

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

Document Creator includes an easy-to-use standalone report designer (based on proven technology, used since 1998, in >50 countries, by >20K 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, think of 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),
- Render HTML embedded in Text-objects,
- Use advanced controls, including Scalable Vector Graphics (SVG), Subreports, Shapes, Charts and Rich Text.

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.

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 specify whether Excel exports of a report should include the headers and footers.

Watch the [video](#) and discover all the benefits of Document Creator in less than 15 minutes.



Learn more about how to install and use Document Creator:

- [Installation Manual](#)
- [User Manual](#)

Changelog

Extension

1.20.0 (2020-08-28)

- Rebranding to Apportunix
- Enable Cloud Printers and (On-Prem) Direct Printing
- On-premise demo version: Do not show BC license mismatch warning

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.

Report Engine

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).

Templates

1.8.0 (2020-08-28)

- Rebranding to Apportunix

1.6.0 (2020-02-13)

- Added a variety of columns and labels to the report objects.
- Fixed an issue with the Format-property of the TotalAmountInclVAT TextObject.
- Applied the **LineHeightAuto** property to a majority of the layout TextObjects.

1.4.0 (2019-10-22)

- Initial public release

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](#).

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

1. Go to **Setup & Extensions > Extensions**
2. Open the extension marketplace (AppSource) via: **Manage > Extension Marketplace**
3. Search for "Document Creator" (By Appportunix)
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

Important

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

Permission Configuration

Once the Document Creator extension has been installed, a `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.

To assign the `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 `DOCUMENT CREATOR`.

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

Setting up your Product Key

Attention

If you do not have a product key for your tenant, then you can use the Demo/Trial version of Document Creator in a Sandbox environment. Please find more information on the [licensing and pricing](#) on our website.

To order a product key for the full version of Document Creator, please [contact us](#) providing your **Tenant ID**, which can be copied from the alike named field on the **Document Creator Setup** page.

Before you can run reports with a Document Creator layout in a Production environment of your tenant, you will need to configure your product key in the **Document Creator Setup** page.

Note

You can find the **Document Creator Setup** page under **Setup & Extensions > Manual Setup**, or you can search for the page using the *Tell Me* search feature in Dynamics 365 Business Central.

You can enter the product key that you received for your tenant in the *Product Key* field of the **Authentication** group:



✓ SAVED



Document Creator Setup

- Download Designer
- Import Default Layout
- Export Default Layout
- Init Default Layout
- More options

General

Enabled Format Locale English (United States) ...

Default Export Profile DEFAULT

Authentication

Tenant ID 8ae07a11-5e0f-432b-bf25-a5c72b426a0f

Product Key

Translations

Show less

Default Translation La...

Translation Show Tags

Translation Update Us... None

Suppress Update Usa...

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 Document Creator in your Dynamics 365 Business Central or NAV environment, please make sure the prerequisites listed in this section are met. Please note that there is a "Demo" version (for evaluation purposes) and a "Release" version (for production environments) of Document Creator, which each have their own prerequisites. Downloads for both versions can be found on the [Downloads](#) page on our website.

For additional support, please visit our [Support](#) page to get in contact with our support engineers.

Demo Version

Before installing the "Demo" version, please check if the following prerequisites are met:

- The Business Central license should have access to the `70000..70020` and `71000..71010` object ID range.
- The latest available Demo product key should be used, which can be downloaded from the [Downloads](#) page on our website together with the Demo version.
- For the use of the Document Creator Report Templates, the Business Central license should have access to the `72100..72199` (W1) or `72200..72299` (NA) object ID range. However, please note that the source code of the report templates is also available.
- For a demo of all the possibilities of the Document Creator Designer, please check out the **Document Creator Designer Demo**. The Designer Demo can be downloaded from the [Downloads](#) page on our website as well.

Release Version

Before installing the "Release" version, please check if the following prerequisites are met:

- The Business Central/NAV license should have access to the Document Creator object ID range (i.e., 11249650. . .). If you encounter any issues with missing permissions, please ensure you have downloaded a new Business Central/NAV license and that you have restarted your server instance(s) after uploading your license to the database.
- A product key registered for your Business Central/NAV license's Serial No./VOICE ID/PSBCID should be used.
- 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.

Installation

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

- [Dynamics 365 Business Central 2019 release Wave 2 and up](#)
- [Dynamics 365 Business Central Spring '19 Release](#)
- [Dynamics NAV 2015 – 2018 and Dynamics 365 Business Central Fall '18 Release](#)

Dynamics 365 Business Central 2019 release Wave 2 and up

The installation files are grouped into a directory for each target version (e.g., NAV150W1 corresponds to Dynamics 365 Business Central 2019 release Wave 2). 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
DOCUMENT CREATOR	The Document Creator extension/app.

Folder	Contents
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TEMPLATE	Files for template reports, layouts and translations.
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- 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, etc.
- The **Document Creator On-Premise** app is an extension on the Document Creator app which makes the add-on 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.
- 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.

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.

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.

3. Publishing and Installing the "Document Creator On-Premise" extension

Please, follow the same instructions from step (1) and (2) to publish and install the **Document Creator On-Premise** app.



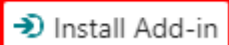
4. Installing the Control Add-In

Open the client, search for, and open the **Document Creator Setup** page.

In the **Document Creator Setup** page:

a. Invoke the **Install Add-in** action.

Document Creator Setup

 Check Product Key  License Information 

b. 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.](#)



c. You will get a message if the installation has completed successfully.

Attention

"Allow HTTP Client Requests" should be enabled for the **Document Creator On-Premise** app for this action to work. You can change this setting on the **Extension Management** page via the **Configure** action.

5. Setting up your Product Key

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

- Paste the product key in the "Product Key" field.
- Invoke the **Check Product Key** action to validate the product key.
- Invoke the **License Information** action for more information about the license.

Info

If the BC Serial No. of your BC license and the Document Creator product key do not match, then a warning will be displayed which informs you that the currently active and licensed BC license are not matching. If this message is shown, you can use Document Creator without any problems, but a watermark will be shown on generated reports.

6. Installing the Templates

Please follow the installation instructions on the [Templates](#) page.

Document Creator is ready for use!

Dynamics 365 Business Central Spring '19 Release

The installation files can be found in the `NAV140W1` directory, which corresponds to the Dynamics 365 Business Central Spring '19 Release. The installation set contains the following directories:

Folder	Contents
<code>DOCUMENT_CREATOR</code>	The Document Creator extension/app.
<code>DOCUMENT_CREATOR_UTILS</code>	The Document Creator Utilities extension/app + C/AL version.
<code>TEMPLATE</code>	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\NAVApportunix_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"
```

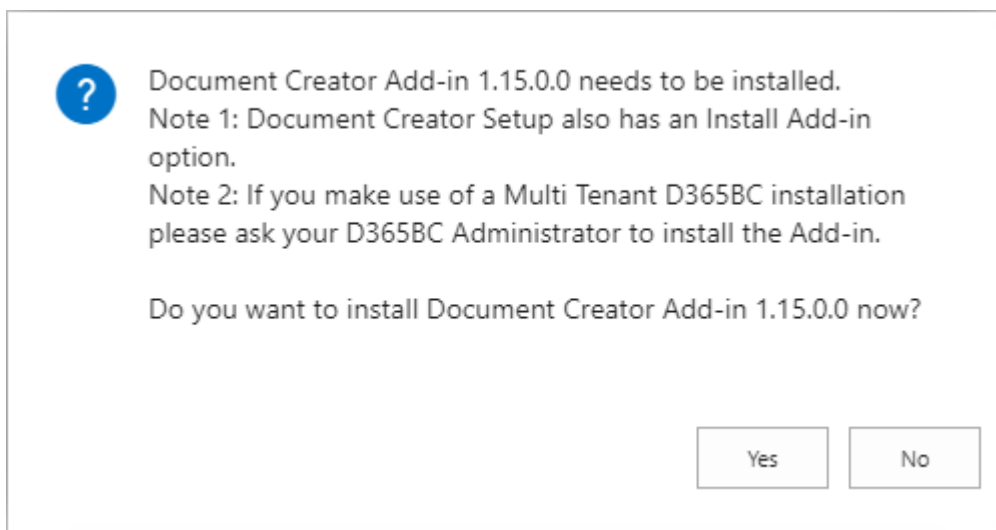
If you are upgrading from a previous version of the extension, follow the instructions as described in the previous step to run the data upgrade in the same way for this extension.

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

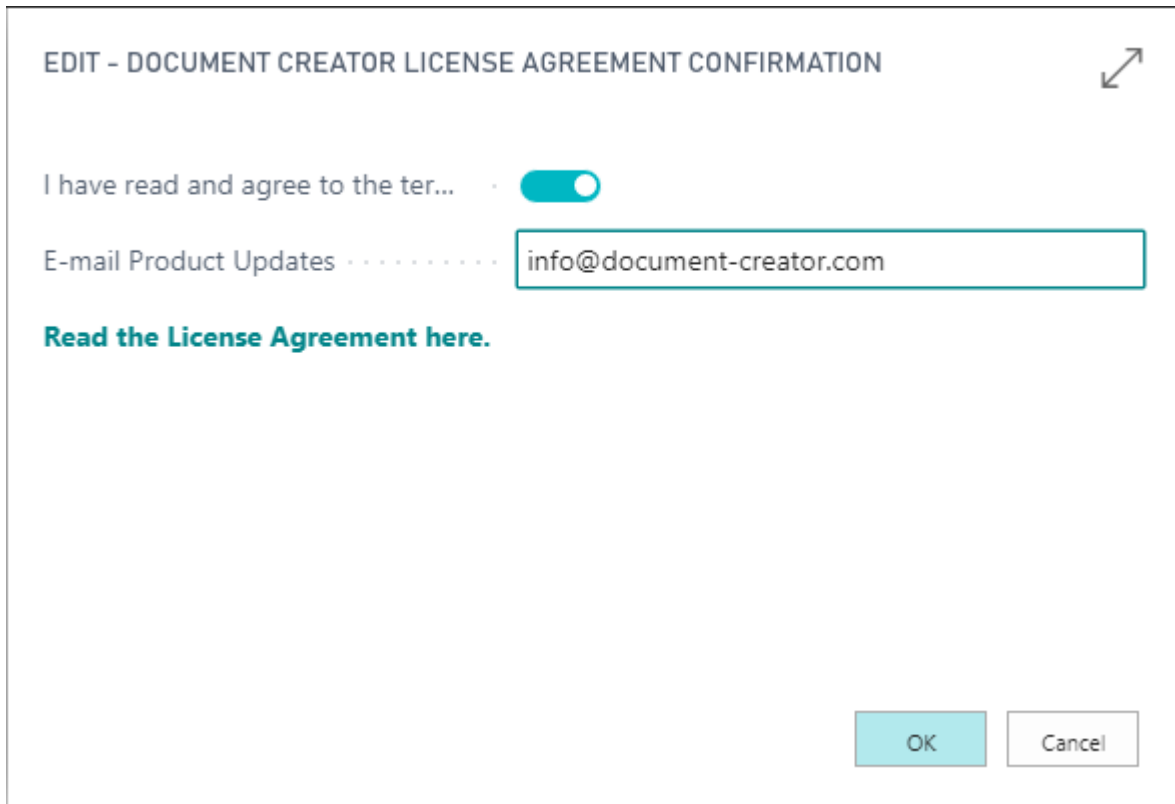
Import the menu-suite from the NAV<version>_MenuSuite1056.fob file or edit the menu-suite object ID in the NAV<version>_MenuSuite1056.txt file.

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:

- Paste the product key in the "Product Key" field.
- Invoke the **Check Product Key** action to validate the product key.
- Invoke the **License Information** action for more information about the license.

6. 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 **Custom Report Layouts** page, choose 'Import Report Package' and import the following file:

```
LayoutPackage - W1 - DCR_<Release/Demo>_<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/Demo>_<version>.dcr
```

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

7. Importing the Template Translations

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

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

The installation files are grouped into a directory for each target version (e.g., `NAV80W1` 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:

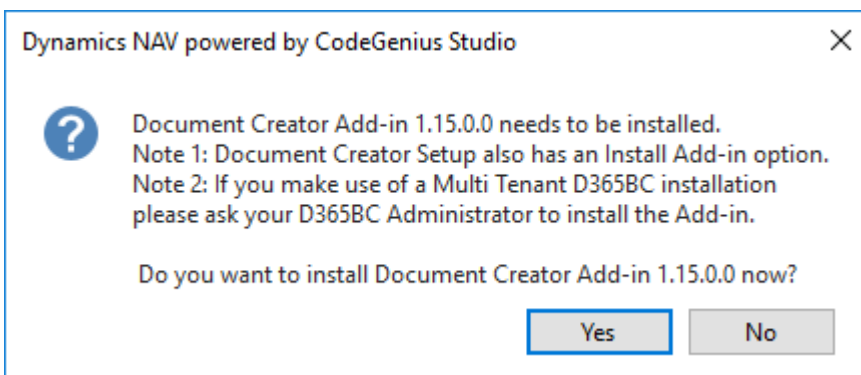
Folder	Contents
<code>APPLICATION OBJECTS</code>	New and Merge NAV Objects.
<code>TEMPLATE</code>	Files for template reports, layouts and translations.

To install Document Creator, please follow these steps:

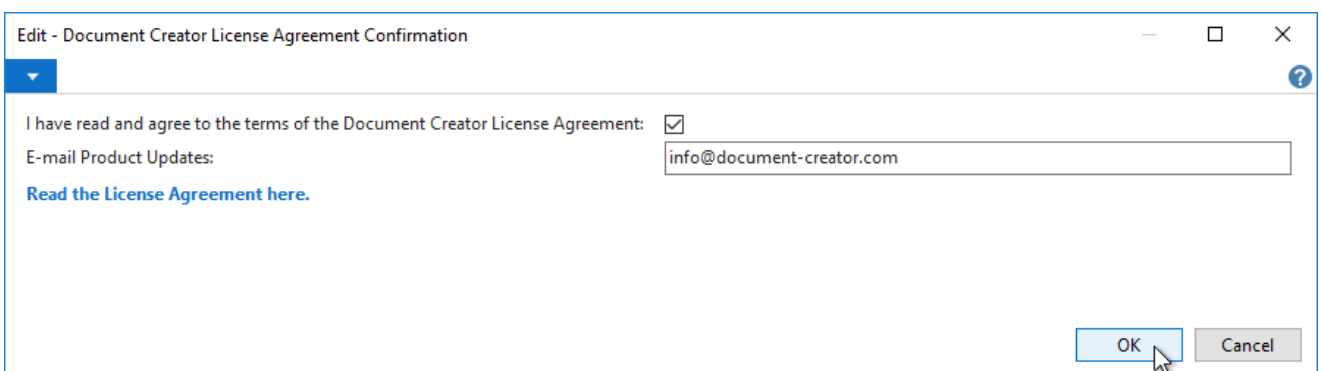
1. Start the Dynamics NAV development environment and import the `NAV<version> - New Objects.fob` file.
2. Merge the following NAV objects with the objects in file `NAV<version> - Merge Objects.txt` :

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_Demo_<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!

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.

Document Creator Setup



To install the designer:

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

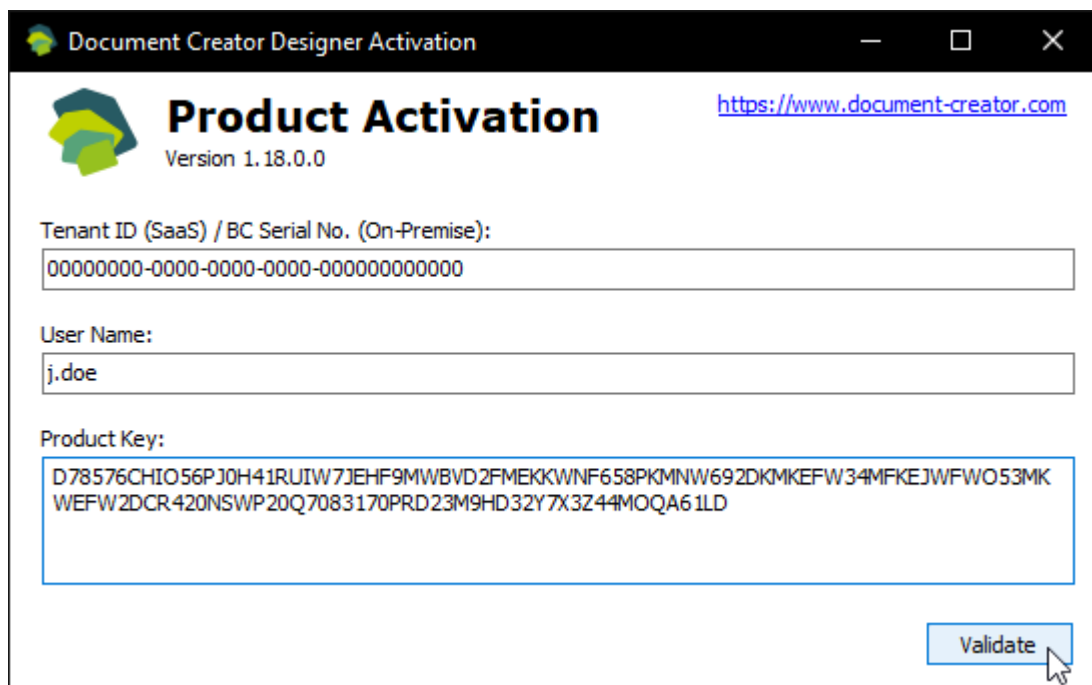
Attention

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.


Note

The Document Creator Designer is not included in the Demo/Trial version of Document Creator on Microsoft Dynamics 365 Business Central. To explore the features of the Designer you can check out the [Document Creator Designer Demo](#). If you would like to try out the full version of the Document Creator Designer, please [contact us](#).

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



Document Creator Designer Activation

 **Product Activation** <https://www.document-creator.com>
Version 1.18.0.0

Tenant ID (SaaS) / BC Serial No. (On-Premise):
00000000-0000-0000-0000-000000000000

User Name:
j.doe

Product Key:
D78576CHIO56PJ0H41RUIW7JEHF9MWBVD2FMEKKWNF658PKMNW692DKMKEFW34MFKEJWFWO53MK
WEFW2DCR420NSWP20Q7083170PRD23M9HD32Y7X3Z44MOQA61LD

Validate

To activate the designer:

1. Enter the (AAD) Tenant ID or BC License Serial No. of your Business Central tenant in the **Tenant ID (SaaS) / BC Serial No. (On-Premise)** field. The ID for your tenant can be found on the **Document Creator Setup** page.
2. Enter a User Name in the **User Name** field.
3. Enter the Product Key for your tenant in the **Product Key** field.
4. Click on the **Validate** button.

 **Attention**

The Document Creator Designer can only be activated with a product key for licenses in the new license model. 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.

Default Layout

When you create a new Document Creator custom 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.

Document Creator Setup







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.


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

 Download Designer  Import Default Layout  Export Default Layout  Init Default Layout | More options

Translations Show less

Default Translation La...  Translation Show Tags

Translation Update U...  Suppress Update Usa...

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`.

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 suppressed 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.

Templates

Document Creator provides a set of templates for reports, layouts and translations which can be downloaded from the [Downloads](#) page on our website.

The Document Creator Templates package includes the following files:

Filename	Description
DCR_Translations.rapidstart	A RapidStart configuration package with report label translations for the W1-based report templates for language codes <code>DEU</code> , <code>ENG</code> , <code>ENU</code> , <code>FRA</code> , <code>NLD</code> .
Document Creator W1 Templates.Source.zip	A ZIP file containing the source code of the Document Creator W1 Templates extension.
LayoutPackage_W1.dcr	A Document Creator Layout Package for the reports in the Document Creator W1 Templates extension.
Apportunix_Document Creator W1 Templates.app	The Document Creator W1 Templates extension.

W1 Templates Installation

To install the W1 Template reports and corresponding layouts, please follow these steps:

Info

For **on-premise** environments, you can use the Admin PowerShell cmdlets to publish the app in case *External Deployment* is not enabled.

1. On the Home Page, select the **Setup & Extensions** dropdown
2. Select **Extensions**, this will open the **Extension Management** page.
3. Invoke the **Manage > Upload Extensions** action, this will open the **Upload and Deploy Extension** page.

- 4. Select the `Apportunix_Document Creator W1 Templates_<version>.app` file via the AssistEdit-button of the **Select .app file** field.
- 5. Enable the **Accept** toggle.
- 6. Select **Deploy**.

UPLOAD AND DEPLOY EXTENSION



Upload Extension

Select .app file Apportunix_Document Creator W1 Temp...

Deploy Extension


Deploy to Current version

Language English (United States)

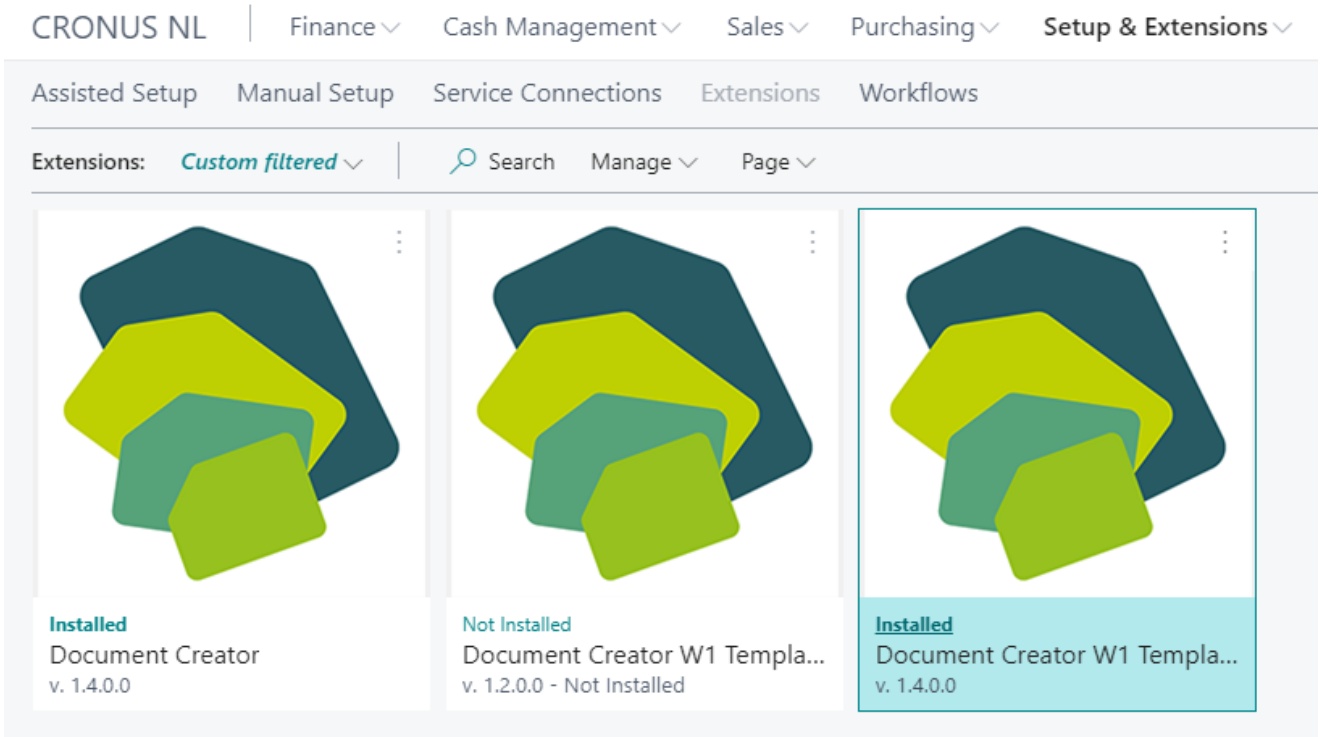
Disclaimer

Accept

