document Creator report layouts are defined as **External** (in AL `rendering` sections, this layout type is named `Custom`) layouts with the `MimeType` set to `reportlayout/dcrx`.

You can include a Document Creator layout for a report in your app by adding a `layout` section with the properties set as follows:

```
 1   rendering
 2   {
 3      layout("XYZ - Document Creator Blue Sales Invoice Layout")
 4      {
 5          Caption = 'XYZ - Document Creator Blue Sales Invoice Layout';
 6          LayoutFile = 'Source/Reports/Sales/XYZSalesInvoiceBlue.Layout.dcrx';
 7          MimeType = 'reportlayout/dcrx';
 8          Summary = 'The XYZ Blue Document Creator layout for the Posted Sales
 9   Invoice';
10          Type = Custom;
11      }
12
13      layout("XYZ - Document Creator Red Sales Invoice Layout")
14      {
15          Caption = 'XYZ - Document Creator Red Sales Invoice Layout';
16          LayoutFile = 'Source/Reports/Sales/XYZSalesInvoiceRed.Layout.dcrx';
17          MimeType = 'reportlayout/dcrx';
18          Summary = 'The XYZ Red Document Creator layout for the Posted Sales
19   Invoice';
20          Type = Custom;
      }
   }
```

When the app is installed, the newly added, extension-provided report layouts can all be found on the **Report Layouts** page.

Last update: March 22, 2023

Installation & User Manual

Editing Layouts

Watch the Editing Layouts (Report Layouts) section of our demo video to learn more about how to start editing your layouts!

|

> **Important**
>
> Note that you can only edit user-defined report layout records! It is not possible to edit extension-provided layout records; to make changes to an extension-provided layout, you will need to make a copy of the layout to create a new user-defined/tenant report layout.

> **Tip**
>
> Use the **Document Creator User-Defined Report Layouts** page for editing layouts in your Business Central Sandbox environment.

Editing Layouts using Design Files

On the **Report Layouts** page you will find an **Export Design** and **Import Design** action (within the *Document Creator* promoted 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 (i.e., layout format "External" and MIME Type "reportlayout/dcrx"). If you attempt to use these actions for any other layout type, such as RDLC, Word or Excel, 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:

1. Select the 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.

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.

Sales - Invoice

Options

No. of Copies · · · · · · · · · · · · · · · · ·	0
Show Internal Information · · · · · · · ·	⬤) Off
Show Serial/Lot Number · · · · · · · · ·	(⬤ On
Log Interaction · · · · · · · · · · · · · · ·	⬤) Off
Show Assembly Components · · · · ·	(⬤ On
Show Additional Fee Note · · · · · · · ·	⬤) Off

Filter: Posted Sales Invoice

✕ No. ·	103025 ⌄
✕ Sell-to Customer No. · · · · · · · · ·	⌄
✕ No. Printed · · · · · · · · · · · · · · ·	

+ Filter...

OK   Cancel

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 selected, user-defined Document Creator report layout record on the **Report Layouts** page.

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

1. Select the target report layout record.

2. Invoke the **Import Design...** action.

3. Click **Choose...** and select the Design file in the Open File dialog that appears.

> **■ Attention**
>
> This action is only enabled for **user-defined** Document Creator report layout records. It is not possible to edit extension-provided layout records; to make changes to an extension-provided layout, you will need to make a copy of the layout to create a new user-defined/tenant report layout.

> **■ Info**
>
> During the import of a Design file, the previous version of the layout is automatically added to the Tenant Report Layout Archive, along with a comment that reads "Before 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.

Last update: June 8, 2023

Installation & User Manual

Layout Selection

Layout Selection Factbox

You can view which layout is used for each company on the **Report Layout Selection** page, provided standard by Business Central. To make checking the layout selections a bit more convenient, the Document Creator extension also adds a new **Layout Selection** factbox to the **Report Layouts** page (and also to the **Apportunix Report Selection** page).

In this factbox you can view which layout is used for each company for the target report of the currently selected record.

Note that you can also change the report layout selection for the selected record's company by using the **Change Layout Selection** action on the factbox, which allows you to select the report layout to use for that company.
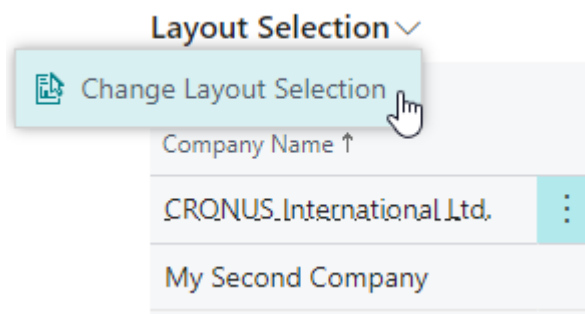
Configuring Layout Selections

To make sure your report uses the correct 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 **Report Layouts** page.

Company Layout Selection Action

Report Layouts:	Document Creator ⌄		🔍 Search	🗑 Delete	Process ⌄

Report ID ↑	Report Name	Layout Name ↑
11249660	Sales - Quote	Document Creator - Sales Quote
11249661	Sales - Order Confirmation	Document Creator - Sales Ord...
11249662	Sales - Invoice	Document Creator - Sales Invoi...
11249662 ⋮	Sales - Invoice	My Sales Invoice
11249663	**Process**	Document Creator - Sales Cred...
11249664	📄 New Layout	Document Creator - Sales Ship...
11249665	✏ Edit Info	Document Creator - Sales Retu...
11249666		Document Creator - Sales Retu...
11249667	**Document Creator**	Document Creator - Sales Blan...
11249668	📄 New Blank Layout...	Document Creator - Sales Draf...
11249669	📋 Copy Layout...	Document Creator - Sales Pickl...
11249670	📊 Dataset Extensions	Document Creator - Sales Wor...
11249671	📄 Export Design...	Document Creator - Sales Pro ...
11249680	📄 Import Design	Document Creator - Purchase ...
11249681		Document Creator - Purchase ...
11249682	📄 Company Layout Selection...	Document Creator - Purchase I...
11249683	📄 Fast Report Layout Selection...	Document Creator - Purchase ...

Configure the use of the selected layout for the report object per company.

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

1. On the **Report Layouts** page, select the 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 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.

> **Example**
>
> In the example below a checkmark is set for the company "CRONUS International Ltd." which means the report layout selection for report 11249662 "Sales - Invoice" will change from the extension-provided Document Creator layout to the selected layout (i.e., "My Sales Invoice", a user-defined Document Creator report layout).
>
> The company "Second Company" is displayed in bold/green and the **Selection Exists** mark is checked which indicates that the report layout selection was already configured to use the selected layout ("My Sales Invoice") earlier.
>
> ### Edit - Report Layout Selection - Sales - Invoice (11249662)
>
> Select All   Select Unassigned   Select None | Related Fewer options
>
> | Company Name ↑ | | Selection Exists | Change |
> |---|---|---|---|
> | → **CRONUS International Ltd.** | ⋮ | ☐ | ☑ |
> | **Second Company** | | ☑ | ☐ |
>
> **Current Report Layout**
>
> | Layout Name | Document Creator - Sales Invoice | MIME Type | reportlayout/dcrx |
> |---|---|---|---|
> | Type | External | User Defined | No |
>
> **New Report Layout**
>
> | Code | My Sales Invoice | MIME Type | reportlayout/dcrx |
> |---|---|---|---|
> | Type | External | User Defined | Yes |
>
> Close

Fast Report Layout Selection Action

Document Creator   Page | Actions   Navigate   Report   Fewer options

Import Layout Package...   Report Layout Selection...   **Fast Report Lay...ut Selection...**

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

1. On the **Report Layouts** page, select the 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 report layout(s) for all companies.

> ? Set selected layouts as Report Layout Selection for all companies?
>
> [Yes] [No]

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

> i 2 Report Layout Selections created.
>
> [OK]

Last update: February 13, 2023

Tenant Report Layout Archive

After modifying a user-defined/tenant report layout, there is always the possibility to revert your changes to a previous version of your report layout. On the **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 tenant report layouts by opening the **Tenant Report Layout Archive** page.

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

> **When are layouts archived automatically?**
>
> Tenant Report Layouts are archived automatically before the following events take place on the record:
>
> - **Layout Package Import** - Importing a layout package can overwrite existing layouts. The version before the import is automatically archived.
> - **Layout Restore** - Restoring a previous version will overwrite the current version. The version before the restore is automatically archived.
> - **Design Import** - Importing a design file overwrites the current version of the layout. The version before the import is automatically archived.
> - **Description Update** - One can edit the description of a layout. The version with the original description is automatically archived.
> - **MIME Type Change** - One can change the MIME type of a layout by uploading a new layout with a different file format. The version before the upload is automatically archived.

Archiving Layouts

You can *manually* archive the current version of a tenant/user-defined report layout using the **Archive Layout…** action on the **Report Layouts** page. A new archive record will be created with the current version of the selected layout record. By default, the archive commment 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 **Report Layouts** page, or the like-named action on the **Tenant 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.

Last update: March 24, 2022

Installation & User Manual

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.
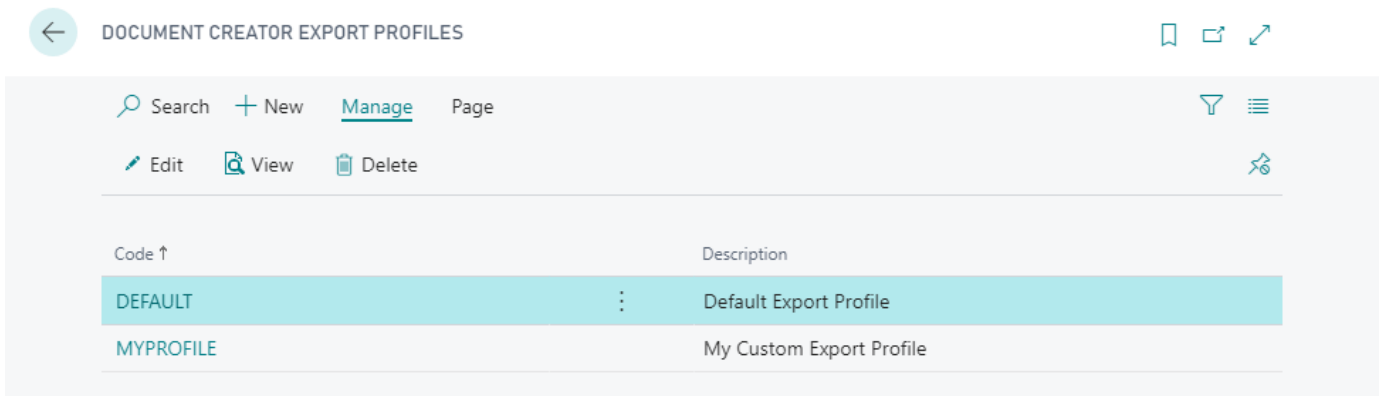
Changing Export Profile Settings

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.
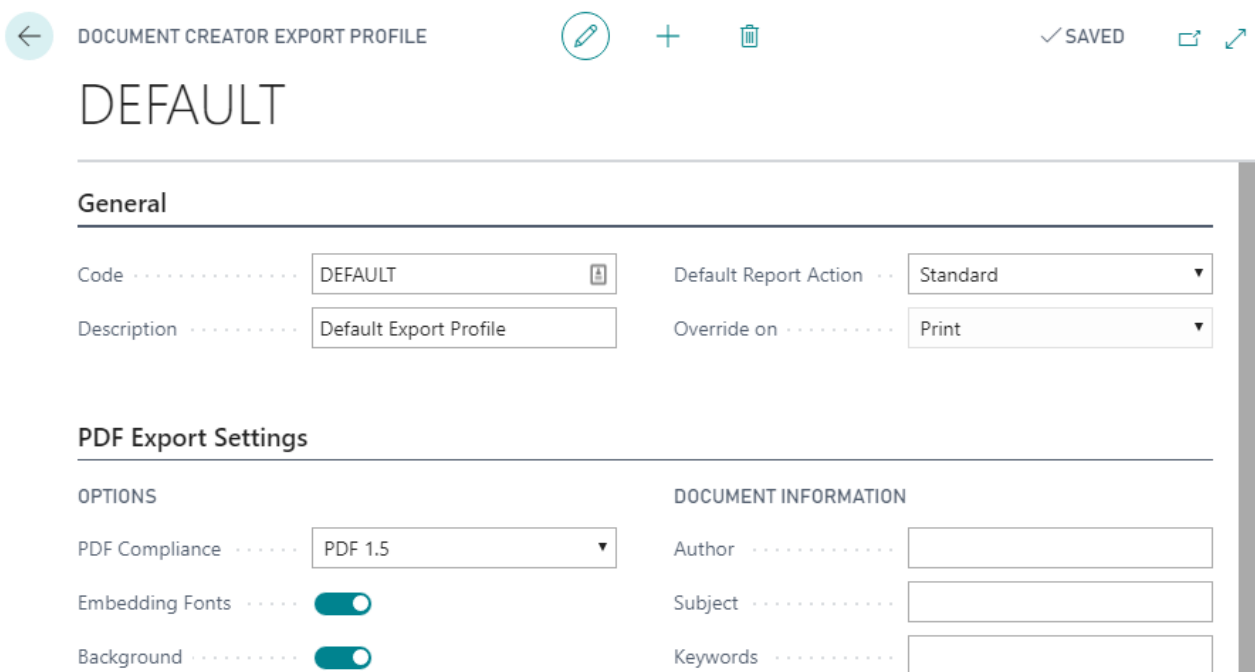
The available settings are grouped into the following categories.

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.

PDF Merges

In the *PDF Merges* group you can set up underlays and appendices for your document reports for when they are exported to PDF. For example, you can add a stationery PDF file as **Underlay** action for all reports that are generated with the current export profile, or add an appendix PDF file as an **Append** action for it to be appended at the end of the final PDF file.

> **■ Attention**
>
> PDF merges incur additional time and usage costs for report generation. To use this feature you must activate your subscription to the "PDF Merge" product in the **Apportunix Subscriptions** page. The usage will be reported to the external API that is invoked and will be invoiced periodically. Please see the **Prices** page on the Apportunix website for more information.
>
> You can use the "PDF Merge" features for free, without any charges or restrictions, in a Business Central Sandbox environment. In a Sandbox environment, the Demo API will be used and a watermark will be applied to the reports accordingly.

> **■ Tip**
>
> You can use the **Apply Underlay** field to specify whether the underlay should be applied to appended PDF files as well. By default, underlays will not be applied to appended PDF files.

> **Tip**
>
> You can use the **Company Selections** action to view and edit the companies to which the selected PDF Merge applies.
>
> 🏢 Company Selections
>
> DEFAULT · 1 | Work Date: 25/01/2024
>
> PDF Merge Company Selections | 🔍 Search + New 📝 Edit List 🗑 Delete
>
> Company Name ↑
>
> CRONUS International Ltd.
>
> → [ ]   ⌄
>
> Name ↑
>
> → CRONUS International Ltd.
>
> SomeOtherCompany
>
> Select from full list
>
> If no companies are specified, then the PDF Merge will be applied in all companies.
>
> You can use the **Company-Specific** field to see whether or not a PDF Merge only applies to specific companies.
>
> Company-
> Specific
>
> Yes
>
> No

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.

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

> **Note**
>
> 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.

> **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.

Last update: March 24, 2022

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

Watch the Report Translations (Customize translations yourself) section of our demo video to learn more about the benefits of the Report Translations feature!

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 Translation / Unspecified Language 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.

Column	Description
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.
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 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.

DOCUMENT CREATOR TRANSLATIONS | WORK DATE: 10/1/2019 ✓ SAVED

🔍 Search ➕ New 📝 Edit List 🗑 Delete 📋 Copy... Page | More options

Tag ↑	Default Translation	To-do	To-do Exists	Report ID ↑	Report Caption
AdditionalFee	Additional Fee	☐	☐		
Address	Address	☐	☐		
AllowInvDisc	Allow Invoice Discount	☐	☐		
→ Amount	Amount	☐	☐		
AmountInclVAT	Amount Incl. VAT	☐	☐		
BankAccNo	Account No.	☐	☐		
BankName	Bank	☐	☐		
BillToAddress	Bill-to Address	☐	☐		
BillToCustomerNo	Bill-to Customer No.	☐	☐		
BuyFromAddress	Buy-from Address	☐	☐		
BuyFromVendorNo	Buy-from Vendor No.	☐	☐		
CompanyRegistrationNo	Company Registration No.	☐	☐		
Copy	COPY	☐	☐		
CreditMemoNo	Credit Memo No.	☐	☐		
CustomerNo	Customer No.	☐	☐		
DaysExpired	Days Expired	☐	☐		
Description	Description	☐	☐		
DirectUnitCost	Direct Unit Cost	☐	☐		

Translations | Manage

Language Code ↑	Translation	To-do	Last Used	Last Used by Report ID
→ DEU	Betrag	☐		
ENG	Amount	☐		
ENU	Amount	☐		
FRA	Montant	☐		
NLD	Bedrag	☐		
		☐		

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

🟦 **Info**

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. See Copying Translations.

> **Important**
>
> Document Creator ships with a **Translations package** that already provides you with a set of translations for multiple languages. See Import Translations Template.

Export to / Import from XLIFF Translation Files

The Document Creator Translations page includes convenient actions for exporting/importing your report translations to/from XLIFF translation files.
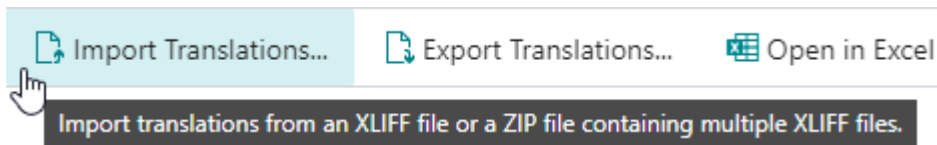
With the **Export Translations...** action, it is possible to export all translations for one language to an *.xlf* file, or for multiple languages to a *.zip* containing multiple *.xlf* files for each language code. It is also possible to export the report-specific translations by specifying the report to export the specific translations for.
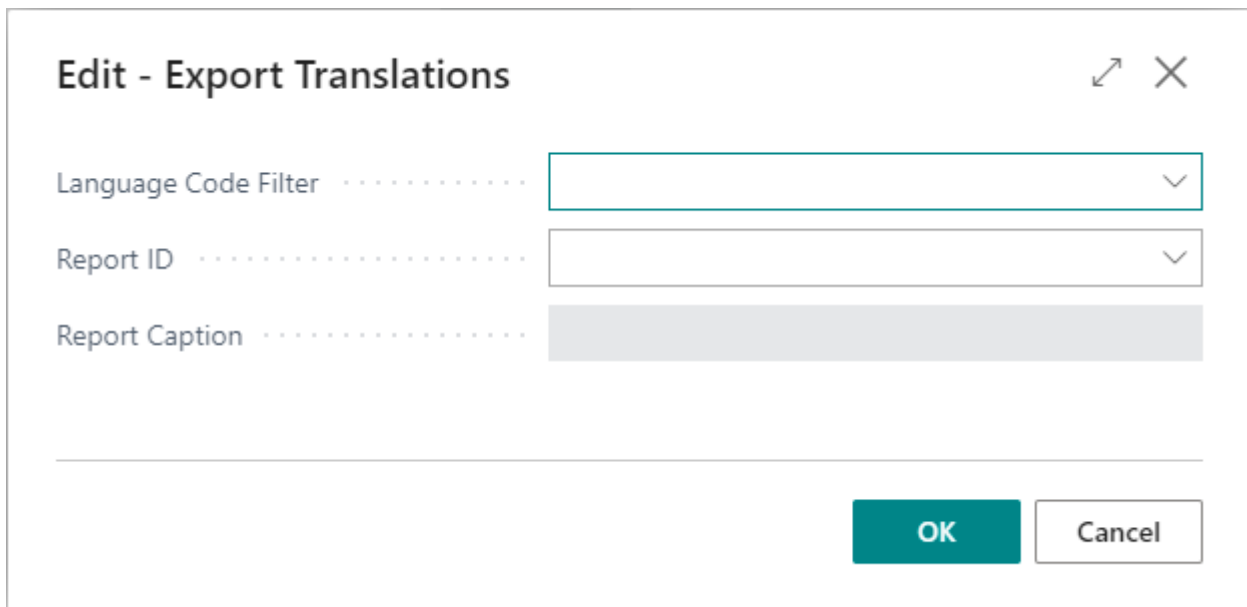
With the **Import Translations...** action, you can select an *.xlf* file to import the translations for one language, or select a *.zip* file containing multiple *.xlf* files to import the translations for multiple languages at once.

Copying Translations

You can use the **Copy** action to copy translation for selected records.
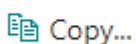
This action opens the **Copy Translations** report which allows you to copy translations in the following ways:

- **Report Specific Translations**: Copy the translations of the selected record(s) as report-specific translations by specifying the **Target Report ID**.

- **Copy Language Translations**: Copy the translations of the selected record(s) from one specific language to another specific language. Note that the *blank* language code concerns the **Default Translation**/**Unspecified Language Translation**.

- **Copy Translations to Tag**: Copy the translations of one specific tag to another specific tag.

It is also possible to combine these options.

There is also an **Overwrite** option which let's you specify if you would like existing translations to be overwritten.

Copy Translations

Create Report Specific Translations

Target Report ID · · · · · · · · · · · · · · · [⌄]

Target Report Caption · · · · · · · · · · [   ]

Copy Language Translations

Copy All Translations · · · · · · · · · · · ●━○

From Language Code · · · · · · · · · · [⌄]

From Language Name · · · · · · · · · [   ]

To Language Code · · · · · · · · · · · [⌄]

To Language Name · · · · · · · · · · · [   ]

Copy Translations to Tag

Target Tag · · · · · · · · · · · · · · · · · · · [⌄]

Overwrite · · · · · · · · · · · · · · · · · · · ○━●

Filter: From Translations

✕ Tag · [Amount   ]

╋ Filter...

[OK] [Cancel]

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.

> **Tip**
>
> It is also possible to add translatable labels more conveniently with the Dataset Extensions feature!

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 'Document Creator" report objects. The AL source code of these report objects is available on the **Downloads** drive.

First add the following needed global variables:

```
1    var
2        Language: Codeunit Language;
3        wDCR_TranslationMgt: Codeunit
4    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:

```
1    trigger OnAfterGetRecord()
2    begin
3        CurrReport.Language := Language.GetLanguageIdOrDefault("Language
4    Code");
5        wDCR_TranslationMgt.wgFncSetLanguageCode("Language Code");
6        // ...
     end;
```

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

```
1    local procedure Trl(pLblName: Text[50]): Text
2    begin
3        if ReportId = 0 then begin
4            Evaluate(ReportId, DelChr(CurrReport.ObjectId(false), '=',
5    DelChr(CurrReport.ObjectId(false), '=', '1234567890')));
6            wDCR_TranslationMgt.wgFncSetReportId(ReportId);
7        end;
8        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.:

```
1    column(lblAllowInvDisc;
2    Trl('AllowInvDisc')) { }
3    column(lblAmount; Trl('Amount')) { }
4    column(lblBankAccNo; Trl('BankAccNo')) { }
5    column(lblBankName; Trl('BankName')) { }
     // ...
```

Last update: June 9, 2023

Installation & User Manual

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 (tenant) report 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.

Export / Import

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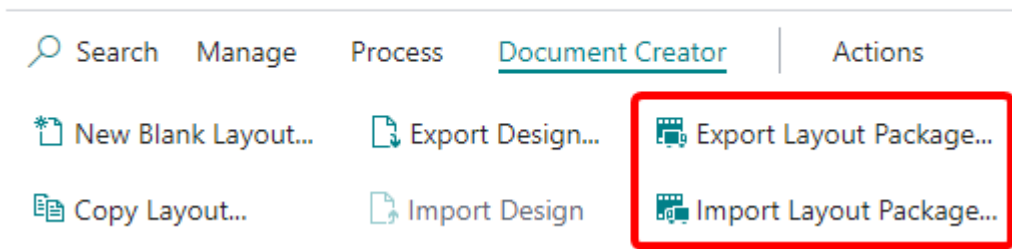
Info

If layouts are found that would be overwritten during the import of a Layout Package, then the current version of the layout is automatically added to the Tenant Report Layout Archive before the package is imported, along with a comment that reads "Before Layout Package Import".

Dataset Extensions

By default, layout packages also include Dataset Extensions for the reports that the layouts apply to. If you import dataset extensions from a layout package, then any existing dataset extensions for the same report will be overwritten.

To change whether or not Dataset Extensions should be included, you can change the value of the **Layout Package Contents** field in the **Document Creator Setup** page.
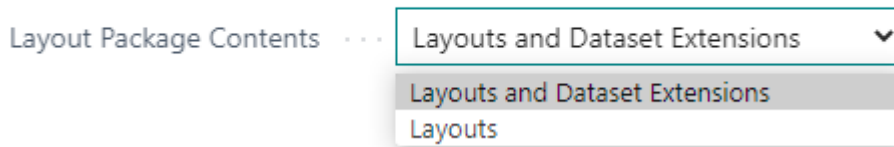
Last update: March 25, 2022

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 **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.
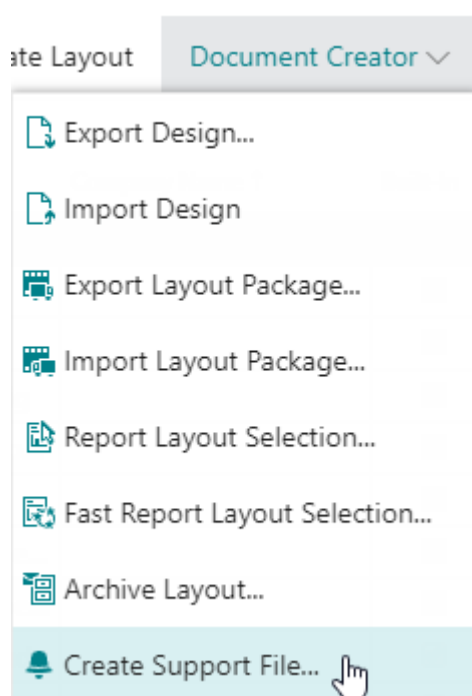
Analyzing Support Files

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.

✎   +   🗑   ✓ SAVED   🔖 ⬈ ⤢

Document Creator Support File Analysis

__Report__ | More options

📊 Run Report   📌

General

Support File · · · · · · · · · [   ] ···   Export Profile · · · · · · · · · [DEFAULT   ⌄]

Output File Type · · · · · · [PDF   ▾]

Last update: March 24, 2022

Installation & User Manual

Dataset Extensions

Document Creator Dataset Extensions allow you to add your own columns, data items and translatable labels to your reports, completely from within your Business Central client, i.e., no need for any report(extension) development!

> **Important**
>
> This feature is only enabled when reports are run with a **Document Creator layout**. For RDLC, Word and other layout types this feature is disabled.

Watch the Extending Datasets (Adding new columns) section of our demo video to learn more about how to extend your report datasets!

Report Dataset Extensions

Report Dataset Extensions can be set up in the **Document Creator Report Dataset Extensions** page. In this page you can specify reports to which you want to add new columns, dataitems and/or translatable labels to use them in your Document Creator report layouts. With the **Enabled** field you also have the option to either enable or disable the customizations that you defined for the report.

The page offers the following actions:

- **Custom Columns** - View or edit the custom columns for the selected report.

- **Custom Labels** - View or edit the custom labels for the selected report.

- **Custom Data Items** - View or edit the custom data items for the selected report.

- **Export** - Export the dataset extensions for the selected report(s) to an XML file.

- **Import** - Import dataset extensions from an XML file.

- **View Columns** - View the columns of the selected report in a tree view.

- **View Data Items** - View the data items of the selected report in a tree view.

- **Filter Sets** - View or edit the filter sets configured for the selected report.

- **Report Layouts** - View or edit the Document Creator report layouts for the selected report.

- **Document Creator Translations** - View or edit Document Creator Translations.
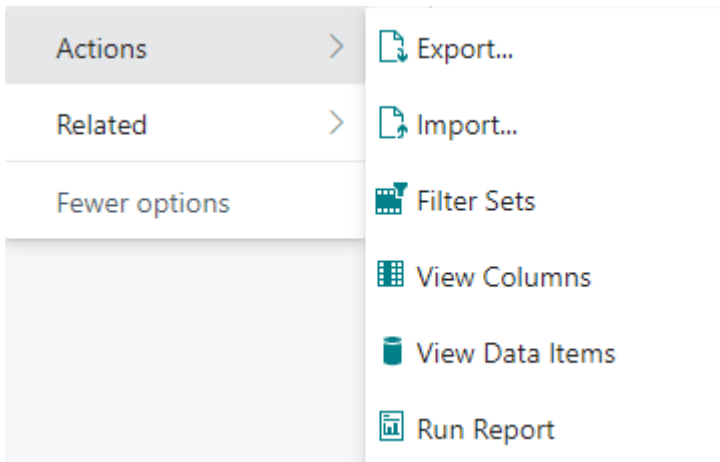
Custom Columns

To start adding custom columns to a report, open the **Document Creator Report Dataset Extensions** page, select the report for which you want to add columns and then invoke the **Custom Columns** action.

This will open a page in which you can view and edit the custom columns for the selected report. A custom column contains the value from a specified table field and can be added to any of the data items of the report object.

Some examples of custom columns you could add:

- Add the Bill-to Customer's "City" to header data item of the Sales Invoice report.
- Add the Item's "Vendor No." to the line data item of the Sales Invoice report.

Parent Data Item

In the **Parent Data Item Name** field you can enter the data item to which you want to add the new column. You can use the lookup available from the field to look up and select a parent from the data items available in the report.
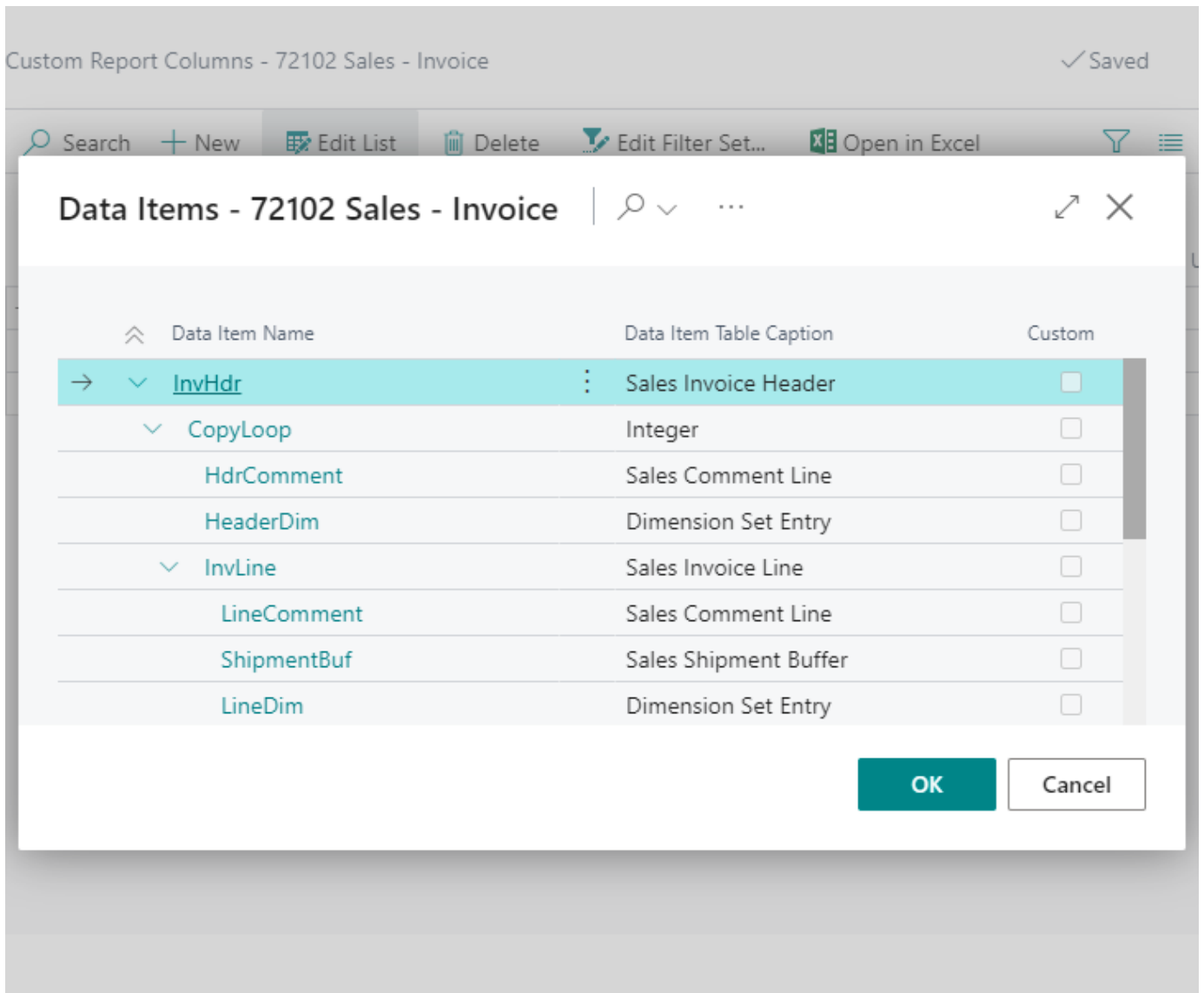
> **▮ Note**
>
> Custom columns can be added to existing data items or custom data items. If the parent data item is a custom data item then the **Custom Parent** field will have a checkmark to signify this. In this case the custom column will automatically use the table and the filters of the parent data item.

Field

In the **Table ID** field you can specify the table containing the field for the custom column. Accordingly, in the **Field No.** field you can specify the field where the value for the custom column is taken from.

In the **Column Name** field you can enter the name for the custom column. A name will be suggested automatically after you entered a table and field for the column. The suggested name will be `<FieldName>_<TableName>`, but you can freely change this to your liking.

> **▮ Warning**
>
> You cannot use names that are already used by other columns or data items in the report.

Filters

In the **Filter Set** field you can enter the filter set that should be used for the column. A "filter set" is a set of filters that define the link between the parent data item and the table that the field for the custom column is taken from.

To create a filter set for a custom column, open the dropdown of the **Filter Set** field and choose *New* to create a filter set for the parent data item and table combination of the column.
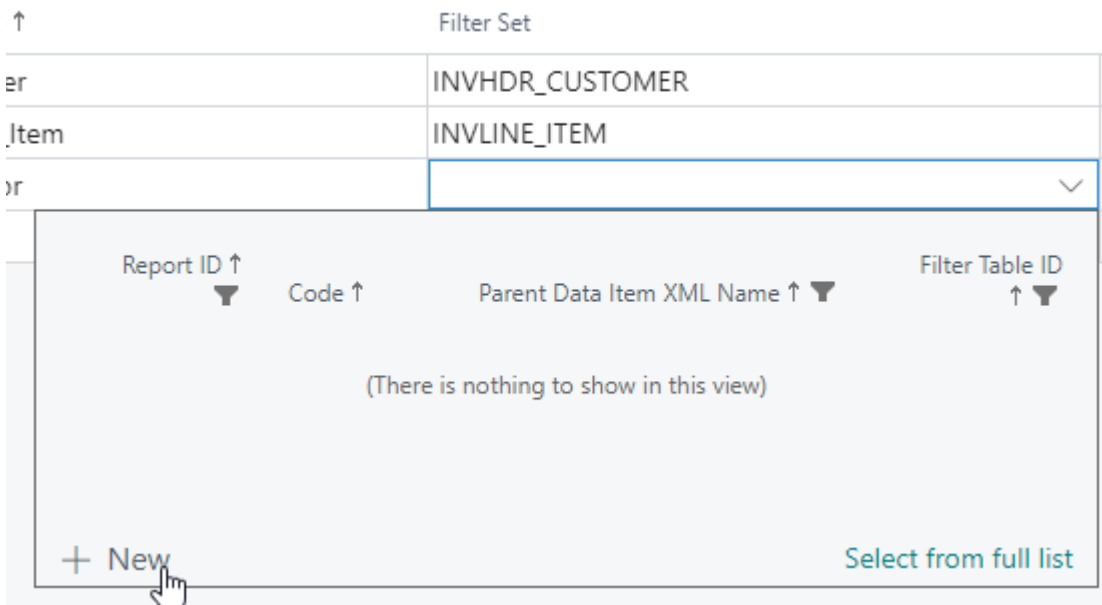
This will open the **Filter Set** card page with parent data item and table already filled in and a code automatically suggested.

By adding filters you can set up the link between the parent data item and the table that the field value is taken from.

You can set up filters on another column in the report by entering the column name in the **Value Column Name** field. The Assist-Edit of this field will open a page where you can select a column from the parent data item *or* any of the other ascendant data items.

You can also set up filters on a constant/fixed value, which you can enter in the **Constant Value** field (e.g., enter `1` / `Order` to filter on "Sales Document Type").

Finally, you can also set up filters by entering a **Filter String** on the filter field's value. In this field you can enter filters like `<>0`, `42|365|9000` or `%1..`. This filter string can also include a placeholder `%1` in which the Value Column's value or Constant Value will be substituted if either one is specified.

> **Info**
>
> Each filter can only have either a Value Column or Constant Value specified. If you try to enter both at the same time, the other field's value will be cleared.

For convenience, you can use the **Edit Filter Set...** action to open the **Filter Set** card page and edit the filter set for the selected custom column.

Custom Report Columns - 72102 Sales - Invoice   ✓ Saved

| 🔍 Search | + New | 📝 Edit List | 🗑 Delete | ▼ Edit Filter Set... | 📊 Open in Excel | ▽ ☰ |

Edit the filter set used for the selected custom column.

Parent Data Item Name		Custom Parent	Table ID	Table Caption	Field No.	Field Caption	Column Name ↑	Filter Set	Unfiltered
→ InvHdr	⋮	☐	18	Customer	7	City	City_Customer	INVHDR_CUSTO ∨	☐
InvLine		☐	27	Item	31	Vendor No.	Vendor_No__Item	INVLINE_ITEM	☐

Reusing filter sets

You can reuse filter sets in other custom columns that add a field for the same parent data item and source table combination. If you add a new column with a field from the same table, simply open the dropdown and you will see the filter sets created earlier for other custom columns.

Custom Report Columns - 72102 Sales - Invoice   ✓ Saved

🔍 Search   + New   📝 Edit List   🗑 Delete   📝 Edit Filter Set...   📊 Open in Excel   ▽   ☰

Parent Data Item Name			Custom Parent	Table ID	Table Caption	Field No.	Field Caption	Column Name ↑	Filter Set	Unfiltered
InvHdr			☐	18	Customer	7	City	City_Customer	INVHDR_CUSTOMER	☐
InvLine			☐	27	Item	12	Shelf No.	Shelf_No__Item	INVLINE_ITEM	☐
→ InvHdr	🗒	⋮	☐	18	Customer	102	Email	E_Mail_Customer	⌄	☐

Report ID ↑ ▽	Code ↑	Parent Data Item XML Name ↑ ▽	Filter Table ID ↑ ▽
→ 72102	INVHDR_CU...	InvHdr	18

+ New   Select from full list

If you do not want to set any filters and use the first record from the table, you should explicitly set the **Unfiltered** field. In that case the custom column will use the first record in the table to retrieve the field value. This could be used if the source table only contains a single record in the first place (e.g., the "Company Information" table).

Attention

If there are multiple records that match the filters, then custom column(s) will use the field value(s) of the first record in the record set.

Restrictions

In the **Filter Set** page, you can also set up **Restrictions**. These can be used for scenarios in which you want to skip certain records that do not meet the condition specified in one of these restrictions. For example, you could specify that you only want to retrieve fields from the "Item" table, when the Sales Line that is being processed is in fact a line of type Item, i.e., `TypeNo = 2`. If the restrictions are not met, then no values will be retrieved and the values of the column(s) that use this filter set will be empty.

Select - Filter Set   ⤢ ✕

General

Code · · · · · · · · · ·	SALESLINE_ITEM	Filter Table ID · · · · ·	27
Parent Data Item ... ·	SalesLine	Filter Table Caption ·	Item

Filters | Manage   ⤴ ⤢

	Filter Field No. ↑		Filter Field Caption	Filter Field Data Type	Value Column Name	Constant Value	Filter String
→	1	⋮	No.	Code20	No_2		

Restrictions | Manage   ⤴ ⤢

	Column Name ↑		Column Data Type	Constant Value	Filter String
→	TypeNo	⋮	Integer	2	

                                        OK   Cancel

For a more detailed example usage of **Restrictions**, please see: Add Item Column for Item Sales Line.

Advanced Settings

Unfiltered	Cast as Data Type	Language Code Column	Decimal Formatter
☐	Decimal	LanguageCode	#,##0.00

- **Unfiltered** - If you set this setting to `true` ('marked the checkbox'), then no filters/links will be used: the field value of the first record from the specified table will be retrieved.

- **Cast as Data Type** - This setting allows you to convert ('cast') a custom column to a different data type, e.g.:

  - Add **Enum/Option** fields as **Integer** (their integer ('number') value) or as **Text** (Caption value, translated based on the **Language Code Column** setting).

  - Add **Boolean** fields as **Boolean** (`true` / `false`) or as **Text** (`Yes` / `No` , translated based on the **Language Code Column** setting)

  - Add **Date** fields as **Date** (N.B., column gets `DateTime` datatype in the designer, which allows for calculations and custom formatting) or as **Text** (the formatting of the date is determined based on the Regional setting in Business Central)

  - Add **Decimal** fields as **Decimal** (N.B., column gets `Decimal` datatype in the designer, which allows for calculations and custom formatting) or as **Text** (the formatting of the decimal is determined based on the Regional setting in Business Central)

- **Language Code Column** - This setting allows you to select a column that contains the "Language Code" that should be used for translating the column value (e.g., an **Enum/Option** value as Text is translated based on this language)

- **Decimal Formatter** - This setting allows you to specify the (default) formatting that should be used for a custom column with data type **Decimal**. You can use the format syntax as described on the Custom Numeric Format Strings and Standard Numeric Format Strings pages.

