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In the previous blog post, I shared how to speed up your Classic to RDLC reports transformation by using the FREE Express version of iClickFactory's Classic to RDLC report transformation tool. In this post I will use the same example, show how you can easily create a word layout from RDLC, also how to get a report with both RDLC and Word layouts. **Step #1: Create Word layout** We will create a Word layout by running the report and saving its result to Word. Run report 5055 Contact - Cover Sheet from NAV development environment. Choose to print it to Word. Now copy the contents from the first page and paste it into the Word layout. Select contents in the first page. Now go back to NAV 2015 development environment and open the design of report 5055. Go to report properties and set WordMergeDataItem to Contact. This part is very important to do before inserting the new Word layout. From the tools menu, choose Word Layout > New. After the blank Word layout is inserted in report object, choose Tools > Word Layout > Export, and enter the file name where it should be exported. Open the exported file in Word, and paste the layout from the earlier Word file. Paste the content from the earlier Word document's first page. Open the XML mapping window. Choose dataset namespace in Custom XML Part. Replace the text with contact controls. Save the Word file, and test how it looks when used in Word Layout. **Step #2: Test Word Layout From NAV 2015 report design**, choose Tools > Word Layout > Import, and select the saved Word document. Save the report and run it from the development environment. Press Preview on the request page. Notice the Word message that pops up. A Happy Ending In these two blog posts, we shared an example of how to upgrade a Classic report to NAV 2015 for free and with a functioning RDLC layout. By running the RDLC report and saving to Word, we were able to create a Word template for the report's Word layout design. We then replaced text with content controls and ended up with a report with both RDLC and Word layouts. Now end users can tweak the design of the report in their favorite program: Word. Good luck in your transformation journey! Author of the post: iClickFactory Associate Paulius Grigas. Before we get into design of reports in Microsoft Dynamics NAV 2013 and Microsoft Dynamics NAV 2013 R2, its important to understand what's required. Apart from access to NAV development environment and developer's license, the following are required: >>->To Design reports in Microsoft Dynamics NAV 2013 we require Microsoft Visual Studio 2010 SP1 Professional, Premium, or Ultimate. >>->To Design reports in Microsoft Dynamics NAV 2013 R2 we need to use: Microsoft Visual Studio 2012/2013 Professional, Premium, or Ultimate edition (Microsoft Visual Studio 2013 is only supported if Microsoft Dynamics NAV is updated according to Knowledge Base article 2907585.) OR Microsoft SQL Server Report Builder for Microsoft SQL Server 2012/2012 Sp1 or Microsoft SQL Server 2008 R2 Report Builder 3.0 (Microsoft Dynamics NAV 2013 R2 Setup installs Microsoft SQL Server Report Builder for Microsoft SQL Server 2012 if it is not already installed on the target computer.) In NAV 2013 R2, you can choose to design or modify the report layout using Visual studio or SQL Server Report Builder. You can switch between these 2 designers by going to development environment-> Tools-> Options->Use Report Builder(Yes or No) please note : The Visual Studio Report Designer provides design functionality that SQL Server Report Builder does not support. For example, in Report Builder, you do not have a document outline view. Also, fields that you add to the table in the development environment are not added automatically to the report dataset in Report Builder. Report Builder functionality that requires access to a SQL Server Reporting Services server is not supported. This includes running the report from Report Builder, and adding Report Parts. I have referred to multiple videos from Microsoft's channel on YouTube in this post. It showcases how we can build reports in NAV using Visual studio from scratch. Simple List Report in Microsoft Dynamics NAV 2013 The first video in this section shows how easy it is to build a simple Customers list report in Microsoft Dynamics NAV 2013 with page header, page footer, image etc., from scratch. This is a great video for the beginners. The output of the report is shown in the below image: Customers List Report This video explains How to: Build a simple list report in Microsoft Dynamics NAV 2013 using Visual studio 2010. You can try this report in NAV 2013 R2 with Visual studio 2012/2013 as well: Grouping Data in reports: The next video shows how the above report (customers list) can be grouped country wise. It also shows how you can group data and add sub totals in reports. The output of the grouped report is shown in the below image: Customers list grouped on Country Group Do I: Group data in Microsoft Dynamics NAV 2013 Reports (You can try this report in NAV 2013 R2 with Visual studio 2012/2013 as well): Additional video on Grouping data in Microsoft Dynamics NAV 2013 R2. View Report Dataset One can view all the data being fetched from Dynamics NAV for a report. This can be seen using the "About this report" feature. How Do I: View My Report Dataset in Microsoft Dynamics NAV 2013 R2 Similar to above videos, there are many more useful NAV reporting videos available on YouTube channel and MSDN. I've listed most of them below: List of all How Do I videos on Dynamics NAV are available here In my next blog post under Dynamics NAV report design, I will explain how we can