- 7. Wait for the extension to be deployed. A message should show up to inform you that the extension deployment is in progress.

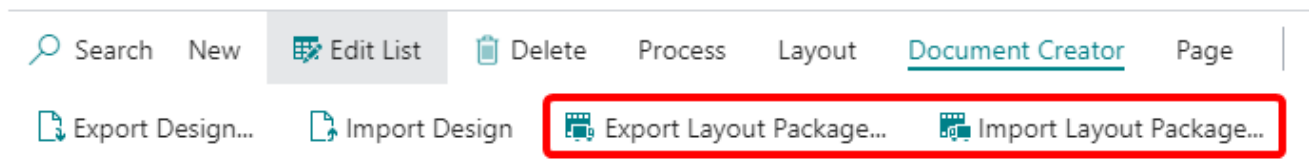
 Extension deployment is in progress. Please check the Deployment Status page for updates.

- Once the deployment has finished, the *Document Creator W1 Templates* extension will show up in the **Extension Management** page. If a previous version was installed, you will see the previous version has been uninstalled and the new version is now installed.

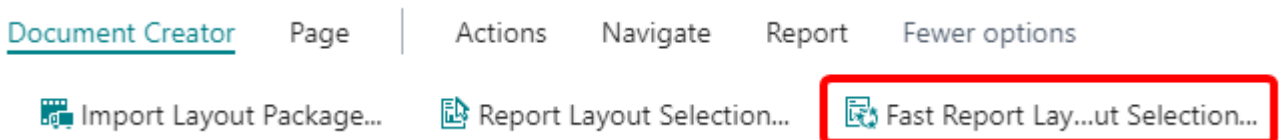


- Use the *Tell Me* search feature to search for and open up the **Custom Report Layouts** page.
- Invoke the **Document Creator > Import Layout Package...** action and select the `LayoutPackage_W1.dcr` file to import the layouts. See [Layout Packages](#).

CUSTOM REPORT LAYOUTS - 117 REMINDER | WORK DATE: 10/1/2019



- Select the newly imported layouts and use the **Fast Report Layout Selections...** action to configure the layout selections for the reports. See [Fast Report Layout Selection Action](#).



- To have the W1 Template reports used when your documents are printed, you need to configure *Report Selections* for each document type. You can configure report selections in the **Report Selection - *** pages in Dynamics 365 Business Central.

Example

To set up report 72102 Sales - Invoice to be used when a Posted Sales Invoice is printed, search and open the **Report Selection - Sales** page, choose **Usage = Invoice** and select this report in the **Report ID** field of the record.

REPORT SELECTION - SALES | WORK DATE: 10/1/2019 ✓ SAVED [🔖](#) [📄](#)

Usage Invoice

Manage 🔍

Sequence ↑	Report ID	Report Caption	Use for Email Body	Use for Email Atta...	Email Body Layout Description
→ 1	72102	Sales - Invoice	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-
			<input type="checkbox"/>	<input type="checkbox"/>	

 Info

The **Document Creator W1 Templates** extension includes reports for the following documents:

- **Sales**

- Quote
- Order Confirmation
- Invoice
- Credit Memo
- Shipment
- Return Order
- Return Receipt
- Draft Invoice

- **Purchase**

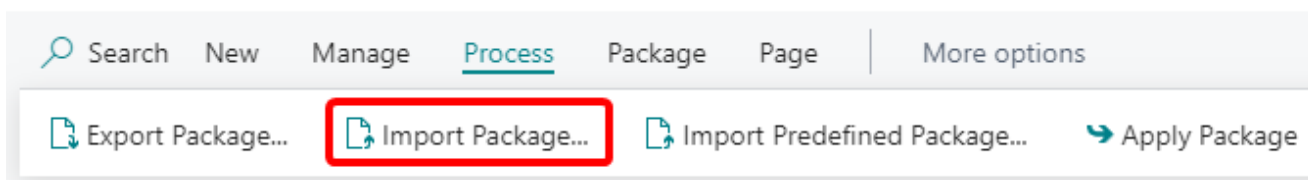
- Quote
 - Order
 - Invoice
 - Credit Memo
 - Receipt
 - Return Order
 - Return Shipment
- Reminder

Translation Package Installation

To import the template translation package, please follow these steps:

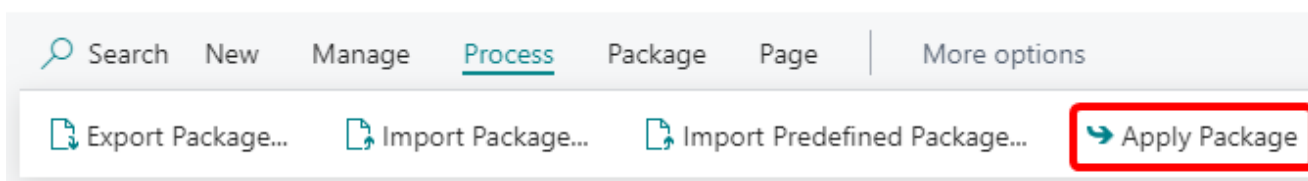
1. Use the *Tell Me* search feature to search and open the **Configuration Packages** page
2. On the page, invoke the **Process > Import Package...** action and select the `DCR_Translations.rapidstart` file.

CONFIGURATION PACKAGES | WORK DATE: 10/1/2019



3. Wait for the package to be imported.
4. On the page, invoke the **Process > Apply Package** action and confirm.

CONFIGURATION PACKAGES | WORK DATE: 10/1/2019



5. Wait while the package is being applied. You should receive a message that the records are inserted/modified without errors.
6. Open the **Document Creator Translations** page. Here you can verify that the translations from the package are now indeed added.

Getting Started

⚠ Attention

Before you start using Document Creator, please make sure you have completed the steps in the [Installation Manual](#). The **Product Key** needs to be set up to run reports with a Document Creator layout.

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

TELL ME WHAT YOU WANT TO DO



Custom Report Layouts

Go to Pages and Tasks

> Custom Report Layouts

Administration



> Custom Report Layout Archive

Lists

The **Custom Report Layouts** page shows a list of all the custom report layouts in your Dynamics 365 Business Central environment. By default, the page shows the following columns for the layout records:




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 name of the target report object.
Description	A description of the report layout.
Company Name	The Dynamics 365 Business Central company that the report layout applies to.





Column	Description
Built-In	Specifies whether or not the layout is a built-in one, i.e., ships by default with Dynamics 365 Business Central.
Type	The type of the report layout which can be either "RDLC", "Word" or "Document Creator".
Document Creator Export Profile	The Document Creator Export Profile that will be used when the report is run with this report layout. Only applies to layouts of type "Document Creator". See Export Profiles .





CUSTOM REPORT LAYOUTS - 72102 SALES - INVOICE | WORK DATE: 10/1/2019

✓ SAVED   

Custom Report Layouts

Search
New
Edit List
Delete
Process
Layout
Document Creator
Page
Actions
Navigate
Report
Less




 Export Design...
 Export Layout Package...
 Report Layout Selection...
 Archive Layout...

 Import Design
 Import Layout Package...
 Fast Report Layout Selection...


Report ID ↑	Report Name	Description	Company Name ↑	Built-In	Type	Document Creator Export Profile
72100	Sales - Quote	DCR Sales - Quote		<input type="checkbox"/>	Document ...	
72101	Sales - Order Confirmation	DCR Sales - Order Confirmation		<input type="checkbox"/>	Document ...	
→ 72102	Sales - Invoice	DCR Sales - Invoice		<input type="checkbox"/>	Document ...	MYPROFILE