Examples

In this section you will find examples of how to add and/or configure custom columns to your report objects and Document Creator layouts.

Getting Started

Please check the example below for a complete walkthrough of adding a custom column to a report object and adding it to a Document Creator layout for that report accordingly.

Example: Adding a custom column to a report

A step-by-step walkthrough of how to add a custom column to a report.

The example as seen in the screenshots uses report 11249662 "Sales - Invoice" which is one of the Document Creator reports.

1. Open the **Document Creator Report Dataset Extensions** page.

   Add a new record for the report that you want to add a custom column for.
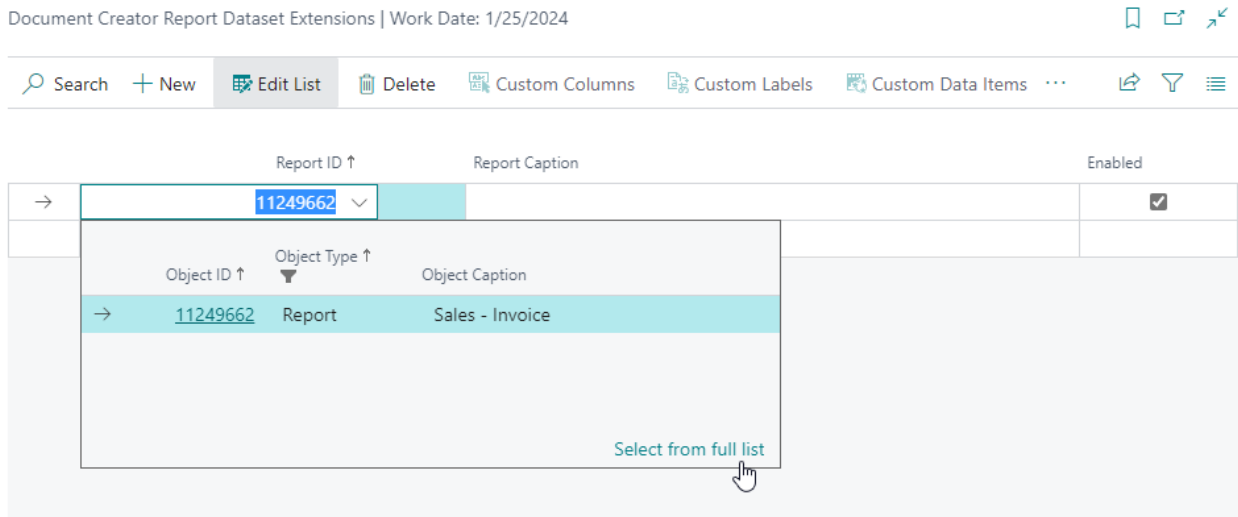
2. With the record for your report selected, invoke the **Custom Columns** action.
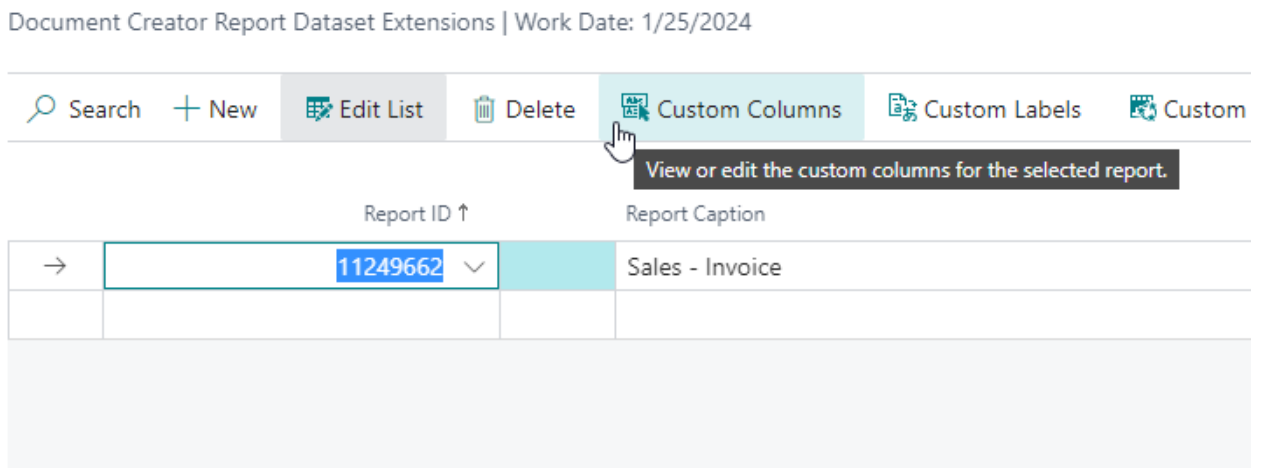
   This will open the **Custom Report Columns** page for the report.

3. First, to select a parent data item to add the column use the lookup of the **Parent Data Item Name** field.

4. Select the data item to which you want to add a custom column.

5. Next, select a table and the field you want to use for the custom column's value.

A column name will be suggested automatically based on the values you selected.

6. Then, create a new filter set. For this, open the dropdown of the **Filter Set** field and choose *New*.

Parent Data Item Name	Custom Parent	Table ID	Table Caption	Field No.	Field Caption	Column Name ↑	Filter Set
→ InvHdr	☐	18🔒	Customer	7	City	City_Custo...	▽

Report ID ↑		Code ↑	Parent Data Item XML Name ↑ ▼	Filter Table ID ↑ ▼
▼				

(There is nothing to show in this view)

+ New   Select from full list

7. This will create a filter set for you.

To add a filter, first enter the field from the table to filter on using the lookup of the **Filter Field No.** field.

Then, set a filter value on another column of the report by clicking on the **Value Column Name** field to start selecting a column.
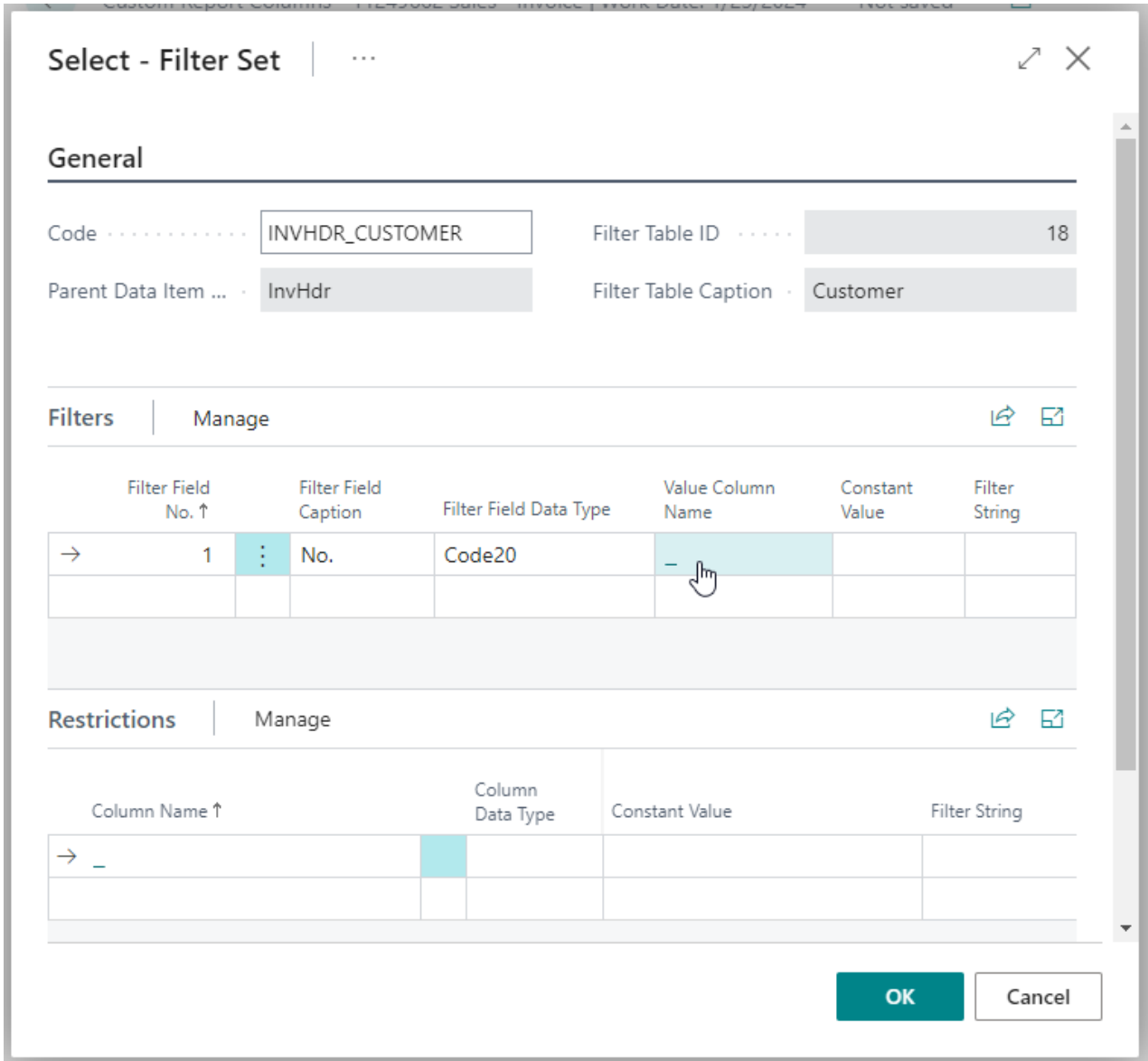
8. Select a column to filter on from the **Report Columns** page.

   For our example, we use the **BilltoCustNo** column so that the Bill-to Customer of the invoice is retrieved for our custom column.
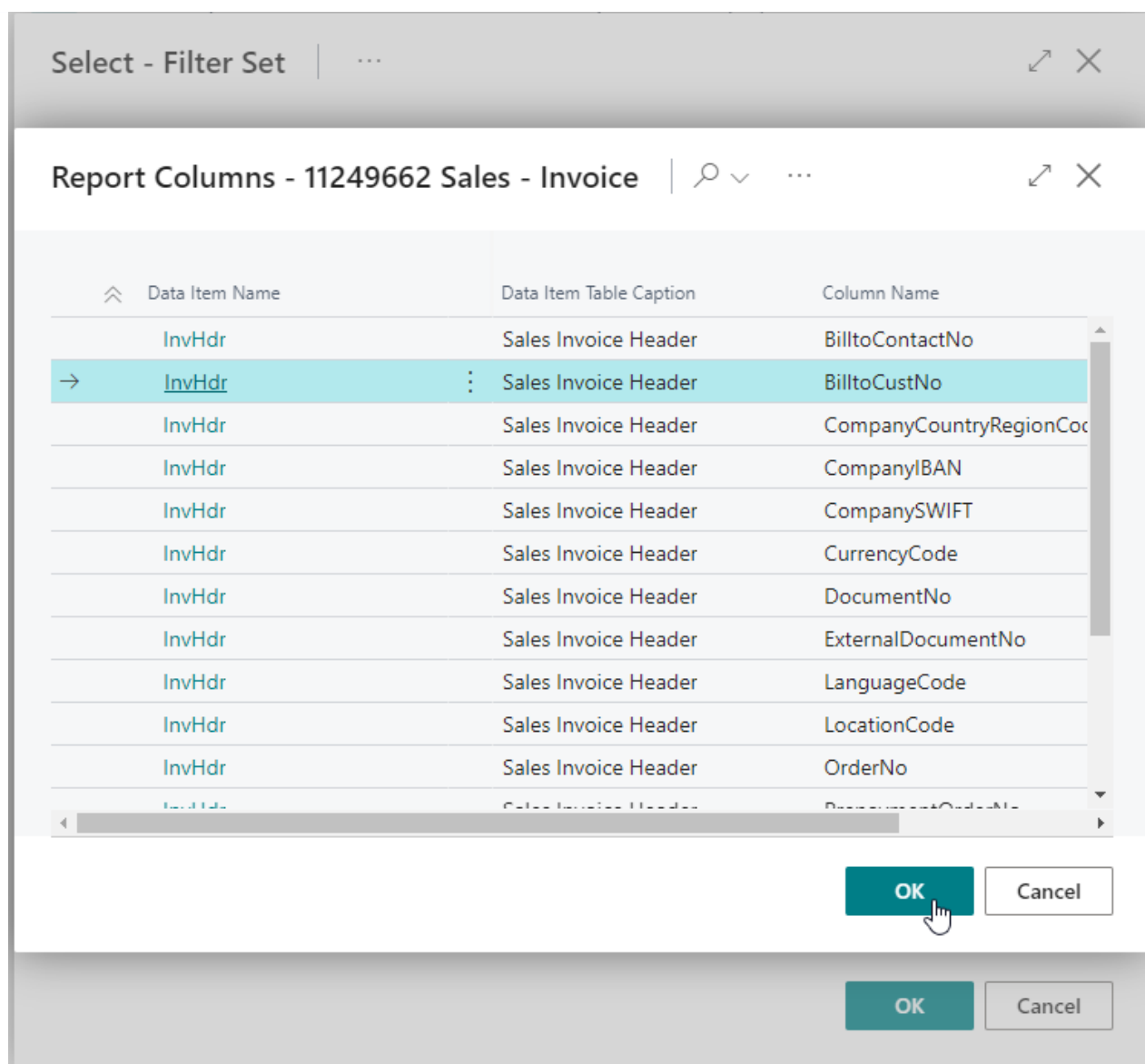
Select a column and choose **OK**.

Add any more filters if applicable for your column and when done choose **OK** to close the **Filter Set** card page.

9. The custom column is now ready to use in your report.

   Now go back to the **Document Creator Report Dataset Extensions** page.

   With the record for your report selected invoke the **Report Layouts** action.

10. This will open the **Report Layouts** page (filtered on Document Creator layouts for the report).

    Select one of the Document Creator layouts and then invoke the **Export Design** action to start editing the layout in the designer. See Editing Layouts.

11. In the **Data** window, you will now see the custom column that was just added.

Custom columns are added at the end of the data item, after all the other columns of the data item.

12. You can now add the custom column to your layout. Actually, you can do anything with custom columns that you could do with any other column (e.g., using it in the **VisibleExpression** property).
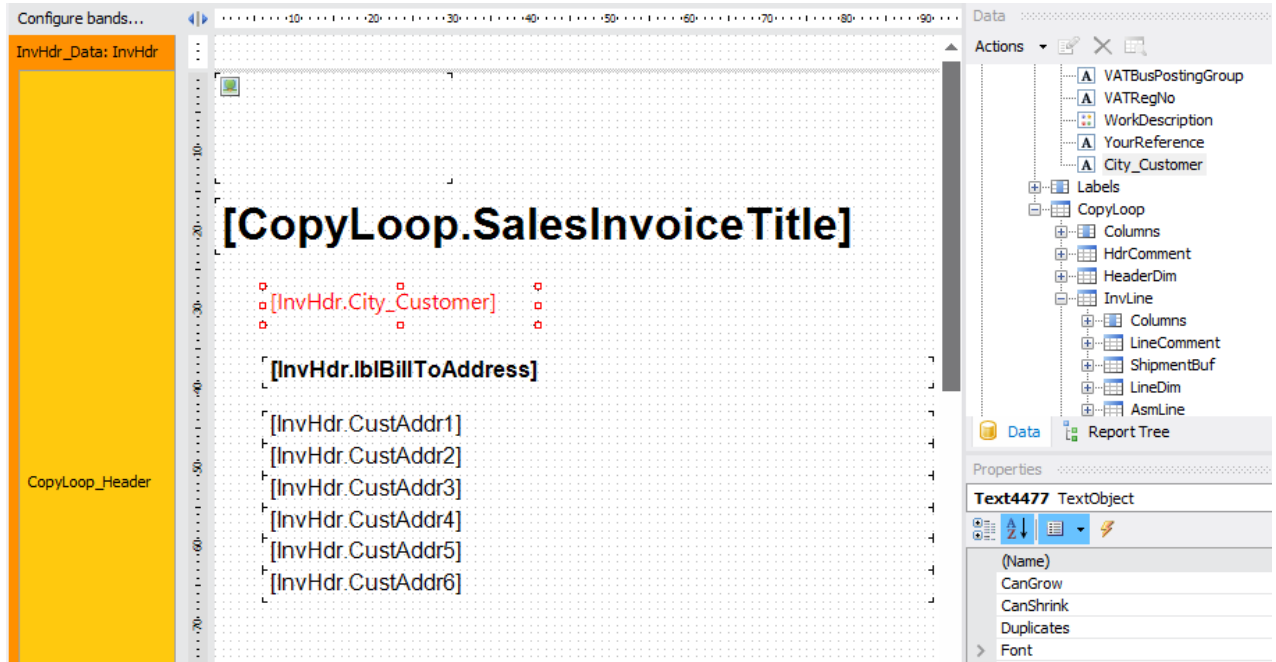
13. And when we preview the layout, we will see it is filled with a value based on our filters.

Add Item Column for Item Sales Line

If you would like to add a custom column for a field from the **Item** table (e.g., the "Shelf No." field) to the **SalesLine** data item in report object 11249661 "Sales - Order Confirmation", then please follow these steps:

1. Open the **Document Creator Report Dataset Extensions** page.

2. If there is no entry present for the report with ID 11249661 ("Sales - Order Confirmation"), then add it.

3. Invoke the **Custom Columns** action.

4. On the **Custom Report Columns** page, add a new entry with the following configuration:

   • Use the drill-down of the **Parent Data Item** field, and select the **SalesLine** data item.

   • In the **Table ID** field, select table 27 **Item**.

   • In the **Field No.** field, select the field from this table you would like the custom column to use, e.g., the **Shelf No.** field.

   • A **Column Name** will be automatically suggested after entering the previous data. You can choose to change this to a different name, if you would like. For example, you might want to add a suffix, e.g., "_DSX", to prevent possible future collisions).

Custom Report Columns - 11249661 Sales - Order Confirmation | Work Date: 1/25/2024

	Parent Data Item Name		Table ID	Table Caption	Field No.	Field Caption	Field Data Type	Column Name ↑	Filter Set
	SalesHdr		18	Customer	102	Email	Text80	BilltoCustEmail_DSX	SALESHDR_CUSTOMER
→	SalesLine	⋮	27	Item	12	Shelf No.	Code10	ItemShelfNo_DSX	SALESLINE_ITEM ⌄
	SalesLine		37	Sales Line	45	Job No.	Code20	JobNo_DSX	SALESLINE_SALESLINE

5. Then, create and configure a new filter set for this entry. For this, open the dropdown of the **Filter Set** field and choose *New*.

6. Configure the filter set as follows:

   • The **Item."No."** field should be equal to the **SalesLine** data item's column value of column **No_2** (this is the column containing the value of the **Sales Line"."No."** field for each record of the **Sales Line** data item).

   To set this up, in the **Filters** tab, first select the **Item."No."** field using the drill-down of the **Filter Field No.** field on the **Filter Set** page.

   Then, select the **No_2** column using the drill-down of the **Value Column Name** field.

   • The column/field value should only be retrieved for **Sales Line** records of type **Item**.

   To set this up, in the **Restrictions** tab, first select the **TypeNo** column using the drill-down of the **Column Name** field.

Then, enter **2** in the **Constant Value** field (where '2' is the ordinal value of the **"Item"** type for the **"Sales Line Type"** enum field).

EXPLANATION: You should use the **TypeNo** column and check against the ordinal/number value instead of just checking that **"Type" = "Item"**, because the field/column values are translated based on the document's language code. This means that the **Type** field/column value is translated into the current document's language, which is why you should check against the integer/ordinal value of the line type.

Finally, choose **OK**.

7. You have now added a new custom column for an **Item** table field to the **SalesLine** data item, with the appropriate filters, to the Sales Order Confirmation report object. You can now add this custom column to your Document Creator layouts for this report using the designer.

Add Sales Line Column

If you would like to add a custom column for a field from the **Sales Line** table (e.g., the "Job No." field) to the **SalesLine** data item in report object 11249661 "Sales - Order Confirmation", then please follow these steps:

1. Open the **Document Creator Report Dataset Extensions** page.

2. If there is no entry present for the report with ID 11249661 ("Sales - Order Confirmation"), then add it.

3. Invoke the **Custom Columns** action.

4. On the **Custom Report Columns** page, add a new entry with the following configuration:

   • Use the drill-down of the **Parent Data Item** field, and select the **SalesLine** data item.

   • In the **Table ID** field, select table 37 **Sales Line**.

   • In the **Field No.** field, select the field from this table you would like the custom column to use, e.g., the **Job No.** field.

   • A **Column Name** will be automatically suggested after entering the previous data. You can choose to change this to a different name, if you would like. For example, you might want to add a suffix, e.g., "_DSX", to prevent possible future collisions).

Custom Report Columns - 11249661 Sales - Order Confirmation | Work Date: 1/25/2024

	Parent Data Item Name		Table ID	Table Caption	Field No.	Field Caption	Field Data Type	Column Name ↑	Filter Set
	SalesHdr		18	Customer	102	Email	Text80	BilltoCustEmail_DSX	SALESHDR_CUSTOMER
	SalesLine		27	Item	12	Shelf No.	Code10	ItemShelfNo_DSX	SALESLINE_ITEM
→	SalesLine	⋮	37	Sales Line	45	Job No.	Code20	JobNo_DSX	SALESLINE_SALESLIN ∨

5. Then, create and configure a new filter set for this entry. For this, open the dropdown of the **Filter Set** field and choose *New*.

6. Configure the filter set as follows:

   • The **"Sales Line"."Document Type"** field should be equal to the **SalesHdr** data item's column value of column **DocumentType** (this is the column containing the value of the **Sales Header"."Document Type"** field for each record of the **SalesHdr** data item).

   To set this up, in the **Filters** tab, first select the **"Sales Line"."Document Type"** field using the drill-down of the **Filter Field No.** field on the **Filter Set** page.

   Then, select the **DocumentType** column (of the **SalesHdr** data item(!)) using the drill-down of the **Value Column Name** field.

- The **"Sales Line"."Document No."** field should be equal to the **SalesHdr** data item's column value of column **DocumentNo** (this is the column containing the value of the **Sales Header"."No."** field for each record of the **SalesHdr** data item).

  To set this up, in the **Filters** tab, first select the **"Sales Line"."Document No."** field using the drill-down of the **Filter Field No.** field on the **Filter Set** page.

  Then, select the **DocumentNo** column (of the **SalesHdr** data item(!)) using the drill-down of the **Value Column Name** field.

- The **"Sales Line"."Line No."** field should be equal to the **SalesLine** data item's column value of column **LineNo** (this is the column containing the value of the **Sales Line"."Line No."** field for each record of the **SalesLine** data item).

  To set this up, in the **Filters** tab, first select the **"Sales Line"."Line No."** field using the drill-down of the **Filter Field No.** field on the **Filter Set** page.

  Then, select the **LineNo** column using the drill-down of the **Value Column Name** field.

Select - Filter Set ⋯   ↗ ✕

General

Code	SALESLINE_SALESLINE	Filter Table ID	37
Parent Data Item XML...	SalesLine	Filter Table Caption	Sales Line

Filters | Manage   ↪ ⊡

	Filter Field No. ↑		Filter Field Caption	Filter Field Data Type	Value Column Name	Constant Value	Filter String
→	1	⋮	Document Type	Option	DocumentType		
	3		Document No.	Code20	DocumentNo		
	4		Line No.	Integer	LineNo		

Restrictions | Manage   ↪ ⊡

	Column Name ↑	Column Data Type	Constant Value	Filter String
→	_			

                                                    OK   **Cancel**

Finally, choose **OK**.

7. You have now added a new custom column for a **Sales Line** table field to the **SalesLine** data item, with the appropriate filters, to the Sales Order Confirmation report object. You can now add this custom column to your Document Creator layouts for this report using the designer.

Custom Labels

You can add custom labels which can be translated with the Document Creator Report Translations feature.

To start adding custom columns to a report, open the **Document Creator Report Dataset Extensions** page, select the report for which you want to add translatable labels and then invoke the **Custom Labels** action.
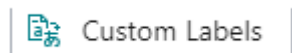
This will open a page in which you can view and edit the custom labels for the selected report. A custom label contains the translation for a tag and can be added to any of the data items of the report object.

> **Note**
>
> Typically labels will be added to a top-level data item that contains the language code.

Similarly to custom columns, the **Parent Data Item Name** can be used to select the parent data item to add the label column to.

In the **Tag** field you can enter the tag/identifer for the translations. The **Column Name** will be suggested automatically after entering the tag.

Custom Report Labels - 11249662 Sales - Invoice | Work Date: 1/25/2024   Not saved

🔍 Search   + New   ⊞ Edit List   🗑 Delete   ⋯   ↗ ⏷ ☰

Parent Data Item Name		Tag	Column Name ↑	Language Code Column
→ InvHdr	⬚	City	lblCity	

In the **Language Code Column** field you can enter the column in the report object that contains the language code to use for retrieving translations. The Assist-Edit of this field will open a page where you can select a column from the parent data item *or* any of the other ascendant data items.

Custom Report Labels - 11249662 Sales - Invoice | Work Date: 1/25/2024   ✓ Saved

Report Columns - 11249662 Sales - Invoice   🔍 ⌄   ⋯

Data Item Name		Column Name	Data Type ▼	Custom
InvHdr		ExternalDocumentNo	Code	☐
→ InvHdr	⋮	LanguageCode	Code	☐
InvHdr		LocationCode	Code	☐
InvHdr		OrderNo	Code	☐

OK   Cancel

This way you can create labels that you can provide translations for in the **Document Creator Translations** page (See Report Translations). Similarly to custom columns, the columns for custom labels are added at the end of the data item, after all the other columns of the data item.

> **Note**
>
> The **Language Code Column** field is automatically populated for new records.

Custom Data Items

It is also possible to add new data items to your reports. That way you can retrieve multiple records from a table and use it as a datasource for your layouts.

> **What is the difference between custom columns and custom data items? When should we use custom data items vs. custom columns?**
>
> **Custom Columns** should be used when you are dealing with a **1-to-1 relation**. For example, each **Sales Line** record (of *Type = Item*) only has a single related **Item** record. And, another example, each **Sales Header** only has a single bill-to **Customer** record.
>
> **Custom Data Items** should be used when you are dealing with a **1-to-n relation**. For example, each **Sales Line** may have multiple **Sales Comment Line** records linked to it. Each **Item** record may have multiple **Item Attribute** records, and similarly, it may have multiple **Item Substitute** records. And, another example, each **Sales Line** may have multiple **Assembly Line** records linked to it (via an **Assemble-to Order Link** record).

To start adding custom data items to a report, open the **Document Creator Report Dataset Extensions** page, select the report for which you want to add data items and then invoke the **Custom Data Items** action.

This will open a page in which you can view and edit the custom data items for the selected report. A custom data item has a source table (either filtered or unfiltered) and custom columns linked to it.

Similarly to custom columns, the **Parent Data Item Name** can be used to select the parent data item to add the new data item to. It is however also possible to leave the field blank so that the data item is added to the root.

The **Table ID** field is used to specify the source table of the data item. After specifying the table, a name for the data item will be suggested automatically in the **Data Item Name** field, but you can freely change this afterwards.

In the **Filter Set** field you can enter a filter set to use to filter the records that should be included in the data item. It is also possible to reuse filter sets that are also used for custom columns.

If you do not want to set any filters and use all records from the table, you should explicitly set the **Unfiltered** field.

To add columns to the custom data item, you can invoke the **Columns** action.

Custom Report Data Items - 11249662 Sales - Invoice | Work Date: 1/25/2024   ✓ Saved   ⊡

	Parent Data Item Name		Table ID	Table Caption	Data Item Name ↑	Filter Set	Unfiltered
→	InvHdr	⋮	18	Customer	Customer	INVHDR_CUSTO...	☐
	InvLine		27	Item	Item	INVLINE_ITEM	☐
			79	Company Inform...	Company_Information		☑

Search + New Edit List Delete Edit Filter Set... Columns ···   ↗ ▽ ☰

View or edit the columns for the selected custom data item.

This will open a page in which you can view and edit the columns of the custom data items. The names of the columns are suggested automatically, but you can freely change them afterwards.

Custom Report Columns - 11249662 Sales - Invoice - Customer | 18 Customer | Work Date: 1/25/2024   Not saved   ⊡

Search + New Edit List Delete View Columns Export Dataset... ···   ↗ ▽ ☰

		Field No.		Field Caption	Field Data Type	Column Name ↑	Cast as Data Type
		1		No.	Code20	No__Customer	
		2		Name	Text100	Name_Customer	
→		9		Phone No.	Text30	Phone_No__Customer	

Similarly to custom columns, the custom data items are added at the end of the parent data item, after all the other child data items of the parent.
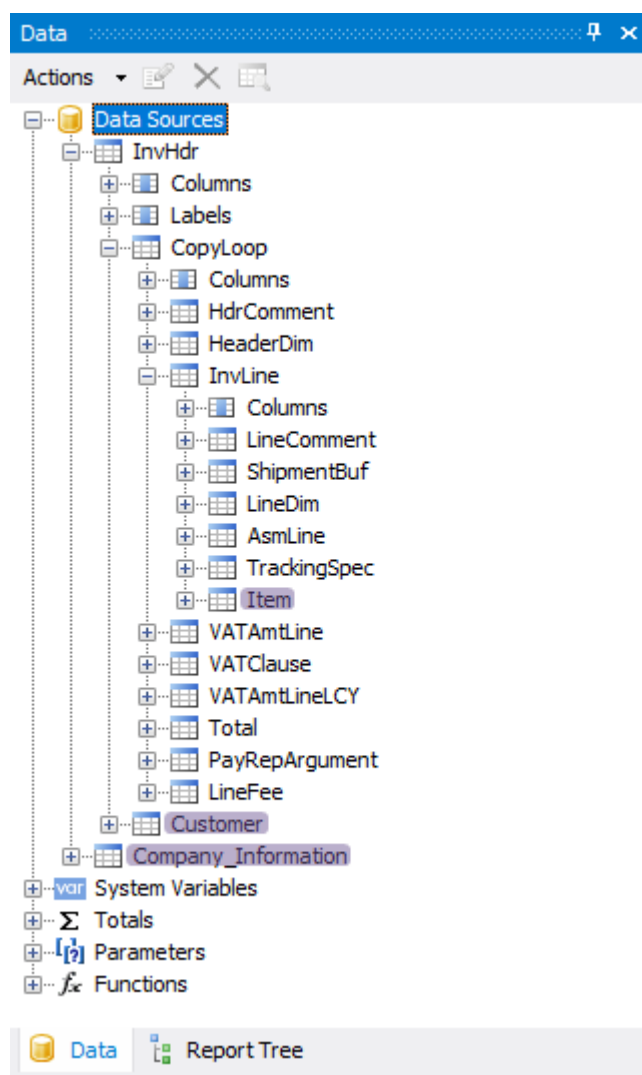
> **Info**
>
> With Document Creator (version "1.30.0.0") it is also possible to link custom data items/columns to other custom columns.

Export / Import

Dataset Extensions can be exported to and imported from an XML file. On the **Document Creator Report Dataset Extensions** page you can find an **Export** and **Import** action for this purpose.

On the page you can select records for one or more reports and export them to a single XML file with the **Export** action.

When you use the **Import** action to import dataset extensions, then please note that this could overwrite any dataset extensions that may already exist for the included reports.

View Columns and Data Items

On the **Document Creator Report Dataset Extensions** page you can find a **View Columns** and **View Data Items** action, which can be used to view all the columns or all data items of a report respectively.
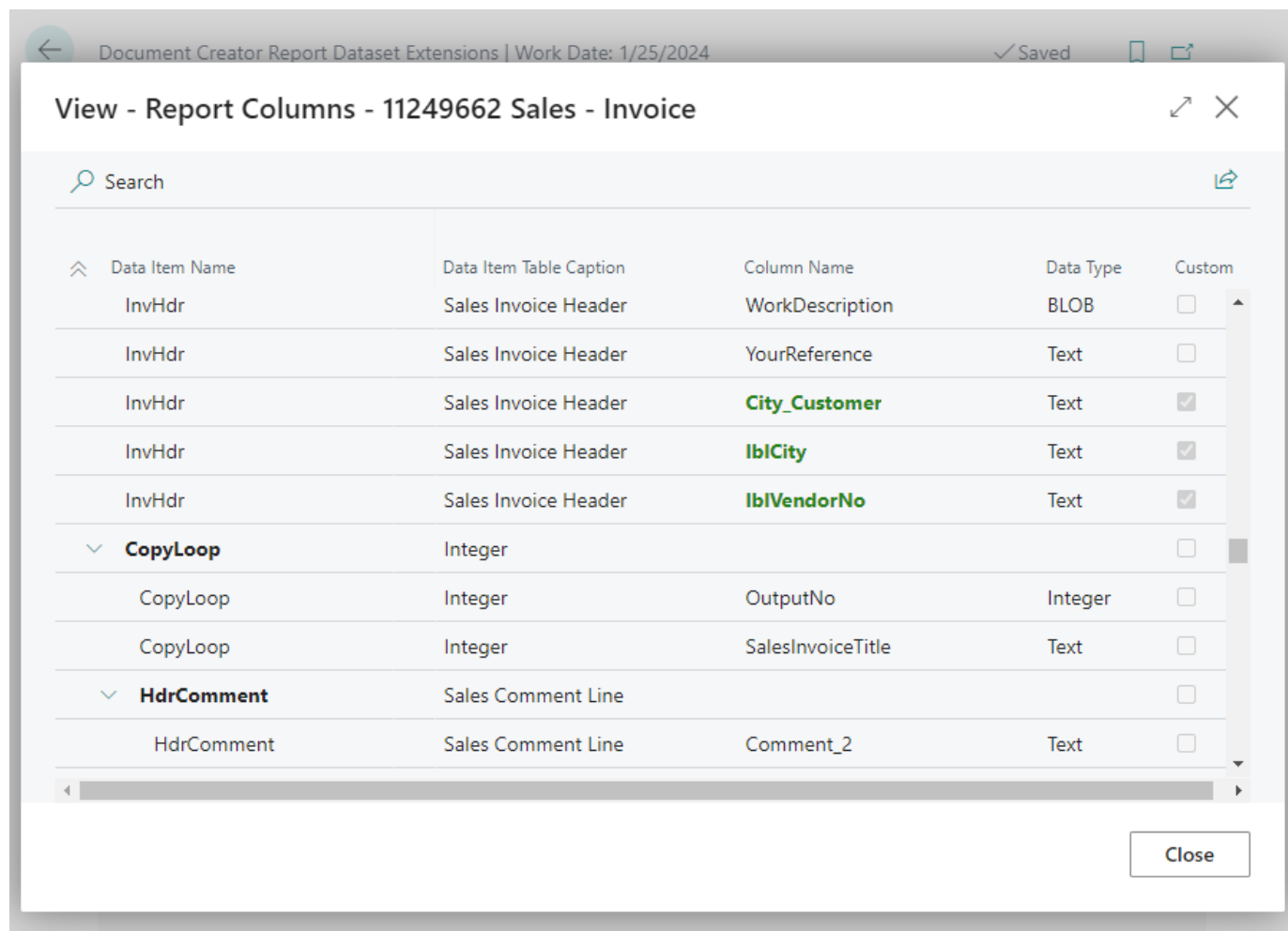
The **View Columns** action opens a page that shows all the columns of a report, the parent data item they each belong to and the data type of the value they contain.

Custom columns are found at the end of their parent data item. For custom columns the **Custom** field is checked and shown in "Bold + Green".

Custom data items and their columns are included in the overview as well.

The **View Data Items** action opens a page that shows all the data items of a report, including all the custom data items.

View - Data Items - 11249662 Sales - Invoice   ⤢ ✕

🔍 Search   ⤴

Data Item Name	Data Item Table Caption	Custom
⌄ InvHdr ⋮	Sales Invoice Header	☐
⌄ CopyLoop	Integer	☐
HdrComment	Sales Comment Line	☐
HeaderDim	Dimension Set Entry	☐
⌄ InvLine	Sales Invoice Line	☐
LineComment	Sales Comment Line	☐
ShipmentBuf	Sales Shipment Buffer	☐
LineDim	Dimension Set Entry	☐
AsmLine	Posted Assembly Line	☐
TrackingSpec	Tracking Specification	☐
Item	Item	☑
VATAmtLine	VAT Amount Line	☐
VATClause	VAT Amount Line	☐
VATAmtLineLCY	VAT Amount Line	☐
Total	Integer	☐
PayRepArgument	Payment Reporting Argument	☐
LineFee	Line Fee Note on Report Hist.	☐
Customer	Customer	☑
Company_Information	Company Information	☑

                                                              [Close]

Conditional Layout Selections

Document Creator Conditional Layout Selections allow you to map conditions based on the contents of your report datasets to layouts that should be used when a (set of) condition(s) is/are satisfied.

> **Important**
>
> This feature is only enabled when reports are run with a **Document Creator layout**. For RDLC, Word and other layout types this feature is disabled.

> **Attention**
>
> We **highly recommend** to use a single layout with conditional visibility (e.g., using the **VisibleExpression** property) to show or hide sections/elements of your layout under certain conditions. This will considerably reduce maintenance costs for your layouts, when the layouts are almost the same, which is the case for the vast majority of all scenarios. We would advise to only use conditional layout selections if the layouts that you would like to use are considerably different!

Conditional Layout Selections

Conditional Layout Selections can be set up in the **Document Creator Conditional Layout Selections** page. In this page you can specify reports for which you wants to map conditions based on the report dataset's columns to a Document Creator layout when these conditions are met. With the **Enabled** field you also have the option to either enable or disable the layout mappings that you defined for the report.

This page offers the following actions:

- **Layout Mappings** - Set up mappings from conditions to a layout for the report (see Layout Mappings). The **Layout Mappings** flowfield will also show the number of conditional layout mappings that you have defined for the report.

- **Report Layouts** - View or edit the Document Creator report layouts for the report.

- **Run Report** - Run the report with a request page. You can use this action to see which layout is used when you run the report with certain parameters and filters.

- **Export** - Export the conditional layout selections for the selected report(s) to an XML file.

- **Import** - Import conditional layout selections from an XML file.

- **View Columns** - View the columns of the report in a tree view. You can use this action to see which columns are available to use in your conditions (including custom columns added via the Dataset Extensions feature).

- **View Data Items** - View the data items of the report in a tree view.

- **Dataset Extensions** - View or edit the dataset extensions for the selected report.
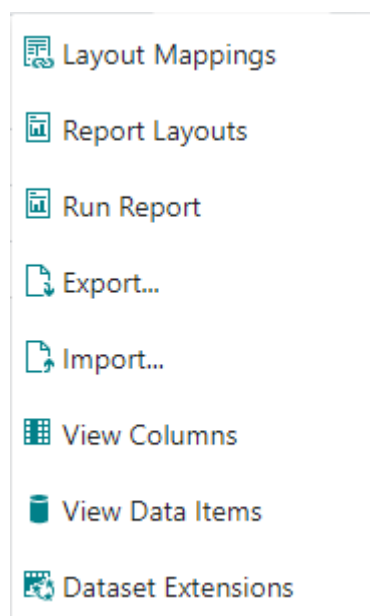
> **Note**
>
> If there are zero mappings, then the **Layout Mappings** field is displayed in red.

> **Info**
>
> Layout selections take the following precedence:
>
> 1. Design-time layout selection
>
> 2. (Custom) Report selection layout selection (email body and attachment report layouts configured in the (Apportunix) Report Selection page(s))
>
> 3. Conditional layout selection
>
> 4. Run-time layout selection from the request page (Note: lower precedence as conditional layout selections are based on the report dataset, which is generated *after* the request page was opened)
>
> 5. Layout selection
>
> 6. Default layout (built-in, extension-provided)

Layout Mappings

On the **Conditional Layout Mappings** page you can map a (set of) condition(s) to a layout that should be used when the report is run. Here you can define one or more *layout mappings*, for which you can define conditions which, when satisfied by the report dataset, will make the report use a specific layout as configured for that scenario in the layout mapping record.

Each layout mapping record has the following fields:

- **Sequence No.** - Specifies the sequence no. (starts at `1`) for this conditional layout mapping, determining the order in which the layout mappings for this report will be processed. You can change this number to change the order of the layout mappings, if you wish that one layout mapping is evaluated before another. The layout of the first layout mapping whose conditions are met when the report is run, will be used as the layout for that report run.

- **Enabled** - Specifies whether the conditional layout mapping is enabled.

- **Description** - Specifies a description for this conditional layout mapping (optional). Here you can add an additional description so that you can further explain this conditional layout mapping to other users.

- **Layout Name** - Specifies the name of the layout to configure the conditions for. If you create a new layout mapping record, this field will initially display *Select Layout...*, and if you drill down you can select a Document Creator layout that should be used when the conditions of this mapping are met.

- **Company-Specific** - Specifies whether this conditional layout mapping only applies to one or more specific companies. If the value is **Yes** then this layout mapping will only be used when a report is executed from those companies. Note that you can view the linked companies in the **Companies** factbox and also view or edit them by drilling down on the field or using the **Companies** action. If the value is **No** (no companies are linked), then the layout mapping will be used in all companies. See also Layout Mapping Companies.

- **Conditions** -Specifies the number of conditions configured for this layout mapping.

> **Note**
>
> If there are zero conditions, then the **Conditions** field is displayed in red and the layout mapping will never be used.

> **Note**
>
> Before you can edit the values on this page, you should first click on the **Edit List** action in the action ribbon.

This page offers the following actions:

- **Conditions** - Set up the conditions for the selected layout mapping for the report based on the values of the columns in the report dataset (see Conditions).

- **Companies** - Set up the companies to which the selected layout mapping for the report specifically applies. If the layout mapping should apply to all companies, then you should not enter any specific companies. See also Layout Mapping Companies.

- **Report Layouts** - View or edit the Document Creator report layouts for the report.