design NAV reports using SQL server report builder. By default, a report will have a built-in report layout, which can be either an RDLC report layout or Word report layout, or both. You cannot modify built-in layouts. However, you can create your own custom layouts that enable you to change the appearance of report when it is viewed, printed or saved. You can create multiple custom report layouts for the same report, and then switch the layout that is used by a report as needed.To create a custom layout, you can either make a copy of an existing custom layout or add a new custom layout, which in most cases is based on a built-in layout. When you add a new custom layout, you can choose to add an RDLC report layout type, Word report layout type, or both. The new custom layout will automatically be based on the built-in layout for the report if one is available. If there is no built-in layout for the type, then a new blank layout is created, which you will have to modify and design from scratch. For more information about RDLC and Word report layouts, built-in and custom layouts, and more, see About Report Layouts.In the Search box of the Microsoft Dynamics NAV Windows client or Microsoft Dynamics NAV Web client, enter Report Layout Selection, and then choose the related link.The Report Layout Selection window lists all the reports that are available in the company that is specified in the Company field at the top of the window. Set the Company field to the company in which you want to create the report layout.Select the row for the report that you want to create the layout for, and then on the Home tab, in the Process group, choose Custom Layouts.The Custom Report Layouts window appears and lists all the custom layouts that are available for the selected report. If you want to create a copy of an existing custom layout, select the existing custom layout in the list, and then on the Home tab, in the New group, choose Copy.The copy of the custom layout appears in the Custom Report Layouts window and has the words Copy of in the Description field.If you want to add a new custom layout that is based on a built-in layout, do the following:On the Home tab, in the New group, choose New.The Insert Built-in Layout for a Report window appears. The ID and Name fields are automatically filled in.To add a custom Word report layout type, then select the Insert Word Layout check box. To add a custom RDLC report layout type, then select the Insert RDLC Layout check box.Choose the OK button.The new custom layouts appear in the Custom Report Layouts window. If a new layout is based on a built-in layout, then it has the words Copy of a Built-in Layout in the Description field. If there was no built-in layout for the report, then the new layout has the words New Layout in the Description field, which indicates that custom layout is blank.By default, the Company Name field is blank, which means that the custom layout will be available for the report in all companies. To make the custom layout available in a specific company only, on the Home tab, in the Manage group, choose Edit, and then set the Company Name field to the company that you want.The custom layout has been created. You can now modify the custom layout as needed. For more information, see How to: Modify a Custom Report Layout. For information about how to make the custom layout the current layout for the report, see How to: Change Which Layout is Currently Used on a Report. A report dataset can consist of fields that display labels, data, and images. This topic describes the procedure for adding fields of a report dataset to an existing Word report layout for a report. You add fields by using the Word custom XML part for the report and adding content controls that map to the fields of the report dataset. Adding fields requires that you have some knowledge of the report's dataset so that you can identify the fields that you want to add to the layout. For more information about custom XML parts, see Custom XML Part Overview for Word Report Layouts.Note You can only add images that have a format that is supported by Word, such as .bmp, .jpeg, and .png file types. If you add an image that has a format that is not supported by Word, you will get an error when you run the report from Word. For more information, see How to: Modify a Custom Report Layout.Show the Developer tab in the ribbon of Microsoft Word.By default, the Developer tab is not shown in the ribbon. For more information, see How to: Show the Developer Tab on the Ribbon.On the Developer tab, choose XML Mapping Pane.In the XML Mapping pane, in the Custom XML Part dropdown list, choose the custom XML part for Microsoft Dynamics NAV report, which is typically last in the list. The name of the custom XML part has the following format:urn-microsoft-dynamics-nav/reports/report_name/IDreport_name is the name that is assigned to the report as specified by the report's Name Property in the Microsoft Dynamics NAV Development Environment.ID is the identification number of the report.After you select the custom XML part, the XML Mapping pane displays the labels and field controls that are available for the report.Place your cursor in the document where you want to add the control.In the XML Mapping pane, right-click the control that you want to add, choose Insert Content Control, and then choose Plain Text.Note You cannot add a field by manually typing the dataset field name in the content control. You must use the XML Mapping pane to map the fields.In a table, add a table row that includes a column for each field that you want repeated.This row will act as a placeholder for the repeating fields.Select the entire row.In the XML