Course Outline

80433-Reporting in Microsoft Dynamics NAV 2013

Duration: 2 days (12 hours)

OFFICIAL MICROSOFT CURRICULUM

Target Audience:

This course is intended to a partner that sells and implements the reporting module to customers. The typical partner has an ERP background and is strong in accounting principles.

Prerequisites:

Before attending this course, students must have:

- Basic understanding of what is new in Microsoft Dynamics NAV 2013.
- Basic understanding of development in Microsoft Dynamics NAV 2013 and Microsoft Visual Studio.

Topics Covered:

- Module 1: Creating Reports
    - Prerequisites
    - Anatomy of Reports
    - Creating the Dataset
    - Creating the Layout
    - Dataset Patterns
    - Report Properties
    - Building the Request Page
    - Sorting and Filtering
        - Lab : Creating a Table Report
            - Create the Report
        - Lab : Creating a Matrix Report
            - Build a Matrix Report
        - Lab : Adding a Chart
            - Adding a Chart to an RDLC Report Layout
        - Lab : Using a Gauge
            - Adding a Gauge Control to a Report

    After completing this module, students will be able to:

    - Describe the roles of reports and know the anatomy of a report.
    - Understand the way a report layout is designed and executed.
    - Know how frequently used report properties are implemented in Report Definition Language Client (RDLC) report layouts.

- Know how to build a request options page for the RDLC report layout.
- Describe the prerequisites for report development in Microsoft Dynamics NAV 2013.
- List the software prerequisites for report development.
- List the hardware prerequisites for report development.
- Explain where to find more information about Microsoft Visual Studio 2010.
- Describe the roles of reports and know the anatomy of a report.
- Explain the structure of reports in Visual Studio Report Designer.
- Understand the rules for flattening data.
- Understand the steps involved in creating a basic report.
- Explain how to include a label, variable and expression.
- Explain the creation of the layout of a report.
- Document the User Experience (UX) guidelines for reports in Microsoft Dynamics NAV 2013.
- Demonstrate how to view the dataset at runtime.
- Describe how to set page options, paper size.
- Understand the creation process for the dataset.
- Know how frequently used report properties are implemented in RDLC report layouts.
- Know what the request options page in a report is used for and how to build a request options page for the RDLC report layout.
- Learn how to implement sorting and filtering in Microsoft Dynamics NAV 2013 reports.

➢ Module 2: Interactive Features

- Working with Headers and Footers
- Grouping
- Using Images in a Report
- Print Preview and Print Layout
- Working with Visibility Options
- Interactive Sorting
- Working with Document Maps
- Creating a Multi Column Report
- Formatting Reports and Report Items
  - Lab : Adding Visibility Options
    - Adding Visibility Options to the Sales by Salesperson Report
  - Lab : Adding Interactive Sorting
    - Add Interactive Sorting for a Number of Fields
  - Lab : Adding a Document Map
    - Implement a Document Map in the Sales by Salesperson Report
  - Lab : Adding Pictures to a Report
    - Create an Item Catalog Report

After completing this module, students will be able to:

- Explain when to use headers and footers and how to add or delete a header or footer section.
- Explain the difference between Print Preview and Print Layout.
- Describe the visibility options for the reports and how to use them.

- Explain interactive sorting and how to implement it.
- Explain how document maps work and how to add them to a report.

- Module 3: Adding Code to a Report
  - Using Variables and C/AL Code in a Report
  - Working with Report Expressions
  - Understanding and Using Simple and Complex Expressions
  - Expression Examples
  - Anatomy of the Sales Invoice Report
    - Lab : Adding Conditional Formatting to a Report – Part ILab : Adding Conditional Formatting to a Report - Part IILab : Cleaning up the Report and Using the Company Logo from the Database

  After completing this module, students will be able to:
    - Explain how coding can be used in reports.
    - Work with expressions.
    - Learn how to use expressions.
    - Examine frequently used expressions.
    - Describe the components of the Sales Invoice report.

- Module 4: Design Considerations
  - Report Patterns and Recipes
  - Report Rendering Considerations
  - Pagination
  - Useful Information
    - Lab : Creating Green Bar Reports
    - Implement a Green Bar Effect.
    - Lab : Creating a Top X Report
      - Implement a Top X Dashboard

  After completing this module, students will be able to:
    - Apply green bar effects and create dashboard reports.
    - Understand how a report will be rendered when it is exported to an Excel spreadsheet or a PDF file.
    - Apply some helpful information that can be useful when you design reports.

- Module 5: Running Reports
  - The ReportViewer Control
  - Run a Report in Microsoft Dynamics NAV
  - Hyperlinks to Reports
  - Run a Report from a SharePoint Site
  - Hyperlinks in a Report
  - Run a Stand-Alone Report in Visual Studio
  - Interesting Links
    - Lab : Add a Report to the RoleTailored ClientLab : Call a Report from a Web Service

  After completing this module, students will be able to:
    - Use the features of the ReportViewer control.

LEBANON
Beirut, Sodeco Square
+961 1 611 111
info@formatech.com.lb

U.A.E
Dubai, Knowledge Village
+971 43695391
info@formatech.ae

- Describe how to run a report from the RoleTailored client.
- Examine how to add a report to a page and the Departments section.
- Examine how to create and run hyperlinks to reports at the command prompt, the Start menu, the Desktop and Microsoft Internet Explorer.
- Describe how to run a report from a SharePoint site.
- Describe how to create a hyperlink to a page.
- Describe how to create a hyperlink to a report.
- Review where to locate additional resources and information about reporting.
- Run a stand-alone report by using Visual Studio.

➢ Module 6: Upgrade Reports

- How to Upgrade a Report to Microsoft Dynamics NAV 2013
- Optimize the Dataset for the New Report Dataset Designer
- The Windows Page File
- Optimize the Layout for RDLC 2008
- Determining which Reports to Upgrade
  - Lab : Redesigning a Customer List Report
    - Importing and Upgrading the Report
    - Modifying the Customer List Report RDLC Layout
    - Add Captions and Labels to the Report
    - Saving the RDLC Report Layout
  - Lab : Redesigning a Customer – Order Summary Report
    - Importing and Upgrading the Report
    - Modifying the Customer - Order Summary Report RDLC Layout
    - Saving the RDLC Report Layout

After completing this module, students will be able to:

- Explain the report upgrade workflow for different report types.
- Implement report dataset optimization.
- Describe the upgrade process and flow of reports to the RoleTailored client.
- Explain how to use the dataset for the report dataset designer.
- Describe how to upgrade classic reports.
- Apply dataset optimization techniques in reports.
- Apply report design UX guidelines.
- Optimize performance.
- Build the request page.
- Import and upgrade a report that has only a Classic report layout to a Microsoft Dynamics NAV 2013 report that has an RDLC layout.
- Modify the RDLC layout.