- **Run Report** - Run the report with a request page. You can use this action to see which layout is used when you run the report with certain parameters and filters.

- **View Columns** - View the columns of the report in a tree view. You can use this action to see which columns are available to use in your conditions (including custom columns added via the Dataset Extensions feature).

- **View Data Items** - View the data items of the report in a tree view.

- **Dataset Extensions** - View or edit the dataset extensions for the selected report.

- Conditions
- Companies
- Report Layouts
- Run Report
- View Columns
- View Data Items
- Dataset Extensions

Layout Mapping Companies

You can use the **Companies** action (or **Company-Specific** field's drill-down) to open the **Conditional Layout Mapping Companies** page. If you would like that a layout mapping is only evaluated when the report is run in specific companies, then you can enter these companies in this page.

If there are no companies listed in this page, then the layout mapping will be evaluated, no matter which company the report is run from.

> **Tip**
>
> You can also view the specific companies that are linked to a layout mapping by looking at the **Companies** factbox on the **Conditional Layout Mappings** page. This factbox shows the specific companies in which the layout mapping applies when the report is run.

Conditions

On the **Layout Selection Conditions** page you can set up conditions that should be met for a conditional layout mapping to be applied. On this page you can set up one or more conditions that specifies that the value of a column in the report dataset (the **Condition Column**) should match the value of either (1) a **Constant Value** (a fixed value), (2) the value of another column in the same context (the value of the **Value Column**), or (3) matches a specified filter (specified in the **Filter String** field).

Each condition record has the following fields:

- **Condition Column** - Specifies a column from the report"s dataset to base the condition on. This can be a column from any data item in the report dataset, including custom columns added via the Dataset Extensions feature.

- **Value Column** - Specifies the name of another column whose value the value of the condition column should meet to fulfill the condition. The value of this column can also be substituted in a filter by using a `%1` placeholder in the **Filter String** field.

- **Constant Value** - Specifies a constant/fixed value that the value of the condition column should meet to fulfill the condition.

- **Filter String** - Specifies a filter string that the value of the condition column should meet to fulfill the condition. The filter string can also include a placeholder `%1` in which the value column value or constant value will be substituted if either one is specified.

- **Fulfillment Method** - Specifies the fulfillment method for this condition, i.e., which records should meet the condition for the condition to be fulfilled. For example, if you want to check that *all sales lines* of your sales document satisfy a condition you can put this to **All**, while if you want to check if there is at least 1 sales line that meets the condition you can set this to **Any**.
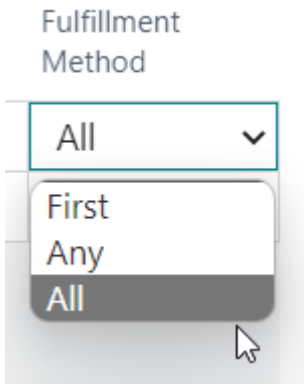
- **First** - The column value of the first record should meet the condition.

- **Any** - The column value of at least 1 record should meet the condition.

- **All** - The column value for all records should meet the condition.

Example 1: Comparing against constant values

For our first example, we have two conditions that should be satisfied for the layout to be used when the report is run. With this example we would like to demonstrate how you can set up conditions that check column values against a fixed value.

Scenario: The "VAT Business Posting Group" should be equal to "EU" and Reverse Charge VAT applies for the sales order.

The first condition checks that the value of the (boolean) column **ReverseChargeVATExists** is equal to `True` .

The second condition checks that the value of the (text-code) column **VATBusinessPostingGroup** is equal to `EU` .

When we print a sales order for which both conditions are satisfied, the layout set up for this conditional layout mapping (with sequence no. 1) will be used.

Example 2: Comparing against another column's value

For our second example, we have a single condition that should be satisfied for the layout to be used when the report is run. With this example we would like to demonstrate how you can set up a condition to check the value of one column against the value of another column.

Scenario: The "Bill-to Customer No." should NOT be equal to the "Sell-to Customer No." for the sales order.

The **Condition Column** used is the **BilltoCustNo** column.

Its value is compared to the value of the **Value Column** which is set to the **SelltoCustNo** column.

We want the values to be different (NOT equal), so therefore, we also enter the filter string `<>%1` in the **Filter String** field where `%1` is a placeholder for the value of the **SelltoCustNo**.

When the condition is evaluated, the value of the **SelltoCustNo** column will be substituted in the filter string's placeholder. For example, if the "Bill-to Customer No." would be 'C0100' and the "Sell-to Customer No." would be 'C0200', then the filter string will become `<>C0200`. In that case, the condition will be satisfied, as 'C0100' is NOT equal (`<>`) to 'C0200'.
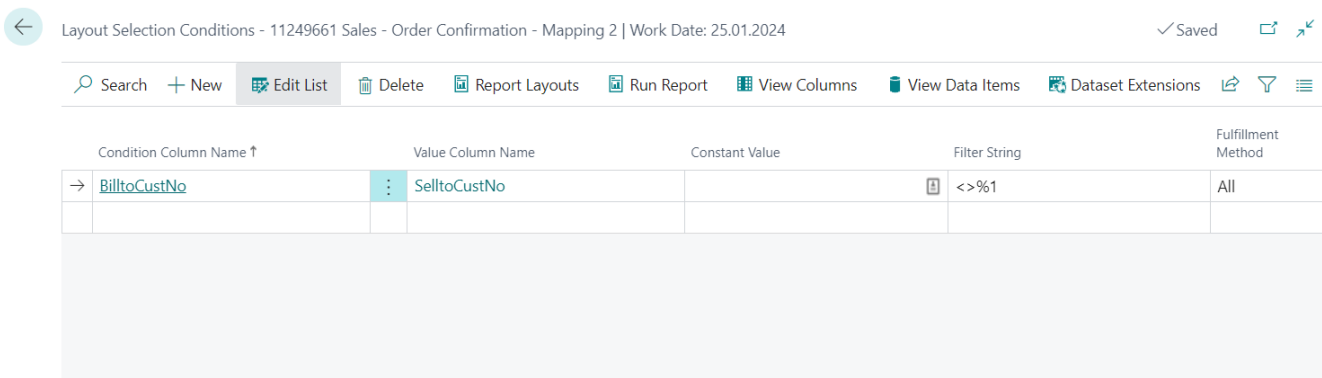
Example 3: Condition that needs to be met by at least one record

For our third example, we have a single condition that should be satisfied for the layout to be used when the report is run. With this example we would like to demonstrate how you can set up conditions that check if at least one record in the dataset satisfies the condition.

Scenario: There is at least one sales order line where the "No." field is equal to '1964-W'.

The **Condition Column** used is the **No_2** column of the SalesLine data item, which contains the "No." field of the sales line.

The **Constant Value** field is set to `1964-W` which is the fixed value we are comparing against.

The **Fulfillment Method** field is set to **Any**, so that the condition is satisfied if there is at least one sales line where the "No." field is equal to '1964-W' (which we entered in the **Constant Value** field).

When the condition is evaluated, it will check the value of the **No_2** column for each sales line record until it finds a match with the constant value `1964-W`. If we run the report for a sales order with two sales lines, the first with "No."='1976-W' and the second with "No."='1964-W', then the condition is satisfied by the second record and the configured layout is used.

Layout Selection Conditions - 11249661 Sales - Order Confirmation - Mapping 3 | Work Date: 25.01.2024   ✓ Saved

🔍 Search   + New   📝 Edit List   🗑 Delete   📊 Report Layouts   📊 Run Report   ⋯

	Condition Column Name ↑		Condition Column Data Type	Condition Column Data Item Name	Constant Value	Fulfillment Method
→	No 2	⋮	Code	SalesLine	1964-W	Any

> **Tip**
>
> You can change the layout of the page using the **Personalize** action in Business Central to add or hide fields that you would like to see on these pages, e.g., if you would like to see the **Condition Column Data Item Name** field, then it is available to add this way.

Example 4: Use custom columns in conditions

For our fourth example, we have a single condition that should be satisfied for the layout to be used when the report is run. With this example we would like to demonstrate how you can set up conditions based on custom columns that you add with the Dataset Extensions feature.

Scenario: There is at least one purchase order *item* line for which the "Inventory Posting Group" of the Item is set to "RAW MAT".

First, add a **custom column** (see Custom Columns for detailed information) called `Inventory_Posting_Group_Item` to the `PurchLine` dataitem.

To do this, first, create a **Dataset Extension** for report 11249681 "Purchase Order":

Document Creator Report Dataset Extensions | Work Date: 25.01.2024   ✓ Saved

🔍 Search   + New   📝 Edit List   🗑 Delete   🔲 Custom Columns   🔲 Custom Labels   ⋯

	Report ID ↑ ▼		Report Caption	Enab...	Custom Columns	Custom Data Items	Custom Labels
→	11249681	⋮	Purchase - Order	☑	0	0	0

Then, create a custom column, with parent data item `PurchLine`, from table `Item`, selecting field `Inventory Posting Group`:

Then, set up the filters by choosing **New** under the **Filter Set** field, and set up the filters and restrictions as follows:

- The **"No."** field of the **Item** table record should be equal to the value of the **No_2** column of the **PurchLine** data item.

- Only item lines should be considered, so a restriction is set up, to make sure the value of the **TypeNo** column is equal to **2** (= **Item**).
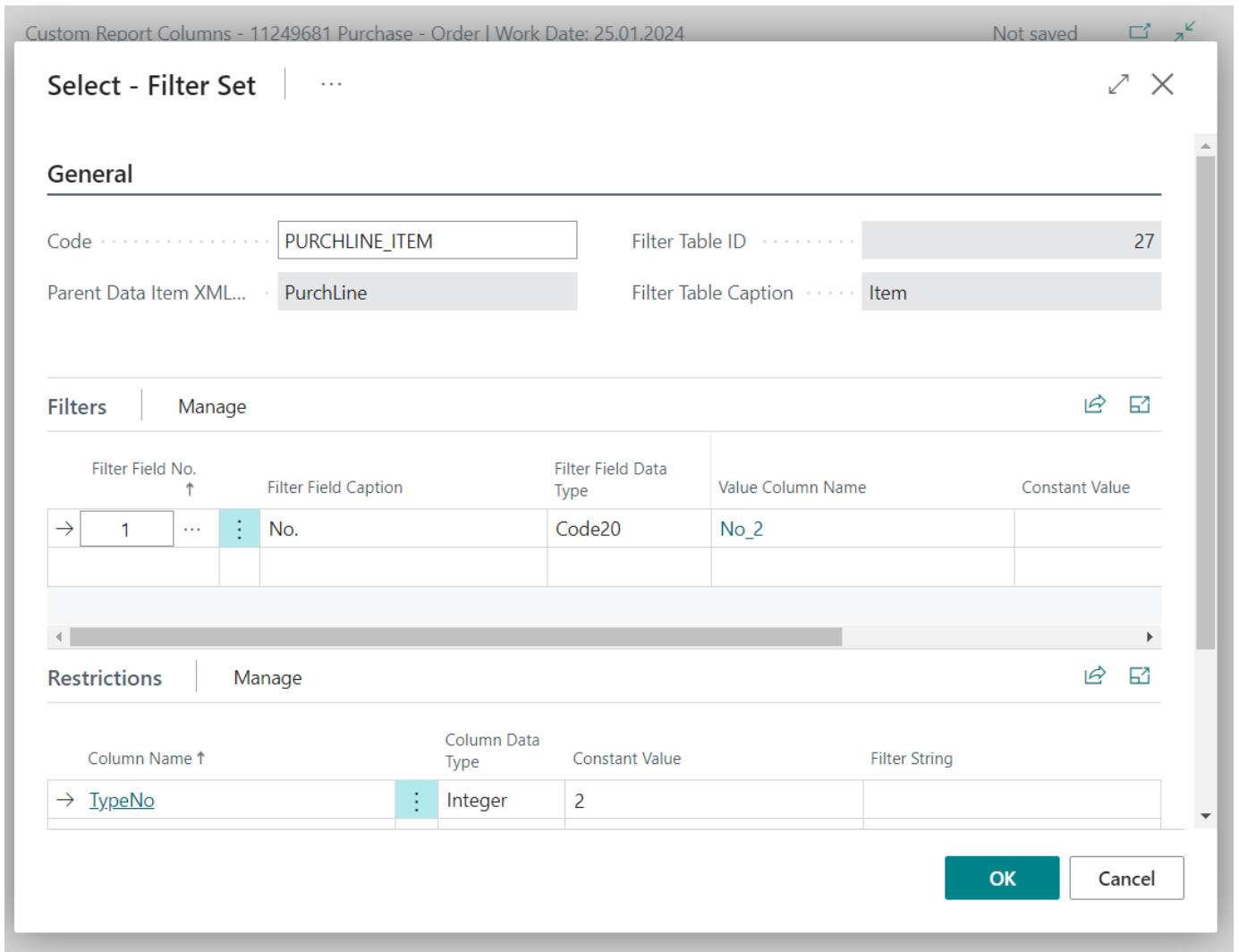
Finally, make sure you save all changes of this dataset extension and then go ahead to set up the condition for your purchase order layout as follows.

The **Condition Column** used is the **Inventory_Posting_Group_Item** column of the PurchLine data item, which contains the value of the "Inventory Posting Group" field of the purchase order line's item.

The **Constant Value** field is set to `RAW MAT` which is the fixed value we are comparing against.

The **Fulfillment Method** field is set to **Any**, so that the condition is satisfied if there is at least one purchase order line where the value of the "Inventory Posting Group" field is equal to 'RAW MAT' (which we entered in the **Constant Value** field).

When the condition is evaluated, it will check the value of the **Inventory_Posting_Group_Item** column for each purchase line record until it finds a match with the constant value `RAW MAT` .

Layout Selection Conditions - 11249681 Purchase - Order - Mapping 1 | Work Date: 25.01.2024   ✓ Saved   ⌷↗

🔍 Search   + New   ☰ Edit List   🗑 Delete   📊 Report Layouts   📊 Run Report   ⋯   ↗ ▽ ☰

Condition Column Name ↑		Condition Column Data Type	Condition Column Data Item Name	Constant Value	Value Column Name
→ Inventory_Posting_Group_Item	⋮	Code	PurchLine	RAW MAT	_

Example 5: Layout per responsibility center

For our fifth example, we set up sales invoice layouts for each of our responsibility centers and would like them to be used depending on the value of the **Responsibility Center** and **Customer Posting Group** field of the posted sales invoice.

Scenario:

We have set up three report layouts for posted sales invoices:

- **London Sales Invoice** - We want this layout to be used when the **Customer Posting Group** is equal to "FOREIGN" and the **Responsibility Center** is equal to "LONDON".

- **Birmingham Sales Invoice** - We want this layout to be used when the **Customer Posting Group** is equal to "DOMESTIC" or "EU" and the **Responsibility Center** is equal to "BIRMINGHAM".

- **Document Creator - Sales Invoice** - The built-in (extension-provided) Document Creator layout for the Posted Sales Invoice, to be used by default when the conditions for the other layouts are not met.

First, add a **custom column** (see Custom Columns for detailed information) for (1) the **Customer Posting Group** of the posted sales invoice and (2) the **Responsibility Center** of the posted sales invoice.

Custom Report Columns - 11249662 Sales - Invoice | Work Date: 25.01.2024   ✓ Saved   ⌷↗ ↙

🔍 Search   + New   ☰ Edit List   🗑 Delete   ▽ Edit Filter Set...   ▦ View Columns   ⤓ Export Dataset...   ⋯   ↗ ▽ ☰

Parent Data Item Name		Custom Parent	Table ID	Table Caption	Field No.	Field Caption	Field Data Type	Column Name ↑	Filter Set
→ InvHdr 🗎	⋮	☐	112	Sales Invoice Header	31	Customer Posting Group	Code20	Customer_Posting_Group_Sal...	INVHDR_SAL...
InvHdr		☐	112	Sales Invoice Header	5700	Responsibility Center	Code10	Responsibility_Center_Sales_I...	INVHDR_SAL...

Then, set up a conditional layout selection for report 11249662 Sales - Invoice and create two layout mappings, one for the **London Sales Invoice** layout, and one for the **Birmingham Sales Invoice** layout.

Using the **Conditions** action, configure the conditions for the layout mappings accordingly:

1. For layout mapping 1, for **London Sales Invoice**, for the first condition select **Condition Column** = `Customer_Posting_Group_Sales_Invoice_Header` and set **Constant Value** to `FOREIGN`, and for the second condition select **Condition Column** = `Responsibility_Center_Sales_Invoice_Header` and set **Constant Value** to `LONDON`.

2. For layout mapping 2, for **Birmingham Sales Invoice**, for the first condition select **Condition Column** = `Customer_Posting_Group_Sales_Invoice_Header` and set **Filter String** to `DOMESTIC|EU` (N.B. this is an **OR**-filter), and for the second condition select **Condition Column** = `Responsibility_Center_Sales_Invoice_Header` and set **Constant Value** to `BIRMINGHAM`.

Layout Selection Conditions - 11249662 Sales - Invoice - Mapping 2 | Work Date: 25.01.2024

🔍 Search   ＋ New   📝 Edit List   🗑 Delete   📄 Report Layouts   📄 Run Report   ▥ View Columns   ⋯

Condition Column Name ↑		Condition Column Data Type	Condition Column Data Item Name	Filter String	Constant Value
→ Customer_Posting_Group_Sal...	⋮	Code	InvHdr	DOMESTIC|EU	
Responsibility_Center_Sales_I...		Code	InvHdr		BIRMINGHAM

Finally, make sure your changes are saved and close the pages.

Now, we can check what happens for our three different cases:

1. If we have a Posted Sales Invoice that doesn't meet the conditions for the layout mappings, then we get the built-in, default layout:

Page 1 of 1

CRONUS International Ltd.
5 The Ring
Westminster
W2 8HG London
Phone No. 0666-666-6666
Fax No. 0666-666-6660
E-Mail
Home Page

Sales Invoice

Bill-to Address

Progressive Home Furnishings
Mr. Scott Mitchell
3000 Roosevelt Blvd.
Chicago, US-IL 61236
USA

Invoice No.	103023		Bill-to Customer No.	01445544
Document Date	20-01-24		Payment Terms	Net 14 days
Order No.	101002		Shipment Method	Ex Warehouse
Invoice Date	22-01-24		Salesperson	Otis Falls
Due Date	03-02-24			
Prices Including VAT	No			

No.	Description	Shipment Date	Quantity	Unit of Measure	Unit Price	Discount %	VAT Identifier	Amount
1928-S	AMSTERDAM Lamp	20-01-24	14	Piece	54.869		VAT25	768.17
1988-W	CALGARY Whiteboard, yellow	20-01-24	1	Piece	1,502.411	10	VAT25	1,352.17
1972-S	MUNICH Swivel Chair, yellow	20-01-24	1	Piece	190.036		VAT25	190.04

	Total USD	2,310.38
	0% VAT	0.00

2. If we have a Posted Sales Invoice that meets the conditions for the first layout mapping, the **London Sales Invoice** layout, then the corresponding is used to generate the output:

3. If we have a Posted Sales Invoice that doesn't meet the conditions for the first layout mapping, but does meet the conditions for the second layout mapping, the **Birmingham Sales Invoice** layout, then the corresponding is used to generate the output:

Sales Invoice

CRONUS, Birmingham RC.
Aaron Nicholls
Main Street, 14
Birmingham, B27 4KT
Great Britain
Phone No. +44-161 818192
Fax No. +44-161 818100
E-Mail
Home Page

Birmingham Bicycles

Bill-to Address

The Cannon Group PLC
Mr. Andy Teal
192 Market Square
Birmingham, B27 4KT
Great Britain

Invoice No.	103028	Bill-to Customer No.	10000	
Document Date	17-01-24	VAT Registration No.	789456278	
Order No.	6005	Payment Terms	1 Month/2% 8 days	
Invoice Date	17-01-24	Shipment Method	Ex Warehouse	
Due Date	17-02-24	Salesperson	Jim Olive	
Prices Including VAT	No			

No.	Description	Shipment Date	Quantity	Unit of Measure	Unit Price	VAT Identifier	Amount
1964-W	INNSBRUCK Storage Unit/G.Door	17-01-24	10	Piece	292.00	VAT25	2,920.00
70011	Glass Door	17-01-24	5	Piece	72.30	VAT25	361.50

Total GBP Excl. VAT		3,281.50
25% VAT		820.38
Total GBP Incl. VAT		4,101.88

Last update: February 13, 2023

Installation & User Manual

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 by the Apportunix team to the designer to support even faster and more efficient layout development.

VisibleExpression Property

You can use the `VisibleExpression` property to specify a condition/expression of when a certain part/control of the layout (e.g., TextObject, Databand, PictureObject, etc.) should be visible. In these expression you can also include columns from the report dataset.

To set up a `VisibleExpression`, please follow these steps:

1. First, export the layout to a **Document Creator Design File (.dcrd)** file and open it in the Document Creator designer. See **Export Design**.

2. In the designer, select the control (e.g., TextObject, Databand, PictureObject, ...) that you would like to show or hide conditionally.

3. In the **Properties** tab/grid (on the bottom-right of the designer), scroll down to the `VisibleExpression` property and use the `...` button (drill-down) to open a text editor for the property.
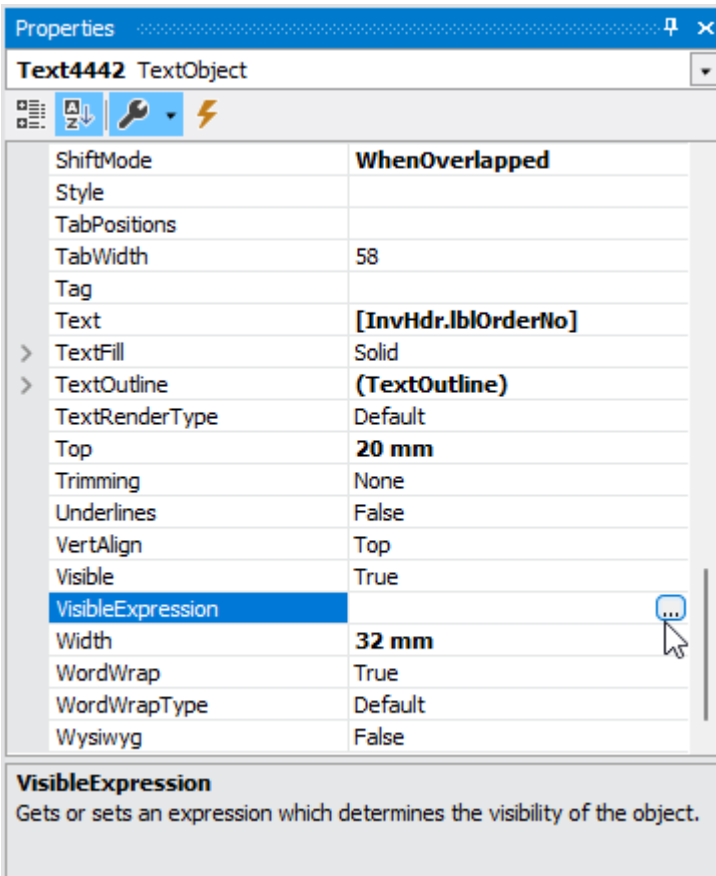
4. In the **Edit expression** window that opens you can include data columns in your expression by selecting them from the pane on the right and dragging them into the expression editor pane on the left. Please see the animation below for an example (where we set up a conditional expression which says "The part/control should be visible if the "Order No." is not empty.").
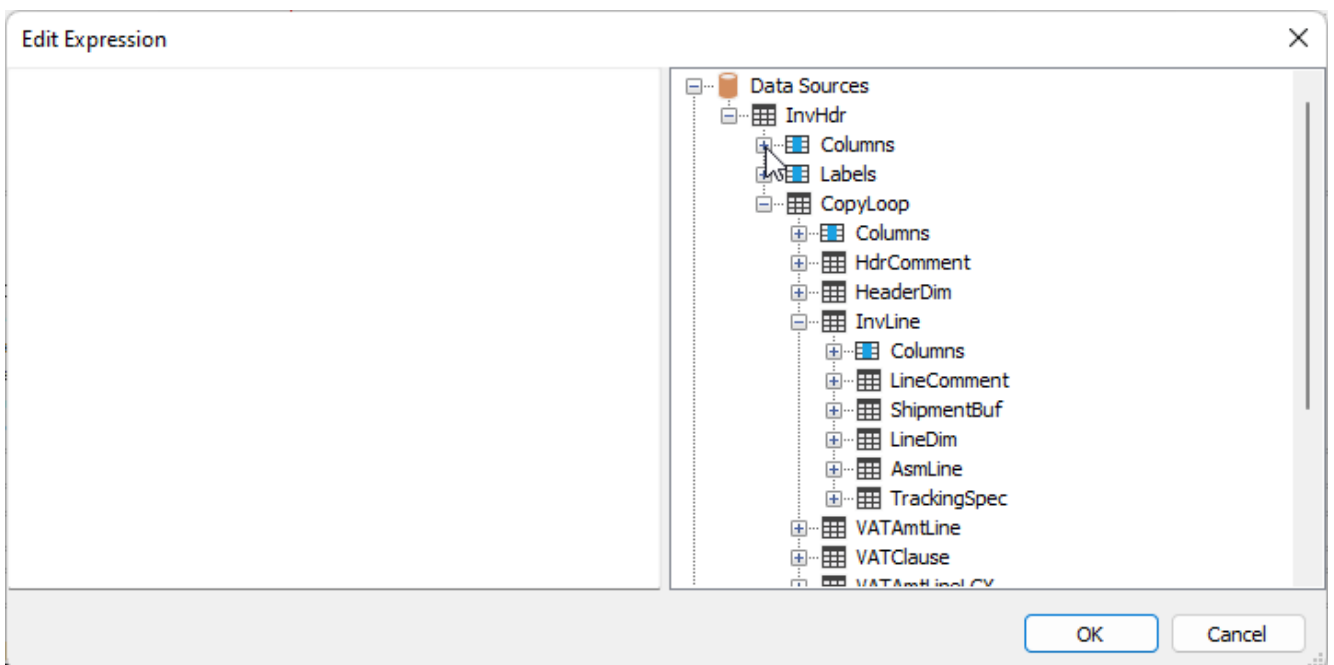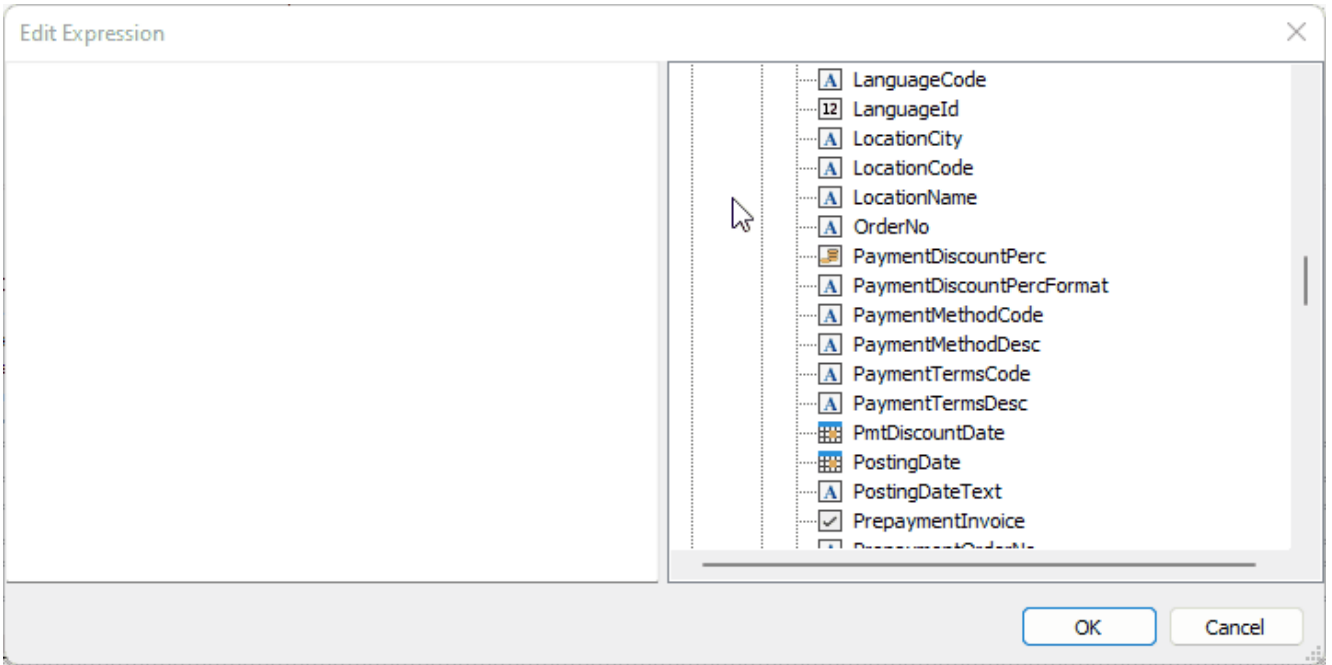
After completing your expression, close the editor by clicking on the **OK** button.

> **Tip**
>
> Please check our F.A.Q.-item: "What is the syntax we can use for expressions (e.g., for the VisibleExpression property)?" for examples of the syntax of conditional expressions.

5. You can now test out/preview your changes by using the **Preview** (`^ Ctrl` + `P`) button in the top-left of the Document Creator designer. After you are satisfied you can save the file and close the designer, and then import the new version of your layout (stored in the .dcrd design file) in Business Central (see **Import Design**).

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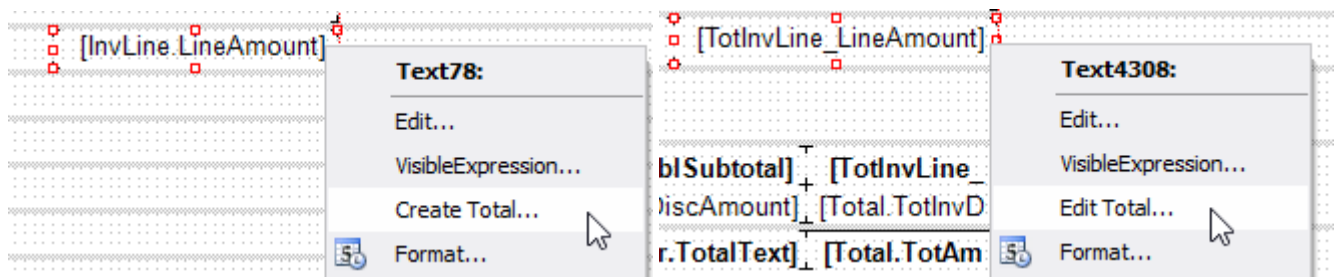
> **Info**
>
> Placing the new *TextObject* on a Footer-band will automatically set the **Reset on band** property to the last child band of the Footer band, to reset the running value back to 0 each time the band is reached.

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.
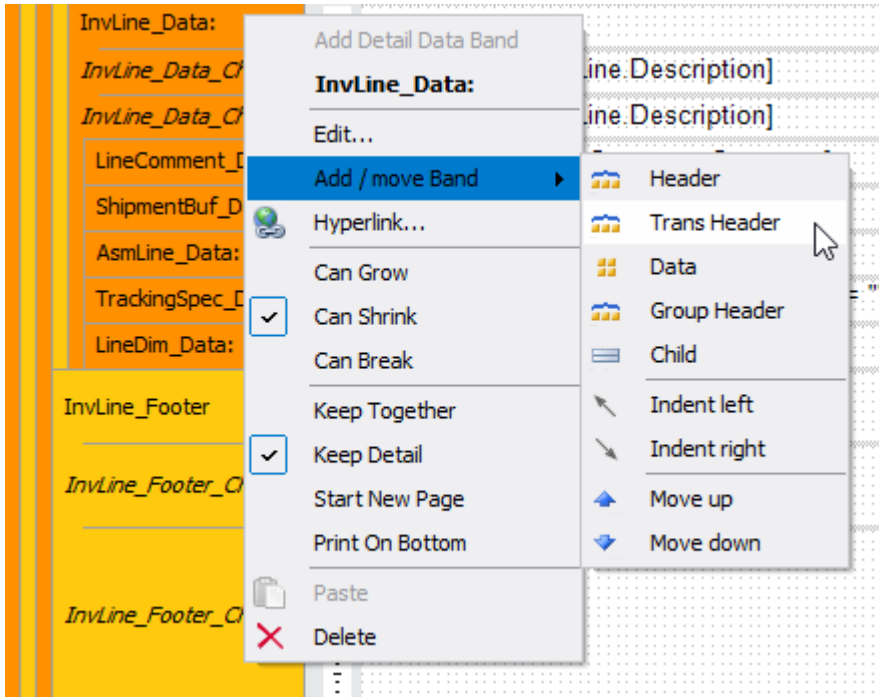
On these bands you can put any earlier-created totals in TextObject controls, whose running value will be shown on the bottom and top of the pages where needed. In the image below an example usage of the Transheader and Transfooter band is shown for a Sales Invoice report layout to show the running value 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.
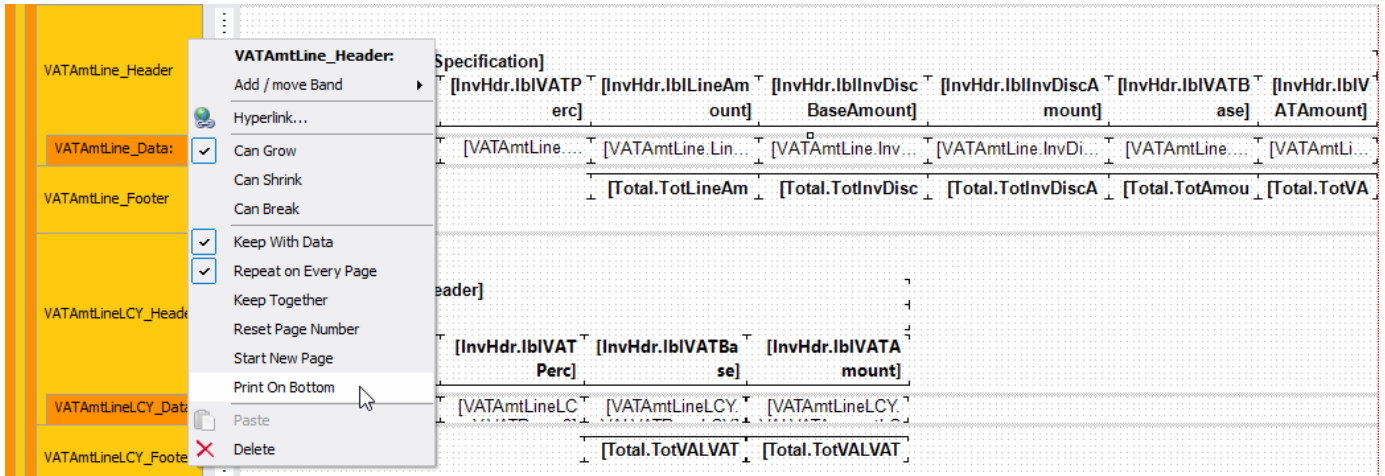
> **Note**
>
> Enabling the **PrintOnBottom** property for a band will also enable the property for any bands that are displayed below. Similarly, disabling the property will disable it for any bands that are displayed above.

> **Caution**
>
> 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**.
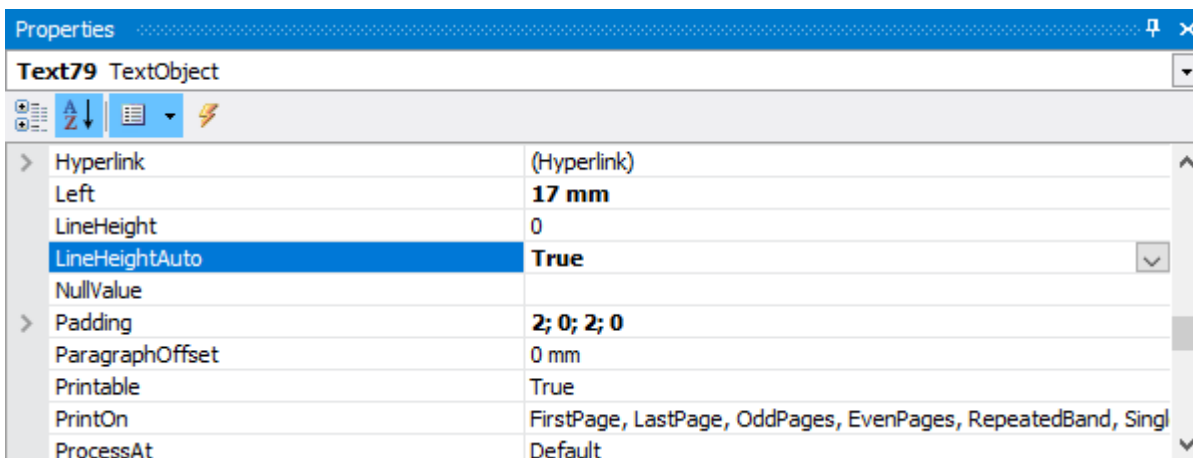
> **Info**
>
> When you add a new TextObject control to your layout, its **LineHeightAuto** property is automatically set to **true**.

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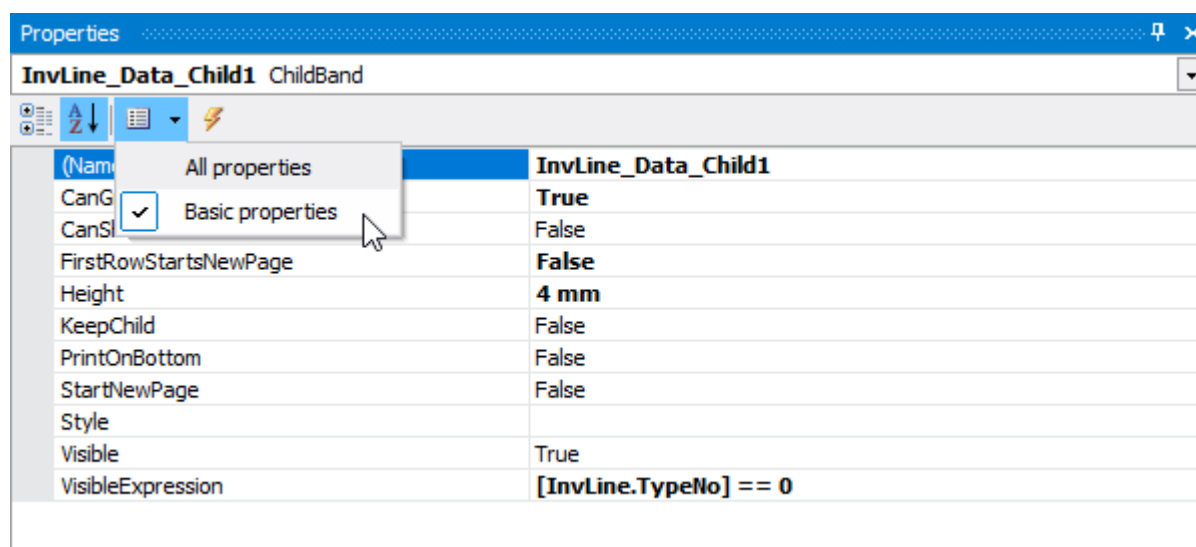
You can change the default value of the setting by navigating to **View** > **Options...** > **User Interface**, which will open the **View Options** menu. In this menu you can enable or disable the "**Show all properties in the property-grid by default**" setting to change the default filtering of the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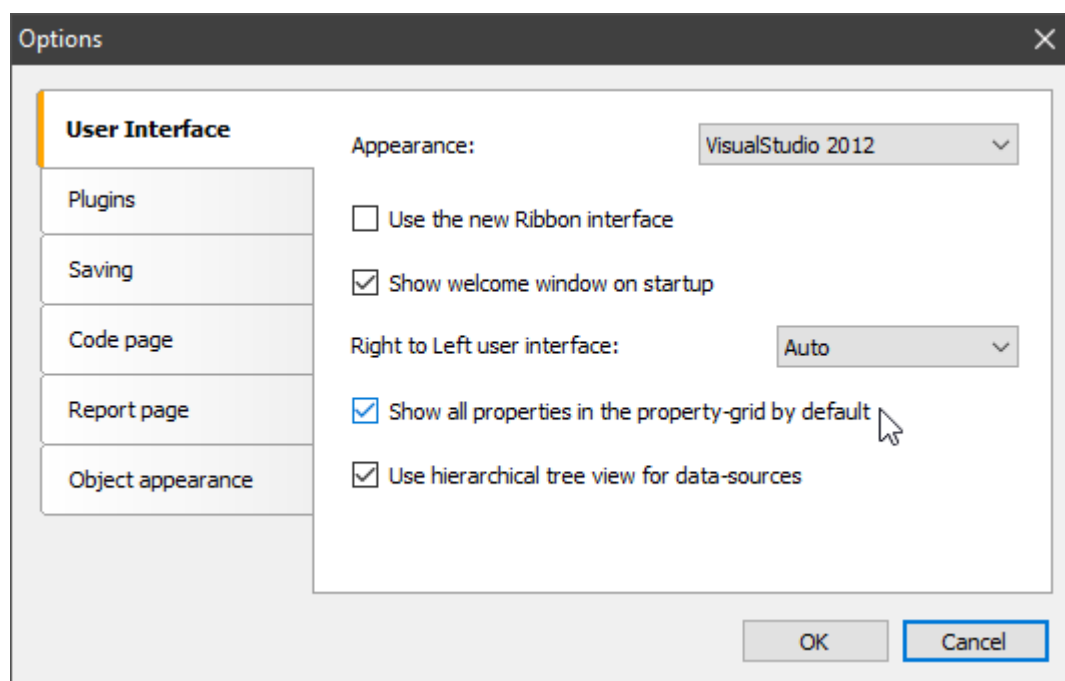
The **Basic Properties** consist of the following properties:

Basic Properties				
Barcode	Filter	Left	RowCount	Style
BottomMargin	Font	LeftMargin	RowSpan	Text
CanGrow	Format	LineHeightAuto	SegmentCount	TextAlign
CanShrink	GroupBy	MaxHeight	SegmentHeight	Top
CheckedSymbol	Height	MaxWidth	SegmentWidth	TopMargin
ChildDataSource	HideIfNoData	Name	Shape	TotalType
ColSpan	HideIfUnchecked	NoDataText	ShowErrorImage	VertAlign
ColumnCount	HideValue	PaperHeight	ShowGrid	Visible
Condition	HideZeros	PaperWidth	ShowMarkers	VisibleExpression
DataColumn	HorzAlign	ParentDataSource	ShowText	Width
DataSource	IncludeInvisibleRows	PrintOnBottom	SizeMode	WordWrap

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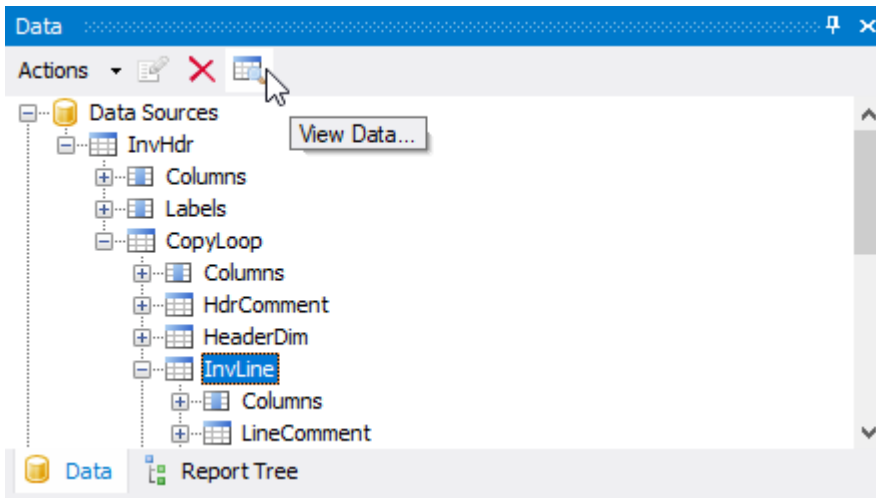
In the window that opens you can view the data of each record in the Data Source and even edit it by leaving a cell after changing its contents.