Mapping pane, right-click the control that corresponds to the report data item that contains the fields that you want repeated, choose Insert Content Control, and then choose Repeating.Add the repeating fields to the row as follows: Place your pointer in a column.In the XML Mapping pane, right-click the control that you want to add, choose Insert Content Control, and then choose Plain Text.For each field, repeat steps a and b.A report dataset can include a field that contains an image, such as a company logo or a picture of an item. To add an image from the report dataset, you insert a Picture content control. Images align in the top-left corner of the content control and resize automatically in proportion to fit the boundary of the content control.Important You can only add images that have a format that is supported by Word, such as .bmp, .jpeg, and .png file types. If you add an image that has a format that is not supported by Word, you will get an error when you run the report from the Microsoft Dynamics NAV client.Place your pointer in the document where you want to add the control.In the XML Mapping pane, right-click the control that you want to add, choose Insert Content Control, and then choose Picture.To increase or decrease the image size, drag a sizing handle away from or towards the center of the content control. Tip For more information about how to work with fields and columns, see Work with Data. For more information about how to find specific pages, see Search. Open the MS Office Word. File -> New and type Invoice in search and press enter to list available Invoice Templates. In my example I am using [Sales Invoice (Blue Border Design)] Select Create to download the template and create a document for you. Your new document created from this template will look as below: Prepare the Layout by removing extralines as we will be using repeating lines for Lines. Save your Template. I have made a copy of Report 206 - Sales - Invoice on new ID say (50005 as Sales - Invoice Word). This report doesn't have Word Layout. We will be creating one Customized Layout form above saved Invoice above. [Sales Invoice (Blue Border Design)] Open Report Layout as shown in below Screen: Slect the Report and choose Custom Layout as shown in above screen. In Custom Report Layout Window Click on New. From window Insert Built-in Layout for Report Select Insert Window Layout and click OK button. From Custom Report Layout window Select Import Layout. Select your word file prepared above and Respond Open to Import. Then, press Edit Layout and prepare layout on Developer tab, find XML Mapping Pane and find your document in Custom XML Part. Now, you can find all fields from Dataset. Please see below links to complete your report: Adding image fields Add fields from a report dataset to a word report layout Creating my first word list report in Navision 2015 How to specify the default built in report layout Create a word report layout for a report Once you are done with your field assignment close the word layout. Select Yes to import changes to the report. Select Run Report to view the output of your report. Now you are done with your Custom Report Layout. Please see sections which will be more helpful to complete your task: Reports Company was incorporated under sub-section (2) of section 7 of Companies Act, 2013 and rule 18 the Companies (Incorporation) Rules, 2014. Company Directors are (1) Ashwini Tripathi & (2) Rashmi Tripathi We provide wide range of services currently only for Microsoft Dynamics Navision. (1) Freelancing (2) Virtual Employee (3) Hourly basis service (4) Dedicated resource (5) Training You can hire/ contract/ offshore work. Provide assistance and service for Implementation, Development and Upgrade. We are also Partner under Affiliate/MVAR Program for NAV, AX & CRM. Currently we are servicing to only international customers. We have associated with some Indian Companies to service International Customers. We have provided service to Microsoft Affiliated Partners too. We have our own customers too. View all posts by Ashwini Tripathi December 9, 2014Submitted by Tom MarshelloReading time: 5 minsIn every implementation of Microsoft Dynamics NAV (Navision) I have worked on, it has been requested that we change the way that the customer facing invoice looks. This is not an unusual request as every business is unique, so it is natural to want your invoice to look the way you want it to. Now, if you aren't adept at modifying the invoice report yourself (which is close to 100% of the time), then it requires a custom modification done by a NAV developer, which of course, adds cost to the project. Well, that is no longer the case! We can now rejoice and throw huge parties filled with decadent food and drink, full body massages, and presents worthy of a rock star, because Dynamics NAV 2015 has put the power of invoice editing into the general layman's hands! OK, so maybe it is not as exciting as I might portray it to be, but it really is very cool! NAV 2015 lets you take an existing report, modify it in Microsoft Word, and then use the new modified report. Pretty slick! Let's take a look at a very simple example of how to accomplish this. From the navigation pane, select Administration > IT Administration > Reports: Figure 1 - NAV 2015 Navigation Pane The first step is to create a new Custom Report Layout. Select Custom Report Layouts from the reports menu, and in the window that opens, press the New button in the top left corner: Figure 2 - Custom Report Layouts Window Select the report you wish to modify, choose to Insert the Word Layout, and press OK. In our example, we are going to modify Report 1306 - Sales - Invoice, which