

## (80433A) –Reporting in Microsoft Dynamics NAV 2013

### OBJECTIVE

This two-day course is designed for students who are preparing to create Role Tailored client reports in Microsoft Dynamics NAV. The course primarily provides explanation of the reporting features and the design of Role Tailored client reports in Microsoft Dynamics NAV 2013.

### COURSE TOPICS

#### 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

#### 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

#### 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

**Module 4: Design Considerations**

- Report Patterns and Recipes
- Report Rendering Considerations
- Pagination
- Useful Information

**Module 5: Running Reports**

- The Report Viewer 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

**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

After completing this course, 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.
- 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.
- 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.
- 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.
- Use the features of the Report Viewer control.
- Describe how to run a report from the Role Tailored 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.
- Explain the report upgrade workflow for different report types.

- Implement report dataset optimization.
- Describe the upgrade process and flow of reports to the Role Tailored 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.

## 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.

## TRAINING APPROACH

This course includes lectures, course notes, exercises and hands-on practice.

## COURSE DURATION

12 Hours (in 2 days)

## CERTIFICATION COMPLETION

A certificate of completion is provided for all trainees attending the course