> **Info**
>
> Any changes you make to the data in the View Data window only changes the data used in the currently opened designer. Changes you have made to the data from this window in the designer will **neither** be saved to the Design file **nor** to Dynamics 365 Business Central.

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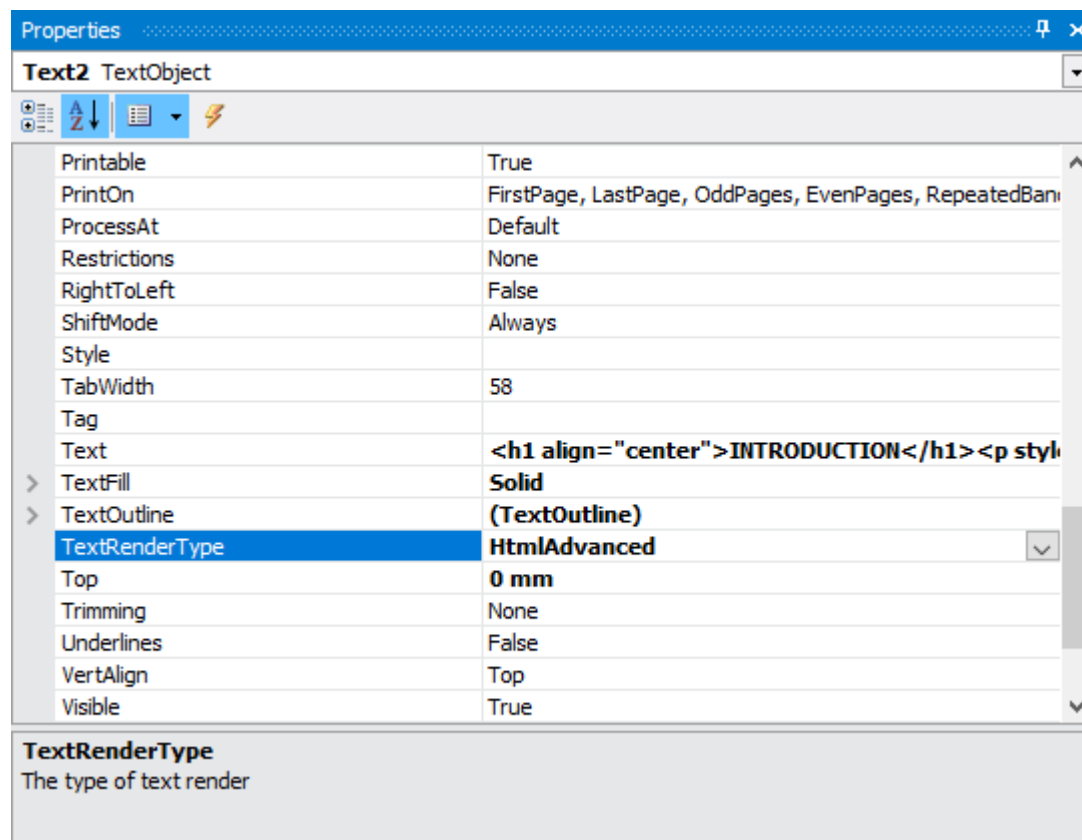
The extended functionalities comprise a larger set of HTML tags being supported, such as paragraphs, divisions, headers and lists, and support for the most-used CSS style attributes, which can be embedded in the supported HTML tags.

Supported HTML Tags

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

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

Tag	Description	Supported Attributes
`<div>...</div>`	Division/Section without any default margins or paddings.	`align` – left, right, center, justify `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, justify
		`style` – (see below)

`<ol>...</ol>`	Ordered lists, default bottom margin of 1 em and left-padding of 40 px.	`type` – 1, A, a `start` – [integer] `style` – (see below)
`<ul>...</ul>`	Unordered lists, default bottom margin of 1 em and left-padding of 40 px.	`type` – disc, circle, square `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.	`color` – [name]/#xxxxxx `face` – [font_family] `size` – [dimension] `style` – (see below)
` `, ` `	Line break.	-
`<img>`	Image.	`src` ="...;base64,..." `alt` – [text]
`<body>...</body>`	Container with default margin of 8 px.	`style` – (see below)
`<b>...</b>` `<strong>...</strong>`	Bold text.	`style` – (see below)
`<i>...</i>` `<em>...</em>`	Cursive text.	`style` – (see below)
`<u>...</u>`	Underlined text.	`style` – (see below)

Tag	Description	Supported Attributes
`<s>...</s>` `<strike>...</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-align`	Text-alignment of the underlying paragraph. If both the align and text-align CSS attribute are defined, the CSS attribute has higher precedence.	`p`, `div`, `h#`, `li`
`text-indent`	Indent of the first line of a paragraph.	`p`, `div`, `h#`, `li`
`font-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` `padding-bottom` `padding-top` `padding-right` `padding-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-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.

```
1   <p style="padding-left: 1cm">
2     Document Creator is a fully functional .NET report designer for Microsoft Dynamics NAV,
3   compatible with <strong>NAV2015</strong> and up.
4     It is rich in functionality, e.g., Drag & Drop fields in reports, choose your own code
5   per report (VB.NET | C#) and barcode usage, including various <i>QR codes</i>.
6   </p>
7   <p style="padding-left: 1.5 cm">Your benefits:</p>
8   <ul style="padding-left: 2 cm">
9     <li>Saves a <span style="font-weight: bold">hugh amount</span> of time</li>
10    <li>Easy to use</li>
11    <li>Rich in functionality<ul type="square">
12      <li>An easy-to-use report designer with endless possibilities</li>
13      <li>Conversion of <i>Classic</i> and <i>RDLC</i> report layouts</li>
14      <li>Fully integrated in Dynamics NAV</li>
15    </ul></li>
      <li style="padding-top: 6pt"><em>Fantastic reports as outcome!</em></li>
    </ul>
```

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!*

Last update: March 22, 2023

Installation & User Manual

Redirect Printers

> **⬛ Attention**
>
> This feature only applies to **Dynamics 365 Business Central on-premise** installations.

> **⬛ Important**
>
> This feature is only enabled when reports are run with a **Document Creator layout**. For RDLC, Word and other layout types this feature is disabled.

To allow for direct printing in Microsoft Dynamics 365 Business Central on-premise of reports with a Document Creator layout, you can set up redirect printers for your local server-printers in the **Document Creator Redirect Printer List** page.

While normally it is not possible to directly print to local printers (due to restrictions implied by Business Central), with Document Creator this becomes possible by setting up a new redirect printer. You can conveniently add redirect printers for all local printers using the **Add redirect printers for all local printers** action.
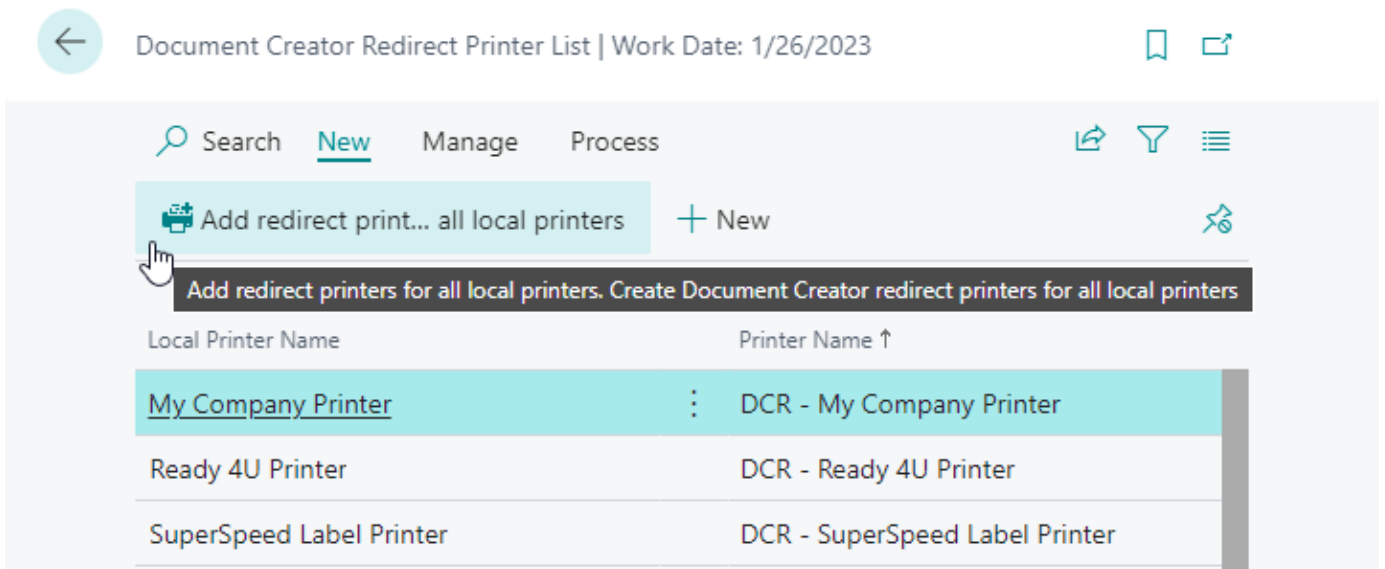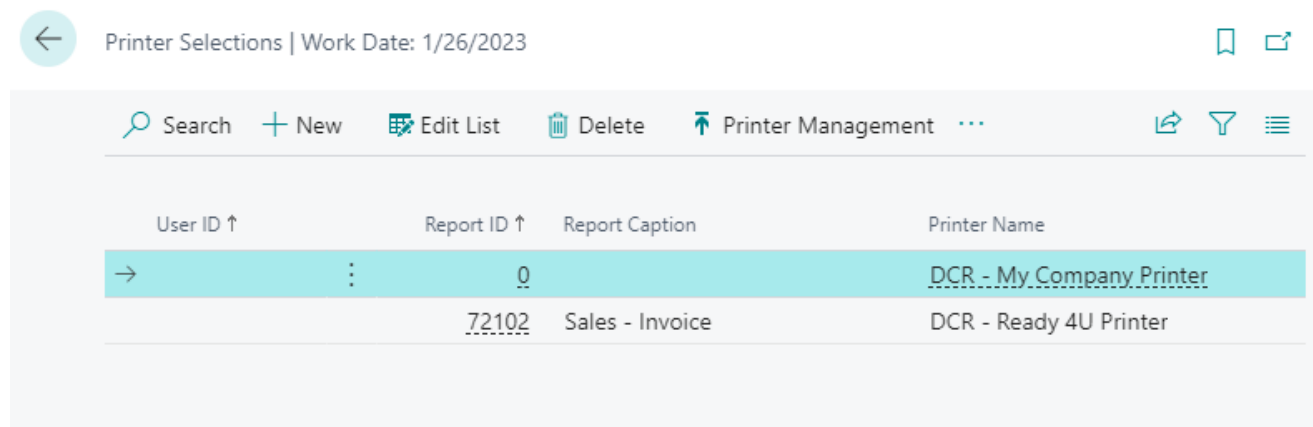
> **⬛ Important**
>
> First, you need to set up and configure your printers under the **service account** that is running the Business Central server instance. After that, the printer(s) will be available as **Local**/**Server** printers in Business Central so that you can add redirect printers for them.

Finally, you can use these redirect printers in the **Printer Selections** page, to specify which printer to use for specific users and/or reports.

■ **Example**

In the example below report *72102 Sales - Invoice* will be printed to the **Ready 4U Printer** when printing a report with a Document Creator layout selection. All other reports with a Document Creator layout selection will be printed to the **My Company Printer**.

← Printer Selections | Work Date: 1/26/2023

🔍 Search   ＋ New   📝 Edit List   🗑 Delete   ⬆ Printer Management   ⋯

User ID ↑		Report ID ↑	Report Caption	Printer Name
→	⋮	0		DCR - My Company Printer
		72102	Sales - Invoice	DCR - Ready 4U Printer

■ **Note**

You can also find the Document Creator Redirect printers in the **Printer Management** page.

Last update: January 12, 2023

RDLC Report Layout Converter

> **🟧 Attention**
>
> This feature only applies to **Dynamics 365 Business Central on-premise** installations.

> **🟥 Take note**
>
> Please note that the Document Creator RDLC Report Layout Converter is provided as is.
>
> Due to structural differences between the Document Creator reporting engine and the RDLC reporting engine, fully automated report layout conversion is not always possible.
>
> The RDLC Report Layout Converter is not meant to be a 100% automated layout conversion. Though, in a lot of cases, the layout converter supplies us with a very usable start to a new Document Creator report layout based on the existing RDLC layout (using the existing dataset).

> **🟦 Note**
>
> The RDLC Report Layout Converter creates report layouts with expressions in the VB.NET syntax instead of the default C# syntax.

Document Creator includes an *RDLC Layout Converter* for converting the built-in RDLC layout of one or more report objects to a new Document Creator report layout. New layouts are created with no need to modify the report object and can exist next to the existing built-in RDLC layout of the report object.

The conversion process can be performed in a few easy steps/clicks as follows:

1. In the Dynamics 365 Business Central client use the *Tell Me* search feature to navigate to the **RDLC Report Layout Conversion** page.

2. Invoke the "Add RDLC Reports" action and use the request page that pops up to select the reports to convert the built-in RDLC layout for.

Add RDLC Reports to Convert

Filter: Report Metadata

× ID · [⌄]

+ Filter...

[Schedule...]   [OK]   [Cancel]

3. On the **RDLC Report Layout Conversion** page select the reports for which you would like to start the conversion. Patiently wait for the conversion to finish.

4. After the conversion is finished, please note that there may be warnings or errors. You can view the warning or error message by drilling down on the **Warnings** or **Errors** field respectively.

	Report ID ↑	Report Name	Has Built-In RDLC Layout	Original Layout Name	New Layout (BLOB)	New Layout Created	New Layout Name	Errors	Warnings	Status
✓	108	Customer - Order Detail	☑	./SalesReceivables/CustomerOrderDetail.rdlc	☑	☑	Converted RDLC Layout Report 108 Customer - ...	No	No	Completed
✓	308	Vendor - Order Detail	☑	./PurchasesPayables/VendorOrderDetail.rdlc	☑	☑	Converted RDLC Layout Report 308 Vendor - Or...	No	Yes	Completed
✓	713	Inventory - Customer Sa...	☑	./InventoryMgt/InventoryCustomerSales.rdlc	☑	☑	Converted RDLC Layout Report 713 Inventory - ...	No	Yes	Completed
→ ✓	5878	Phys. Invt. Recording	☑	./InventoryMgt/PhysInventory/PhysInvtRecording.r...	☑	☑	Converted RDLC Layout Report 5878 Phys. Invt. ...	No	No	Completed

5. Open the **Report Layouts** page to find the new Document Creator layouts from the conversion.

Last update: March 24, 2022

Restrictions

Reports with a Document Creator report layout are rendered via the Document Creator API. This chapter elaborates on the restrictions that apply to the usage of this API.

The usage from a Business Central environment is restricted to a maximum number of requests in a time period to ensure a stable experience. The restrictions that are put on the number of requests are configured differently for Production and Sandbox (Demo) environments.

Production Environments

The following table summarizes the currently configured limits per time period for Production environments:

Time Period	Maximum Number of Render Requests
2 seconds	8
1 hour	1250

Sandbox Environments

The following table summarizes the currently configured limits per time period for Sandbox environments:

Time Period	Maximum Number of Render Requests
2 seconds	5
1 hour	1250
1 day	8000

Last update: February 1, 2023

API Reference Introduction

In this reference documentation you can find an overview of all the objects that make up the public Application Programming Interface (API) of the latest version of the Document Creator extensions for Microsoft Dynamics 365 Business Central.

This documentation is intended as a reference for Business Central extension developers who would like to use the exposed functionality in their own extensions.

Installation & User Manual

Codeunit wDCR_CondLayoutSelectionMgt

Exposes procedures to work with conditional layout selections.

Properties

Name	Value
Access	Public

Methods

wgFncExportConditionalLayoutSelections(wDCR_CondLayoutSelection@)

Exports conditional layout selections for the reports in the filter to an XML file.

Parameters

Type	Name	Description
Record `"wDCR_CondLayoutSelection"`	`vRecwDCR_CondLayoutSelection`	Filter of the conditional layout selections to export.

wgFncExportConditionalLayoutSelections(wDCR_CondLayoutSelection@, Codeunit::TempBlob@)

Exports conditional layout selections for the reports in the filter as XML to a BLOB.

Parameters

Type	Name	Description
Record `"wDCR_CondLayoutSelection"`	`vRecwDCR_CondLayoutSelection`	Filter of the conditional layout selections to export.
Codeunit `"Temp Blob"`	`vCduTempBlob`	The TempBlob to write the conditional layout selections to.

wgFncGetConditionalLayout(Integer, Text, Codeunit::Temp Blob, Report Layout List@):Boolean

Gets the layout that applies for the specified report dataset.

Parameters

Type	Name	Description
`Integer`	`pReportID`	ID of the report.
`Text`	`pWordXmlPart`	The XML Part definition of the dataset.
`Codeunit "Temp Blob"`	`pCduTempBlobXmlDataset`	The Temp Blob containing the XML dataset.
`Record "Report Layout List"`	`vRecResultReportLayoutList`	The layout that should be used meeting the conditions.

Returns

Type	Description
`Boolean`	true iff the conditions for one of the conditional layout mappings is met.

wgFncGetDocumentCreatorConditionalLayoutSelectionsFileExtension:Text[3]

Returns the file extension for Document Creator Conditional Layout Selections files.

Returns

Type	Description
`Text[3]`	Document Creator Conditional Layout Selections file extension.

wgFncGetDocumentCreatorConditionalLayoutSelectionsFileFilter:Text

Returns the file filter for Document Creator Conditional Layout Selections files.

Returns

Type	Description
Text	Document Creator Conditional Layout Selections file filter.

wgFncImportConditionalLayoutSelections

Imports conditional layout selections for reports from an XML file.

wgFncImportConditionalLayoutSelections(Codeunit::Temp Blob)

Imports conditional layout selections for reports from a BLOB that contains the conditional layout selections in XML format.

Parameters

Type	Name	Description
Codeunit "Temp Blob"	pCduTempBlob	The TempBlob to read the conditional layout selections from.

wlEvpOnAfterGetConditionalLayout(Integer, Text, Codeunit::Temp Blob, wDCR_CondReportLayoutMapping@, Report Layout List@, Boolean@)

Allows to hook into whether the layout specified by the wDCR_CondReportLayoutMapping record should be used for the report.

Parameters

Type	Name	Description
Integer	pReportID	The ID of the report object.
Text	pWordXmlPart	The Word XML Part contents of the report as text.
Codeunit "Temp Blob"	pCduTempBlobXmlDataset	A Blob containing the contents of the XML dataset.

Type	Name	Description
Record "wDCR_CondReportLayoutMapping"	vRecwDCR_CondReportLayoutMapping	The conditional report layout mapping record
Record "Report Layout List"	vRecResultReportLayoutList	The resulting report layout that will be used.
Boolean	vConditionalLayoutFound	Whether or not the report layout should be used.

Type	Name	Description
Record "wDCR_CondReportLayoutMapping"	vRecwDCR_CondReportLayoutMapping	The conditional report layout mapping record

nit::TestPlatform&DCR_ManRep... ReportLayoutMapping@, Report Layout List@, Boolean@)

nit::TestPlatform&DCR_ManRep... ReportLayoutMapping@, Report Layout List@, Boolean@)

Codeunit wDCR_DesignFileMgt

Provides all implementation related to the flow of Document Creator Design Files and Support Files.

- A Document Creator Design File is an archive including the layout, wordxmlpart, design settings (and optionally a dataset), which can be opened and edited in the Document Creator Report Designer.
- A Document Creator Support File is an archive including the layout, wordxmlpart and a dataset for a report, which can be run from any installation from the Document Creator Support File Analysis page.

Properties

Name	Value
Access	Public

Methods

wgFncExportDesignFile(Report Layout List, Boolean)

Creates a Document Creator Design File from a Report Layout List record. Optionally, the report will open a request page to run the report and generate a dataset to include in the file.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecReportLayoutList	The Report Layout List record
Boolean	pExportWithData	Specifies whether a dataset should be included in the Design file.

wgFncExportDesignFile(Custom Report Layout, Boolean)

> **■ Obsolete**
>
> Document Creator layouts have been moved to the report layout system tables. 2.0.0.0

Creates a Document Creator Design File from a Custom Report Layout record. Optionally, the report will open a request page to run the report and generate a dataset to include in the file.

Parameters

Type	Name	Description
Record "Custom Report Layout"	pRecCustomRptLayout	The Custom Report Layout record
Boolean	pExportWithData	Specifies whether a dataset should be included in the Design file.

wgFncExportSupportFile(Report Layout List)

Creates a Document Creator Support File from a Report Layout List record.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecReportLayoutList	The Report Layout List record

wgFncExportSupportFile(Custom Report Layout)

> **Obsolete**
>
> Document Creator layouts have been moved to the report layout system tables. 2.0.0.0

Creates a Document Creator Support File from a Custom Report Layout record.

Parameters

Type	Name	Description
Record "Custom Report Layout"	pRecCustomRptLayout	The Custom Report Layout record

wgFncGetDesignSettings(Report Layout List, Integer):JsonObject

Gets the design settings as a JSON object for a report layout.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecReportLayoutList	The report layout.
Integer	pDataLocaleID	The locale ID/region of the dataset.

Returns

Type	Description
JsonObject	The design settings as a JSON object.

wgFncGetDesignSettings(Codeunit::Temp Blob):JsonObject

Gets the design settings as a JSON object from a Document Creator Design File (.dcrd).

Parameters

Type	Name	Description
Codeunit "Temp Blob"	pCduTempBlobDesignFile	The Temp Blob containing the design file.

Returns

Type	Description
JsonObject	The design settings as a JSON object.

wgFncGetDocumentCreatorDesignFileExtension:Text[4]

Returns the file extension for Document Creator Design Files.

Returns

Type	Description
Text[4]	Document Creator Design file extension.

wgFncGetDocumentCreatorDesignFileExtFilter:Text

Returns the file extension filter for Document Creator Design Files.

Returns

Type	Description
Text	Document Creator Design file extension filter.

wgFncGetDocumentCreatorDesignFileFilter:Text

Returns the file filter for Document Creator Design Files.

Returns

Type	Description
Text	Document Creator Design file filter.

wgFncGetDocumentCreatorSupportFileExtension:Text[4]

Returns the file extension for Document Creator Support Files.

Returns

Type	Description
Text[4]	Document Creator Support file extension.

wgFncGetDocumentCreatorSupportFileExtFilter:Text

Returns the file extension filter for Document Creator Support Files.

Returns

Type	Description
Text	Document Creator Support file extension filter.

wgFncGetDocumentCreatorSupportFileFilter:Text

Returns the file filter for Document Creator Support Files.

Returns

Type	Description
Text	Document Creator Support file filter.

wgFncImportDesignFile(Report Layout List)

Imports a design file into a report layout list record.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecReportLayoutList	The report layout list record to import the design file into.

wgFncImportDesignFile(Custom Report Layout@)

> 🟥 **Obsolete**
>
> Document Creator layouts have been moved to the report layout system tables. 2.0.0.0

Imports the layout from a Document Creator Design File into a Custom Report Layout record, prompting the user for the design file. The original version of the layout is archived in the custom report layout archive before the import.

Parameters

Type	Name	Description
Record "Custom Report Layout"	vRecCustomReportLayout	The Custom Report Layout record to import the layout into.

wgFncImportDesignFile(Tenant Report Layout)

Imports a design file into a tenant report layout record.

Parameters

Type	Name	Description
Record "Tenant Report Layout"	pRecTenantReportLayout	The tenant report layout record to import the design file into.

wgFncImportDesignFile(Report Layout List, InStream)

Imports a design file into a report layout list record.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecReportLayoutList	The report layout list record to import the design file into.
InStream	pInStreamDesignFile	The InStream containing the design file to import.

wgFncImportDesignFile(Tenant Report Layout, InStream)

Imports a design file into a tenant report layout record.

Parameters

Type	Name	Description
``	pRecTenantReportLayout	The tenant report layout record to import the design file into.
``	pInStreamDesignFile	The InStream containing the design file to import.

wgFncRunReportRequestPageWithStoredRequestParameters(Integer, Text, Text, Text):Text

Runs the request page with stored parameters.

Parameters

Type	Name	Description
Integer	pReportID	Report ID

Type	Name	Description
Text	pCompanyName	Company Name
Text	pUserID	User ID
Text	pXmlParameters	XML request page parameters to use instead of the stored.

Returns

Type	Description
Text	The XML parameters after closing the request page. Empty if cancelled.

wgFncGetDocumentCreatorDesignFileDatasetEntryLabel:Text

The signature label for the dataset entry in a design/support file.

Returns

Type	Description
Text	The signature dataset entry label.

wgFncGetDocumentCreatorDesignFileLayoutEntryLabel:Text

The signature label for the layout entry in a design/support file.

Returns

Type	Description
Text	The signature layout entry label.

wgFncGetDocumentCreatorDesignFileWordXmlPartEntryLabel:Text

The signature label for the wordxmlpart entry in a design/support file.

usFmGetDocumentCreatorDesignFileWordXmlPartEntryLabel:Text

Returns

Type	Description
Text	The signature wordxmlpart entry label.

wgFmGetDocumentCreatorDesignFileWordXmlPartEntryLabel:Text

Codeunit wDCR_ExportProfileMgt

Provides functions to work with export profiles.

Properties

Name	Value
Access	Public

Methods

wgFncApplyPDFMerges(wDCR_ExportProfile, InStream@)

> 🟥 **Obsolete**
>
> Use wgFncApplyPDFMergesToDocument instead (Added return value). 2.26.0.0

Applies the PDF Merges of the specified export profile to the passed PDF document.

Parameters

Type	Name	Description
Record "wDCR_ExportProfile"	pRecwDCR_ExportProfile	The export profile.
InStream	vInStreamOutputDoc	The PDF Document as a Stream.

wgFncApplyPDFMergesToDocument(wDCR_ExportProfile, InStream@):Boolean

Applies the PDF Merges of the specified export profile to the passed PDF document.

Parameters

Type	Name	Description
Record "wDCR_ExportProfile"	pRecwDCR_ExportProfile	The export profile.

Type	Name	Description
InStream	vInStreamOutputDoc	The PDF Document as a Stream.

Returns

Type	Description
Boolean	true if PDF merges were applied

wgFncClearPDFMergeFile(wDCR_ExportProfilePDFMerge@)

Clears the merge PDF for the passed export profile.

Parameters

Type	Name	Description
Record "wDCR_ExportProfilePDFMerge"	vRecwDCR_ExportProfilePDFMerge	The Document Creator Export Profile

wgFncExportPDFMergeFile(wDCR_ExportProfilePDFMerge@)

Exports a PDF file of a Document Creator Export Profile, prompting the user for a destination to save the file.

Parameters

Type	Name	Description
Record "wDCR_ExportProfilePDFMerge"	vRecwDCR_ExportProfilePDFMerge	The Document Creator Export Profile PDF Merge.

wgFncExportPDFMergeFile(wDCR_ExportProfilePDFMerge@, Codeunit::Temp Blob@)

Exports a PDF file of a Document Creator Export Profile and saves it to a Temp Blob.

Parameters

Type	Name	Description
`Record "wDCR_ExportProfilePDFMerge"`	`vRecwDCR_ExportProfilePDFMerge`	The Document Creator Export Profile PDF Merge.
`Codeunit "Temp Blob"`	`vCduTempBlob`	A Temp Blob to save the merge PDF to.

wgFncImportPDFMergeFile(wDCR_ExportProfilePDFMerge@)

Imports a merge PDF file for a Document Creator Export Profile, prompting the user to upload a PDF file.

Parameters

Type	Name	Description
`Record "wDCR_ExportProfilePDFMerge"`	`vRecwDCR_ExportProfilePDFMerge`	The Document Creator Export Profile.

wgFncImportPDFMergeFile(wDCR_ExportProfilePDFMerge@, Codeunit::Temp Blob, Text)

Imports a merge PDF file for a Document Creator Export Profile.

Parameters

Type	Name	Description
``	`vRecwDCR_ExportProfile`	The Document Creator Export Profile.
``	`pCduTempBlob`	The Temp Blob containing the merge PDF.
``	`pPdfFileName`	The file name of the merge PDF.

wgFncOpenExportProfilePage(Report Layout List)

Opens the Document Creator Export Profile page for a report layout record. If none is specified, the page will be opened for the default export profile.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecReportLayoutList	The Report Layout record.

wgFncOpenExportProfilePage(Custom Report Layout)

> 🟥 **Obsolete**
>
> Document Creator layouts have been moved to the report layout system tables. 2.0.0.0

Opens the Document Creator Export Profile page for a custom report layout record. If none is specified, the page will be opened for the default export profile.

Parameters

Type	Name	Description
Record "Custom Report Layout"	pRecCustomReportLayout	The Custom Report Layout record.

wgFncPDFMergesExistForExportProfile(wDCR_ExportProfile):Boolean

Gets whether PDF Merges exist for a export profile.

Parameters

Type	Name	Description
Record "wDCR_ExportProfile"	pRecwDCR_ExportProfile	The export profile.

wgFncOpenExportProfilePage(wDCR_LayoutSettings)

Opens the Document Creator Export Profile page for a report layout record. If none is specified, the page will be opened for the default export profile.

Parameters

Type	Name	Description
`Record "Report Layout List"`	`pRecReportLayoutList`	The Report Layout record.

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Codeunit wDCR_FormatRegion

Allows to change the format region that should be used by Document Creator for rendering reports in the current session.

Properties

Name	Value
Access	Public
SingleInstance	True

Methods

wgFncGetFormatRegionLocaleID:Integer

Get the locale ID of the currently set Format Region. Returns 0 if no format region was set.

Returns

Type	Description
Integer	The locale ID of the format region that is currently set.

wgFncGetFormatRegionTag:Text

Gets the tag/name of the currently set Format Region. Returns an empty string if no format region was set.

Returns

Type	Description
Text	The tag/name of the format region that is currently set.

wgFncSetFormatRegion(Integer)

Set the format region for rendering in the current session.

Parameters

Type	Name	Description
Integer	pFormatRegionLocaleID	The locale ID of the format region.

wgFncSetFormatRegion(Text)

Set the format region for rendering in the current session.

Parameters

Type	Name	Description
Integer	pFormatRegionLocaleID	The tag/name of the format region.

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Codeunit wDCR_ItemTrackingExtensions

Exposes procedures to retrieve item tracking data to be used by reports.

Properties

Name	Value
Access	Public

Methods

wgFncRetrieveItemTrackingAssemblyDocuments(Tracking Specification@, Integer, Code[20], Enum::Assembly Document Type):Boolean

Retrieving Tracking Specification for (Posted) Assembly Order (Lines). Retrieving Qty. to Handle (Base), Quantity Handled (Base), Item Ledger Entry No. for Warehouse Receipts/Shipments

Parameters

Type	Name	Description
Record "Tracking Specification" temporary	vRecTempTrackingSpecBuffer	The tracking specification result set.
Integer	pTableNo	The Table No. ((Posted) Assembly Header/Assembly Line)
Code[20]	pDocumentNo	The Document No.
Enum "Assembly Document Type"	pDocumentType	The Assembly Document Type

Returns

Type	Description
Boolean	true iff retrieving tracking spec. was successful

TrackingSpecification&UserID Manager, Code[20], Enum::Assembly Document Type):Boolean

Codeunit wDCR_LayoutArchiveMgt

A codeunit with functions related to the report layout archive.

Properties

Name	Value
Access	Public

Methods

wgFncArchive(Report Layout List, Text[100]):Boolean

Creates an archive version for a Report Layout List record.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecReportLayoutList	The Report Layout List record to archive.
Text[100]	pComment	The archive comment to add to the archive record.

wgFncArchive(Tenant Report Layout@, Text[100]):Boolean

Creates an archive version for a Tenant Report Layout record.

Parameters

Type	Name	Description
Record "Tenant Report Layout"	vRecTenantReportLayout	The Tenant Report Layout record to archive.

Type	Name	Description
`Text[100]`	`pComment`	The archive comment to add to the archive record.

wgFncEditComment(wDCR_TenantReportLayoutArchive@):Boolean

Opens the <see cref="wDCR_EditLayoutArchiveComment" /> dialog page to edit the comment of a Tenant Report Layout Archive record.

Parameters

Type	Name	Description
`Record "wDCR_TenantReportLayoutArchive"`	`vRecwDCR_TenantReportLayoutArchive`	The record to open the dialog page with.

Returns

Type	Description
`Boolean`	true iff the user confirmed to edit the comment.

wgFncEditComment(wDCR_TenantReportLayoutArchive@, Boolean):Boolean

Opens the <see cref="wDCR_EditLayoutArchiveComment" /> dialog page to edit the comment of a Tenant Report Layout Archive record.

Parameters

Type	Name	Description
`Record "wDCR_TenantReportLayoutArchive"`	`vRecwDCR_TenantReportLayoutArchive`	The record to open the dialog page with.
`Boolean`	`pModify`	Specifies whether to modify the record after editing the comment.

Returns

Type	Description
`Boolean`	true iff the user confirmed to edit the comment.

wgFncExportLayout(wDCR_TenantReportLayoutArchive@):Text

Exports an archived layout file, prompting the user for a location to save the file.

Parameters

Type	Name	Description
`` ` ``	`vRecwDCR_CustomReportLayoutArchive`	The Custom Report Layout Archive record.

Returns

Type	Description
`` ` ``	Layout file name.

wgFncExportLayout(wDCR_TenantReportLayoutArchive@, OutStream@):Boolean

Gets the contents of an archived layout file and writes them to the passed TempBlob.

Parameters

Type	Name	Description
`Record` `"wDCR_TenantReportLayoutArchive"`	`vRecwDCR_TenantReportLayoutArchive`	The Tenant Report Layout Archive record.
`OutStream`	`vOutStreamLayout`	The OutStream to write the layout to.

Returns

Type	Description
Boolean	true iff the record contains a layout and was written to the OutStream.

wgFncIsDocumentCreatorReportLayout(wDCR_TenantReportLayoutArchive):Boolean

Checks if an archived tenant report layout is a Document Creator layout.

Parameters

Type	Name	Description
Record "wDCR_TenantReportLayoutArchive"	pRecwDCR_TenantReportLayoutArchive	The archived tenant report layout.

Returns

Type	Description
Boolean	true iff the report layout is a Document Creator layout.

wgFncRemoveArchiveVersions(Tenant Report Layout, Boolean)

Removes all versions of a tenant report layout from the archive.

Parameters

Type	Name	Description
Record "Tenant Report Layout"	pRecTenantReportLayout	The tenat report layout
Boolean	pRunTrigger	Whether to run the OnDelete trigger.

wgFncRestoreLayout(wDCR_TenantReportLayoutArchive@)

Restores an archived layout to a Custom Report Layout record.

Parameters

Type	Name	Description
Record "wDCR_TenantReportLayoutArchive"	vRecwDCR_TenantReportLayoutArchive	The Tenant Report Layout Archive record.

wlEvpOnBeforeArchive(Tenant Report Layout@, Text[100])

Allows to hook into archiving a tenant report layout.

Parameters

Type	Name	Description
Record "Tenant Report Layout"	vRecTenantReportLayout	The tenant report layout to archive.
Text[100]	pComment	The comment text to add to the new archive entry.

wlEvpOnBeforeGetDefaultArchivedLayoutFileName(wDCR_TenantReportLayoutArchive@, Text@, Boolean@)

Allows to edit the default archive layout file name for an archive entry when it is exported.

Parameters

Type	Name	Description
Record "wDCR_TenantReportLayoutArchive"	vRecwDCR_TenantReportLayoutArchive	The tenant report layout archive record.
Text	vDefaultFileName	The default layout file name for when the layout archive record is exported.

Type	Name	Description
Boolean	vIsHandled	Set this parameter to true if your extension handles getting a default layout file name for the archive record.

Type	Name	Description
Boolean	vIsHandled	Set this parameter to true if your extension handles getting a default layout file name for the archive record.

DefaultArchiveDirectoryAndFileName(WDCR_TenantReportLayoutArchive@, Text@, Boolean@)

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Codeunit wDCR_LayoutFileManagement

Provides all implementation related to the flow of Document Creator layouts (e.g., create, copy, import, export, archive, upgrade).

Properties

Name	Value
Access	Public

Methods

wgFncCopyReportLayout(Report Layout List, Integer@, Text[250]@):Boolean

Copy a report layout to a new tenant report layout record. Opens a page where you can enter the report ID and layout name for the new layout.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecSelectedReportLayoutList	The report layout to copy.
Integer	vReturnReportID	The report ID for the new report layout.
Text[250]	vReturnLayoutName	The layout name for the new report layout.

Returns

Type	Description
Boolean	true iff the layout was created.

wgFncCopyReportLayout(Report Layout List, Integer, Text[250], Text[250])

Copy a report layout to a new tenant report layout record with specified report ID, layout name and description.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecSelectedReportLayoutList	The report layout to copy.
Integer	pReportID	The report ID for the new report layout.
Text[250]	pLayoutName	The layout name for the new report layout.
Text[250]	pLayoutDescription	The layout description for the new report layout.

wgFncCreateNewBlankDocumentCreatorTenantReportLayout(Integer, Integer@, Text[250]@):Boolean

Opens a dialog page that allows the user to create a new, blank Document Creator tenant report layout for the specified report object.

Parameters

Type	Name	Description
Integer	pReportID	The ID of the report object to create a new Document Creator tenant report layout for.
Integer	vReturnReportID	The ID of the selected target report object selected in the dialog.
Text[250]	vReturnLayoutName	The name of the new tenant report layout.

Returns

Type	Description
Boolean	true iff a layout was created.

wgFncCreateNewBlankDocumentCreatorTenantReportLayout(Integer, Text[250], Text[250]):Boolean

Creates a new, blank Document Creator tenant report layout for the specified report object with specified layout name and layout description.

Parameters

Type	Name	Description
Integer	pReportID	The ID of the target report object.
Text[250]	pLayoutName	The name of the new tenant report layout.
Text[250]	pLayoutDescription	The description of the new tenant report layout.

Returns

Type	Description
Boolean	true iff a new layout was created.

wgFncGenerateUniqueTenantReportLayoutName(Integer, Text[250]):Text[250]

Generates a unique/unreserved name for a new tenant report layout.

Parameters

Type	Name	Description
Integer	pReportID	The ID of the report to which the layout applies.
Text[250]	pInitialLayoutName	The name to base the new name on.

wgFncGetDocumentCreatorDefaultLayoutFileName(Report Layout List):Text

Returns the default file name for a layout file.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecReportLayoutList	The report layout.

Returns

Type	Description
Text	The file name.

wgFncGetDocumentCreatorLayoutFileExtension:Text[4]

Returns the file extension for Document Creator Layout files.

Returns

Type	Description
Text[4]	Document Creator Layout file extension.

wgFncGetDocumentCreatorLayoutFileFilter:Text

Returns the file filter for Document Creator Layout files.

Returns

Type	Description
Text	Document Creator Layout file filter.

wgFncGetDocumentCreatorReportLayoutMimeType:Text[255]

Gets the MIME Type for Document Creator report layouts.

Returns

Type	Description
Text[255]	The MIME Type for Document Creator Report Layouts as Text.

wgFncGetDocumentCreatorReportLayoutSelection(Integer, Report Layout List@):Boolean

Gets the Document Creator report layout selection if it is set up for the current company.

Parameters

Type	Name	Description
Integer	pReportID	The ID of the report object.
Record "Report Layout List"	vRecReportLayoutList	The Report Layout.

Returns

Type	Description
Boolean	true iff the report has a Document Creator report layout selection.

wgFncHasDocumentCreatorReportLayoutSelection(Integer):Boolean

Returns whether the report with the specified ID has a Document Creator report layout selection.