has an existing Word layout to modify. Note that if no Word Layout exists for that report, you will have to create one from scratch. Figure 3 - New Custom Report Layout Window After pressing OK, you will notice that a Custom Report Layout Line has been created. You can now specify which company you want the new layout to apply to. I have selected to use this layout in the CRONUS USA, Inc. company. The cool part about this is that you can create different layouts for different companies! Figure 4 - Custom Report Layout Line Before we edit the report layout, let's first take a look at what the sales invoice looks like in its current state: Figure 5 - Unedited, Boring Invoice Now it is time to edit it! From the Home ribbon of the Custom Report Layouts window, press Edit Layout. Figure 6 - Custom Reports Layout Window Since we specified that this is a Microsoft Word Layout, lo and behold, Microsoft Word magically opens! In Word, make the changes you desire. I have made the following blatantly obvious change to the invoice for our example: Figure 7 - Microsoft Word Window After making your changes, save the Word document and close it. Upon closing it, you will be prompted with the following dialog box. Answer Yes to import the layout: Figure 8 - Import Changes Dialog box Finally, we need to tell NAV to use the new report layout we created. From the Reports page, choose Report Layout Selection. In this window, find the report you created the layout for and change the Selected Layout to "Custom Layout." Figure 9 - Report Layout Selection Window This will open a list of the custom layouts you created for that report (remember there could be more than one). Select the one you want to use and then Press OK and OK again to close both windows. Let's now take a look at the edited invoice! Drum roll please.... Figure 10 - Awesome Edited Invoice So how does it feel to be an invoice editing rock star? Pretty good, right? I think that, like all rock stars, you deserve a drink (or five, as rock stars frequently indulge in)! And I can think of no better drink to recommend on this cold winter day than this tasty Hot Mulled Wine! I've made it, it's awesome...just like you! Read more "How To" blogs from ArcherPoint for practical advice on using Microsoft Dynamics NAV. After you design a dataset for a report, you can create a Word report layout that can be used when you view and print a report from the Microsoft Dynamics NAV client. This topic describes how to create blank a Word report layout on a report from the Microsoft Dynamics NAV Development Environment. After you create the layout, you can modify the layout to include dataset fields and define the general format.In the development environment, open the report in Report Dataset Designer as follows. On the Tools menu, choose Object Designer. In Object Designer, choose Report, select the report, and then choose the Design button.On the Tools menu, choose Word Layout, and then choose New, and then choose the OK button.Note If the New item is inactive, then the report already has a Word report layout.Save the report object.A blank Word report layout is created on the report object. The report layout includes a custom XML part for the current report dataset. You can now design the layout in Word. For more information, see How to: Modify a Word Report Layout.Designing Word Report Layouts In the development environment, open the report in Report Dataset Designer as follows. On the Tools menu, choose Object Designer. In Object Designer, choose Report, select the report, and then choose the Design button. On the Tools menu, choose Word Layout, and then choose New, and then choose the OK button. Save the report object. A blank Word report layout is created on the report object. The report layout includes a custom XML part for the current report dataset. You can now design the layout in Word. A Word report layout determines the content and format of a report when it is viewed and printed from the Microsoft Dynamics NAV client. When you modify a Word report layout, you specify the fields of the report dataset to include on report and how the fields are arranged. You also define the general format of the report, such as text font and size, margins, and background images. You will typically arrange the content of the report by adding tables to the layout. You insert dataset fields in the layout by using a custom XML part that is automatically generated for the report when you create the Word report layout.Filed under: Report Tagged: 2015, Create, Dynamics, Layout, Microsoft, MS, Nav, Navision, Report, Word From NAV 2015 and on it is possible to handle the report layout in word. Let's look how you do it in NAV 2016. First create a new report and add the needed dataitems. As an example, we want to create a customer list with addresses. Save report and we are ready for start adding the layout. First we have to create and empty layout (Tools -> Word Layout -> New) and afterwards export it (Tools -> Word Layout -> Export), so that we can edit it in word. Open the exported document in Word and you will see a blank page To be able to add the fields from Navision, you have to enable the Developer Tab (or Udvikler, since my Word is Danish). In the Developer Tab you then click on the XML Mapping Pane (XML_tilknytningsrude) and a sidebar will open. Here you choose the XML mapping that belongs to your report. (The name of the report is part of the mapping name) Now you can see your dataitems/fields defined in the report and can now add them to the report. A tip is to use a table, and then added the repeater (Customer) around it, then it will create one line per customer like in the good old reports.