72103	Sales - Credit Memo	DCR Sales - Credit Memo		<input type="checkbox"/>	Document ...	
72104	Sales - Shipment	DCR Sales - Shipment		<input type="checkbox"/>	Document ...	
72105	Purchase - Quote	DCR Purchase - Quote		<input type="checkbox"/>	Document ...	

From this page you can perform the following tasks for Document Creator 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](#)

Creating and Copying Layouts

Creating a New Layout

A Dynamics 365 Business Central report is made up of the following two components:

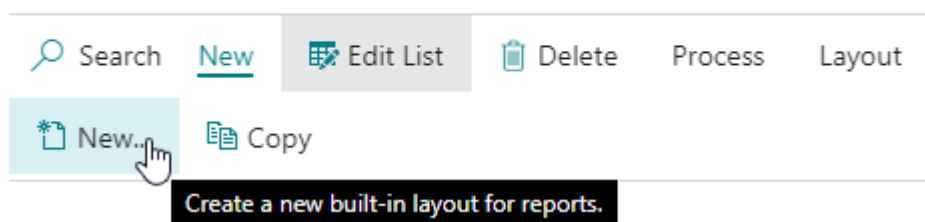
- **Report Object:** A report object defines the report dataset (i.e., based on the report schema, which include the data items, fields/columns and parameters) and request page. Its definition is found in the code of a Dynamics 365 Business Central (AL) extension.
- **Layout:** A layout defines how the 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.

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 our W1 Report Templates extension (see [Templates](#)), or from any other extension.

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

1. Invoke the **New...** action.

CUSTOM REPORT LAYOUTS - 117 REMINDER | WORK DATE: 10/1/2019



2. Enter/Select the **Report ID** of the target report object.
3. Enable **Insert Document Creator Layout**.
4. Select **OK**.

The figure below shows the inputs on the **Insert Built-In Layout** page to create a new Document Creator layout for report 72102 Sales – Invoice:

EDIT - INSERT BUILT-IN LAYOUT FOR A REPORT



Report ID 72102 ▾

Report Name Sales - Invoice

Insert Word Layout

Insert RDLC Layout

Insert Document Creator L...



A new record will have been created with "Document Creator Layout" as the default description. You can change this description to a more descriptive name of your liking.

→	72102	:	Sales - Invoice	Document Creator Layout
---	-------	---	-----------------	-------------------------

Copying a Layout

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

1. Select a custom report layout record from which to copy the layout.
2. Invoke the **Copy** action
3. By default the **New Layout Description** will be set to "Copy of <Original Description>". You can freely change this description. (Optional)
4. You can also change the target report object for the new layout if you enable the **Change Dataset** option. If this option is enabled, you can enter/select the **Report ID** of the new target report object. (Optional)
5. Select **OK**.

EDIT - COPY DOCUMENT CREATOR LAYOUT



From

Description DCR Sales - Invoice
Report ID 72102

Report Name Sales - Invoice

To

New Layout Desc... · Copy of DCR Sales - Invoice

Report ID

Change Dataset

Report Name

A new record will have been created containing a copy of the layout of the earlier selected record.

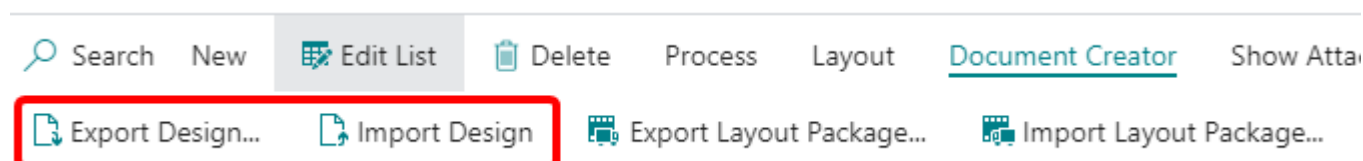
 **Caution**

If you enable the **Change 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.

Editing Layouts

Editing Layouts using Design Files

On the **Custom Report Layouts** page you will find an **Export Design** and **Import Design** action (within the *Document Creator* 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. If you attempt to use these actions for any other layout type, such as RDLC or Word, 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 Custom 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.

EDIT - EXPORT DESIGN - 72102-000001 DCR SALES - INVOICE

Edit with Data

OK

Cancel

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

Show Internal Information

Show Serial/Lot Number

Log Interaction

Show Assembly Componen...

Show Additional Fee Note

Filter: Posted Sales Invoice

× No. 103198

× Sell-to Customer No.


× No. Printed

[+ Filter...](#)

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 record selected on the **Custom Report Layouts** page.

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

1. Select the target custom report layout record.
2. Invoke the **Import Design...** action.
3. Click **Choose...** and select the Design file in the Open File dialog that appears.

 **Info**

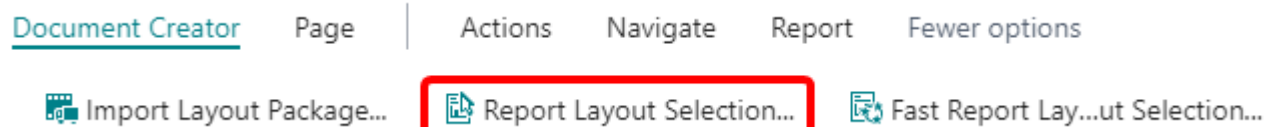
During the import of a Design file, the previous version of the layout is automatically added to the [Custom Report Layout Archive](#), along with a comment that reads "Design Import". This allows you to restore the previous version of the layout, e.g., in case you made a mistake and want to revert your changes.

Configuring Layout Selections

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

Report Layout Selection Action



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

1. On the **Custom Report Layouts** page, select the custom 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 custom 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 "My Company" which means the report layout selection for report 72102 Sales - Invoice will change from the built-in RDLC layout to the selected layout (i.e., 72102-000001 DCR Sales - Invoice).

The company "CRONUS NL" is displayed in bold/green which indicates that the report layout selection was already configured to use this layout earlier.

Select all | Select unassigned | Select none | More options