Parameters

Type	Name	Description
Integer	pReportID	The ID of the report object.

Returns

Type	Description
Boolean	true iff the report has a Document Creator report layout selection.

wgFncImportLayoutWithArchiveComment(Report Layout List, Text[255], InStream, Text[100])

Imports the layout to the Report Layout List record and archives the previous version.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecReportLayoutList	The Report Layout List record.
Text[255]	pMimeType	The MIME type of the layout to import.
InStream	pInStreamLayout	The layout to import as an InStream.
Text[100]	pComment	The comment to add to the archived layout.

wgFncImportLayoutWithArchiveComment(Tenant Report Layout@, Text[255], InStream, Text[100])

Imports the layout to the Tenant Report Layout record and archives the previous version.

Parameters

Type	Name	Description
Record "Tenant Report Layout"	vRecTenantReportLayout	The Tenant Report Layout record.
Text[255]	pMimeType	The MIME type of the layout to import.
InStream	pInStreamLayout	The layout to import as an InStream.
Text[100]	pComment	The comment to add to the archived layout.

wgFncIsDocumentCreatorReportLayout(Report Layout List):Boolean

Returns whether the report layout is a Document Creator report layout.

wgFncIsDocumentCreatorReportLayout(Tenant Report Layout):Boolean

Parameters

Type	Name	Description
Record "Report Layout List"	pRecReportLayoutList	The report layout.

Returns

Type	Description
Boolean	true iff the report layout is a Document Creator report layout.

wgFncIsDocumentCreatorReportLayout(Tenant Report Layout):Boolean

Returns whether the report layout is a Document Creator report layout.

Parameters

Type	Name	Description
Record "Tenant Report Layout"	pRecTenantReportLayout	The report layout.

Returns

Type	Description
Boolean	true iff the report layout is a Document Creator report layout.

wgFncIsDocumentCreatorReportLayout(Option, Text[255]):Boolean

Returns whether the report layout with specified properties is a Document Creator report layout.

Parameters

Type	Name	Description
Option	pLayoutFormat	The Layout Format of the layout.
Text[255]	pMimeType	The MIME Type of the layout.

Returns

Type	Description
Boolean	true iff the report layout is a Document Creator report layout.

wgFncIsDocumentCreatorReportLayoutMimeType(Text):Boolean

Returns whether the specified MIME Type corresponds to a Document Creator report layout.

Parameters

Type	Name	Description
Text	pMimeType	The MIME Type

Returns

Type	Description
Boolean	true iff the MIME Type corresponds to a Document Creator report layout.

wlEvpOnBeforeGetDocumentCreatorDefaultLayoutFileName(Report Layout List, Text@, Boolean@)

Allows to hook into how the default layout file name is determined.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecReportLayoutList	The report layout.
Text	vDefaultFileName	The default layout file name.
Boolean	vIsHandled	Set this to true if your extension handles the default layout file name for this report layout.

GetStandardUserDefaultLayoutFileName(Report Layout List, Text@, Boolean@)

preInstallation&customize

Installation & User Manual

Codeunit wDCR_LayoutFileMgt

> **Obsolete**
>
> Document Creator layouts have been moved to the report layout system tables. Use codeunit wDCR_LayoutFileManagement et al. instead.

Provides all implementation related to the flow of Document Creator custom report layouts (e.g., create, copy, import, export, archive, upgrade).

Properties

Name	Value
Access	Public
ObsoleteReason	Document Creator layouts have been moved to the report layout system tables. Use codeunit wDCR_LayoutFileManagement et al. instead.
ObsoleteState	Pending
ObsoleteTag	2.0.0.0

Methods

wgFncArchive(Custom Report Layout@, Text[100])

Creates an archive version for a Custom Report Layout record.

Parameters

Type	Name	Description
Record "Custom Report Layout"	vRecCustomRptLayout	The Custom Report Layout record to archive.

Type	Name	Description
Text[100]	pComment	The archive comment to add to the archive record.

wgFncConvertAllDocumentCreatorCustomReportLayoutsToTenantReportLayouts(Boolean, Text@):Boolean

Converts all Document Creator custom report layouts generating new tenant report layouts.

Parameters

Type	Name	Description
Boolean	pConvertReportLayoutSelections	Whether to update report layout selections accordingly.
Text	vErrorMessage	The error message for a failed conversion of one of the custom report layout records.

wgFncConvertAllDocumentCreatorCustomReportLayoutsToTenantReportLayoutsWithConfirmation(Boolean, Boolean):Boolean

Converts all Document Creator custom report layouts generating new tenant report layouts.

Parameters

Type	Name	Description
Boolean	pConvertReportLayoutSelections	Whether to update report layout selections accordingly.
Boolean	pMarkUpgraded	Whether to modify the descriptions of the custom report layout records to mark them as upgraded.
Boolean	pOpenPage	Whether to open the Report Layouts page after successful conversion.

wgFncConvertCustomReportLayoutsToTenantReportLayouts(Custom Report Layout@, Boolean, Boolean, Text@):Boolean

Converts all selected custom report layouts generating new tenant report layouts.

Parameters

Type	Name	Description
Record "Custom Report Layout"	vRecCustomReportLayout	The Custom Report Layout records to converts.
Boolean	pConvertReportLayoutSelections	Whether to update report layout selections accordingly.
Boolean	pMarkUpgraded	Whether to modify the descriptions of the custom report layout records to mark them as upgraded.
Text	vErrorMessage	The error message for a failed conversion.

Returns

Type	Description
Boolean	Whether the conversion was successful for all custom report layouts.

wgFncConvertCustomReportLayoutsToTenantReportLayoutsWithConfirmation(Custom Report Layout@, Boolean, Boolean, Boolean)

Converts all selected custom report layouts generating new tenant report layouts. This procedures asks for confirmation and opens the Report Layouts page after successful conversion.

Parameters

Type	Name	Description
Record "Custom Report Layout"	vRecCustomReportLayout	The Custom Report Layout records to converts.
Boolean	pConvertReportLayoutSelections	Whether to update report layout selections accordingly.
Boolean	pMarkUpgraded	Whether to modify the descriptions of the custom report layout records to mark them as upgraded.

Type	Name	Description
Boolean	pOpenPage	Whether to open the Report Layouts page after successful conversion.

wgFncConvertReportLayoutSelections(Custom Report Layout, Report Layout List, Boolean):Boolean

Converts the report layout selections that are set to a custom report layout to report layout selections for a report layout list record.

Parameters

Type	Name	Description
Record "Custom Report Layout"	pRecFromCustomReportLayout	The custom report layout
Record "Report Layout List"	pRecTargetReportLayoutList	The report layout list record
Boolean	pConfirm	Whether the conversion should be confirmed by the user

Returns

Type	Description
Boolean	true iff the conversion was performed

wgFncCopyReportLayoutAsTenantReportLayout(Custom Report Layout, Integer@, Text[250]@, Text@):Boolean

Copy a custom report layout to a new tenant report layout record. Opens a page where you can enter the report ID and layout name for the new layout.

Parameters

Type	Name	Description
`Record "Custom Report Layout"`	`pRecCustomReportLayout`	The custom report layout to copy.
`Integer`	`vReturnReportID`	The report ID for the new report layout.
`Text[250]`	`vReturnLayoutName`	The layout name for the new report layout.
`Text`	`vErrorMessage`	The error message for a failed conversion.

Returns

Type	Description
`Boolean`	true iff the layout was created.

wgFncCopyReportLayoutAsTenantReportLayout(Custom Report Layout, Text[250]@, Text@):Boolean

Copy a custom report layout to a new tenant report layout record with auto-suggested name.

Parameters

Type	Name	Description
`Record "Custom Report Layout"`	`pRecCustomReportLayout`	The custom report layout
`Text[250]`	`vLayoutName`	The suggested name.
`Text`	`vErrorMessage`	The error message for a failed conversion.

wgFncCopyReportLayoutAsTenantReportLayout(Custom Report Layout, Integer, Text[250], Text[250], Text@):Boolean

Copy a custom report layout to a new tenant report layout record with specified report ID, layout name and layout description.

Parameters

Type	Name	Description
Record "Custom Report Layout"	pRecCustomReportLayout	The custom report layout to copy.
Integer	pReportID	The report ID for the new report layout.
Text[250]	pLayoutName	The layout name for the new report layout.
Text[250]	pLayoutDescription	The description for the new report layout.
Text	vErrorMessage	The error message for a failed conversion.

Returns

Type	Description
Boolean	true iff the layout was created.

wgFncExportLayout(wDCR_CustomReportLayoutArchive@):Text

Exports an archived layout file, prompting the user for a location to save the file.

Parameters

Type	Name	Description
Record "wDCR_CustomReportLayoutArchive"	vRecwDCR_CustomReportLayoutArchive	The Custom Report Layout Archive record.

Returns

Type	Description
Text	Layout file name.

wgFncExportLayoutToBlob(wDCR_CustomReportLayoutArchive@, Codeunit::Temp Blob@):Boolean

Gets the contents of an archived layout file and writes them to the passed TempBlob.

Parameters

Type	Name	Description
Record "wDCR_CustomReportLayoutArchive"	vRecwDCR_CustomReportLayoutArchive	The Custom Report Layout Archive record.
Codeunit "Temp Blob"	vCduTempBlob	The TempBlob to write the layout to.

Returns

Type	Description
Boolean	true iff the record contains a layout and was written to the TempBlob.

wgFncGetDefaultLayoutFileName(Custom Report Layout):Text

Gets the default file name for a custom report layout.

Parameters

Type	Name	Description
Record "Custom Report Layout"	pRecCustomReportLayout	The custom report layout to get a default file name for.

Returns

Type	Description
Text	The default file name.

wgFncGetDocumentCreatorLayoutFileExtension:Text[4]

Returns the file extension for Document Creator Layout files.

Returns

Type	Description
Text[4]	Document Creator Layout file extension.

wgFncGetDocumentCreatorLayoutFileFilter:Text

Returns the file filter for Document Creator Layout files.

Returns

Type	Description
Text	Document Creator Layout file filter.

wgFncGetLayoutFormatAndMimeType(Custom Report Layout, Option@, Text[255]@)

Gets the corresponding layout format and MIME Type for a custom report layout record.

Parameters

Type	Name	Description
Record "Custom Report Layout"	pRecCustomReportLayout	The custom report layout.
Option	vLayoutFormat	The layout format.
Text[255]	vMimeType	The MIME type.

wgFncImportLayoutBlobWithArchiveComment(Custom Report Layout@, Codeunit::Temp Blob@, Text[30], Text[100])

Imports a layout file from a Blob into a Custom Report Layout and creates an archive version of the previous version.

Parameters

Type	Name	Description
Record "Custom Report Layout"	vRecCustomReportLayout	The Custom Report Layout record into which the layout should be imported.
Codeunit "Temp Blob"	vCduTempBlob	The Blob containing the layout to import.
Text[30]	pFileExtension	The file extension of the layout to import.
Text[100]	pArchiveComment	The comment to add to the archive version that is created.

wgFncIsDocumentCreatorLayout(Custom Report Layout):Boolean

Returns whether the custom report layout is a Document Creator layout.

Parameters

Type	Name	Description
Record "Custom Report Layout"	pRecCustomReportLayout	The Custom Report layout record to check.

Returns

Type	Description
Boolean	true iff the layout is a Document Creator layout

wgFncOpenEditCommentDialog(wDCR_CustomReportLayoutArchive@)

Opens the <see cref="wDCR_EditComment" /> dialog page to edit the comment of a Custom Report Layout Archive record.

Parameters

Type	Name	Description
Record "wDCR_CustomReportLayoutArchive"	vRecwDCR_CustomReportLayoutArchive	The record to open the dialog page with.

wgFncRestoreLayout(wDCR_CustomReportLayoutArchive@, Custom Report Layout@)

Restores an archived layout to a Custom Report Layout record.

Parameters

Type	Name	Description
Record "wDCR_CustomReportLayoutArchive"	vRecwDCR_CustomReportLayoutArchive	The Custom Report Layout Archive record.
Record "Custom Report Layout"	vRecCustomReportLayout	The Custom Report Layout record to restore the layout to.

wgFncSelectLayoutsForAllCompanies(Custom Report Layout@)

Sets the report layout selection to the custom report layouts for all companies.

Parameters

Type	Name	Description
Record "Custom Report Layout"	vRecCustomReportLayout	The set of Custom Report Layout records to use.

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Codeunit wDCR_LayoutPackageManagement

Provides all implementation related to the flow of Document Creator Layout Packages.

- A Document Creator Layout Package is a file including a set of custom report layouts, which can be used to easily import/export layouts from/to another database.

Properties

Name	Value
Access	Public

Methods

wgFncExportLayoutPackage(Report Layout List@)

Exports a layout package for a set of report layout records, prompting the user for a location to save the file.

Parameters

Type	Name	Description
`Record "Report Layout List"`	`vRecReportLayoutList`	The set of Report Layout records to include in the package.

wgFncExportLayoutPackage(Report Layout List@, Codeunit::Temp Blob@)

Creates a layout package file and writes the contents to a TempBlob.

Parameters

Type	Name	Description
`Record "Report Layout List"`	`vRecReportLayoutList`	The set of Report Layout records to include in the package.

Type	Name	Description
Codeunit "Temp Blob"	vCduTempBlob	The TempBlob to write the Layout Package file contents to.

wgFncGetLayoutPackageExtFilter:Text

Returns the file extension filter for Document Creator Layout Packages.

Returns

Type	Description
Text	Document Creator Layout Package file extension filter.

wgFncGetLayoutPackageFileExtension:Text[4]

Returns the file extension for Document Creator Layout Package files.

Returns

Type	Description
Text[4]	Document Creator Layout Package file extension.

wgFncGetLayoutPackageFileFilter:Text

Returns the file filter for Document Creator Layout Packages.

Returns

Type	Description
Text	Document Creator Layout Packages file filter.

wgFncImportLayoutPackage

Imports a layout package, prompting the user for the file. The original version of each layout is archived in the custom report layout archive before the import (if any with the same ID already exist).

wgFncImportLayoutPackage(Codeunit::Temp Blob)

Imports the layouts from a layout package contained in a TempBlob. The original version of each layout is archived in the custom report layout archive before the import (if any with the same ID already exist).

Parameters

Type	Name	Description
Codeunit "Temp Blob"	pCduTempBlob	The TempBlob to read the layout package file contents from.

wlEvpOnAfterGetDefaultLayoutPackageFileName(Text@)

Allows to change the default layout package file name.

Parameters

Type	Name	Description
Text	vLayoutPackageDefaultFileName	THe default layout package file name.

vlEvpOnAfterGetDefaultLayoutPackageFileName(Text@)

Installation & User Manual

Codeunit wDCR_LayoutPackageMgt

> 🟥 **Obsolete**
>
> Document Creator layouts have been moved to the report layout system tables.

Provides all implementation related to the flow of Document Creator Layout Packages.

- A Document Creator Layout Package is a file including a set of custom report layouts, which can be used to easily import/export layouts from/to another database.

Properties

Name	Value
Access	Public
ObsoleteReason	Document Creator layouts have been moved to the report layout system tables.
ObsoleteState	Pending
ObsoleteTag	2.0.0.0

Methods

wgFncExportLayoutPackage(Custom Report Layout@)

Exports a layout package for a set of custom report layout records, prompting the user for a location to save the file.

Parameters

Type	Name	Description
Record "Custom Report Layout"	vRecCustomReportLayout	The set of Custom Report Layout records to include in the package.

wgFncExportLayoutPackage(Custom Report Layout@, Codeunit::Temp Blob@)

Creates a layout package file and writes the contents to a TempBlob.

Parameters

Type	Name	Description
`Record "Custom Report Layout"`	`vRecCustomReportLayout`	The set of Custom Report Layout records to include in the package.
`Codeunit "Temp Blob"`	`vCduTempBlob`	The TempBlob to write the Layout Package file contents to.

wgFncGetLayoutPackageExtFilter:Text

Returns the file extension for Document Creator Layout Packages.

Returns

Type	Description
`Text`	Document Creator Layout Package file extension.

wgFncGetLayoutPackageFileFilter:Text

Returns the file filter for Document Creator Layout Packages.

Returns

Type	Description
`Text`	Document Creator Layout Packages file filter.

wgFncImportLayoutPackage

Imports a layout package, prompting the user for the file. The original version of each layout is archived in the custom report layout archive before the import (if any with the same ID already exist).

wgFncImportLayoutPackage(Codeunit::Temp Blob)

Imports the layouts from a layout package contained in a TempBlob. The original version of each layout is archived in the custom report layout archive before the import (if any with the same ID already exist).

Parameters

Type	Name	Description
Codeunit "Temp Blob"	pCduTempBlob	The TempBlob to read the layout package file contents from.

Installation & User Manual

Codeunit wDCR_LayoutSelectionMgt

A codeunit with procedures for layout selections.

Properties

Name	Value
Access	Public

Methods

wgFncGetReportLayoutSelection(Integer, Text[30], Guid, Report Layout Selection@, Text[250]@, Guid@, Text[255]@, Boolean@, Boolean@)

Procedure to retrieve the report layout selection for specified report ID, company name and user ID.

Parameters

Type	Name	Description
Integer	pReportID	Report Object ID
Text[30]	pCompanyName	Company Name
Guid	pUserID	User ID
Record "Report Layout Selection" temporary	vRecTempReportLayoutSelection	The layout selection.
Text[250]	vLayoutName	The name of the layout of the layout selection.
Guid	vAppID	The layout app ID.
Text[255]	vMimeType	The MIME Type of the layout.

Type	Name	Description
Boolean	vIsUserDefined	Whether the layout is a user-defined layout.
Boolean	vSelectionExists	Whether a layout selection exists.

wgFncRemoveReportLayoutSelections(Integer)

Removes the report layout selections for the report object with specified ID, in all companies.

Parameters

Type	Name	Description
Integer	pReportID	Report Object ID.

wgFncRemoveReportLayoutSelectionsForCurrentCompany(Integer)

Removes the report layout selections for the report object with specified ID in the current company only.

Parameters

Type	Name	Description
Integer	pReportID	Report Object ID.

wgFncRemoveTenantReportLayoutSelections(Report Layout List, Boolean)

Removes all tenant report layout selections for the specified report layout.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecReportLayoutList	The report layout.
Boolean	pConfirm	Whether confirmation from the user is needed.

wgFncRemoveTenantReportLayoutSelections(Integer, Text[250], Guid, Boolean)

Removes all tenant report layout selections for the specified report layout.

Parameters

Type	Name	Description
Integer	pReportID	Report Object ID.
Text[250]	pLayoutName	The name of the layout.
Guid	pAppID	The layout app ID.
Boolean	pConfirm	Whether confirmation from the user is needed.

wgFncSelectLayoutsForAllCompanies(Report Layout List@)

Sets up the report layout selections to the specified report layout for all companies. Confirmation from the user is requested.

Parameters

Type	Name	Description
Record "Report Layout List"	vRecReportLayoutList	The report layout.

wgFncSelectReportLayout(Integer, Report Layout List@, Boolean):Boolean

Opens a page to select a report layout from the "Report Layouts" page.

Parameters

Type	Name	Description
Integer	pReportID	The ID of the report object for which to select a layout.
Record "Report Layout List"	vRecReportLayoutList	The report layout that was selected.
Boolean	pForEmailBody	Whether to filter the page to only display layouts that can be used as email body.

Returns

Type	Description
Boolean	true iff a layout was selected on the page (the user selected a layout and pressed OK)

wgFncSetReportLayoutSelection(Report Layout List, Text[30]):Boolean

Sets a report layout selection. Copy of "Report Layouts Impl.".SetDefaultReportLayoutSelection

Parameters

Type	Name	Description
Record "Report Layout List"	pRecSelectedReportLayoutList	The report layout.
Text[30]	pCompanyName	Company name.

Returns

Type	Description
Boolean	true iff successful.

wgFncSetReportLayoutSelection(Report Layout List, Text[30], Guid):Boolean

Sets a report layout selection. Copy of "Report Layouts Impl.".SetDefaultReportLayoutSelection

Parameters

Type	Name	Description
Record "Report Layout List"	pRecSelectedReportLayoutList	The report layout.
Text[30]	pCompanyName	Company name.
Guid	pUserID	User ID

Returns

Type	Description
Boolean	true iff successful.

wgFncSetReportLayoutSelectionForCurrentCompany(Report Layout List):Boolean

Sets a report layout selection for the current company.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecSelectedReportLayoutList	The report layout

Returns

Type	Description
Boolean	true iff successful

wlEvpOnBeforeSelectLayoutsForAllCompanies(Report Layout List@, Boolean@)

Allows to hook into setting a report layout to be used in all companies.

Parameters

Type	Name	Description
Record "Report Layout List"	vRecReportLayoutList	The report layout.
Boolean	vIsHandled	Set this to true if your extension handles setting report layout selections for the report layout.

InstallUponBeforeManualLayoutsForAllCompanies(Report Layout List@, Boolean@)

Installation & User Manual

Codeunit wDCR_Publishers

Exposes additional event publishers next to the event publishers that are available from the public objects.

Properties

Name	Value
Access	Public

Methods

wgEvpReportExecutionParameters_OnAfterGetDevelopmentEnvironmentName(Text@)

Allows to hook into getting the environment name that will be used for (default) file names of exported files.

Parameters

Type	Name	Description
Text	vEnvironmentName	The environment name.

wgEvpReportExecutionParameters_OnAfterGetFormattingCulture(Integer@)

Allows to change the formatting culture that should be used for specific scenarios.

Parameters

Type	Name	Description
Integer	vFormattingLocaleID	The locale ID of the formatting culture that should be used for rendering the report.

wgEvpReportExecutionParameters_OnBeforeGetDefaultOutputTypeFileName(Integer, Enum::wDCR_OutputFileType, Text@, Boolean@)

Allows to hook into the moment right before the (default) file name of a document is determined. This concerns the fallback file name that is used if no file name was specified for the document by Business Central.

Parameters

Type	Name	Description
Integer	pReportID	The ID of the report.
Enum "wDCR_OutputFileType"	pOutputFileType	The output file type (e.g., PDF)
Text	vDefaultOutputFileName	The output default file name.
Boolean	vIsHandled	Set this parameter to true if your custom extension sets the file name.

wgEvpReportExecutionParameters_OnBeforeGetTenantDBIdentifyingName(Text@, Boolean@)

Allows to hook into getting the identifying name that will be used for (default) file names of exported files.

Parameters

Type	Name	Description
Text	vTenantIdentifyingName	The identifying name.
Boolean	vIsHandled	Whether an extension handles the identifying name.

ReportInstallationParametersOnBeforeGetTenantDBIdentifyingName(Text@, Boolean@)

Installation & User Manual

Codeunit wDCR_ReportDatasetExtensionMgt

Provides all implementation related to Document Creator Report Dataset Extensions.

Properties

Name	Value
Access	Public

Methods

wgFncExportCustomizedDataSetXml(Integer, Text):Text

Opens a report's request page and exports the customized XML report dataset.

Parameters

Type	Name	Description
Integer	pReportID	Report ID
Text	pXmlParameters	The parameters to use (can also be empty).

Returns

Type	Description
Text	Dataset XML File Name

wgFncExportDataSetExtensions(wDCR_DatasetExtension@)

Exports Dataset extensions for the reports in the filter to an XML file.

Parameters

Type	Name	Description
Record "wDCR_DatasetExtension"	vRecwDCR_DatasetExtension	Filter of the report dataset extensions to export.

wgFncExportDataSetExtensions(wDCR_DatasetExtension@, Codeunit::Temp Blob@)

Exports Dataset extensions for the reports in the filter as XML to a BLOB.

Parameters

Type	Name	Description
Record "wDCR_DatasetExtension"	vRecwDCR_DatasetExtension	Filter of the report dataset extensions to export.
Codeunit "Temp Blob"	vCduTempBlob	The TempBlob to write the Dataset extensions to.

wgFncGetCustomizedDataSetXml(Integer, Codeunit::Temp Blob@):Boolean

Applies Dataset extensions to an XML report dataset.

Parameters

Type	Name	Description
Integer	pReportID	Report ID
Codeunit "Temp Blob"	vCduTempBlobXmlDataset	The Temp Blob containing the original XML report dataset.

Returns

Type	Description
Boolean	true iff there were Dataset extensions to apply.

wgFncGetCustomizedReportFiles(Integer, Text@, Codeunit::Temp Blob@):Boolean

Applies Dataset extensions to a report's WordXMLPart and XML dataset.

Parameters

Type	Name	Description
Integer	pReportID	Report ID
Text	vWordXmlPart	The report's WordXMLPart.
Codeunit "Temp Blob"	vCduTempBlobXmlDataset	The Temp Blob containing the original XML report dataset.

Returns

Type	Description
Boolean	true iff there were Dataset extensions to apply.

wgFncGetCustomizedWordXmlPart(Integer):Text

Applies Dataset extensions to a report's WordXMLPart.

Parameters

Type	Name	Description
Integer	pReportID	Report ID

Returns

Type	Description
Text	true iff there were Dataset extensions to apply.

wgFncGetCustomizedWordXmlPart(Integer, Text@):Boolean

Applies Dataset extensions to a report's WordXMLPart.

Parameters

Type	Name	Description
Integer	pReportID	Report ID
Text	vWordXmlPart	The report's WordXMLPart.

Returns

Type	Description
Boolean	true iff there were Dataset extensions to apply.

wgFncGetDocumentCreatorDatasetExtensionsFileExtension:Text[3]

Returns the file extension for Document Creator Dataset Extensions files.

Returns

Type	Description
Text[3]	Document Creator Dataset Extensions file extension.

wgFncGetDocumentCreatorDataSetExtensionsFileFilter:Text

Returns the file filter for Document Creator Dataset Extensions files.

Returns

Type	Description
Text	Document Creator Dataset Extensions file filter.

wgFncGetReportNodes(Integer, wDCR_DatasetNode@, Boolean, Boolean)

Gets the report nodes as a record set.

Parameters

Type	Name	Description
`Integer`	`pReportID`	Report ID
`Record "wDCR_DatasetNode" temporary`	`vRecTempwDCR_ReportNode`	The temporary record set that the nodes are written to.
`Boolean`	`pDataItemsOnly`	Whether to include the Data Item nodes only.
`Boolean`	`pIncludeCustom`	Whether to include the Custom nodes.

wgFncImportDataSetExtensions

Imports Dataset extensions for reports from an XML file.

wgFncImportDataSetExtensions(Codeunit::Temp Blob)

Imports Dataset extensions for reports from a BLOB that contains the extensions in XML format.

Parameters

Type	Name	Description
`Codeunit "Temp Blob"`	`pCduTempBlob`	The TempBlob to read the Dataset extensions from.

wgFncSelectFieldsForCustomColumns(Integer):Boolean

Select fields to add custom columns for in a report object's dataset extension.

Parameters

Type	Name	Description
`Integer`	`pReportID`	The ID of the report object.

Returns

Type	Description
Boolean	true iff the user selected fields to be added as custom columns

wgFncSelectFieldsForCustomColumns(Integer):Boolean

Codeunit wDCR_ReportDatasetTransformMgt

Allows for converting a culture-dependent XML dataset to a culture-invariant XML dataset.

Properties

Name	Value
Access	Public

Methods

wgFncConvertXmlDatasetToCultureInvariantDataset(Text, Codeunit::Temp Blob@):Boolean

Converts the XML BC report dataset from a region-dependent format in the user's current region setting to a dataset where decimals, dates, times and datetimes are in a region-independent (invariant) format.

Parameters

Type	Name	Description
`Text`	`pWordXmlPart`	The XML Part defining the column datatypes.
`Codeunit "Temp Blob"`	`vCduTempBlobXmlDataset`	The dataset as a TempBlob.

Returns

Type	Description
`Boolean`	true iff the conversion was successful.

Codeunit wDCR_ReportFunctions

Provides helper functions for reports.

Properties

Name	Value
Access	Public

Methods

wgFncContactGetSalutationText(Text, Code[20], Code[10], Enum::Salutation Formula Salutation Type):Text

Returns Salutation Text (Formal or Informal) based on Salutation Formula settings Contact Function will test if Contact No. and Salutation Formula language exists to exclude errors. If no Contact or Translation for Salutation is found then only pContactName will be sent as Salutation Text.

Parameters

Type	Name	Description
Text	pContactName	Contact Name from document
Code[20]	pContactNo	Contact No. from document
Code[10]	pLanguageCode	Language Code
Enum "Salutation Formula Salutation Type"	pSalutationType	Salutation Type

Returns

Type	Description
Text	Salutation Text

wgFncFormatDateText(Date):Text

Formats a date according to the format-option of the current report.

Parameters

Type	Name	Description
Date	pDate	The Date.

Returns

Type	Description
Text	The formatted date text.

wgFncFormatDateText(Integer, Date):Text

Formats a date according to the format-option of the report with the specified ID.

Parameters

Type	Name	Description
Integer	pReportID	The Report ID.
Date	pDate	The Date.

Returns

Type	Description
Text	The formatted date text.

wgFncFormatDateText(Date, Enum::wDCR_DateTextFormat):Text

Formats a date according to the specified format option.

Parameters

Type	Name	Description
`Date`	`pDate`	The date.
`Enum "wDCR_DateTextFormat"`	`pwDCR_DateTextFormat`	The format option.

Returns

Type	Description
`Text`	The formatted date text.

wgFncGetCurrencySymbol(Code[10]):Text[10]

Returns CurrencySymbol.

Parameters

Type	Name	Description
`` `` ``	`pCurrency`	The Currency Code.

Returns

Type	Description
`` `` ``	The CurrencySymbol.

wgFncGetDateTextFormat(Integer, Enum::wDCR_DateTextFormat@):Boolean

Retrieves the format-option that should be used to format dates in a report with specified ID.

Parameters

Type	Name	Description
`Integer`	`pReportID`	The ID of the report.

Type	Name	Description
Enum "wDCR_DateTextFormat"	vDateTextFormat	The Format to use.

Returns

Type	Description
Boolean	true iff a date text format setting could be found for the report.

wgFncGetDimText(Dimension Set Entry@, Text[120]@)

Builds strings of Dimension Code and Dimension Value Code pairs from a set of Dimension Set Entry records. This procedure is meant to be used iterating over a record set, for example in the OnAfterGetRecord trigger of a Dimension Set Entry dataitem. It will result in a string formatted like: 'DimCode1 DimValueCode1, DimCode2 DimValueCode2, DimCode3 DimValueCode3'.

Parameters

Type	Name	Description
Record "Dimension Set Entry"	vRecDimSetEntry	The Dimension Set Entry dataitem.
Text[120]	vDimText	The text build from the Dimension Set Entry records.

wgFncGetReportIDFromCurrReportObjectIDString(Text):Integer

Retrieves the Report ID from the string returned by CurrReport.ObjectId(false)

Parameters

Type	Name	Description
Text	pCurrReportObjectID	The output of CurrReport.ObjectId(false).

Returns

Type	Description
`Integer`	The Report ID.

wgFncHideLineDiscount(RecordRef@):Boolean

Determines whether or not the Line Discount column needs to be shown on the document. Checks whether there are any lines under the document that have a line discount. If there are no lines with a discount, then the return value will be `true`. The procedure should be able to check this for the following header tables:

- Sales Headers
- Purchase Headers
- Sales Shipment Headers
- Sales Invoice Headers
- Sales Credit Memo Headers
- Service Headers
- Service Invoice Headers
- Service Credit Memo Headers
- Return Receipt Headers For any other unsupported record type the return value is "true".

Parameters

Type	Name	Description
`RecordRef`	`vRecRef`	The header record

Returns

Type	Description
`Boolean`	true iff there are no lines in the document with a line discount.

wgFncIsMonolithicVAT(VAT Amount Line@):Boolean

Determines whether a set of VAT Amount Line records only apply to a single VAT type. If the record set only includes 0 or 1 records, or 2 records being a positive and negative line for the same VAT type, then the return value will be true, because there is only a single VAT type.

Parameters

Type	Name	Description
Record "VAT Amount Line"	vRecVATAmountLine	The set of VAT Amount Line records.

Returns

Type	Description
Boolean	true iff only a single VAT type exists in the VAT Amount Line record set.

wgFncSetReportID(Integer)

Sets the Report ID for this codeunit.

Parameters

Type	Name	Description
Integer	pReportID	The report ID.

wgFncSetReportIDFromCurrReportObjectIDString(Text):Integer

Sets the Report ID for this codeunit from the string returned by CurrReport.ObjectId(false)

Parameters

Type	Name	Description
Text	pCurrReportObjectID	The output of CurrReport.ObjectId(false).

Returns

Type	Description
Integer	The Report ID.

wgFncShouldLoadItemPictures:Boolean

Retrieves whether item pictures should be loaded for the current report.

Returns

Type	Description
Boolean	true iff item pictures are to be loaded.

wgFncShouldLoadItemPictures(Integer):Boolean

Retrieves whether item pictures should be loaded for the report with the specified ID.

Parameters

Type	Name	Description
Integer	pReportID	The Report ID.

Returns

Type	Description
Boolean	true iff item pictures are to be loaded.

wlEvpOnBeforeFormatDateText(Date, Enum::wDCR_DateTextFormat, Text@, Boolean@)

Allows to hook into how dates are formatted to text.

Parameters

Type	Name	Description
Date	pDate	The date.
Enum "wDCR_DateTextFormat"	pwDCR_DateTextFormat	The date format that should be used.
Text	vFormattedDateText	The output (date formatted as text).

OnBeforeFormatUserDateText(Date, Enum::wDCR_DateTextFormat, Text@, Boolean@)

Type	Name	Description
Boolean	vIsHandled	Set this parameter to true if your extension handled formatting the date as text.

IEvpOnBallatedFromUserDateText(Date, Enum::wDCR_DateTextFormat, Text@, Boolean@)

IEvpOnBallatedFromUserDateText(Date, Enum::wDCR_DateTextFormat, Text@, Boolean@)

Codeunit wDCR_ReportSelectionMgt

A codeunit with helper functions for document report selections.

Properties

Name	Value
Access	Public

Methods

wgFncGetDocumentCreatorReportSelectionCount(Integer@, Integer@)

Gets the number of report selections that are set to Document Creator report objects.

Parameters

Type	Name	Description
Integer	vSetCount	The number of Document Creator report objects set as report selection.
Integer	vTotalAvailableCount	The total number of Document Creator report objects available for report selection.

wgFncGetDocumentCreatorReportSelectionCountText:Text

Gets a text that specifies the number of (available) report selections set to Document Creator report objects.

Returns

Type	Description
Text	A text specifying the number of report selections set to use a Document Creator report object.

wgFncSetAllReportSelectionsToDocumentCreatorReportObjects:Boolean

Sets all the report selections to use the Document Creator report objects.

Returns

Type	Description
Boolean	true iff report selections were updated.

wgFncUpdateReportSelection(Enum::Report Selection Usage, Integer)

Updates the report selection for a specific usage to the specified report ID.

Parameters

Type	Name	Description
Enum "Report Selection Usage"	pUsage	The Usage.
Integer	pReportID	The new Report ID.

wlEvpOnAfterGetEmailBodyLayout(Integer, Text[250]@, Guid@, Boolean@)

Allows to hook into retrieving the layout that should be used to generate the email body contents for the report.

Parameters

Type	Name	Description
Integer	pReportID	The ID of the report object.
Text[250]	vLayoutName	The name of the layout.
Guid	vLayoutAppID	The app ID of the layout.
Boolean	vFound	Whether a layout to use for the email body was found.

wlEvpOnAfterUpdateReportSelections

Allows to hook into updating the report selections to Document Creator defaults.

wlEvpOnBeforeUpdateReportSelection(Enum::Report Selection Usage, Integer@, Boolean@)

Allows to hook into updating a report selection.

Parameters

Type	Name	Description
Enum "Report Selection Usage"	pUsage	The report selection usage.
Integer	vReportID	The report ID to apply.
Boolean	vIsHandled	Set this to true if your extension handles setting the report object to use for this usage.

OnBeforeUpdateReportSelection(Enum::Report Selection Usage, Integer@, Boolean@)

Installation & User Manual

Codeunit wDCR_SaveReport

Provides functions to save reports with a Document Creator Layout to a file in the specified output-format. You can use these functions to save reports to any output format included in enum <see cref="wDCR_OutputFileType" />, including output formats that are not supported by default in Microsoft Dynamics 365 Business Central.

Properties

Name	Value
Access	Public

Methods

wgFncConvertReportFormatToOutputFileType(ReportFormat):Enum::wDCR_OutputFileType

Converts the passed ReportFormat value to the corresponding wDCR_OutputFileType enum value.

Parameters

Type	Name	Description
`ReportFormat`	`pReportFormat`	The ReportFormat to convert.

Returns

Type	Description
`Enum wDCR_OutputFileType`	The corresponding wDCR_OutputFileType enum value.

wgFncSaveReportAs(Integer, Enum::wDCR_OutputFileType, OutStream@)

Runs a specific report with a Document Creator layout without a request page and saves the report in the specified output format to a stream.

Parameters

Type	Name	Description
Integer	pReportID	The ID of the report that you want to save.
Enum "wDCR_OutputFileType"	pOutputFileType	The output format of the report.
OutStream	vOutStreamOutputDoc	The OutStream to which the file is saved.

wgFncSaveReportAs(Integer, Text, Enum::wDCR_OutputFileType, OutStream@)

Runs a specific report with a Document Creator layout with specified request page parameters and saves the report in the specified output format to a stream.

Parameters

Type	Name	Description
Integer	pReportID	The ID of the report that you want to save.
Text	pXmlParameters	A string of request page parameters as XML to use to run the report.
Enum "wDCR_OutputFileType"	pOutputFileType	The output format of the report.
OutStream	vOutStreamOutputDoc	The OutStream to which the file is saved.

wgFncSaveReportAs(Integer, Text, Enum::wDCR_OutputFileType, Variant, OutStream@)

Runs a specific report with a Document Creator layout with specified request page parameters and record and saves the report in the specified output format to a stream.

Parameters

Type	Name	Description
Integer	pReportID	The ID of the report that you want to save.

Type	Name	Description
`Text`	`pXmlParameters`	A string of request page parameters as XML to use to run the report.
`Enum "wDCR_OutputFileType"`	`pOutputFileType`	The output format of the report.
`Variant`	`pRecordVariant`	Specifies which record to use in the report.
`OutStream`	`vOutStreamOutputDoc`	The OutStream to which the file is saved.

wgFncSaveReportAs(Report Layout List, Text, Enum::wDCR_OutputFileType, Variant, OutStream@)

Runs a specific report with a Document Creator layout with specified request page parameters and record and saves the report in the specified output format to a stream.

Parameters

Type	Name	Description
`Record "Report Layout List"`	`pRecReportLayoutList`	The report layout to use.
`Text`	`pXmlParameters`	A string of request page parameters as XML to use to run the report.
`Enum "wDCR_OutputFileType"`	`pOutputFileType`	The output format of the report.
`Variant`	`pRecordVariant`	Specifies which record to use in the report.
`OutStream`	`vOutStreamOutputDoc`	The OutStream to which the file is saved.

wgFncSaveReportWithRequestPageAs(Integer, Enum::wDCR_OutputFileType):Boolean

Runs a specific report with a Document Creator layout with a request page and saves the report in the specified output format.

Parameters

Type	Name	Description
`Integer`	`pReportID`	The ID of the report that you want to save.
`Enum "wDCR_OutputFileType"`	`pOutputFileType`	The output format of the report.

Returns

Type	Description
`Boolean`	true iff successful

wgFncSaveReportWithRequestPageAs(Integer, Enum::wDCR_OutputFileType, OutStream@):Boolean

Runs a specific report with a Document Creator layout with a request page and saves the report in the specified output format to a stream.

Parameters

Type	Name	Description
`Integer`	`pReportID`	The ID of the report that you want to save.
`Enum "wDCR_OutputFileType"`	`pOutputFileType`	The output format of the report.
`OutStream`	`vOutStreamOutputDoc`	The OutStream to which the file is saved.

Returns

Type	Description
`Boolean`	true iff successful

wgFncSaveReportWithRequestPageAs(Report Layout List, Enum::wDCR_OutputFileType):Boolean

Runs a specific report with a Document Creator layout with a request page and saves the report in the specified output format to a stream.

Parameters

Type	Name	Description
``	`pRecSelectedReportLayoutList`	The Report Layout to use.
``	`pOutputFileType`	The output format of the report.
``	`vOutStreamOutputDoc`	The OutStream to which the file is saved.

Returns

Type	Description
``	true iff successful

ReportsValidation&UsageManager IsWithRequestPageMask(Report Layout List, Enum::wDCR_OutputFileType):Boolean

Codeunit wDCR_SupportFileAnalysis

Provides functions to run reports from a Document Creator Support File.

Properties

Name	Value
Access	Public

Methods

wgFncRunSupportFileOnServer(Text, InStream, Enum::wDCR_OutputFileType, Code[10])

Runs the report contained in a support file and saves the resulting file to a location specified through a file dialog.

Parameters

Type	Name	Description
Text	pSupportFileName	The file name of the support file.
InStream	pInStreamSupport	The InStream containing the support file contents.
Enum "wDCR_OutputFileType"	pOutputFileType	The output format of the report.
Code[10]	pExportProfileCode	The export profile to use for the report.

wgFncRunSupportFileOnServer(Text, InStream, Enum::wDCR_OutputFileType, Code[10], OutStream@)

Runs the report contained in a support file and saves the resulting file to a stream.

Parameters

Type	Name	Description
`Text`	`pSupportFileName`	The file name of the support file.
`InStream`	`pInStreamSupport`	The InStream containing the support file contents.
`Enum "wDCR_OutputFileType"`	`pOutputFileType`	The output format of the report.
`Code[10]`	`pExportProfileCode`	The export profile to use for the report.
`OutStream`	`vOutStreamOutputDoc`	The OutStream to which the file is saved.

wgFncRunSupportFileOnServer(Text, InStream, Enum::wDCR_OutputFileType, Code[10], Integer, OutStream@)

Runs the report contained in a support file and saves the resulting file to a stream.

Parameters

Type	Name	Description
`Text`	`pSupportFileName`	The file name of the support file.
`InStream`	`pInStreamSupport`	The InStream containing the support file contents.
`Enum "wDCR_OutputFileType"`	`pOutputFileType`	The output format of the report.
`Code[10]`	`pExportProfileCode`	The export profile to use for the report.
`Integer`	`pDataLocaleID`	The locale ID of the dataset.
`OutStream`	`vOutStreamOutputDoc`	The OutStream to which the file is saved.

nServer(Text, InStream, Manual, wDCR_OutputFileType, Code[10], Integer, OutStream@)

Codeunit wDCR_TranslationMgt

Provides functions to translate labels, tags and descriptions used in reports (or any other object) to another language. The translations are stored in table <see cref="wDCR_Translation" />. You can add new translations, retrieve existing translations, automatically have to-do translations created, have report-specific translations or use available helper functions to more easily retrieve translations of descriptions of records from tables in the base application. The behaviour of the functions can be changed through settings in the Document Creator Setup.

Properties

Name	Value
Access	Public
Permissions	tabledata wDCR_Translation = rimd

Methods

wgFncAddTranslation(Text[50], Code[10], Text[100])

Creates a new translation for a tag for a target language. If a translation already exists, then the translation is updated.

Parameters

Type	Name	Description
Text[50]	pTag	The text to translate.
Code[10]	pLanguageCode	The language code of the target language.
Text[100]	pTranslation	The new translation for the tag.

wgFncAddTranslation(Text[50], Code[10], Integer, Text[100])

Creates a new report-specific translation for a tag for a target language. If a translation already exists, then the translation is updated.

Parameters

Type	Name	Description
Text[50]	pTag	The text to translate.
Code[10]	pLanguageCode	The language code of the target language.
Integer	pReportId	The target report ID.
Text[100]	pTranslation	The new translation for the tag.

wgFncGetCountryRegionTranslation(Code[10]):Text[50]

Retrieves the translation for a Country/Region, if it exists. If the translation does not exist, it returns the name of the Country/Region. If the Country/Region does not exist, it returns the value of <paramref name="pCode" />.

Parameters

Type	Name	Description
Code[10]	pCode	Code of the Country/Region

Returns

Type	Description
Text[50]	Translation for the Country/Region

wgFncGetCountryRegionTranslation(Code[10], Code[10]):Text[50]

Retrieves the translation for a Country/Region, if it exists. If the translation does not exist, it returns the name of the Country/Region. If the Country/Region does not exist, it returns the value of <paramref name="pCode" />.

Parameters

Type	Name	Description
Code[10]	pCode	Code of the Country/Region

Type	Name	Description
`Code[10]`	`pLanguageCode`	Code of the Language

Returns

Type	Description
`Text[50]`	Translation for the Country/Region

wgFncGetItemTranslation(Code[20], Code[10]):Text[100]

Retrieves the translation for an Item, if it exists. If the translation does not exist, it returns the name of the Item. If the Item does not exist, it returns the value of <paramref name="pNo" />.

Parameters

Type	Name	Description
`Code[20]`	`pNo`	Item No.
`Code[10]`	`pVariantCode`	Variant Code

Returns

Type	Description
`Text[100]`	Translation for the Item

wgFncGetItemTranslation(Code[20], Code[10], Code[10]):Text[100]

Retrieves the translation for an Item, if it exists. If the translation does not exist, it returns the name of the Item. If the Item does not exist, it returns the value of <paramref name="pCode" />.

Parameters

Type	Name	Description
`Code[20]`	`pNo`	Item No.

Type	Name	Description
Code[10]	pVariantCode	Variant Code
Code[10]	pLanguageCode	Code of the Language

Returns

Type	Description
Text[100]	Translation for the Item

wgFncGetPaymTermsTrl(Code[10]):Text[100]

Retrieves the translation for a payment term to the target language (set through wgFncSetLanguageCode). If no translation is found, the description of the payment term is returned.

Parameters

Type	Name	Description
Code[10]	pCode	The code of the payment term.

Returns

Type	Description
Text[100]	The translation of the payment term.

wgFncGetPaymTermsTrl(Code[10], Code[10]):Text[100]

Retrieves the translation for a payment term to the specified target language. If no translation is found, the description of the payment term is returned.

Parameters

Type	Name	Description
Code[10]	pCode	The code of the payment term.

Type	Name	Description
Code[10]	pLanguageCode	The language code of the target language.

Returns

Type	Description
Text[100]	The translation of the payment term.

wgFncGetShipmMethodTrl(Code[10]):Text[100]

Retrieves the translation for a shipment method to the target language (set through wgFncSetLanguageCode). If no translation is found, the description of the shipment method is returned.

Parameters

Type	Name	Description
Code[10]	pCode	The code of the shipment method.

Returns

Type	Description
Text[100]	The translation of the shipment method.

wgFncGetShipmMethodTrl(Code[10], Code[10]):Text[100]

Retrieves the translation for a shipment method to the specified target language. If no translation is found, the description of the shipment method is returned.

Parameters

Type	Name	Description
Code[10]	pCode	The code of the shipment method.
Code[10]	pLanguageCode	The language code of the target language.

Returns

Type	Description
Text[100]	The translation of the shipment method.

wgFncGetUnitOfMeaseTrl(Code[10]):Text[50]

Retrieves the translation for a unit of measure to the target language (set through wgFncSetLanguageCode). If no translation is found, the description of the unit of measure is returned.

Parameters

Type	Name	Description
Code[10]	pCode	The code of the unit of measure.

Returns

Type	Description
Text[50]	The translation of the unit of measure.

wgFncGetUnitOfMeaseTrl(Code[10], Code[10]):Text[50]

Retrieves the translation for a unit of measure to the specified target language. If no translation is found, the description of the unit of measure is returned.

Parameters

Type	Name	Description
Code[10]	pCode	The code of the unit of measure.
Code[10]	pLanguageCode	The language code of the target language.

Returns

Type	Description
Text[50]	The translation of the unit of measure.

wgFncSetLanguageCode(Code[10])

Sets the target language to retrieve translations.

Parameters

Type	Name	Description
Code[10]	pNewLanguageCode	The language code of the target language.

wgFncSetReportId(Integer)

Sets the target report to retrieve report-specific translations.

Parameters

Type	Name	Description
Integer	pNewReportId	The target report ID.

wgFncTranslate(Text[50]):Text[100]

Translates a text to the target language (set through wgFncSetLanguageCode). If a target report ID was set (through wgFncSetReportId) then the report-specific translation for the tag is retrieved. If no translation is found a To-do translation record is automatically created for the target language and default language code.

Parameters

Type	Name	Description
Text[50]	pTag	The text to translate.

Returns

Type	Description
Text[100]	The translation of the tag.

wgFncTranslate(Text[50], Code[10]):Text[100]

Translates a text to the specified target language. If a target report ID was set (through wgFncSetReportId) then the report-specific translation for the tag is retrieved. If no translation is found a To-do translation record is automatically created for the target language and default language code.

Parameters

Type	Name	Description
Text[50]	pTag	The text to translate.
Code[10]	pLanguageCode	The language code of the target language.

Returns

Type	Description
Text[100]	The translation of the tag.

wgFncExportTranslations(Text, Integer)

Exports translations for selected languages and report IDs, prompting the user for a location to save the file.

Parameters

Type	Name	Description
Text	pLanguageCodeFilter	The language code or filter of the target language.
Integer	pReportId	Identifier of a report

wgFncImportTranslations

Imports translations from the xlf or zip file specified by the user.

Enum wDCR_CondFulfillmentMethod

Specifies the possible fulfillment methods for conditional layout selection conditions.

Properties

Name	Value
Access	Public
Extensible	False

Values

Ordinal	Name	Description
0	`First`	The condition should evaluate to true for the first record of the dataitem.
1	`Any`	The condition should evaluate to true for any of the records of the dataitem.
2	`All`	The condition should evaluate to true for all records of the dataitem.

Enum wDCR_DateTextFormat

Specifies the possible built-in date text formats (BC's built-in formats).

Properties

Name	Value
Access	Public
Extensible	True

Enum wDCR_DesignAction

Specifies the possible actions the designer should take when opening the Document Creator Design (.dcrd) file.

Properties

Name	Value
Access	Public

Values

Ordinal	Name	Description
0	`None`	No action needs to be taken.
1	`InitDatabands`	The designer should add databands for each of the data items in the report object.

Enum wDCR_DesignFileEntryType

Specifies the possible design file entries.

Properties

Name	Value
Access	Public

Values

Ordinal	Name	Description
0	`Dataset`	The XML dataset file.
1	`Layout`	The layout file.
2	`WordXmlPart`	The Wordpart XML file.
3	`DesignSettings`	The design settings JSON file.

Enum wDCR_DesignFileType

Specifies the possible design file types.

Properties

Name	Value
Access	Public

Values

Ordinal	Name	Description
0	`DesignFile`	A design file (.dcrd)
1	`SupportFile`	A support file (.dcrz) (legacy)

Enum wDCR_LayoutPackageContents

Specifies layout package contents configurations.

Properties

Name	Value
Access	Public

Values

Ordinal	Name	Description
0	`LayoutsAndDatasetExtensions`	A layout package should contain both layouts and dataset extensions.
10	`Layouts`	A layout package should contain only layouts.

Enum wDCR_OutputFileType

Specifies the possible/supported output file formats.

Properties

Name	Value
Access	Public
Extensible	False

Values

Ordinal	Name	Description
0	`PDF`	Export to PDF
1	`Word`	Export to Word
2	`Excel`	Export to Excel
3	`Html`	Export to HTML

Enum wDCR_ReportColumnDataType

Defines possible report column data types.

Properties

Name	Value
Access	Public
Extensible	False

Enum wDCR_ReportColumnType

Possible custom column types.

Properties

Name	Value
Access	Public

Values

Ordinal	Name	Description
0		Blank / N.A.
1	`Field`	Custom column which adds a field.
2	`Label`	Custom column which adds a translatable label.

Enum wDCR_ReportNodeType

Specifies the possible report dataset node types.

Properties

Name	Value
Access	Public

Values

Ordinal	Name	Description
0	`DataItem`	A node of type data item.
1	`Column`	A node of type column.

Enum wDCR_ReportSelectionUsageType

> **Obsolete**
>
> Apportunix Report Selection will be moved to the Apportunix System Library app. Use WSB_ReportSelectionUsageType instead.

Specifies possible report selection usage types.

Properties

Name	Value
Access	Public
Extensible	True
ObsoleteReason	Apportunix Report Selection will be moved to the Apportunix System Library app. Use WSB_ReportSelectionUsageType instead.
ObsoleteState	Pending
ObsoleteTag	2.32.0.0

PageExtension wDCR_ReportLayoutLookup

🟥 **Obsolete**

Document Creator layouts have been moved to the report layout system tables.

Properties

Name	Value
ContextSensitiveHelpPage	Creating-and-Copying-Layouts.html#creating-a-new-layout
ObsoleteReason	Document Creator layouts have been moved to the report layout system tables.
ObsoleteState	Pending
ObsoleteTag	2.0.0.0

Methods

wDCR_wgFncSelectedAddDocCreatorLayout:Boolean

🟥 **Obsolete**

Document Creator layouts have been moved to the report layout system tables. 2.0.0.0

Retrieves whether the "Insert Document Creator Layout" option is selected.

Returns

Type	Description
Boolean	true iff the option is selected.

Page wDCR_CompRptLayoutSelect

> **Obsolete**
>
> Document Creator layouts have been moved to the report layout system tables.

Properties

Name	Value
ApplicationArea	#All
Caption	Company Report Layout Selection
ContextSensitiveHelpPage	Editing-Layouts.html#report-layout-selection-action
DeleteAllowed	False
InsertAllowed	False
ObsoleteReason	Document Creator layouts have been moved to the report layout system tables.
ObsoleteState	Pending
ObsoleteTag	2.0.0.0
PageType	Worksheet
ShowFilter	False
SourceTable	11249656
SourceTableTemporary	True
UsageCategory	None

Methods

wgFncSetCustomReportLayout(Custom Report Layout@)

Sets the Custom Report Layout the page applies to when opened.

Parameters

Type	Name	Description
Record "Custom Report Layout"	vRecCustomReportLayout	The Custom Report Layout record.

Page wDCR_CondLaySelectConditions

A page to view or edit conditional layout selection conditions for a layout mapping.

Properties

Name	Value
ApplicationArea	#All
Caption	Layout Selection Conditions
ContextSensitiveHelpPage	Conditional-Layout-Selections.html#conditions
PageType	List
SourceTable	11249679
UsageCategory	None

Page wDCR_CondLayoutMapCompListPart

A helper factbox to view the companies to which a selected conditional layout selection mapping applies.

Properties

Name	Value
ApplicationArea	#All
Caption	Conditional Layout Mapping Companies
DataCaptionFields	1,2,10
DeleteAllowed	True
Extensible	False
InsertAllowed	False
ModifyAllowed	False
PageType	ListPart
SourceTable	11249680
UsageCategory	None

Page wDCR_CondLayoutMapCompanies

A page to configure conditional layout selections to only apply for specific companies.

Properties

Name	Value
ApplicationArea	#All
Caption	Conditional Layout Mapping Companies
ContextSensitiveHelpPage	Conditional-Layout-Selections.html#layout-mapping-companies
Extensible	False
PageType	List
SourceTable	11249680
UsageCategory	None

Page wDCR_CondLayoutSelections

A page for viewing or editing conditional layout selections for report objects.

Properties

Name	Value
ApplicationArea	#All
Caption	Document Creator Conditional Layout Selections
ContextSensitiveHelpPage	Conditional-Layout-Selections.html
PageType	List
SourceTable	11249664
UsageCategory	Administration

Page wDCR_CondReportLayoutMappings

A page for viewing or editing conditional layout mappings.

Properties

Name	Value
ApplicationArea	#All
Caption	Conditional Layout Mappings
ContextSensitiveHelpPage	Conditional-Layout-Selections.html#layout-mappings
PageType	List
SourceTable	11249678
UsageCategory	None

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Page wDCR_CopyAsTenantReportLayout

> **Obsolete**
>
> Document Creator layouts have been moved to the report layout system tables. This page only exists for the transition.

A page to copy a custom report layout to a tenant report layout.

Properties

Name	Value
ApplicationArea	#All
Caption	Copy Custom Report Layout as Tenant Report Layout
ContextSensitiveHelpPage	Layout-Creation.html#copying-a-layout
DeleteAllowed	False
Extensible	True
InsertAllowed	False
ObsoleteReason	Document Creator layouts have been moved to the report layout system tables. This page only exists for the transition.
ObsoleteState	Pending
ObsoleteTag	2.0.0.0
PageType	StandardDialog
Permissions	tabledata "Tenant Report Layout" = ri
SourceTable	9650

Name	Value
UsageCategory	None

Methods

wgFncGetSelectedLayoutDescription:Text[250]

Retrieves the new layout description.

Returns

Type	Description
Text[250]	Layout Description

wgFncGetSelectedLayoutName:Text[250]

Retrieves the new layout name.

Returns

Type	Description
Text[250]	Layout Name

wgFncGetSelectedReportID:Integer

Retrieves the new report object ID.

Returns

Type	Description
Integer	Report ID

Page wDCR_CopyCustomLayout

> **Obsolete**
>
> Document Creator layouts have been moved to the report layout system tables.

A page to create a copy of a custom report layout.

Properties

Name	Value
ApplicationArea	#All
Caption	Copy Document Creator Layout
ContextSensitiveHelpPage	Creating-and-Copying-Layouts.html#copying-a-layout
DataCaptionExpression	"
DeleteAllowed	False
InsertAllowed	False
ObsoleteReason	Document Creator layouts have been moved to the report layout system tables.
ObsoleteState	Pending
ObsoleteTag	2.0.0.0
PageType	StandardDialog
SourceTable	9650

Page wDCR_CopyLayoutDialog

A page for copying a report layout list record to a new tenant report layout record.

Properties

Name	Value
ApplicationArea	#All
Caption	Copy Layout
ContextSensitiveHelpPage	Layout-Creation.html#copying-a-layout
DeleteAllowed	False
Extensible	True
InsertAllowed	False
PageType	StandardDialog
Permissions	tabledata "Tenant Report Layout" = ri
SourceTable	2000000234
UsageCategory	None

Methods

wgFncGetSelectedLayoutDescription:Text[250]

Retrieves the new layout description.

Returns

Type	Description
Text[250]	Layout Description

wgFncGetSelectedLayoutName:Text[250]

Retrieves the new layout name.

Returns

Type	Description
Text[250]	Layout Name

wgFncGetSelectedReportID:Integer

Retrieves the new report object ID.

Returns

Type	Description
Integer	Report ID

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Page wDCR_CopyTenantLayoutDialog

A page for copying a tenant report layout record to a new tenant report layout record.

Properties

Name	Value
ApplicationArea	#All
Caption	Copy Layout
ContextSensitiveHelpPage	Layout-Creation.html#copying-a-layout
DeleteAllowed	False
Extensible	True
InsertAllowed	False
PageType	StandardDialog
Permissions	tabledata "Tenant Report Layout" = ri
SourceTable	2000000232
UsageCategory	None

Methods

wgFncGetSelectedLayoutDescription:Text[250]

Retrieves the new layout description.

Returns

Type	Description
Text[250]	Layout Description

wgFncGetSelectedLayoutName:Text[250]

Retrieves the new layout name.

Returns

Type	Description
Text[250]	Layout Name

wgFncGetSelectedReportID:Integer

Retrieves the new report object ID.

Returns

Type	Description
Integer	Report ID

Page wDCR_CustomReportColumns

A page for viewing or editing custom columns.

Properties

Name	Value
ApplicationArea	#All
Caption	Custom Report Columns
ContextSensitiveHelpPage	Dataset-Extensions.html#custom-columns
DelayedInsert	True
PageType	List
PopulateAllFields	1
SourceTable	11249666
SourceTableView	sorting(ReportID, NodeName) where(NodeType = const(Column), ColumnType = const(Field))
UsageCategory	None

Page wDCR_CustomReportDataItems

A page for viewing or editing custom data items.

Properties

Name	Value
ApplicationArea	#All
Caption	Custom Report Data Items
ContextSensitiveHelpPage	Dataset-Extensions.html#custom-data-items
DelayedInsert	True
PageType	List
SourceTable	11249666
SourceTableView	sorting(ReportID, NodeName) where(NodeType = const(DataItem))
UsageCategory	None

Page wDCR_CustomReportFilterSets

A page for viewing or editing the available filter sets.

Properties

Name	Value
ApplicationArea	#All
Caption	Filter Sets
CardPageId	wDCR_CustomReportFilterSet
ContextSensitiveHelpPage	Dataset-Extensions.html#filters
Editable	False
PageType	List
SourceTable	11249667
UsageCategory	None

Page wDCR_CustomReportFilters

Subpage to view filter in a filter set.

Properties

Name	Value
ApplicationArea	#All
Caption	Filters
ContextSensitiveHelpPage	Dataset-Extensions.html#filters
PageType	ListPart
SourceTable	11249668
UsageCategory	None

Page wDCR_CustomReportLabels

A page for viewing or editing custom labels.

Properties

Name	Value
ApplicationArea	#All
Caption	Custom Report Labels
ContextSensitiveHelpPage	Dataset-Extensions.html#custom-labels
DelayedInsert	True
PageType	List
SourceTable	11249666
SourceTableView	sorting(ReportID, NodeName) where(NodeType = const(Column), ColumnType = const(Label))
UsageCategory	None

Page wDCR_CustomReportLayArchFact

> **Obsolete**
>
> Document Creator layouts have been moved to the report layout system tables.

A factbox that shows previous versions of a selected custom report layout.

Properties

Name	Value
ApplicationArea	#All
Caption	Custom Report Layout Archive
ContextSensitiveHelpPage	Custom-Report-Layout-Archive.html
Editable	True
ObsoleteReason	Document Creator layouts have been moved to the report layout system tables.
ObsoleteState	Pending
ObsoleteTag	2.0.0.0
PageType	ListPart
SourceTable	11249652
SourceTableView	sorting(Code, wDCR_VersionNo) order(descending)

Page wDCR_CustomReportRestrictions

A subpage for viewing or editing the restrictions of a filter set.

Properties

Name	Value
ApplicationArea	#All
Caption	Restrictions
ContextSensitiveHelpPage	Dataset-Extensions.html#restrictions
PageType	ListPart
SourceTable	11249677
UsageCategory	None

Page wDCR_DocumentCreatorActivities

A page for viewing details on Document Creator on the (Apportunix) rolecenter.

Properties

Name	Value
ApplicationArea	#All
Caption	Document Creator Activities
PageType	CardPart
RefreshOnActivate	True
SourceTable	11249654

Page wDCR_EditComment

> **Obsolete**
>
> Document Creator layouts have been moved to the report layout system tables.

A page which allows for editing the comment of custom report layout archive entry records.

Properties

Name	Value
ApplicationArea	#All
Caption	Comment
DataCaptionFields	11249660,11249661
DeleteAllowed	False
InsertAllowed	False
ModifyAllowed	True
ObsoleteReason	Document Creator layouts have been moved to the report layout system tables.
ObsoleteState	Pending
ObsoleteTag	2.0.0.0
PageType	StandardDialog
SourceTable	11249652
SourceTableTemporary	True

Methods

wgFncInitRecord(wDCR_CustomReportLayoutArchive@)

Sets the initial value(s) for editing the comment.

Parameters

Type	Name	Description
`Record` `"wDCR_CustomReportLayoutArchive"`	`vRecwDCR_CustomReportLayoutArchive`	The Custom Report Layout Archive record to initialize the page.

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Page wDCR_EditLayoutArchiveComment

A page to edit the comment for a report layout archive record.

Properties

Name	Value
ApplicationArea	#All
Caption	Edit Archive Comment
DataCaptionExpression	wgDataCaptionExpr
DeleteAllowed	False
InsertAllowed	False
ModifyAllowed	True
PageType	StandardDialog
SourceTable	11249662
SourceTableTemporary	True

Methods

wgFncInitRecord(wDCR_TenantReportLayoutArchive@)

Sets the initial value(s) for editing the comment.

Parameters

Type	Name	Description
`Record` `"wDCR_TenantReportLayoutArchive"`	`vRecwDCR_TenantReportLayoutArchive`	The Tenant Report Layout Archive record to initialize the page.

Page wDCR_ExportDesignFile

A page for exporting a design file from a report layout list record with specified options.

Properties

Name	Value
ApplicationArea	#All
Caption	Export Design
ContextSensitiveHelpPage	Editing-Layouts.html#export-design
DataCaptionFields	2
DeleteAllowed	False
InsertAllowed	False
ModifyAllowed	True
PageType	StandardDialog
SourceTable	2000000234

Page wDCR_ExportPDFMergesSubPage

A subpage for viewing and editing PDF merge configurations of an export profile.

Properties

Name	Value
ApplicationArea	#All
Caption	PDF Merges
DelayedInsert	True
DeleteAllowed	True
Editable	True
Extensible	True
InsertAllowed	True
ModifyAllowed	True
PageType	ListPart
SourceTable	11249653

Page wDCR_ExportProfileList

A page for viewing or editing the export profiles.

Properties

Name	Value
ApplicationArea	#All
Caption	Document Creator Export Profiles
CardPageId	wDCR_ExportProfile
ContextSensitiveHelpPage	Export-Profiles.html
Editable	False
PageType	List
SourceTable	11249651
UsageCategory	Administration

Page wDCR_ExportTenantDesignFile

A page for exporting a design file from a tenant report layout record with specified options.

Properties

Name	Value
ApplicationArea	#All
Caption	Export Design
ContextSensitiveHelpPage	Editing-Layouts.html#export-design
DataCaptionFields	2
DeleteAllowed	False
InsertAllowed	False
ModifyAllowed	True
PageType	StandardDialog
SourceTable	2000000232

Page wDCR_ExportTranslations

A page to export translations to XLIFF files.

Properties

Name	Value
ApplicationArea	#All
Caption	Export Translations
ContextSensitiveHelpPage	Report-Translations.html
DeleteAllowed	False
InsertAllowed	False
ModifyAllowed	True
PageType	StandardDialog
UsageCategory	None

Page wDCR_NewBlankLayoutDialog

A page to create a new blank Document Creator tenant report layout.

Properties

Name	Value
ApplicationArea	#All
Caption	Add New Blank Document Creator Layout for a Report
ContextSensitiveHelpPage	Layout-Creation.html#creating-a-new-blank-layout
Extensible	True
PageType	StandardDialog
Permissions	tabledata "Tenant Report Layout" = ri
UsageCategory	None

Page wDCR_PDFMergeCompanySelections

A page to view or edit the PDF merge company selections.

Properties

Name	Value
ApplicationArea	#All
Caption	PDF Merge Company Selections
DataCaptionFields	1,2
Extensible	False
PageType	List
SourceTable	11249658
UsageCategory	None

Page wDCR_ReportDatasetExtensions

A page for viewing or editing dataset extensions.

Properties

Name	Value
ApplicationArea	#All
Caption	Document Creator Report Dataset Extensions
ContextSensitiveHelpPage	Dataset-Extensions.html
PageType	List
SourceTable	11249665
UsageCategory	Administration

Page wDCR_ReportLayoutSelectionPart

A helper factbox to view report layout selections for a selected report object.

Properties

Name	Value
ApplicationArea	#All
Caption	Layout Selections
ContextSensitiveHelpPage	Layout-Selection.html#layout-selection-factbox
DeleteAllowed	False
Editable	False
InsertAllowed	False
ModifyAllowed	False
PageType	ListPart
SourceTable	9651
SourceTableTemporary	True
UsageCategory	None

Page wDCR_ReportNodes

A page for viewing report dataset nodes (i.e., all dataitems and/or columns of a report object).

Properties

Name	Value
ApplicationArea	#All
Caption	Report Nodes
ContextSensitiveHelpPage	Dataset-Extensions.html#view-columns-and-data-items
DeleteAllowed	False
Editable	False
InsertAllowed	False
ModifyAllowed	False
PageType	List
SourceTable	11249669
SourceTableTemporary	True
UsageCategory	None

Methods

wgFncLoadReportNodes(Integer, Boolean, Boolean)

Loads the report nodes to be displayed on the page.

Parameters

Type	Name	Description
Integer	pReportID	Report ID
Boolean	pDataItemsOnly	Whether to include the Data Items only.
Boolean	pIncludeCustom	Whether to include custom nodes.

wgFncSetFilterForFilterColumnLookup(Text[250])

Filters the page to only show columns from the specified data item or one of its parents.

Parameters

Type	Name	Description
Text[250]	pDataItemXmlName	The Data Item

Page wDCR_ReportSettingsPart

A subpage to configure report settings per report object.

Properties

Name	Value
ApplicationArea	#All
Caption	Report Settings
ContextSensitiveHelpPage	Report-Selection.html#report-specific-settings
PageType	ListPart
SourceTable	11249659
UsageCategory	None

Page wDCR_ReportSubstitutionPart

A subpage to configure report substitutions.

Properties

Name	Value
ApplicationArea	#All
Caption	Report Substitutions
ContextSensitiveHelpPage	Report-Selection.html#report-substitutions
PageType	ListPart
SourceTable	11249660
UsageCategory	None

Page wDCR_SelParentDataItemAndTable

A page to select a parent data item and table for when a user sets up new custom columns for one or more fields.

Properties

Name	Value
ApplicationArea	#All
Caption	Select Parent Data Item and Table
DataCaptionFields	1,2
Editable	True
PageType	StandardDialog
SourceTable	11249666
SourceTableTemporary	True

Methods

wgFncInitRecord(wDCR_CustomDatasetNode@)

Sets the initial values for selection.

Parameters

Type	Name	Description
`Record "wDCR_CustomDatasetNode"`	`vRecwDCR_CustomDatasetNode`	A custom dataset node with initial values.

Page wDCR_SetupWizard

A wizard page to set up Document Creator.

Properties

Name	Value
ApplicationArea	#All
Caption	Document Creator Setup Wizard
DeleteAllowed	False
InsertAllowed	False
ModifyAllowed	True
PageType	NavigatePage
SourceTable	11249650
UsageCategory	Administration

Methods

wlEvpOnAfterPerformPostStepActions(wDCR_Setup@, Integer)

Allows to perform additional actions after completing a wizard step.

Parameters

Type	Name	Description
`Record "wDCR_Setup"`	`vRecwDCR_Setup`	The Document Creator setup record.
`Integer`	`pCurrentStep`	The current step.

wlEvpOnBeforeFinish(wDCR_Setup@)

Allows one to perform additional actions when a user clicks on Finish in the setup wizard page.

Page wDCR_TenantReportLayArchFact

A factbox to view the report layout archive for a selected report layout.

Properties

Name	Value
ApplicationArea	#All
Caption	Tenant Report Layout Archive
ContextSensitiveHelpPage	Tenant-Report-Layout-Archive.html
DeleteAllowed	True
Editable	False
InsertAllowed	False
ModifyAllowed	False
PageType	ListPart
Permissions	tabledata wDCR_TenantReportLayoutArchive = R
SourceTable	11249662
SourceTableView	sorting("Report ID", Name, "App ID", wDCR_VersionNo) order(descending)

Page wDCR_TenantReportLayouts

A page to view or edit user-defined Document Creator report layouts.

Properties

Name	Value
AdditionalSearchTerms	document creator tenant report layouts,dcr report layouts,dcr layouts
ApplicationArea	#All
Caption	Document Creator User-Defined Report Layouts
DeleteAllowed	True
InsertAllowed	False
ModifyAllowed	False
PageType	List
SourceTable	2000000232
SourceTableView	where("Layout Format" = const(Custom), "MIME Type" = filter('*/dcrx'))
UsageCategory	Administration

Page wDCR_TranslationSubPage

A subpage for viewing translations of a selected tag in multiple languages.

Properties

Name	Value
ApplicationArea	#All
Caption	Translation Subpage
ContextSensitiveHelpPage	Report-Translations.html
DelayedInsert	True
PageType	ListPart
SourceTable	11249655

Page wDCR_Translations

A page to view or edit Document Creator translations for translatable labels.

Properties

Name	Value
ApplicationArea	#All
Caption	Document Creator Translations
ContextSensitiveHelpPage	Report-Translations.html
PageType	List
SourceTable	11249655
SourceTableView	sorting(Tag, LanguageCode, ReportId) where(LanguageCode = const(""))
UsageCategory	Administration

PermissionSet WSB_DCR

A permission set that grants the user permissions to all Document Creator features.

Properties

Name	Value
Access	Public
Assignable	1
Caption	Apportunix Document Creator
IncludedPermissionSets	WSB_MON,WSB_PDF,WSB_SYS

PermissionSet WSB_DCR_USER

A permission set that grants the user only restricted permissions (N.B. for running reports via Document Creator).

Properties

Name	Value
Access	Public
Assignable	1
Caption	Apportunix Doc. Creator User
IncludedPermissionSets	WSB_MON,WSB_PDF,WSB_SYS

Report wDCR_AssemblyOrder

Report for assembly order documents.

Properties

Name	Value
Caption	Assembly Order
DefaultRenderingLayout	Document Creator - Assembly Order
PreviewMode	PrintLayout
UsageCategory	None

Report wDCR_CopyTranslations

A processing-only report to help with copying Document Creator translations.

Properties

Name	Value
ApplicationArea	#All
Caption	Copy Translations
PreviewMode	PrintLayout
ProcessingOnly	True
UsageCategory	None

Report wDCR_IssuedFinanceChargeMemo

Report for issued finance charge memo documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Issued Finance Charge Memo
DefaultRenderingLayout	Document Creator - Issued Finance Charge Memo
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_JobQuote

Report for job quotes.

Properties

Name	Value
Caption	Job Quote
DefaultRenderingLayout	Document Creator - Job Quote
PreviewMode	PrintLayout
UsageCategory	None

Report wDCR_PostedAssemblyOrder

Report for posted assembly order documents.

Properties

Name	Value
Caption	Posted Assembly Order
DefaultRenderingLayout	Document Creator - Posted Assembly Order
PreviewMode	PrintLayout
UsageCategory	None

Report wDCR_ProdOrderJobCard

Report for the production order job card document.

Properties

Name	Value
ApplicationArea	#Manufacturing
Caption	Prod. Order - Job Card
DefaultRenderingLayout	Document Creator - Prod. Order - Job Card
UsageCategory	ReportsAndAnalysis

Report wDCR_ProdOrderMatRequirements

Report for the material requirements document for production.

Properties

Name	Value
ApplicationArea	#All
Caption	Prod. Order - Mat. Requirements
DefaultRenderingLayout	Document Creator - Prod. Order - Mat. Requirements
UsageCategory	ReportsAndAnalysis

Report wDCR_ProdOrderShortageList

Report for the shortage list for production.

Properties

Name	Value
ApplicationArea	#Manufacturing
Caption	Prod. Order - Shortage List
DefaultRenderingLayout	Document Creator - Prod. Order - Shortage List
UsageCategory	ReportsAndAnalysis

Report wDCR_PurchaseBlanketOrder

Report for purchase blanket order documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Purchase - Blanket Order
DefaultRenderingLayout	Document Creator - Purchase Blanket Order
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_PurchaseCreditMemo

Report for posted purchase credit memo documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Purchase - Credit Memo
DefaultRenderingLayout	Document Creator - Purchase Credit Memo
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_PurchaseInvoice

Report for posted purchase invoice documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Purchase - Invoice
DefaultRenderingLayout	Document Creator - Purchase Invoice
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_PurchaseOrder

Report for purchase order documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Purchase - Order
DefaultRenderingLayout	Document Creator - Purchase Order
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_PurchaseQuote

Report for purchase quote documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Purchase - Quote
DefaultRenderingLayout	Document Creator - Purchase Quote
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_PurchaseReceipt

Report for posted purchase receipt documents.

Properties

Name	Value
Caption	Purchase - Receipt
DefaultRenderingLayout	Document Creator - Purchase Receipt
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_PurchaseReturnOrder

Report for purchase return order documents.

Properties

Name	Value
Caption	Purchase - Return Order
DefaultRenderingLayout	Document Creator - Purchase Return Order
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_PurchaseReturnShipment

Report for posted (purchase) return shipment documents.

Properties

Name	Value
Caption	Purchase - Return Shipment
DefaultRenderingLayout	Document Creator - Purchase Quote
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_Reminder

Report for reminder documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Reminder
DefaultRenderingLayout	Document Creator - Reminder
PreviewMode	PrintLayout
UsageCategory	None

Report wDCR_SalesBlanketOrder

Report for sales blanket order documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Sales - Blanket Order
DefaultRenderingLayout	Document Creator - Sales Blanket Order
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_SalesCreditMemo

Report for posted sales credit memo documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Sales - Credit Memo
DefaultRenderingLayout	Document Creator - Sales Credit Memo
Permissions	tabledata "Sales Shipment Buffer" = rimd
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_SalesDraftInvoice

Report for sales draft invoice documents.

Properties

Name	Value
Caption	Sales - Draft Invoice
DefaultRenderingLayout	Document Creator - Sales Draft Invoice
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_SalesInvoice

Report for posted sales invoice documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Sales - Invoice
DefaultRenderingLayout	Document Creator - Sales Invoice
Permissions	tabledata "Sales Shipment Buffer" = rimd
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_SalesOrderConfirmation

Report for sales order confirmation documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Sales - Order Confirmation
DefaultRenderingLayout	Document Creator - Sales Order Confirmation
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_SalesPicklist

Report for sales picklists (based on sales orders).

Properties

Name	Value
Caption	Sales - Picklist
DefaultRenderingLayout	Document Creator - Sales Picklist
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_SalesProFormaInvoice

Report for sales pro forma invoice documents.

Properties

Name	Value
Caption	Sales - Pro Forma Invoice
DefaultRenderingLayout	Document Creator - Sales Pro Forma Invoice
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_SalesQuote

Report for sales quote documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Sales - Quote
DefaultRenderingLayout	Document Creator - Sales Quote
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_SalesReturnOrderConf

Report for sales return order confirmation documents.

Properties

Name	Value
Caption	Sales - Return Order Confirmation
DefaultRenderingLayout	Document Creator - Sales Return Order Confirmation
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_SalesReturnReceipt

Report for posted (sales) return receipt documents.

Properties

Name	Value
Caption	Sales - Return Receipt
DefaultRenderingLayout	Document Creator - Sales Return Receipt
PreviewMode	PrintLayout
UsageCategory	None

Report wDCR_SalesShipment

Report for posted sales shipment documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Sales - Shipment
DefaultRenderingLayout	Document Creator - Sales Shipment
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_SalesWorkOrder

Report for sales work order documents (based on sales order).

Properties

Name	Value
Caption	Sales - Work Order
DefaultRenderingLayout	Document Creator - Sales Work Order
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_ServiceContract

Report for service contract documents.

Properties

Name	Value
Caption	Service - Contract
DefaultRenderingLayout	Document Creator - Service Contract
PreviewMode	PrintLayout
UsageCategory	None

Report wDCR_ServiceCreditMemo

Report for posted service credit memo documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Service - Credit Memo
DefaultRenderingLayout	Document Creator - Service Credit Memo
Permissions	tabledata "Service Shipment Buffer" = rimd
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_ServiceDraftInvoice

Report for service draft invoice documents.

Properties

Name	Value
Caption	Service - Draft Invoice
DefaultRenderingLayout	Document Creator - Service Draft Invoice
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_ServiceInvoice

Report for posted service credit memo documents. Also includes a built-in email body report layout.

Properties

Name	Value
Caption	Service - Invoice
DefaultRenderingLayout	Document Creator - Service Invoice
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_ServiceItemWorksheet

Report for service item worksheet documents.

Properties

Name	Value
Caption	Service Item Worksheet
DefaultRenderingLayout	Document Creator - Service Item Worksheet
PreviewMode	PrintLayout
UsageCategory	None

Report wDCR_ServiceOrderConfirmation

Report for service order confirmation documents.

Properties

Name	Value
Caption	Service - Order Confirmation
DefaultRenderingLayout	Document Creator - Service Order Confirmation
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_ServicePicklist

Report for service picklist (based on service order).

Properties

Name	Value
Caption	Service - Picklist
DefaultRenderingLayout	Document Creator - Service Picklist
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_ServiceProFormaPostedShpt

Report for service pro forma invoices (based on posted service shipment).

Properties

Name	Value
Caption	Service - Pro Forma Invoice (Posted Shipment)
DefaultRenderingLayout	Document Creator - Service Pro Forma Invoice (Posted Shipment)
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_ServiceQuote

Report for service quote documents.

Properties

Name	Value
Caption	Service - Quote
DefaultRenderingLayout	Document Creator - Service Quote
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_ServiceShipment

Report for posted service shipment documents.

Properties

Name	Value
Caption	Service - Shipment
DefaultRenderingLayout	Document Creator - Service Shipment
PreviewMode	PrintLayout
UsageCategory	None

Methods

wgFncInitializeRequest(Integer, Boolean, Boolean, Boolean, Boolean)

Initializes the report with initial values before it is run.

Report wDCR_TransferOrder

Report for transfer order documents.

Properties

Name	Value
Caption	Transfer Order
DefaultRenderingLayout	Document Creator - Transfer Order
UsageCategory	None

Report wDCR_TransferReceipt

Report for posted transfer receipt documents.

Properties

Name	Value
Caption	Transfer Receipt
DefaultRenderingLayout	Document Creator - Transfer Receipt
UsageCategory	None

Report wDCR_TransferShipment

Report for posted transfer shipment documents.

Properties

Name	Value
Caption	Transfer Shipment
DefaultRenderingLayout	Document Creator - Transfer Shipment
UsageCategory	None

Report wDCR_WhseActivityMovementList

Report for warehouse activity movement lists.

Properties

Name	Value
Caption	Warehouse Activity Movement List
DefaultRenderingLayout	Document Creator - Warehouse Movement List
PreviewMode	PrintLayout
UsageCategory	None

Report wDCR_WhseActivityPickList

Report for warehouse activity pick lists.

Properties

Name	Value
Caption	Warehouse Activity Pick List
DefaultRenderingLayout	Document Creator - Warehouse Pick List
PreviewMode	PrintLayout
UsageCategory	None

Report wDCR_WhseActivityPutAwayList

Report for warehouse activity put-away lists.

Properties

Name	Value
Caption	Warehouse Activity Put-Away List
DefaultRenderingLayout	Document Creator - Warehouse Put-Away List
PreviewMode	PrintLayout
UsageCategory	None

Report wDCR_WhsePostedReceipt

Report for posted warehouse receipts.

Properties

Name	Value
Caption	Posted Warehouse Receipt
DefaultRenderingLayout	Document Creator - Warehouse Posted Receipt
PreviewMode	PrintLayout
UsageCategory	None

Report wDCR_WhsePostedShipment

Report for posted warehouse shipments.

Properties

Name	Value
Caption	Posted Warehouse Shipment
DefaultRenderingLayout	Document Creator - Warehouse Posted Shipment
PreviewMode	PrintLayout
UsageCategory	None

Report wDCR_WhseReceipt

Report for warehouse receipts.

Properties

Name	Value
Caption	Warehouse Receipt
DefaultRenderingLayout	Document Creator - Warehouse Receipt
PreviewMode	PrintLayout
UsageCategory	None

Report wDCR_WhseShipment

Report for warehouse shipments.

Properties

Name	Value
Caption	Warehouse Shipment
DefaultRenderingLayout	Document Creator - Warehouse Shipment
PreviewMode	PrintLayout
UsageCategory	None

Table wDCR_CompanyLayoutSelection

A helper table for setting up company layout selections for a report layout.

Properties

Name	Value
Access	Public
Caption	Company Layout Selection Buffer
TableType	Temporary

Methods

wgFncSetReportLayout(Report Layout List@)

Sets the Report Layout the page applies to when opened.

Parameters

Type	Name	Description
``	`vRecReportLayoutList`	The Report Layout record.