EDIT - REPORT LAYOUT SELECTION - SALES - INVOICE (72102)

Company ↑	Selected
CRONUS NL	<input type="checkbox"/>
→ My Company	<input checked="" type="checkbox"/>

CURRENT REPORT LAYOUT

Type	RDLC (built-in)	Description	
Code			

NEW REPORT LAYOUT

Code	72102-000001	Description	DCR Sales - Invoice
------	--------------	-------------	---------------------

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 **Custom Report Layouts** page **in all companies**.

1. On the **Custom Report Layouts** page, select the custom 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 custom 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 custom report layout(s) for all companies. A message will inform you about the number of changed report layout selections.



2 Report Layout Selections created.

OK

Custom Report Layout Archive

After modifying a Document Creator layout, there is always the possibility to revert your changes to a previous version of your report layout. On the **Custom 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.

 Archive Layout...



Archive

Version No. ↓		Comment
3		Design Import
2		Design Import

It is also possible to view all archived custom report layouts by opening the **Custom Report Layout Archive** page.

CUSTOM REPORT LAYOUT ARCHIVE | WORK DATE: 10/1/2019



Version No. ↑	Report ID	Report Name	Company Name	Description
1	72100	Sales - Quote		DCR Sales - Quote
1	72102	Sales - Invoice		DCR Sales - Invoice
2	72102	Sales - Invoice		DCR Sales - Invoice
3	72102	Sales - Invoice		DCR Sales - Invoice
4	72102	Sales - Invoice		DCR Sales - Invoice
5	72102	Sales - Invoice		DCR Sales - Invoice

Note

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

? When are layouts archived automatically?

Custom Report Layouts are archived automatically when the following events take place on the record: **Layout Import, Layout Package Import, Layout Restore, Design Import**

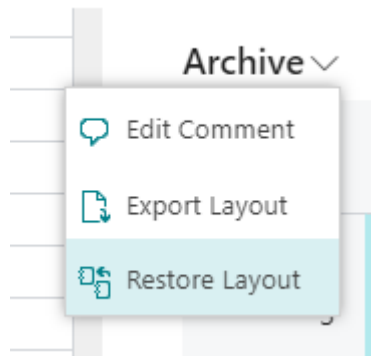
Archiving Layouts

You can *manually* archive the current version of a layout using the **Archive Layout...** action on the **Custom Report Layouts** page. A new archive record will be created with the current version of the selected layout record. By default, the archive comment 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 **Custom Report Layouts** page, or the like-named action on the **Custom Report Layout Archive** page.

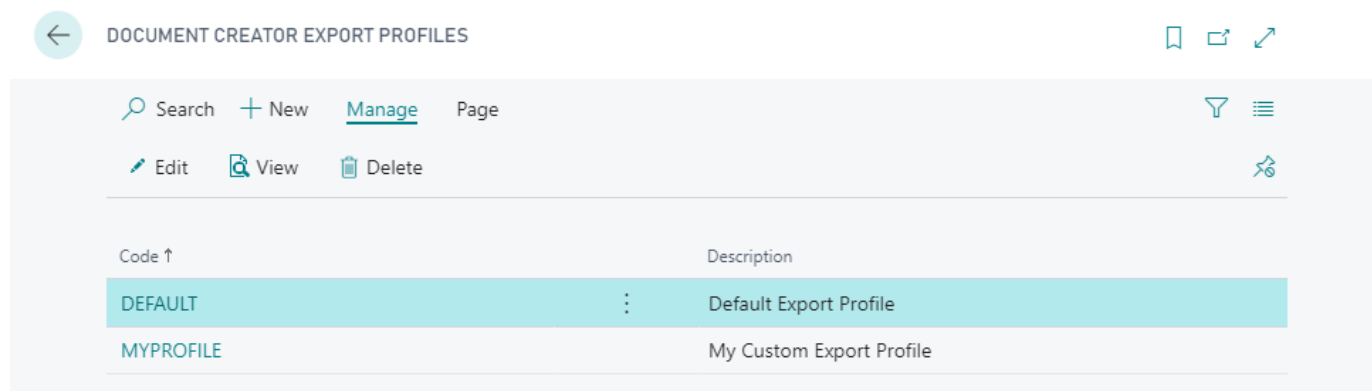


You will be asked to confirm the restore, and the current version will be archived before the selected previous version is restored.

Export Profiles

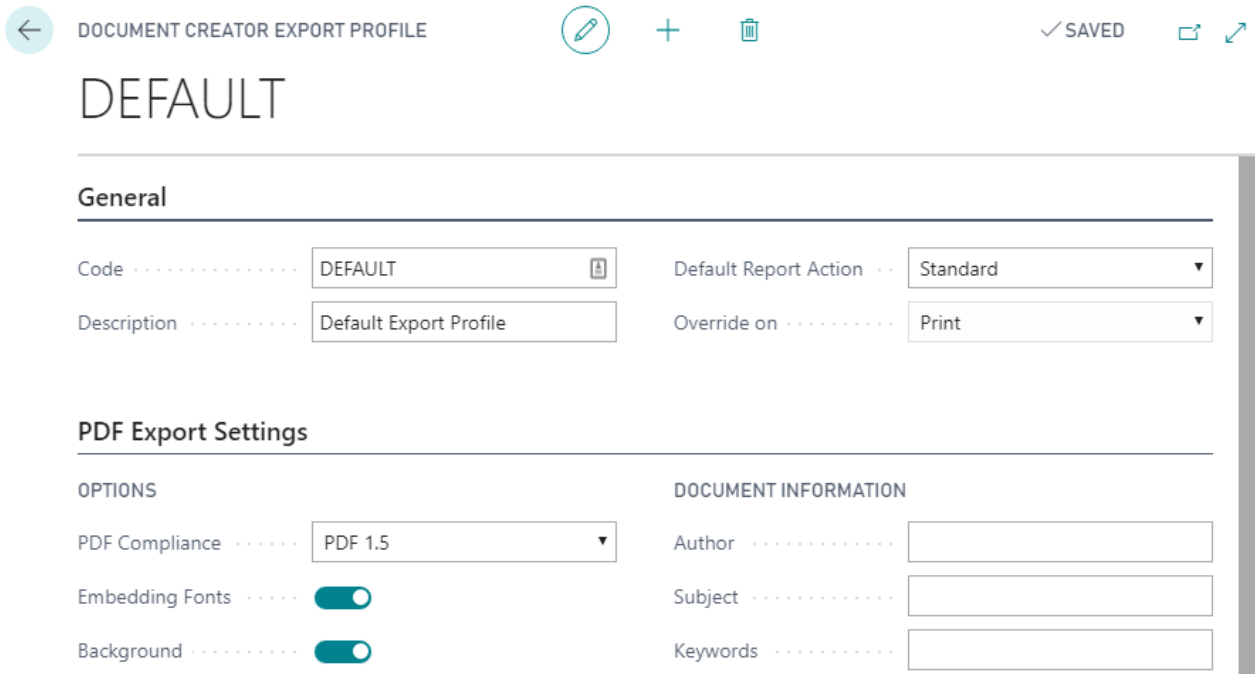
Managing Export Profiles

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.



DOCUMENT CREATOR EXPORT PROFILE

DEFAULT

General

Code DEFAULT

Description Default Export Profile

Default Report Action .. Standard

Override on Print

PDF Export Settings

OPTIONS

PDF Compliance PDF 1.5

Embedding Fonts

Background

DOCUMENT INFORMATION

Author

Subject

Keywords

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.

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.

Document Creator Setup

 Download Designer  Import Default Layout  Export Default Layout  Init Default Layout | More options

General

Enabled

Default Export Profile

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

Custom Report Layouts - 117 Reminder

Search | New | Edit Li | Delet | Proces | Layou | Document Crea | Page | Action | Navigat | Repor | Les:

Home

Report ID ↑	Description	Company Name ↑	Built-In	Type	Document Creator Export Profile
72101	DCR Sales - Order Confirmation		<input type="checkbox"/>	Document ...	
→ 72102	DCR Sales - Invoice		<input type="checkbox"/>	Document ...	MYPROFILE
72103	DCR Sales - Credit Memo		<input type="checkbox"/>	Document ...	
72104	DCR Sales - Shipment		<input type="checkbox"/>	Document ...	

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.

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

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	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.
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.

Column	Description
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.

Search + New Edit List Delete Copy... Page More options

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

Translations | Manage

Language Code ↑	Translation	To-do	Last Used	Last Used by Report ID
→ DEU	Betrag	<input type="checkbox"/>		
ENG	Amount	<input type="checkbox"/>		
ENU	Amount	<input type="checkbox"/>		
FRA	Montant	<input type="checkbox"/>		
NLD	Bedrag	<input type="checkbox"/>		
		<input type="checkbox"/>		

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

i 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.

 **Tip**

Document Creator ships with a **RapidStart package** that already provides you with a set of translations for multiple languages. This package also provides the translations for the **W1 Report Templates**. See [Templates](#).

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.

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 report objects in the **W1 Report Templates** extension.

First add the following needed global variables:

```
var
    Language: Codeunit Language;
    wDCR_TranslationMgt: Codeunit 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:

```
trigger OnAfterGetRecord()
begin
    CurrReport.Language := Language.GetLanguageIdOrDefault("Language Code");
    wDCR_TranslationMgt.wgFncSetLanguageCode("Language Code");
    // ...
end;
```

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

```
local procedure Trl(pLblName: Text[50]): Text
begin
    if ReportId = 0 then begin
        Evaluate(ReportId, DelChr(CurrReport.ObjectId(false), '=',
DelChr(CurrReport.ObjectId(false), '=', '1234567890')));
        wDCR_TranslationMgt.wgFncSetReportId(ReportId);
    end;
    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.:

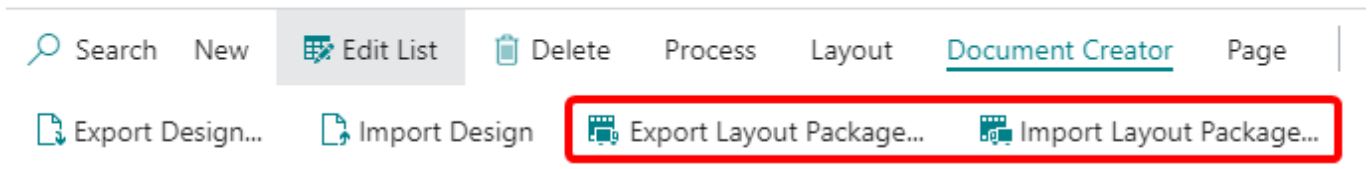
```
column(lblAllowInvDisc; Trl('AllowInvDisc')) { }
column(lblAmount; Trl('Amount')) { }
column(lblBankAccNo; Trl('BankAccNo')) { }
column(lblBankName; Trl('BankName')) { }
// ...
```


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 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.

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

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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 [Custom Report Layout Archive](#) before the package is imported, along with a comment that reads "Layout Package Import".

Report ID ↑	Report Name
72100	Sales - Quote
→ 72101	Sales - Order Confirmation
72102	Sales - Invoice
72103	Sales - Credit Memo
72104	Sales - Shipment
72105	Purchase - Quote
72106	Purchase - Order
72107	Purchase - Invoice

Archive ▾

Version No. ↓	Comment
1	Layout Package Import

**Tip**

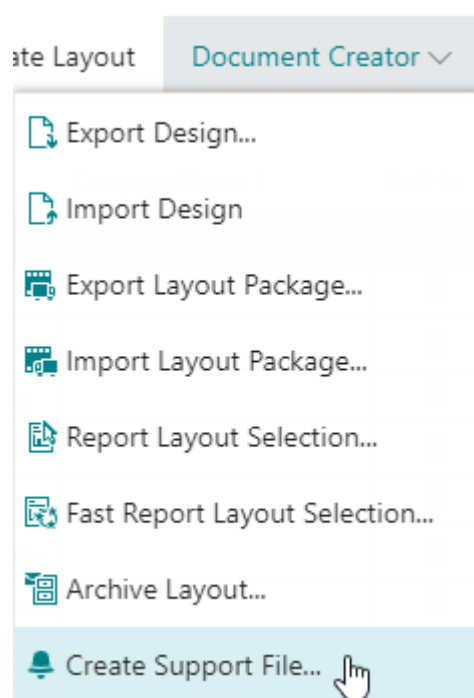
Document Creator ships with a set of **W1 Report Templates**. This comprises the source code of the report objects and a layout package. See [Templates](#).

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 **Custom 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

Output File Type

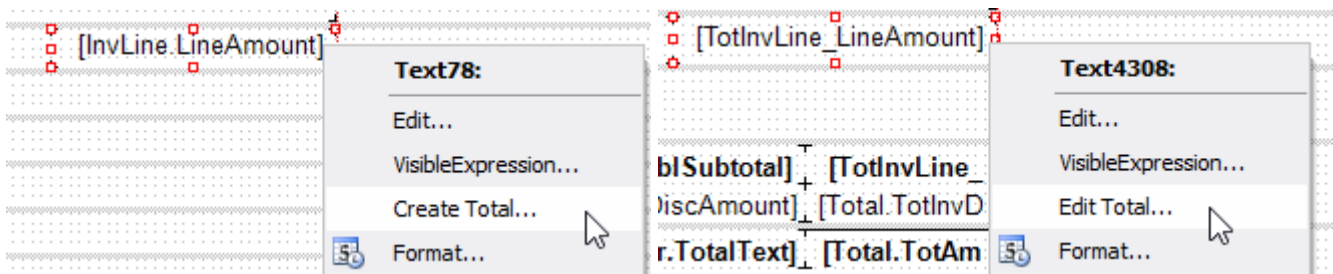
Report Designer Highlights

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 on top of the standard FastReport.Net designer to support even faster and more efficient layout development.

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.



i 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:

Edit Total

Total

Total name:

Function:

Data column or expression:

Evaluate on each row of the band:

Evaluate if the following condition is met:

Reset on band:

Reset if band is repeated (by RepeatOnEveryPage)

Options

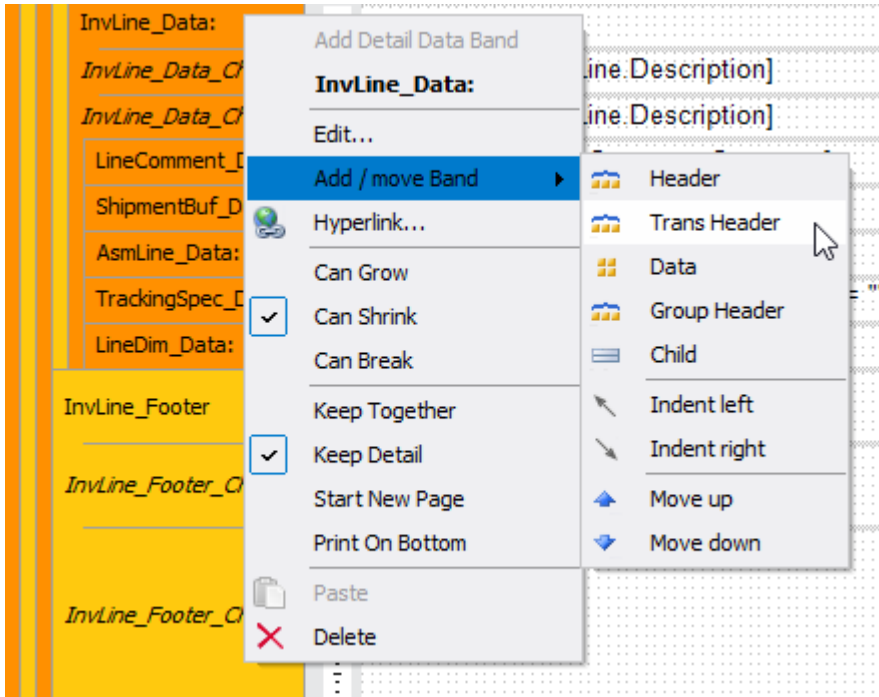
Reset after print

Include invisible rows

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.



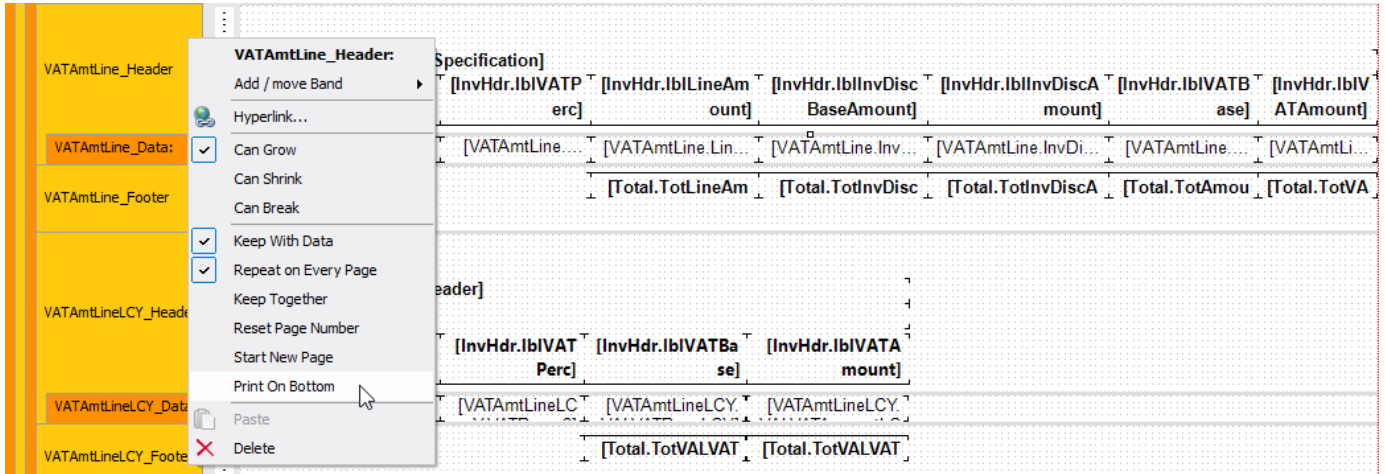
On these bands you can put any earlier-created totals in TextObject controls, whose running value will be shown on the bottom and top of the pages where needed. In the image below an example usage of the Transheader and Transfooter band is shown for a Sales Invoice report layout to show the running value of the total line amount.

InvLine_Header	[InvHdr.IblNo]	[InvHdr.IblDescription]	[InvHdr.IblShipmentDate]	[InvHdr.IblQuantity]	[InvHdr.IblUOM]	[InvHdr.IblUnitPrice]	[InvHdr.IblLineDiscountPerc]]	[InvHdr.IblVATIdentifier]	[InvHdr.IblAmount]	
InvLine_TransHeader	[InvHdr.IblTotalTransHeader]								[TotInvLine_LineAmount]	
InvLine_Data:	[InvLine.Description]									
InvLine_Data_Child1	[InvLine.No]	[InvLine.Description]	[InvLine.Pos]	[InvLine.Qu]	[InvLine.U...	[InvLine.Li...	[InvLine.V	[InvLine.Lin...		