Table wDCR_CondLaySelectCondition

Declares a conditional layout selection condition.

Properties

Name	Value
Access	Public
Caption	Layout Selection Condition
DataClassification	CustomerContent
DataPerCompany	False
DrillDownPageId	wDCR_CondLaySelectConditions
LookupPageId	wDCR_CondLaySelectConditions

Table wDCR_CondLayoutMapCompany

A table whose records allow to configure a conditional layout selection to only apply to specific companies.

Properties

Name	Value
Access	Public
Caption	Conditional Layout Mapping Company
DataClassification	CustomerContent
DataPerCompany	False
DrillDownPageId	wDCR_CondLayoutMapCompanies
LookupPageId	wDCR_CondLayoutMapCompanies

Table wDCR_CondLayoutSelection

Declares a conditional layout selection for a report object. There can be multiple layout mappings for one report object.

Properties

Name	Value
Access	Public
Caption	Document Creator Conditional Layout Selection
DataClassification	CustomerContent
DataPerCompany	False
DrillDownPageId	wDCR_CondLayoutSelections
LookupPageId	wDCR_CondLayoutSelections

Table wDCR_CondReportLayoutMapping

Declares a conditional layout mapping.

Properties

Name	Value
Access	Public
Caption	Conditional Layout Mapping
DataClassification	CustomerContent
DataPerCompany	False
DrillDownPageId	wDCR_CondReportLayoutMappings
LookupPageId	wDCR_CondReportLayoutMappings

Table wDCR_CustomDatasetFilter

Defines a filter/link for custom report nodes.

Properties

Name	Value
Access	Public
Caption	Custom Report Filter
DataClassification	CustomerContent
DataPerCompany	False

Table wDCR_CustomDatasetFilterSet

Defines a set of filters/links for custom report nodes.

Properties

Name	Value
Access	Public
Caption	Custom Report Filter Set
DataClassification	CustomerContent
DataPerCompany	False
DrillDownPageId	wDCR_CustomReportFilterSet
LookupPageId	wDCR_CustomReportFilterSets

Table wDCR_CustomDatasetNode

Declares a custom column/dataitem/label for a dataset extension.

Properties

Name	Value
Access	Public
Caption	Custom Report Node
DataClassification	CustomerContent
DataPerCompany	False

Table wDCR_CustomDatasetRestriction

Defines a 'restriction filter' for custom report nodes.

Properties

Name	Value
Access	Public
Caption	Custom Dataset Restriction
DataClassification	CustomerContent
DataPerCompany	False

Table wDCR_CustomReportFilter

> **Obsolete**
>
> Replaced by wDCR_CustomDatasetFilter

Declares a filter of a filter set.

Properties

Name	Value
Access	Public
Caption	Custom Report Filter
DataClassification	CustomerContent
DataPerCompany	True
ObsoleteReason	Replaced by wDCR_CustomDatasetFilter
ObsoleteState	Removed
ObsoleteTag	1.30.0.0

Table wDCR_CustomReportFilterSet

> **Obsolete**
>
> Replaced by wDCR_CustomDatasetFilterSet

Declares a filter set.

Properties

Name	Value
Access	Public
Caption	Custom Report Filter Set
DataClassification	CustomerContent
DataPerCompany	True
DrillDownPageId	wDCR_CustomReportFilterSet
LookupPageId	wDCR_CustomReportFilterSets
ObsoleteReason	Replaced by wDCR_CustomDatasetFilterSet
ObsoleteState	Removed
ObsoleteTag	1.30.0.0

Table wDCR_CustomReportLayoutArchive

> **Obsolete**
>
> Document Creator layouts have been moved to the report layout system tables.

A table storing previous/archive versions of custom report layouts.

Properties

Name	Value
Access	Public
Caption	Custom Report Layout Archive
DataClassification	EndUserIdentifiableInformation
DataPerCompany	False
DrillDownPageId	wDCR_CustomReportLayoutArchive
LookupPageId	wDCR_CustomReportLayoutArchive
ObsoleteReason	Document Creator layouts have been moved to the report layout system tables.
ObsoleteState	Pending
ObsoleteTag	2.0.0.0

Table wDCR_CustomReportNode

> **Obsolete**
>
> Replaced by wDCR_CustomDatasetNode

Declares a custom report node (column, data item or label).

Properties

Name	Value
Access	Public
Caption	Custom Report Node
DataClassification	CustomerContent
DataPerCompany	True
ObsoleteReason	Replaced by wDCR_CustomDatasetNode
ObsoleteState	Removed
ObsoleteTag	1.30.0.0

Table wDCR_DatasetExtension

Declares a dataset extension for a report object.

Properties

Name	Value
Access	Public
Caption	Document Creator Report Dataset Extension
DataClassification	CustomerContent
DataPerCompany	False
DrillDownPageId	wDCR_ReportDatasetExtensions
LookupPageId	wDCR_ReportDatasetExtensions

Table wDCR_DatasetNode

A helper table for viewing/selecting dataset nodes.

Properties

Name	Value
Access	Public
Caption	Report Node
DataClassification	SystemMetadata
TableType	Temporary

Table wDCR_ExportDesignReportParams

Stores export design report request page parameters per user.

Properties

Name	Value
Access	Public
Caption	Export Design Report Parameters
DataClassification	SystemMetadata
DataPerCompany	True

Table wDCR_ExportProfile

Declares an export profile.

Properties

Name	Value
Access	Public
Caption	Document Creator Export Profile
DataClassification	CustomerContent
DataPerCompany	False
DrillDownPageId	wDCR_ExportProfileList
LookupPageId	wDCR_ExportProfileList

Methods

wgFncInitRecord

Sets initial values for the export profile.

Table wDCR_ExportProfilePDFMerge

Declares an export profile PDF merge.

Properties

Name	Value
Access	Public
Caption	Document Creator Export Profile PDF Merge
DataClassification	CustomerContent
DataPerCompany	False

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Table wDCR_LayoutSettings

Stores additional settings for a report layout.

Properties

Name	Value
Access	Public
Caption	Document Creator Layout Settings
DataClassification	CustomerContent
DataPerCompany	False

Fields

ID	Type	Name	Description
1	`Integer`	`ReportID`	The ID of the layout's report object.
2	`Text[250]`	`LayoutName`	The name of the report layout.
3	`Guid`	`AppID`	The app ID of the report layout.
10	`Text[249]`	`ReportCaption`	The caption of the layout's report object.
100	`Code[10]`	`ExportProfileCode`	The code of the export profile that should be used for rendering this report layout.
101	`Text[30]`	`ExportProfileDesc`	The description of the export profile that should be used for rendering this report layout.
110	`Enum`	`DesignAction`	The design action that should be applied when the report layout is opened via a design file in the designer.

Table wDCR_PDFMergeCompanySelection

Declares the companies to which an export profile PDF merge applies.

Properties

Name	Value
Access	Public
Caption	PDF Merge Company Selection
DataClassification	CustomerContent
DataPerCompany	False
DrillDownPageId	wDCR_PDFMergeCompanySelections
LookupPageId	wDCR_PDFMergeCompanySelections

Table wDCR_ReportSettings

Stores the set-up settings for Document Creator report objects.

Properties

Name	Value
Access	Public
Caption	Report Settings
DataClassification	CustomerContent
DataPerCompany	False

Table wDCR_ReportSubstitution

A subpage to declare report substitutions.

Properties

Name	Value
Access	Public
Caption	Report Substitution
DataClassification	CustomerContent
DataPerCompany	False

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Table wDCR_Setup

Stores the Document Creator setup/configuration.

Properties

Name	Value
Access	Public
Caption	Document Creator Setup
DataClassification	CustomerContent
DataPerCompany	False
DrillDownPageId	wDCR_Setup
LookupPageId	wDCR_Setup

Methods

wgFncGetOrInit

Gets the setup records or inserts it if it does not exist yet.

wgFncGetOrInit(Boolean)

Gets the setup records or inserts it if it does not exist yet.

Parameters

Type	Name	Description
Boolean	pErrorIfDisabled	Whether or not to throw an error if Enabled = false.

Methods

wgFncDownloadDesigner

Opens a link to download the Document Creator Designer.

wgFncExportDefaultLayout

Exports the Default Layout from the Document Creator Setup, prompting the user for a location to save the file.

wgFncExportDefaultLayout(Codeunit::Temp Blob@)

Gets the contents of the Default Layout from the Document Creator Setup and writes them to the passed TempBlob.

Parameters

Type	Name	Description
``	`vCduTempBlob`	The TempBlob to write the layout to.

wgFncGetDefaultExportProfileCode:Code[10]

Gets the code of the default export profile as configured in the Document Creator Setup. If no default export profile exists yet, it is created and the Document Creator Setup is updated accordingly.

Returns

Type	Description
``	The code of the default Document Creator Export Profile.

wgFncGetSessionLocaleID:Integer

Gets the locale ID of the culture of the current session.

Returns

Type	Description
``	Locale ID of the culture of the current session.

wgFncImportDefaultLayout

Imports a layout into the Document Creator Setup that will be used as the Default Layout, prompting the user for a file.

wgFncImportDefaultLayout(Codeunit::Temp Blob)

Imports a layout file from a Blob into the Document Creator Setup that will be used as the Default Layout.

Parameters

Type	Name	Description
``	`pCduTempBlob`	The Blob containing the layout to import.

wgFncSetStandardDefaultLayout

Resets the Default Layout in the Document Creator Setup to the standard default layout.

Table wDCR_TenantReportLayoutArchive

Stores previous versions of report layouts.

Properties

Name	Value
Access	Public
Caption	Tenant Report Layout Archive
DataClassification	CustomerContent
DataPerCompany	False
DrillDownPageId	wDCR_TenantReportLayoutArchive
LookupPageId	wDCR_TenantReportLayoutArchive

Table wDCR_Translation

Stores Document Creator translations for translatable labels used in reports.

Properties

Name	Value
Access	Public
Caption	Document Creator Translation
DataClassification	CustomerContent
DataPerCompany	False
DrillDownPageId	wDCR_Translations
LookupPageId	wDCR_Translations

XmlPort wDCR_LegacyReportLayoutsPort

Allows to import/export (legacy) custom report layouts to an XML definition.

Properties

Name	Value
Caption	Import/Export Legacy Custom Report Layouts
DefaultFieldsValidation	False
Direction	Both
Encoding	ISO88592
FormatEvaluate	Xml

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XmlPort wDCR_ReportLayoutsPort

Allows to import/export layouts from/to a layout package with an XML definition that declares the layouts that are included.

Properties

Name	Value
Caption	Import/Export Report Layouts
DefaultFieldsValidation	False
Direction	Both
Encoding	ISO88592
FormatEvaluate	Xml

Methods

wgFncGetLayoutPackage(Codeunit::Data Compression@)

Gets the layout files of the generated layout package archive.

Parameters

Type	Name	Description
Codeunit "Data Compression"	vCduDataCompression	The layout package archive.

wgFncSetLayoutPackage(Codeunit::Data Compression@)

Sets the layout files for the generated layout package archive.

Parameters

Type	Name	Description
Codeunit "Data Compression"	vCduDataCompression	The layout package archive.

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Codeunit wDCR_PublishersOnPrem

Exposes additional event publishers next to the event publishers that are available from the public objects.

Properties

Name	Value
Access	Public

Methods

wgEvpReportExecutionOnPrem_OnBeforeGetDatabaseName(Text@, Boolean@)

Allows to hook into determining the database name (used in file names).

Parameters

Type	Name	Description
Text	vDatabaseName	The database name.
Boolean	vIsHandled	Set to true if handled by your extension.

wgEvpReportExecutionOnPrem_OnBeforeHandleDocumentCreatorLayoutReportPrint(Report Layout List, Integer, InStream, Text, Boolean@, Boolean@)

Allows to hook into printing reports with a Document Creator report layout.

Parameters

Type	Name	Description
Record "Report Layout List"	pRecReportLayoutList	The report layout that is used.
Integer	pReportID	The ID of the report object.

Type	Name	Description
InStream	pInStrXmlData	The InStream containing the XML DataSet contents.
Text	pPrinterName	The name of the printer to use.
Boolean	vReportSentToPrinter	Specifies whether the report was sent to the printer.
Boolean	vIsHandled	Set to true if printing is handled by your extension.

orLayoutReportRibs(ReMatLalyout List, Integer, InStream, Text, Boolean@, Boolean@)

Enum wDCR_LicenseEdition

Specifies the possible license editions.

Properties

Name	Value
Access	Public
Extensible	False

Values

Ordinal	Name	Description
0	`Unknown`	An unknown/invalid license (type).
5	`Demo`	A demo license.
6	`DemoConverter`	A demo license including converter possibilities.
10	`Viewer`	A viewer license (legacy). This license type allows to run reports with a Document Creator report layout.
15	`Editor`	An editor license (legacy). This license type includes designer capabilities.
16	`Converter`	A converter license (legacy). This license type allows to convert classic and RDLC report layouts.
21	`Single`	A 'Single' license (legacy).
26	`Developer`	A developer license (legacy).
31	`Site`	A 'Site' license (legacy).
33	`S`	An 'S' license. Note that new S/M/L/XL licenses are provided as 'Sized' licenses.

Ordinal	Name	Description
35	`M`	An 'M' license. Note that new S/M/L/XL licenses are provided as 'Sized' licenses.
37	`L`	An 'L' license. Note that new S/M/L/XL licenses are provided as 'Sized' licenses.
39	`XL`	An 'XL' license. Note that new S/M/L/XL licenses are provided as 'Sized' licenses.
41	`Sized`	A sized license, i.e., S/M/L/XL license.

Enum wDCR_RdlcCnvStatus

Defines the possible RDLC report layout conversion statuses.

Properties

Name	Value
Access	Public
Extensible	False

Page wDCR_ConfirmEULA

This page is shown before installing the on-premise control add-in. The page points the user's attention to the EULA which should be accepted before the control add-in can be installed.

Properties

Name	Value
ApplicationArea	#All
Caption	Document Creator License Agreement Confirmation
PageType	StandardDialog
UsageCategory	None

Page wDCR_RedirectPrintSetupOnPrem

A page which allows one to configure a Document Creator Redirect Printer.

Properties

Name	Value
ApplicationArea	#All
Caption	Document Creator Redirect Printer Setup
DeleteAllowed	True
Extensible	False
InsertAllowed	True
ModifyAllowed	True
PageType	Card
RefreshOnActivate	True
SourceTable	11250581
UsageCategory	None

Page wDCR_RedirectPrinterListOnPrem

A page that allows one to view or edit the configured Document Creator redirect printers. With Document Creator redirect printers you can use direct printing with Document Creator report layouts to printers on the NST server on Business Central on-premise.

Properties

Name	Value
AdditionalSearchTerms	direct printing,onpremise print
ApplicationArea	#All
Caption	Document Creator Redirect Printer List
CardPageId	wDCR_RedirectPrintSetupOnPrem
Editable	False
ModifyAllowed	False
PageType	List
SourceTable	11250581
UsageCategory	Administration

Report wDCR_AddRdlcReportToConvert

This report allows one to add the RDLC report layouts for the specified report objects as report layouts to convert on the "RDLC Layout Conversion" page.

Properties

Name	Value
Caption	Add RDLC Reports to Convert
ProcessingOnly	True
UsageCategory	None

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Table wDCR_RdlcLayoutCnv

This table holds the RDLC layout conversion records, each specifying an RDLC layout to convert with information about the conversion status.

Properties

Name	Value
Access	Public
Caption	RDLC Layout Conversion
DataClassification	CustomerContent
DataPerCompany	False
DrillDownPageId	wDCR_RdlcLayoutCnv
LookupPageId	wDCR_RdlcLayoutCnv

Fields

ID	Type	Name	Description
1	`Integer`	`ID`	The entry ID.
3	`Integer`	`ReportID`	The ID of the report object.
4	`Text[30]`	`ReportName`	The name of the report object.
5	`Boolean`	`HasRdlcLayout`	Specifies whether the report object has a built-in RDLC layout.
6	`Text[250]`	`LayoutName`	Specifies the name of the RDLC layout to convert.
7	`Guid`	`LayoutAppID`	Specifies the app ID for the RDLC layout to convert.

ID	Type	Name	Description
10	`Blob`	`NewLayout`	The contents of the new layout.
11	`Code[20]`	`CustomReportLayoutCode`	Specifies the code of the generated custom report layout (deprecated).
12	`Text[250]`	`NewLayoutName`	Specifies the name of the new layout.
15	`Boolean`	`NewWarningMessages`	Specifies whether there are warning messages from the conversion.
16	`Blob`	`WarningMessages`	The warning messages from the conversion.
17	`Boolean`	`NewErrorMessages`	Specifies whether there are error messages from the conversion.
18	`Blob`	`ErrorMessages`	The error messages from the conversion.
19	`Enum`	`Status`	The conversion status.

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Document Creator

2.52.0 (2023-07-24)

- Added multi-fieldselect support adding custom columns in Dataset Extensions.
- Added **Select Fields** action for selecting multiple fields to add as new custom columns.

Custom Report Columns - 11249662 Sales - Invoice | Work Date: 1/23/2025

| Search | + New | Edit List | Delete | Select Fields... | Edit Filter Set... | View Columns |

Select one or more fields to add as new custom columns.

| Parent Data Item Name | Custom Parent | Table ID | Table Caption | Field No. | Field Caption | Field Data Type |
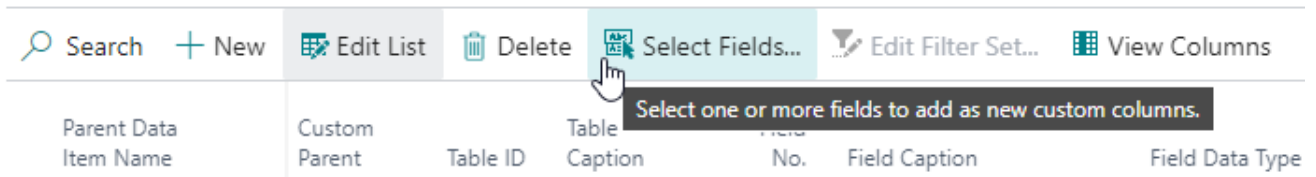
- Miscellaneous maintenance (API docs update, resolve new internal info diagnostics).

2.50.0 (2023-06-08)

- Addressed warnings for next-major builds.
- Miscellaneous code clean-up and additional XML documentation.

2.48.0 (2023-05-17)

Requires Business Central 22.0

- Added Production Order document reports and built-in layouts for:
  - Production Order - Job Card
  - Production Order - Mat. Requirements
  - Production Order - Shortage List

See Reports for more information.

| Apportunix Report Selection: All ⌄ | Search | + New | Delete | Edit List | Set Document Creator Defaults... | Business Rel. Layout Selections | Refresh | ⋯ |

Usage Type ↑	Usage ID	Usage	Sequence	Report ID	Report Caption	Use for Email Atta...	Report Layout Selection
Production Order	22	Job Card	1	11249770	Prod. Order - Job Card	☑	Document Creator - Prod. Order - Job Card
Production Order	23	Mat. & Requisition	1	11249771	Prod. Order - Mat. Requirements	☑	Document Creator - Prod. Order - Mat. Requirements
Production Order	24	Shortage List	1	11249772	Prod. Order - Shortage List	☑	Document Creator - Prod. Order - Shortage List

- Added support for overriding **"Format Region"**:
  - Via the **Report Limits and Settings** page:

Report Limits and Settings | Work Date: 1/23/2025   ✓ Saved

🔍 Search   📝 Edit List   ➡️ Run Report | More options

Report ID ↑		Report Name	Report Caption	Report Timeout (Duration)	Max Rows	Max Documents	Format Region	Language
11249660		wDCR_SalesQuote	Sales - Quote		0	0		0
11249661		wDCR_SalesOrderConfirm...	Sales - Order Confirmation		0	0		0
→ 11249662	⋮	wDCR_SalesInvoice	Sales - Invoice		0	0	nl-NL ⌄	0
11249663		wDCR_SalesCreditMemo	Sales - Credit Memo		0	0		0

• Via the report request page:

Sales - Draft Invoice   ↗ ✕
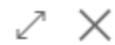
✕ No. Printed · · · · · · · · · · · · · · · · · · [   ]

＋ Filter...

Filter totals by:

＋ Filter...

Advanced

Maximum row generation time · · · [06:00:00]

Maximum rows · · · · · · · · · · · · · [500000]

Maximum documents · · · · · · · · · · [200]

Format region · · · · · · · · · · · · · · [⌄]

Format region

Specifies the format region that will be used to format numbers and dates in this report. The value is specified in the format xx-yy, where xx is the language code and yy is the region code like en-US for English in the United States.

Learn more

Added public codeunit `wDCR_FormatRegion` which is used in report objects to pass along the format region that should be used by the API for rendering (based on the value of `CurrReport.FormatRegion`).

• Added column `FormatRegion` to the top-level dataitem of all report objects, which contains the value of `CurrReport.FormatRegion`.

- Fixed bug in the **Use Region-Independent Datasets** (experimental) feature/switch: it was possible for `Date` and `Time` columns to be parsed incorrectly.

- Replaced usages of (internal) codeunit `wDCR_JITLayoutSelection` with new procedures in codeunit `"Design-time Report Selection"` that were introduced in BC21.0. The codeunit `wDCR_JITLayoutSelection` has been removed.

- Removed (obsoleted) usages of the `"Document Report Mgt."` event publishers which have been removed in the upcoming, next major release of BC (23.0). Using the legacy rendering engine will no longer be possible.

- Maintenance:

    - Replaced 'integer' arguments for "log interaction" with the new "Interaction Log Entry Document Type" enum in report objects.

    - Replaced calls to `"VAT Clause".GetDescription` with `"VAT Clause".GetDescriptionText` in report objects.

    - Resolved ApplicationArea property redundancy on pages.

    - Call `FindSet` with only 1 parameter instead of the obsoleted second parameter.

    - Removed occurrences of the obsoleted `[InDataSet]` attribute.

    - Changed accessibility from `internal` to `local` for procedures that were only used in the same object.

    - Resolved miscellaneous info diagnostics.

2.46.0 (2023-05-05)

- Added the **Usage Layout Selection** field to the **Apportunix Report Selection** page which allows one to set up a layout selection specifically for the report selection. Note that this overrules the report object's report layout selection.

- Added the **Apportunix Report Selection** page as an action on the **Apportunix Role Center** in the **Document Creator** group (besides the **Setup** group from the **System Library**).

2.44.0 (2023-04-21)

- Added new feature that allows you to show more line details on Prepayment Sales/Purchase Invoices/Cr. Memos. (in the extension-provided Document Creator report layouts).

The feature can be enabled (or disabled) using the **Show Prepayment Invoice/Cr. Memo Details** setting on the **Prepayment** tab of the **Document Creator Setup** page (disabled by default)

- Added `TableRelation` to the **Tag** field on the **Custom Labels** page, so that you can now easily select a tag from the existing ones if you want to reuse label translations.

- Fixed a bug with the **Language Code** page field on the **Custom Columns**/**Custom Labels** page that would result in the record to be cleared.

- New public procedure `wDCR_LayoutSelectionMgt.wgFncSelectReportLayout(pReportID: Integer; var vRecReportLayoutList: Record "Report Layout List"; pForEmailBody: Boolean): Boolean`

- Added XML documentation to codeunit `wDCR_Publishers` and added event publisher `wgEvpReportExecutionParameters_OnAfterGetFormattingCulture`.

- Added feature uptake telemetry.

- Hook into new Document Mail Queue features: "Email Body Report Layout" and "Report Layout" on queue entry

2.42.0 (2023-03-16)

- Fix for setting a customer-/vendor-specific layout using the **Layout Name** field on custom report selections, e.g., via the **Business Rel. Layout Selections** page (resolved bug introduced with refactoring in version 2.32.0.0)

2.40.0 (2023-03-15)

- Fix for **Export Design** with **Edit with Data** *disabled* from the **Report Layouts** page.

2.38.0 (2023-03-07)

- Restored Set Document Creator Defaults action on the "Apportunix Report Selection" page that was moved to the "System Library" app.

- Fixed permissions of the 'Apportunix Doc. Creator User' permission set to grant direct execute permissions for codeunits.

- Make the **Convert Selected** and **Copy As Tenant Report Layout** actions visible on the (legacy) Custom Report Layouts page (for conversion purposes) if **Show Legacy Controls** is disabled.

2.36.0 (2023-03-06)

- Added `lblSellToAddress` and `SellToAddr` columns to all sales document reports.

- Removed "Apportunix Report Selection" from the "Document Creator" app in favor of the new "Apportunix Report Selection" page in the "System Library" app.

- Clear the "Product Key" field (legacy) automatically if the license status check finds there is an active Apportunix subscription for the "Document Creator" product and the entered product key (legacy) is invalid.

2.34.0 (2023-02-21)

- Fixed an issue with BC online environment ODataV4/Web sessions returning invalid session locale IDs (i.e., `SessionSettings.LocaleID() = 0`). Procedure `wDCR_Setup.wgFncGetSessionLocaleID(): Integer` will now check the session's current culture if `SessionSettings.LocaleID` returns `0`.

2.32.0 (2023-02-15)

- Changed the **Layout Name** field on the **Apportunix Report Selection** page to show/edit the report layout selection for the report for the current company. The previous implementation would override the report layout selection, which has now been adjusted, to avoid confusion.
- Added **Change Layout Selection** action to the **Layout Selection** factbox.
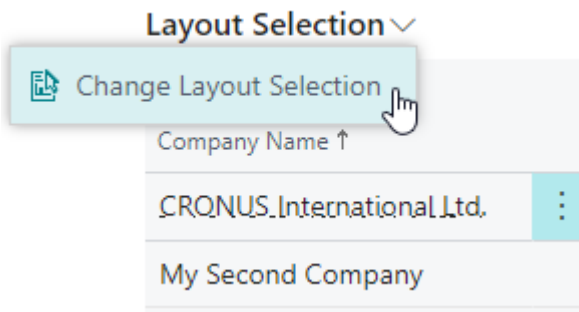
- The **Apportunix Report Selection** page (and accompanying public objects and procedures) will be moved to the "System Library" app and has therefore been obsoleted in the "Document Creator" app. The page in the "System Library" app will offer the same functionality (the 'new' page is currently hidden from search, i.e., `UsageCategory = None`). If you have extensions on the current "Apportunix Report Selection" page, then please mind the obsoletion warnings and adjust your extensions accordingly.
- Added **Layout App ID** and **Layout User Defined** page fields to the **Apportunix Report Selection** page (hidden by default).

2.30.0 (2023-02-01)

- Fix for **Export Design** with **Edit with Data** *disabled* for a report that has dataset extensions: The dataset extension columns and data items would not be included in the `.dcrd` design file.

2.28.0 (2023-01-30)

- Fixed casing of label **lblBilltoCustomerNo** tag: `BillToCustomerNo`; in "Job Quote" report.

2.26.0 (2023-01-30)

- Applied partial record loading in the Dataset Extensions feature.

- Added support for leaving the **Language Code Column** field blank for **Custom Labels**.

- Added `LanguageCode` and `LanguageId` column to all report objects where these were not present yet.

- Fix for company-specific PDF merges: Only call PDF Merge API if at least 1 merge is applicable for the current company

- Added several fields and labels as columns to the "Job Quote" report object.

- The source code of the report objects in the "Document Creator" app is now available (see Downloads).

- The `resourceExposurePolicy.allowDebugging` property is now set to `true` in the `app.json` manifest file of the "Document Creator" app.

2.24.0 (2022-11-25)

- Fix for **Use Region-Independent Datasets** (experimental) feature: Parse values of `Date` and `Time` columns as `DateTime` (instead of BC `Date` and `Time` types).

- Changed fonts in Service document reports and Job Quote reports to use `Arial` instead of `Segoe UI` throughout the entire document layouts (using Styles).

- Align Sales document report layouts and use more descriptive names for bands.

- Fix: If during **Export Design** (with data) the `Report.SaveAs` method runs into an error (e.g., an error related to Database Access Intent, such as "Cannot modify a record. Current connection intent is Read-Only."), then throw the error to present it to the user.

- Fix: **Import Layout Package** would do a duplicate import (from the legacy format and new format).

2.22.0 (2022-11-18)

- Fix for adding custom data item when the parent data item has no existing data items yet.

2.20.0 (2022-11-03)

- Added **Layout Name** and **Email Body Layout Name** page fields to the **Document Layouts** (aka **Customer/ Vendor Report Selections**) pages.

- Added **Apportunix Report Selection** navigation action to the **Document Layouts** (aka **Customer/Vendor Report Selections**) pages.

- Fixed issue with the **Copy from Report Selection** action. The action now also copies the values of the new page fields to the customer/vendor report selection records, if applicable.

- Fixed issue with the **Import Layout Package** action which occurs when a legacy layout/report package is imported.

- Enhanced **Copy** action on the **Document Creator Translations** page:

  - Multi-select/filter capabilities.

  - Copy translations from one tag to another.

  - Support for copying from/to language code `' '` (i.e., the **Default Translation/Unspecified Language Translation**).

Copy Translations   ↗ ✕

Create Report Specific Translations

Target Report ID · · · · · · · · · · · · · [⌄]

Target Report Caption · · · · · · · · · · [   ]

Copy Language Translations

Copy All Translations · · · · · · · · · · ⬤━

From Language Code · · · · · · · · · · [⌄]

From Language Name · · · · · · · · · · [   ]

To Language Code · · · · · · · · · · · [⌄]

To Language Name · · · · · · · · · · · [   ]

Copy Translations to Tag

Target Tag · · · · · · · · · · · · · · · · [⌄]

Overwrite · · · · · · · · · · · · · · · · ━⬤

Filter: From Translations

✕ Tag · · · · · · · · · · · · · · · · · · · [Amount   ]

+ Filter...

[**OK**]   [Cancel]

- Changed caption of **Default Translation** field to **Default Translation/Unspecified Language Translation** (to make more clear this concerns a translation for documents where the language code is `''`).

- Added **Language Name** field to the **Document Creator Translations Subpage**.

- Set default visibility for **Last Used** fields to be hidden.

- Added the **Translations** subpage to the **Custom Labels** page.

- Set the `Enabled` property of the **Translations** subpage to `false` when we are on a new line (**Tag** is empty).

- Changed the drill-down for looking up columns using the **Report Columns** page (used in **Dataset Extensions** and **Conditional Layout Selections**) to set focus on the first record of the direct parent data item.

- Added the **Payment Discount %** and **Pmt. Discount Date** columns to applicable sales, purchase and service document reports. Also added prepayment-related columns to the sales order confirmation document report.

- Allow **Cast Data Type** = `Integer` for `Boolean` field custom columns.

- Added **Conditional Layout Selections** section to the **Document Creator Setup Wizard** page.

- Added **ContextSensitiveHelpPage** property to **Conditional Layout Selections**.

- Removed the deprecated **New Blank Layout** action (which was replaced by the **New Layout** action).

- Deprecated the **VATPerc_3** column in the **Sales Order Confirmation**, **Sales Blanket Order** and **Service Credit Memo** reports (N.B. no plans to delete the column in the near future).

- Fixed miscellaneous next-major build warnings.

2.18.0 (2022-10-20)

- Added **Email Template** layouts for applicable sales, purchase, service and reminder reports as built-in/ extension-provided layouts.

- Updated the **Set Document Creator Defaults** action in the **Apportunix Report Selection** page to also set the **Email Body Layout** field to the new built-in/extension-provided email body template layouts for all applicable document types/usages.

- Added **Bill-to/Buy-from/Pay-to/Sell-to Contact**, **Bill-to/Buy-from/Pay-to/Sell-to Vendor Name**, **Bill-to/Buy-from/Pay-to/Sell-to Vendor Formal Salutation Text**, **Bill-to/Buy-from/Pay-to/Sell-to Vendor Informal Salutation Text**, **Bill-to/Sell-to Contact No.**, **Contact**, **Name** fields to applicable sales, purchase, service and reminder reports.

- Added **lblEmailClosing** and **lblEmailIntroduction** labels to applicable sales, purchase, service and reminder reports.

- Enhancement: For some reports, if "CurrencyCode" is empty, then "CurrencySymbol" would be empty as well. **CurrencySymbol** will now contain the **Local Currency Symbol** from the **General Ledger Setup**. (This is something that is not properly aligned for all document types throughout the procedures provided by the Microsoft Base Application.)

- **VATClause** data item added to all reports where applicable (in report object and built-in/extension-provided layout).

- Fixed **MediaSet** custom columns not working anymore (bug introduced due to breaking change in the Business Central platform).
- Added **DecimalFormatter** setting to the **Custom Columns** page for *Decimal* fields. You can use the format syntax as described on the Custom Numeric Format Strings and Standard Numeric Format Strings pages.
- Fix: Added missing **CastDataType** field to XMLport for exporting/importing dataset extensions.
- Enhancement for better integration with new upcoming Document Mail Queue feature for linking XML request page parameters to reports that should be e-mailed.
- Set actions on the **Document Creator User-Defined Report Layouts** page to `Enabled = false` if the page does not contain any records.
- Misc. small code-cleanup (e.g., fixing casing of keywords of code, removed redundant DataClassification for some fields on field-level).

2.16.0 (2022-09-12)

- Fixed bug in Edit *without* data (small bug introduced with **Use Region-Independent Datasets** feature)

2.14.0 (2022-09-08)

- New feature: **Conditional Layout Selections**:
  - New page: **Document Creator Conditional Layout Selections**
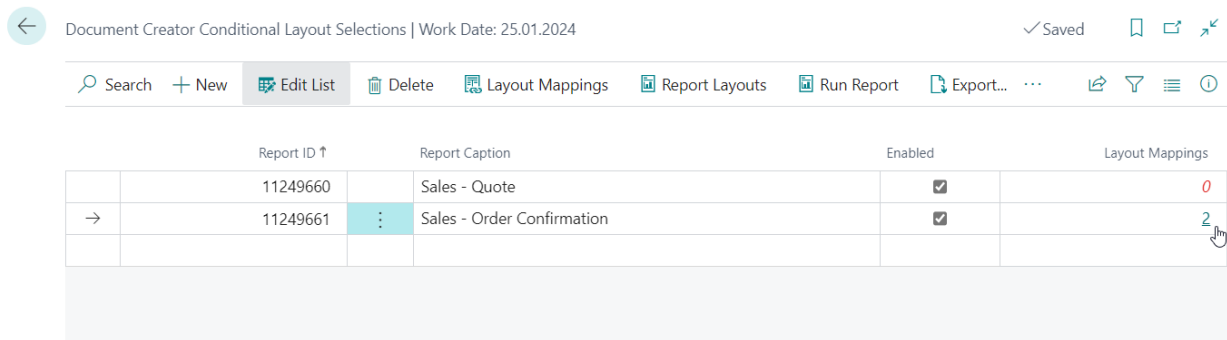
  - **Layout Mappings** action (and flowfield) to view and edit mappings from conditions to layouts to use for the report
  - **Enabled** field to disable the conditional layout selection configuration for the report
  - **Export** and **Import** action to/from an XML file
  - If there are zero mappings, then the **Layout Mappings** field is displayed in red.
  - Convenient actions like, **Report Layouts**, **Run Report**, **View Columns**, **View Data Items**, **Dataset Extensions**

Through this page, you can set up the configurations for conditional layout selections using the following new pages:

  - New page: **Conditional Layout Mappings**
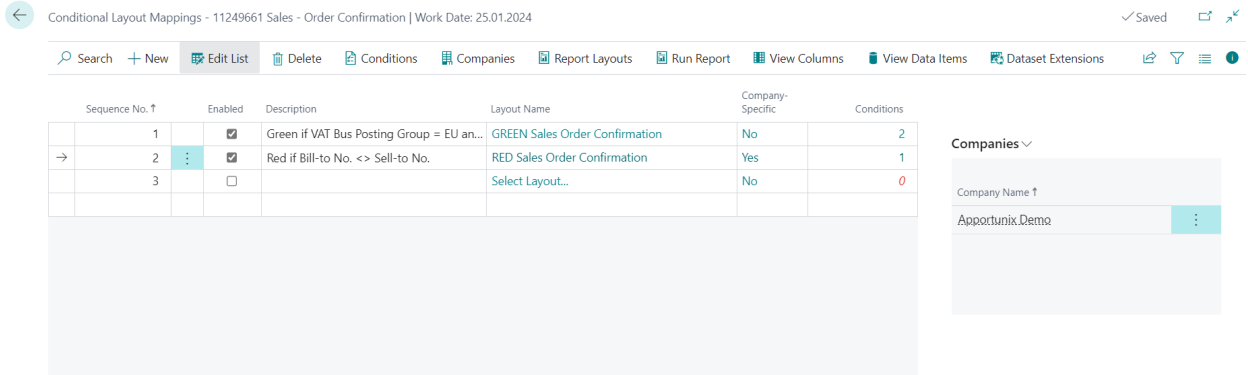
- Map conditions to a layout

- Mappings can be company-specific (flowfield with drilldown, action, factbox):
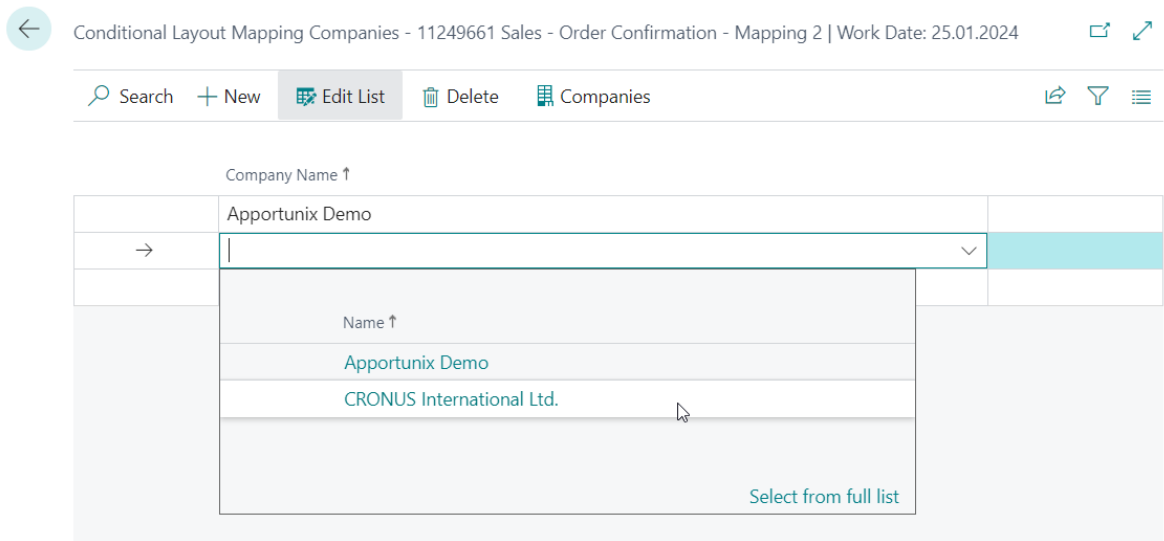
- If there are zero conditions, then the **Conditions** field is displayed in red. Note that if there are zero conditions for a layout mapping, the layout mapping will never be used.

- There is a **Description** (optional) where you can leave additional information about the layout mapping.

- **Enabled** field to disable the conditional layout selection configuration for the report

- Convenient actions like, **Report Layouts**, **Run Report**, **View Columns**, **View Data Items**, **Dataset Extensions**

- New page: **Layout Selection Conditions**
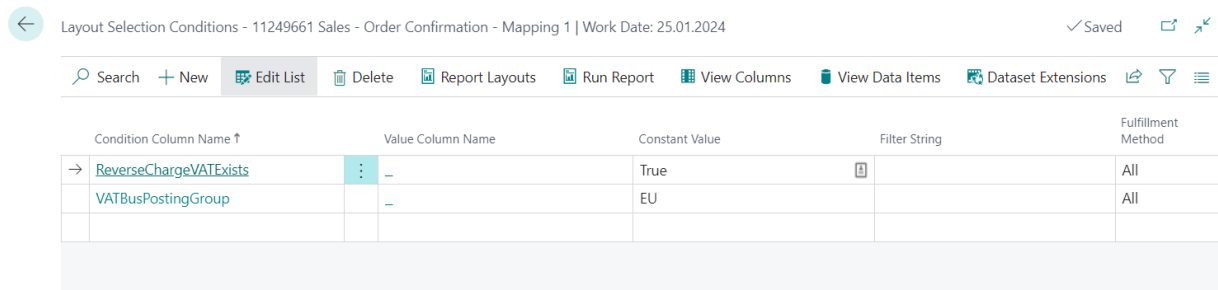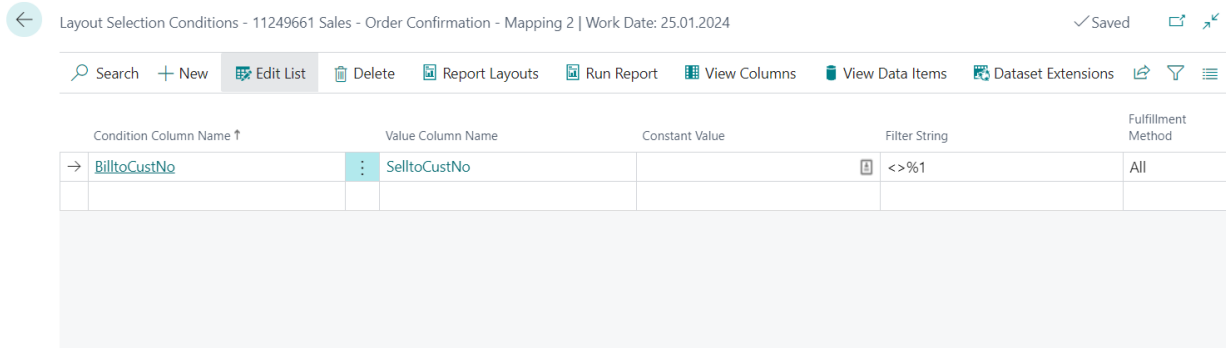
- Allows you to specify a condition for a column value.

- **Condition Column** select a column from the report dataset to put the condition on

- Either set up a **Constant Value** (*aka* fixed value), **Value Column** (comparison against the value of another column) or a **Filter String**

- In the **Filter String** field you can also use a placeholder `%1` which you can use if you want to compare the value of the **Condition Column** with the value of another column (**Value Column**). For example, you can check if the Bill-to Customer No. is not equal to the Sell-to Customer No. (see example in the screenshot).

- The **Fulfillment Method** field allows you to specify which records should satisfy the conditions. For example, if you want to check that *all sales lines* of your sales document satisfy a condition you can put this to **All**, while if you want to check if there is at least 1 sales line that meets the condition you can set this to **Any**.
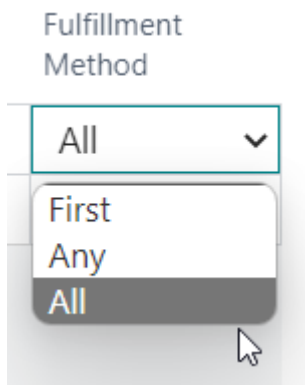
- Convenient actions like, **Report Layouts**, **Run Report**, **View Columns**, **View Data Items**, **Dataset Extensions**

- The Apportunix "Document Mail Queue" app now uses the custom layout and e-mail body template layout as configured in Document Creator's Apportunix Report Selection page (Document Creator 2.14.0.0 required for this feature) (Document Mail Queue 1.24.0.0 required for this feature)

- Added **Custom Columns**, **Custom Data Items** and **Custom Labels** flowfield to the **Document Creator Report Dataset Extensions** page.

- Improved duplicate custom dataset node name check to also check existing column/data item names.
- Fixed issue preventing from opening the Custom Columns page when an app/extension whose fields were used for custom columns was uninstalled.

2.12.0 (2022-08-22)

- New setting **Use Region-Independent Datasets** which allows one to specify whether the region-dependent XML BC report dataset should be converted to a region-independent format. The standard XML dataset is generated based on the region of the user, which could lead to errors when being parsed by third-party extensions/integrations. This feature resolves this bug in BC by converting the XML dataset in a preprocessing step. (Experimental feature)

- Updated the **Document Creator Setup Wizard** to allow for both Apportunix Subscription and Product Key (legacy) activation.
- Fixed minor bug on **Document Creator Setup** bug which would show a notification that the product is not activated when Document Creator is activated with a product key instead of a subscription.

2.10.0 (2022-08-09)

Requires Business Central 20.2

- Fixed **Run Report** action on **Document Creator User-Defined Report Layouts** page (not working when report selection is absent).

- Use the layout specified for the run of a report in the `ObjectPayLoad` parameter of the new **OnCustomDocumentMergerEx** event. If there are multiple report layouts with the same name, then a notification will be shown to the user (known limitation/bug: #18941).

- If the `HttpClient` used in the `Check License` action fails, then show a detailed error message.

- Check for PDF Merges when the "Owner Password" or "User Password" settings are used.

- Abort PDF Merge if the `DocStream` provided by BC is empty.

2.6.0 (2022-06-27)

Requires Business Central 20.1

- Added support for license activation through the "Apportunix Subscriptions" page. You can now create a subscription for Document Creator directly from within Business Central, using the "Create Subscription" action on the "Apportunix Subscriptions" page. It is possible to activate the product with a product key as well (legacy).

- The **Apportunix Report Selection** page has new options:

  a. There is a new **Email Body Layout Name** field which allows you to select a **Document Creator** or Word layout to use as the e-mail body for the report selection. You can use the drill-down of this field to open up the lookup for the configured report and select a different layout to use for the e-mail body. The **Use for Email Body** field will automatically be checked if you select an email body layout.

  b. There is a new Layout Name field which allows you to select a different report layout to use specifically for when the report is printed via this report selection record. Note that you could use this if you would like to use the same report for different report selection records, but with different report layouts. The Reset Layout action allows you to clear the selected layout.

  c. The Use for Email Attachment field is available on this page.

  d. There is a new Business Rel. Layout Selections action which opens a new page for the selected usage that allows you to view and edit specific report selections for business relations.

- New **Business Relation Layout Selections** page

a. In this page you have an overview of all business relations that have custom report/layout selections for a specific usage! (In the screenshot you see the custom sales order selections.) Normally you would need to first navigate to the customer/vendor card to view the selections per customer.

b. This page has a **Copy from Report Selection** action to easily copy the 'main' settings to the selected record.

c. You can specify an **Email Body Layout Name** and **Layout Name** for this customer/vendor specifically. You can also select **Document Creator** layouts for both of these, just like on the **Apportunix Report Selection** page.

- Fixed weird behaviour of the **Apportunix Report Selection** page setting focus on the last record when the page is refreshed or saved.

- Fixed issue with "App ID" being copied to "Layout Settings" records of user-defined report layouts when using the **Copy Layout** action.

- Fixed bug that Attach as PDF (e.g., on Sales Order page) was not working for Document Creator layouts.

- Added **New Layout...** action to the **Report Layouts** and **Document Creator User-Defined Report Layouts** page, which replaces the **New Blank Layout...** action. This action first prompts you whether you want to create a new blank layout or base your new layout on an existing built-in/extension-provided report layout. By default, it opens with **Copy from built-in layout** selected.
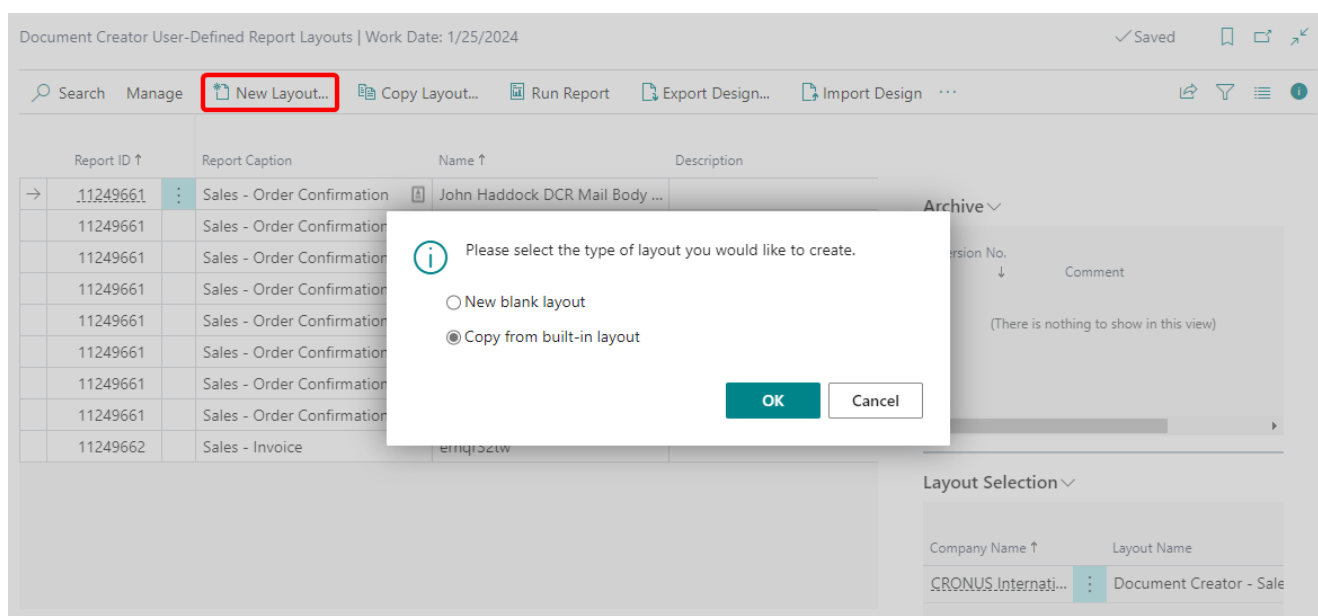
- Added support for new export settings:

  - PDF:

    - PDF Compliance, new option: "PDF/A-2u"

  - Word:

    - Disable Section Break in Document (Default: false)

  - Excel:

    - Print Scale (Default: 10)

    - Pinned Cells in X Ordinate (Default: 0)

    - Pinned Cells in Y Ordinate (Default: 0)

    - Use Preset Print Scale (Default: true)

    - Show Gridlines (Default: true)

    - Group on Separate Sheet (Default: false)

- Added "License Active" field to the **Document Creator Setup** page (with drill-down to the "Apportunix Subscriptions" page)

- Fixed bug in reports for retrieving service costs with code longer than 10 characters.

2.4.0 (2022-05-03)

- Changed conversion of custom report layouts to tenant report layouts so that converted report layouts can be used in **all** companies. If you run the conversion now, the resulting tenant report layouts can be used in all companies, so you do not need a company-specific copy for each company.

- Added new page **Document Creator User-Defined Report Layouts** which shows all Document Creator tenant report layouts with all relevant fields, factboxes and actions.

  - Note that some actions are only enabled for report layouts that are not company-specific and/or for the current company. For example, the **Run Report** action can only be used if the report layout is loaded by Business Central for the current company.

- Added new **Make Available to All Companies** action to the **Document Creator User-Defined Report Layouts** page which allows you to update selected report layouts from being company-specific to being usable in all companies. You can use this action while having multiple layouts selected that are company-specific.

- Added **Company Name** field to the **Report Layouts** page, so that you can see whether a report layout is specific to a company.

- Raise an error/skip custom report layouts for processing-only reports in the conversion procedure.

2.2.0 (2022-04-28)

- Added `AdditionalSearchTerms` to "Report Layouts" page due to inconsistent translation of "Report Layouts" in Microsoft Dynamics 365 Business Central.

- Added missing translation of the `General` tab on the "Document Creator Export Profile" page.

- Added new event `wDCR_Setup.wlEvpOnBeforeGetUserLocaleID` to hook into determining the locale for the session running the report.

- Disabled automatic data upgrade of custom report layouts to tenant report layouts due to absent tracing for upgrade codeunits in Business Central.

2.0.0 (2022-03-25)

Requires Business Central 20.0

- Major release compatible with the major revisions to reporting in the Microsoft Dynamics 365 Business Central 2022 release wave 1 release (April 1st, 2022, version 20.0)

  - All features are now available on the new **Report Layouts** page.

- Document Creator report layouts have "Layout Format" `External` and "MIME Type" `reportlayout/dcrx` .

- **"New Blank Layout"** and **"Copy Layout"** actions added.

- Layout packages support the new system report layout tables, but also allow export **and** import to/from older BC/Document Creator versions.

- Conversion from Custom Report Layouts to Tenant Report Layouts (manually from the Custom Report Layouts page *and* automatically when upgrading from a previous version of Document Creator)

- Legacy features hidden by default, can be made visible again with setting `Show Legacy Controls` on the Document Creator Setup, but note that these are useless as the platform does not support the old events

anymore unless the `EnableReportLegacyWordRender` setting is enabled on the BC server instance (which is only possible in an on-premise installation)

- Updated permission sets

- Updated translations of the Document Creator app

- Updated manual

- Included **document report objects** in the Document Creator app including built-in/extension-provided, default (Document Creator) layouts.

- Added the **Apportunix Report Selection** page, which allows you to manage all report selections in a single page.
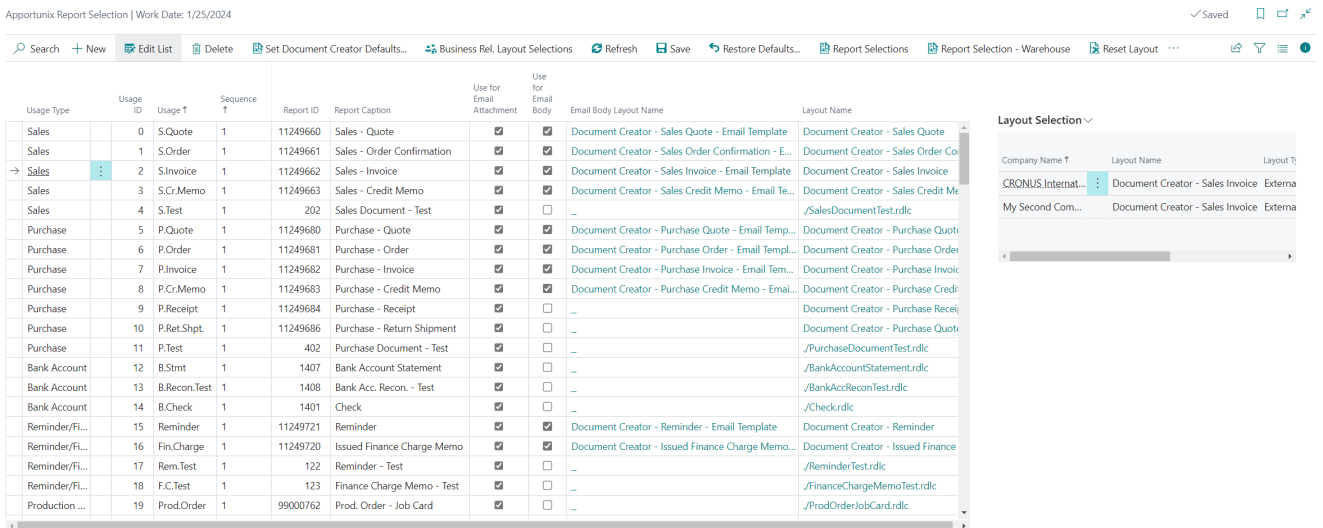
- Added the **Layout Selection** factbox page that allows you to view which layout is used for each company for the target report of the currently selected record.

- Added **Report Settings** for the Document Creator reports.

Reports

Default Date Text For... · [4: April 5, 2021 | <Month Text ⌄]

Default Date Text Format

Specifies the default format to use to format dates in reports as text. This format will also be used for date columns added via Document Creator Dataset Extensions.

Learn more

Report Settings		Manage				↗ ⊡
	Report ID ↑	Report Caption	Date Text Format			Load Item Pictures
→	11249662	⋮	Sales - Invoice	7: 5. Apr 2021	<Day,2><Filler Character, >. <Month Text,3> <Year4>	☑

- Added Report Substitutions feature that allows one to replace one report with another, for document types that do not have a document report selection available.

Report Substitutions		Manage				↗ ⊡
	Report ID (Original) ↑	Report Caption (Original)	Report ID (Replacement)	Report Caption (Replacement)
→	5936	⋮	Service Item Worksheet	11249706	Service Item Worksheet

1.44.0 (2022-02-18)

Requires Business Central 19.1

- Added support for **company-specific PDF merges** (e.g., stationeries, attachments per company)

- Added **Include Individual Layout Files** setting to the **Document Creator Setup** page. When enabled exported layout packages will also include the individual `.dcrx` Document Creator layout files in the archive. (Disabled by default)

- Added confirmation dialog for overwriting dataset extension on import.

- Different default file name for dataset extension XML export if only 1 dataset extension is selected (include report ID + caption).

- Resolved infinite recursion if node name in dataset extension was empty (which could only happen through an (erronous) export/import).

- Skip dataset extensions in export/import if essential fields are missing.

- Generate different default file name for Layout Packages if only 1 report layout is selected (include report ID + caption).

- Added **Document Creator Setup Wizard** to search.

- Added **Open Setup Wizard** action to the **Document Creator Setup** page.

- Changed image for the **Download Designer** action.

- Fixed video link in Assisted Setup to use an *embed* video link.

1.42.0 (2022-01-14)

- Added **Export Dataset...** action to all Dataset Extensions pages to generate a report dataset and export it to an XML file.
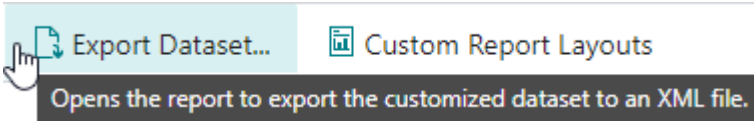
- Added a **Custom Report Layouts** action to Custom Columns/Labels/Data Items pages to view or edit the Document Creator layouts for the report.

- Added an **Enum Inspector** action to the Dataset Extensions "Filter Set" page to lookup members for enum table fields and view their ordinals, names and captions.

i. Invoke the **Enum Inspector** action:
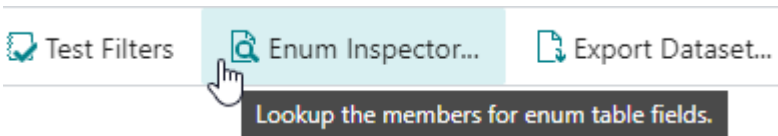
ii. Select the enum table field for which you want to view the members and choose **OK**.


iii. The members of the enum will be shown in a list page.
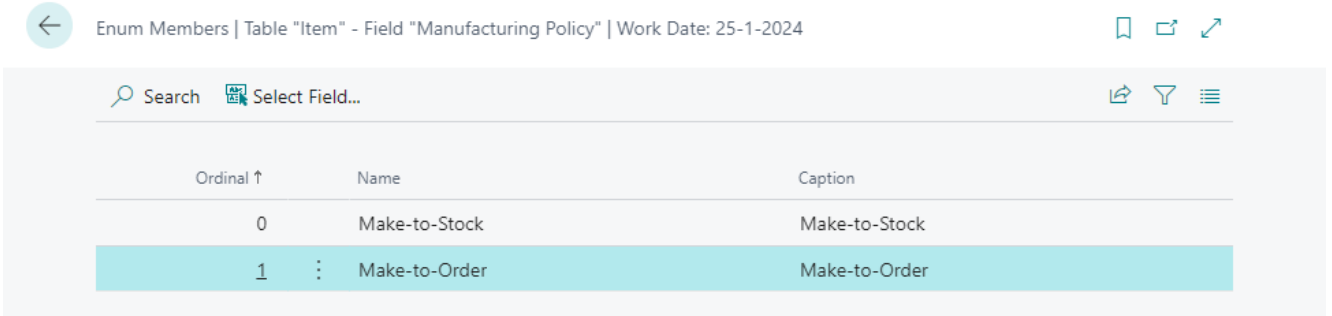
- Added **Run Report** action to the Document Creator Report Dataset Extensions page.

- Added an **Export Profile** action to the Custom Report Layouts page.

- Set `Scope = Repeater` for various page actions.

- Fixed issue in Dataset Extension feature where a thousands separator was used for decimals which is not handled well for some user regions.

- Fix: Made sure that the PDF Merge feature also works in combination with the "Document Creator On-Premise" app.

1.40.0 (2022-01-11)

- New feature: Use PDF files as stationeries or append PDF files to your document report PDF outputs.
  - Note that PDF merges incur additional time and usage costs for report generation.
  - See PDF Merges for more information.
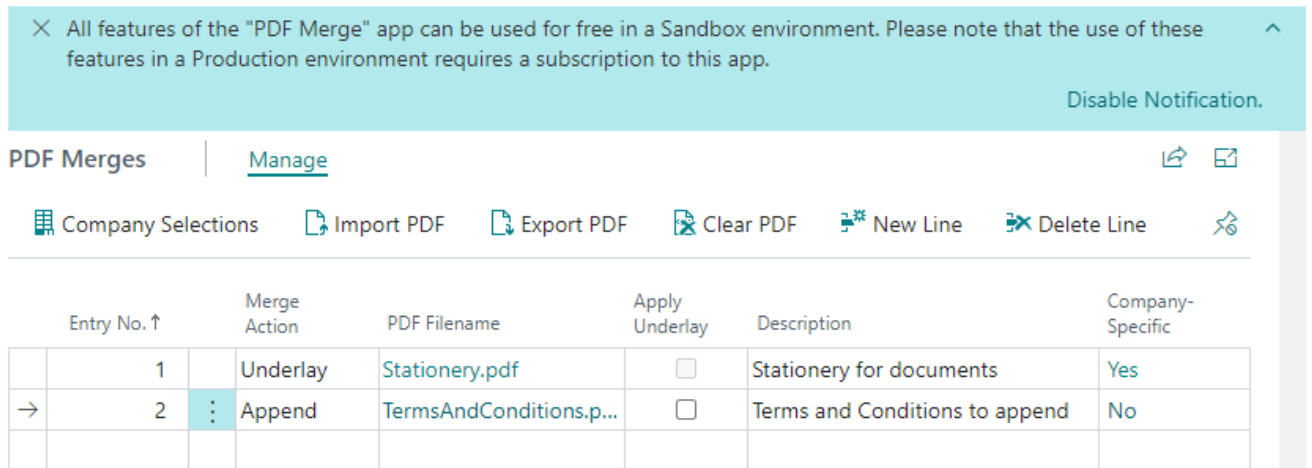
- Fixed issue in Dataset Extension feature caused by passing decimals in XML format rather than passing them in the (incorrect) format that Microsoft Dynamics 365 Business Central adheres to (i.e., dependent on user culture/region) that is not in line with the XML standards.

- Added "Document Creator Layouts" page view to the Custom Report Layouts page.

• Added Document Creator pages to the Apportunix rolecenter.

• Added tiles to the Apportunix rolecenter.

• Added in-app guided tour for the Dataset Extensions "Filter Set" page.

- Use new AL-defined permission set `WSB_DCR` (with automatic data upgrade/migration).

WSB_DCR	Apportunix Document Creator
WSB_DI	Apportunix Deposit Items
WSB_MON	Apportunix Monet
WSB_PDF	Apportunix PDF Merge
WSB_SYS	Apportunix System Library

- Updated code for Dynamics 365 Business Central 2021 wave 2 (e.g., resolved deprecation warnings).
  - The app now takes a dependency on the "System Library", "Monet" and "PDF Merge" app to offer the newly added features.

1.36.0 (2021-11-18)

- Added parameter `pCduTempBlobOutputDoc: Codeunit "Temp Blob"` to event `wgEvpReportExecution_OnAfterSendReportRequest` that allows one to get the output document from Document Creator.

1.34.0 (2021-11-03)

- Added various new event publishers to the app to hook into report execution (found in codeunit `wDCR_Publishers`).
- Added various new event publishers to customize file names, hook into the custom report layout archive functions and fast report layout selection.
- Marked various objects and procedures with `ObsoleteState=Pending` .

1.30.0 (2021-08-23)

- New feature: Linking custom data items/columns to other custom columns in report dataset extensions. You can now go multiple levels deep with adding new columns and data items, now allowing you to include custom columns in filters.
- Shifted Document Creator Report Dataset Extensions to `DataPerCompany=false` . An upgrade option is available from a notification in the role center and the Document Creator Report Dataset Extensions page.
- Added **Assisted Setup** entry with Document Creator Setup Wizard.
- Added field **"Custom Node Count"** to Filter Sets to allow you to check the number of custom nodes the filter set is being used by.
- Added **"Test Filters"** action that checks if your filters are incomplete or otherwise invalid. This same check is now also performed when reports are run, and if any errors are detected in the filters, then report execution will be aborted.
- Implemented **Restrictions** in filter sets.
- It is now possible to **Cast** boolean-, date- and option-/enum-fields for custom columns to different datatypes, e.g., use the caption of an option/enum or its numeric (integer) value. The translation for the column is based on the language specified through the **"Language Code"** column (which applies to all custom columns of the data item).
- The lookup for a filter's "Value Column" is now filtered on data type (by default).
- Fix for "Export Design" (without data) not working when dataset extensions exist for the report.
- Added **"Remove Missing Datasources"** setup field, to specify whether datasources and their relations should be removed automatically when the corresponding data items are removed from the report (Default: true).
- Updated XmlPort for importing/exporting translations to allow for `note` and `context` tags in trans-units.
- Updated telemetry for full + device user count.

1.28.0 (2021-05-14)

- New feature: Export / Import Document Creator translations to/from XLIFF translation files.
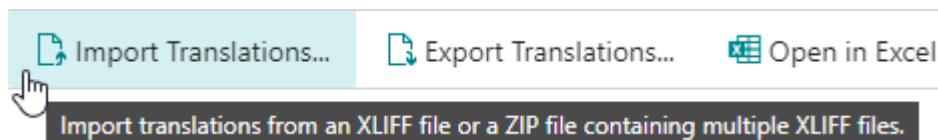
- Fixes for Document Creator Report Dataset Extensions features:

    - Blob fields should be calculated.

    - Boolean fields should be formatted in XML format.

- Apportunix logo

1.26.0 (2021-03-22)

- New feature: **Document Creator Report Dataset Extensions**!

  Add your own columns, translatable labels and data items to reports from within your Business Central client without any report(extension) development!

  For more information, see: Dataset Extensions

- Changed permission set description to "Apportunix Document Creator".

1.24.0 (2021-02-01)

Requires Business Central 16.2

- The Document Creator Setup now includes a new **Fall Back on Default Language** setting. When this setting is enabled, Document Creator will fall back on the translation for the configured default language code if a translation for a language could not be found.

- The **Export Design** action now remembers report request page settings.

- The Document Creator extension can now also be used in Sandbox Docker containers without a product key.

- The Document Creator app now has a transparent logo.

- Fix: Show warning about Translation Update Usage setting only once.

1.20.0 (2020-08-28)

- Rebranding to Apportunix

- Enable Cloud Printers

1.18.0 (2020-05-28)

- Added new Document Creator Export Profile settings:

    - PDF - New PDF-Compliance option: PDF/A-1a

    - Word - Print Optimized; Do not expand shift return

    - Excel - Print Optimized; Split Pages; Font Scale; Print Scaling

1.16.0 (2020-03-23)

- 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.

Last update: August 22, 2023

Installation & User Manual

Document Creator On-Premise

1.50.0 (2023-08-22)

- Updated to control add-in version 1.41.0.0 which resolves miscellaneous small issues, including:
  - Enabled SVG Object for .NET 6.0 control add-in
  - Enforce new RichText rendering implementation
  - Updated RichTextObject exception handling
  - Fixed issues caused by potentially missing codepages
  - Adjusted logic for fall-back fonts

1.48.0 (2023-06-16)

- Added option to install the control add-in in the `Service/Add-Ins` platform folder.

1.46.0 (2023-06-09)

Requires Business Central 22.0

- Updated control add-in engine to 1.40.0.0
- Updated RDLC Layout Conversion page to also select and convert layouts from the "Report Layouts" page and not only the built-in RDLC layout of a report object.
- Miscellaneous code clean-up and additional XML documentation.

1.44.0 (2023-03-08)

- Resolved incompatibility with "Document Creator" version 2.36.0.0.

1.42.0 (2022-08-09)

Requires Business Central 21.0

- Implemented grace period for failing online license check; Online license check only once a day.
- Adjustments to RDLC Layout Converter for BC 20 (convert to new Tenant Report Layout table records)
- Adjustments for direct printing on BC 20.2 and up (get printer name from `ObjectPayLoad` parameter supplied by `OnCustomDocumentMergerEx` event)

1.40.0 (2022-02-18)

Requires Business Central 19.1

- Dataset extensions are also applied for direct printing.

1.38.0 (2022-01-14)

Requires Business Central 19.0

- Added "Export Design" action to RDLC Report Layout Conversion page.
- Added add-in installation notification to the Custom Report Layouts page as well.
- Moved to permission set extension for `WSB_DCR` AL-defined permission set.
- Apportunix rolecenter extensions:
    - "Document Creator Redirect Printer List"
    - "RDLC Report Layout Conversion"

1.36.0 (2021-11-18)

- Added new event `wgEvpReportExecutionOnPrem_OnBeforeHandlePrintReport` to "Document Creator On-Premise" to hook into direct printing.
- Updated permission set for "Document Creator On-Premise"
- Updated message for failed license check for "Document Creator On-Premise"

1.34.0 (2021-11-03)

- Change how Database Name is retrieved for on-premise to address issue with importing/exporting layout packages when working with an AzureSQL server database.
- Fixed online license check for on-premise installations.

1.32.0 (2021-10-11)

- New enhancement/feature for on-premise direct printing: **Redirect Printers**

1.30.0 (2021-08-23)

- A notification is displayed if the Document Creator Control Add-In still needs to be installed. You can invoke the installation from the notification.

1.24.0 (2021-02-01)

Requires Business Central 16.2

- The columns in the dataset (e.g., Date-columns) use the culture that corresponds with the user's region that is configured in his/her Business Central settings. When a report is generated we are now passing this data culture along.
- The way fields are formatted (e.g., using "," vs. ".") on layouts is determined by the culture of the server. The **Format Locale** setting is now also available/visible and used for On-Premise so this can also be set to a different culture without changing the server's culture settings.
- Fix: "E-mail Product Updates" not sent to the API in Document Creator On-Premise for BC15 and up.

1.20.0 (2020-08-28)

- Rebranding to Apportunix
- Enable On-Premise Direct Printing
- On-premise demo version: Do not show BC license mismatch warning

1.16.0 (2020-03-23)

- License check now also reports mismatch of the active and licensed BC Serial No.

1.12.0 (2020-02-14)

- Show a notification to on-premise users to inform about the requirement to install the additional "Document Creator On-Premise" extension for on-premise usage.

1.8.0 (2019-11-28)

- Initial public release.

Last update: August 21, 2023

Report Engine and Designer

1.39.4 (2023-08-22)

- Enforce new RichText rendering implementation

- Updated RichTextObject exception handling

- Fixed issues caused by potentially missing codepages

- Adjusted logic for fall-back fonts

- Restored **Export Layout As...** file menu option (to store the layout of a design file as a new *Document Creator layout file (.dcrx)*)

1.39.0 (2023-04-11)

- Fixed issue with base engine font caching implementation which could lead to a concurrency issue

1.37.0 (2023-03-27)

- Added a Report Validation Feature which will display errors and warnings in the "Validation" window, which help users to easily find and avoid errors and omissions in their report layouts:
  - The warnings that may be shown cover undesirable object configurations that may cause graphical errors when exported or previewed, such as intersecting objects, objects that are outside the parent object's boundaries and objects with zero height and width.
  - The errors that may be shown cover erronous object configurations that will lead to errors when exported or previewed, such as missing/empty object names or conflicting object names.
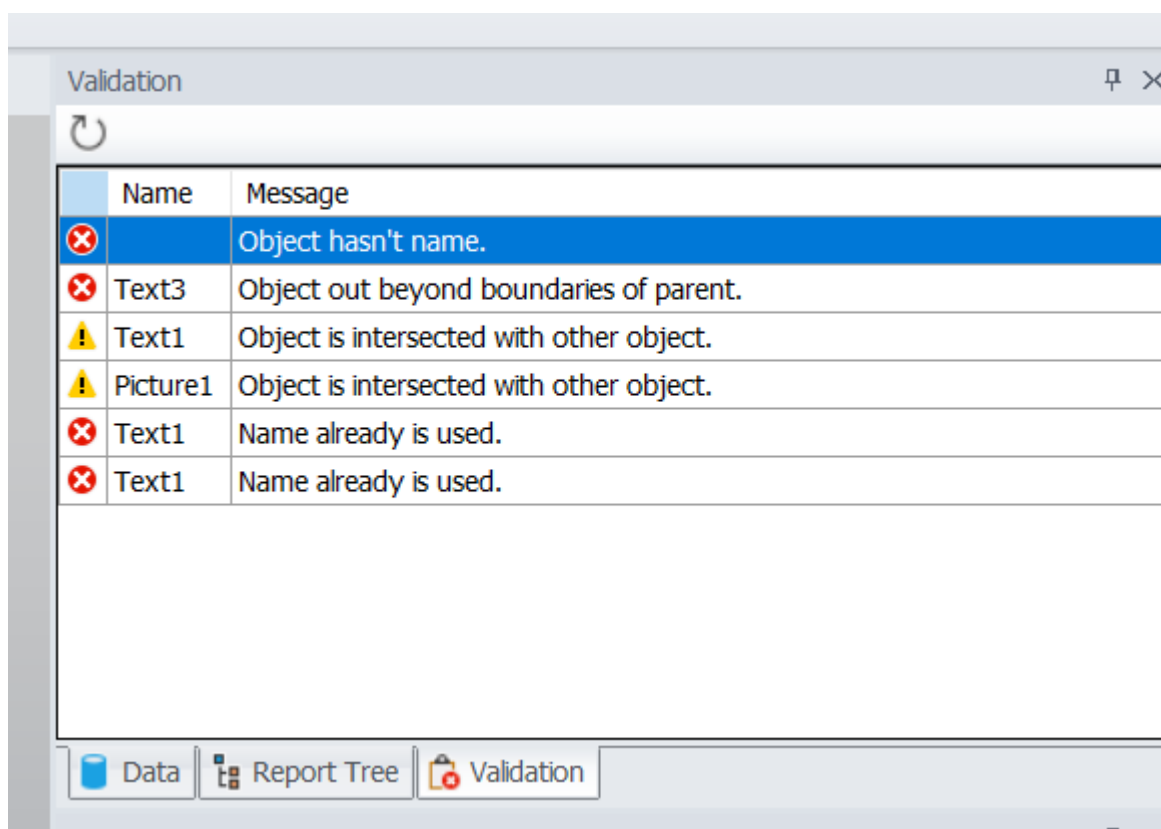
- Added a **Layout XML** editor tab, which allows advanced users to directly view and edit the XML contents of a report layout in the designer. This editor tab is hidden by default, but can be enabled via **View** | **Options** | **Layout XML page** using the **Enable** setting.

- The built-in `Format` functions in the designer now respect the "Format Locale".

- Improvements to the advanced HTML renderer (**TextRenderType** = **HtmlAdvanced**)

    - Fixed render issue where letters would overlap because of a caching bug.

    - Fixed bug where linebreaks (`<br/>`) would be positioned incorrectly.

    - Center paragraph (`<p>`) auto-margin, instead of bottom-only.

    - Fixed bug where **CanGrow** would be miscalculated.

- Made the Text Editor form a bit larger by default.

- Updated base report engine and designer (2023.1.8)

1.35.0 (2022-12-19)

- Automatically expand Data Sources tree in the Text editor form (on first start).

- Preserve data view search after report layout is modified.

- Fixed "Parameter not found" message after editing **Style** of TextObject.

- Fixed "IndexOutOfRangeException" bug that occurs with certain fonts (e.g., Segoe UI, Bolds + Italics).

- Fixed issue with font cache.

- Ensure that the data culture is used when the **Format** property is set to **General**.

1.34.0 (2022-08-11)

- Omit `background-color` css-attribute for transparent elements in HTML-export.
- Append `/production` to username send to API from designer for on-premise designer activation.

1.33.0 (2022-06-28)

- Fixed bug with expressions caused by `PageNumberInfo` class not marked Serializable

1.32.0 (2022-06-27)

- Added support for activation/authentication with the API via an Apportunix account, next to Product key authentication.
- You can now activate the designer with an Apportunix account. (Credentials are stored in the Windows Credential Manager.)
- Added `MoveCssInline` option to the HTML API for better support of e-mail bodies.
- When you export a layout file (`.dcrx`) from the designer, while working from a design file (`.dcrd`), the suggested file name will be based on the design file name.
- Updated base report engine and designer:
  - Added new "Visual Studio" styled icons. You can switch between icon packs in the "View | Options | User Interface" tab (or, "File/Options/User Interface" if you use ribbon UI). The new icons are well suited for HiDPI screens.
  - New option to search in the **Data** window.
  - Added new "Expand All" and "Collapse All" options in the **Data** window.
  - Added "AutoWidth" property to the Basic properties
  - Added "ShiftMode" property to the Basic properties
  - New "Backlight intersecting objects" setting
  - New "Simplified display of DB fields" setting.
  - New "Advanced Matrix" object type.
  - New "Container" object type.
  - New property: PictureObject.ImageSourceExpression, which allows to set an expression that contains the image.
  - New property: PictureObject.ImageFormat, which allows to select the image storage format.
  - New property: ReportPage.ExportAlias, which allows to set the page name when exporting to Excel.

- New barcode types:

    - ITF-14

    - Deutsche Post Identcode

    - Deutsche Post Leitcode

    - SberBank QR code

    - Japanese Post 4 - State Code

    - GS1 DataBar Omnidirectional

    - GS1 DataBar Limited

    - GS1 DataBar Stacked Omnidirectional

    - GS1 Databar Stacked

- The algorithm for converting RTF to report objects has been significantly improved.

- Added HiDPI support.

- Added the ability to add pictures or text by dragging and dropping from a browser

- New PDF/A-2u export-format

- New "Pinned Cells" option for Excel-exports.

- Fixed a bug where the designer crashes when the "StartNewPage" property is enabled for a PageHeader child band.

- Product keys containing whitespace are now rejected by the API

1.31.0 (2022-04-05)

- Added support for HTML-exports to the API

- Improved report rendering error messages by including the expression text in the message.

- The `VisibleExpression` property is hidden for `ReportPage` objects in the designer.

- Uprade to ASP.NET 6 and EF6

1.30.0 (2021-11-16)

- On-Premise: By default use the default printer settings instead of the printer settings as defined in the layout.

1.29.0 (2021-07-28)

- Automatically remove missing datasources by default

- Make file-access errors more user-friendly

- Show Design File Name in the window title bar

- Data View Form: Subscribe to SizeChanged event at the end of the constructor to prevent potential resize issue.

1.28.0 (2021-05-14)

- Apportunix Logo

1.27.0 (2021-03-22)

- Document Creator Design (.dcrd) files are updated immediately after the user hits 'Save' (Save button, or `^ Ctrl` + `s`).

1.26.0 (2021-02-26)

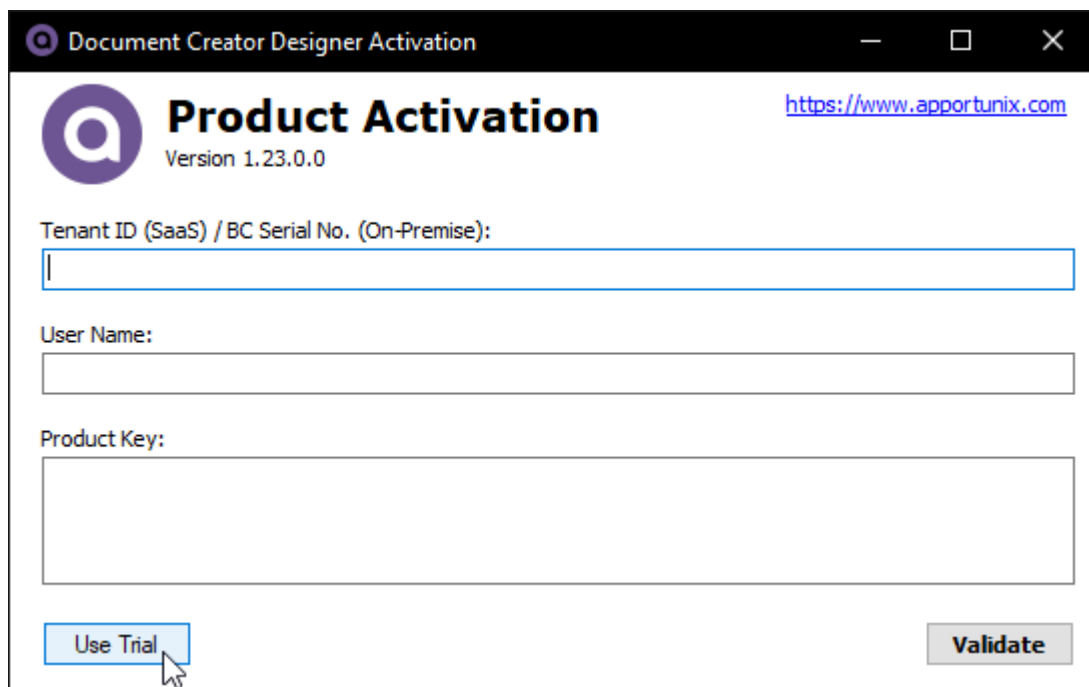- Time out has been increased to 60 seconds.

1.25.0 (2021-02-15)

- Data Culture and Formatting Culture added as properties for On-Premise.

1.24.0 (2021-02-11)

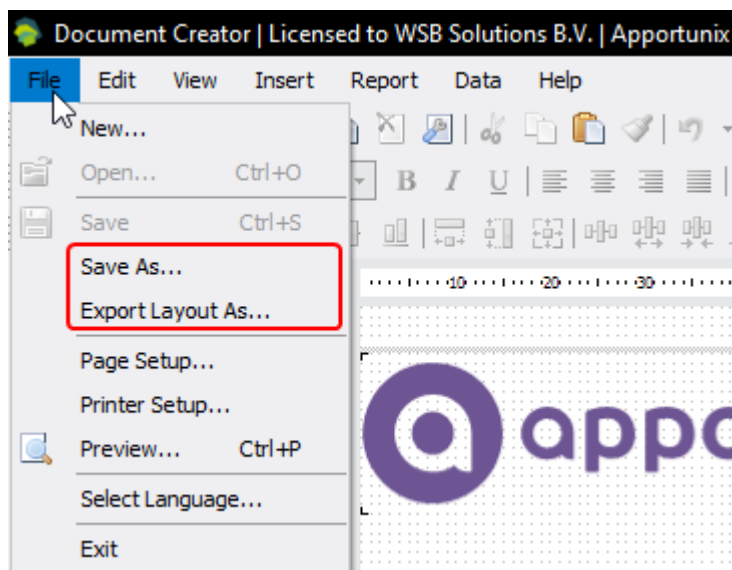- Rebranding to Apportunix.

1.23.0 (2021-01-14)

- The standalone designer now has the option to start a free (14-day) trial:

1.22.0 (2020-12-11)

- The standalone designer now offers the following two commands:

  - **Save As...** - Save the design file (.dcrd) to a different location.

  - **Export Layout As...** - Save the layout file, as .dcrx (default) or .frx file, to a different location.

- Cosmetic fix: The open file dialog now shows `*.dcrd` as the default file name.

- The 'Watermark' class is marked as Serializable to prevent issues when it is used in codebehind.

1.20.0 (2020-08-28)

- Updated base report engine to 2020.3.0
- Fixed issue with changing color of object via dropdown

1.19.0 (2020-06-04)

- Fixed issue with VisibleExpression not always working due to serialization issue (SaaS)

1.18.0 (2020-05-28)

- Updated base report engine to 2020.2.13
- Support for new PDF/Word/Excel export-settings

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).

Last update: August 22, 2023