InvLine_Data_Child2	[LineComment.Comment]									
LineComment_Data	[LineComment.Comment]									
ShipmentBuf_Data:	[InvHdr.IblShipment]	[ShipmentB	[Shipment...							
AsmLine_Data:	[AsmLine.L	[AsmLine.Description_3]	[AsmLine.V	[AsmLine...	[AsmLine...					
TrackingSpec_Data	[If([TrackingSpec.LotNo] != ""									
LineDim_Data:	[Tracking...									
InvLine_TransFooter	[InvHdr.IblTotalTransFooter]								[TotInvLine_LineAmount]	
InvLine_Footer										

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

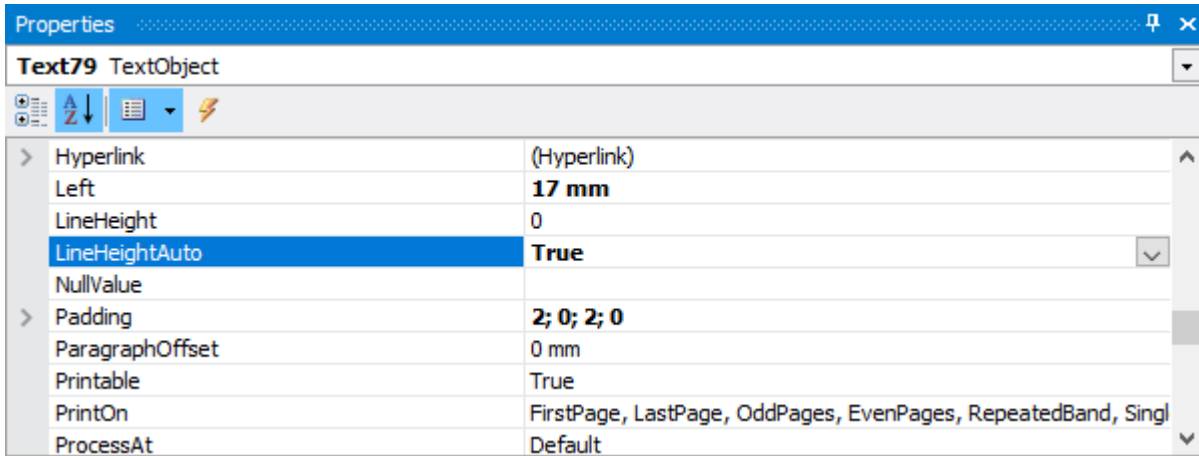
Enabling the **PrintOnBottom** property for a band will also enable the property for any bands that are displayed below. Similarly, disabling the property will disable it for any bands that are displayed above.

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**.

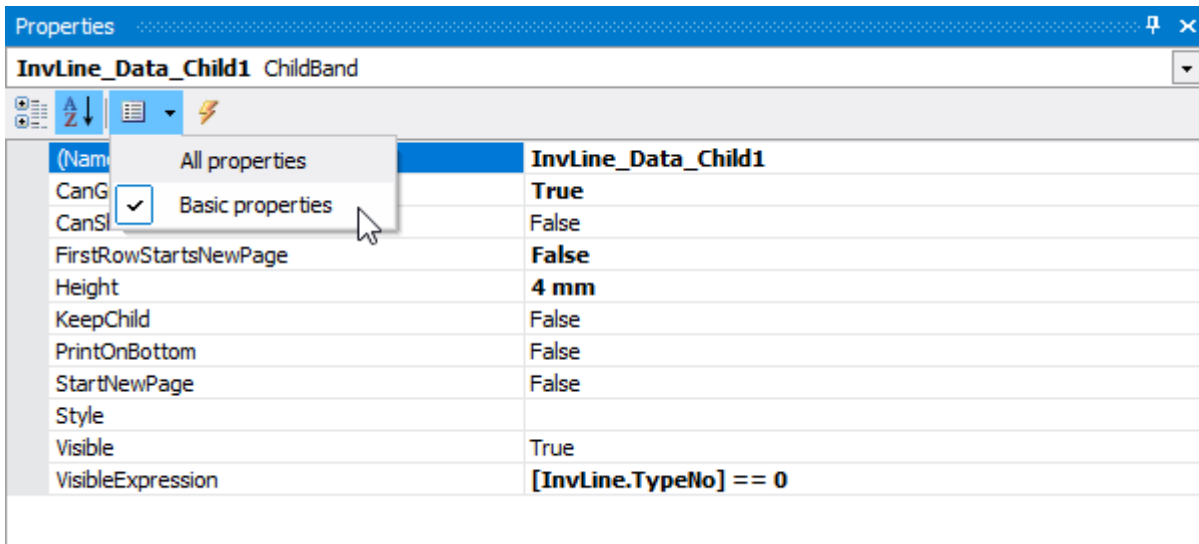


Info

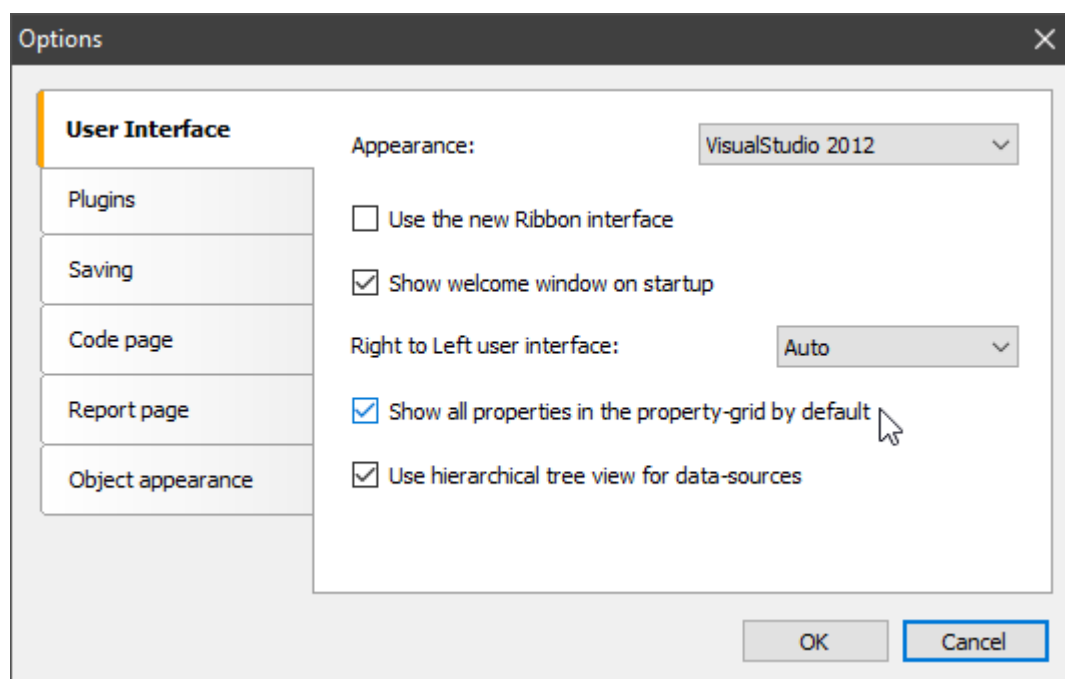
When you add a new TextObject control to your layout, its **LineHeightAuto** property is automatically set to **true**.

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.



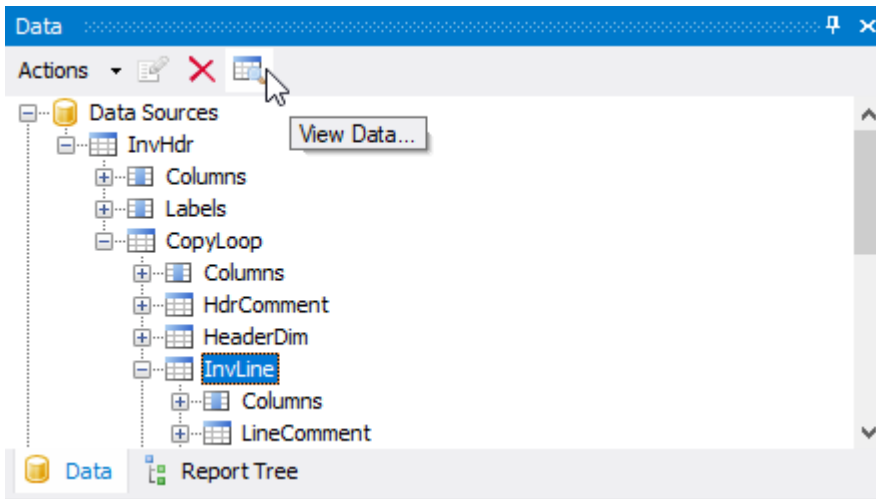
The **Basic Properties** consist of the following properties:

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	HidelfNoData	Name	Shape	TotalType
ColSpan	HidelfUnchecked	NoDataText	ShowErrorMessage	VertAlign
ColumnCount	HideValue	PaperHeight	ShowGrid	Visible
Condition	HideZeros	PaperWidth	ShowMarkers	VisibleExpression
DataColumn	HorzAlign	ParentDataSource	ShowText	Width

Basic Properties				
DataSource	IncludeInvisibleRows	PrintOnBottom	SizeMode	WordWrap
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.



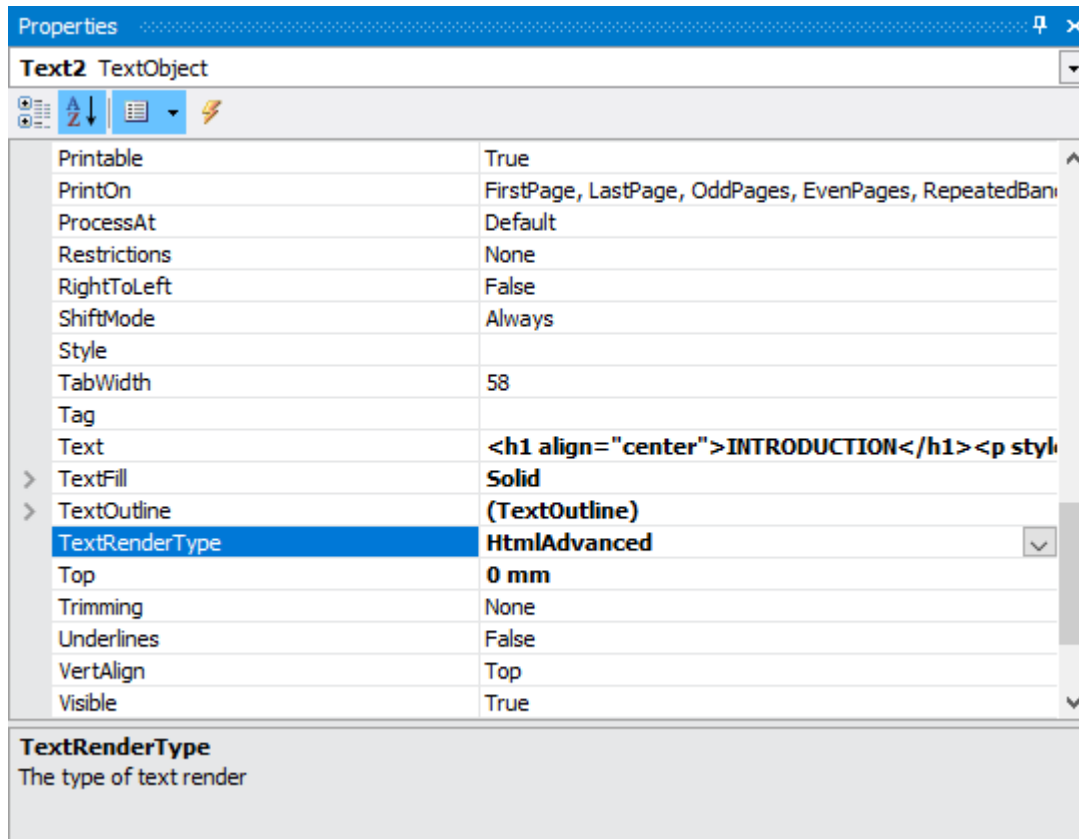
In the window that opens you can view the data of each record in the Data Source and even edit it by leaving a cell after changing its contents.

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

Tag	Description	Supported Attributes
<code><div>...</div></code>	Division/Section without any default margins or paddings.	<code>align</code> – left, right, center, justify <code>style</code> – (see below)
<code><h1>...</h1></code> ... <code><h6>...</h6></code>	Headings with default font-size of 2 em, 1.5 em, 1.17 em, 1 em, 0.83 em and 0.67 em respectively.	<code>align</code> – left, right, center, justify <code>style</code> – (see below)
<code>...</code>	Ordered lists, default bottom margin of 1 em and left-padding of 40 px.	<code>type</code> – 1, A, a <code>start</code> – [integer] <code>style</code> – (see below)
<code>...</code>	Unordered lists, default bottom margin of 1 em and left-padding of 40 px.	<code>type</code> – disc, circle, square <code>style</code> – (see below)
<code>...</code>	List item.	<code>style</code> – (see below)
<code>...</code>	Span (group of in-line elements).	<code>style</code> – (see below)
<code>...</code>	Group of in-line elements with custom font face, color and size.	<code>color</code> – [name]/#xxxxxx <code>face</code> – [font_family] <code>size</code> – [dimension] <code>style</code> – (see below)
<code>
</code> , <code>
</code>	Line break.	-
<code></code>	Image.	<code>src</code> = "...;base64,..." <code>alt</code> – [text]
<code><body>...</body></code>	Container with default margin of 8 px.	<code>style</code> – (see below)
<code>...</code> <code>...</code>	Bold text.	<code>style</code> – (see below)
<code><i>...</i></code> <code>...</code>	Cursive text.	<code>style</code> – (see below)

Tag	Description	Supported Attributes
<code><u>...</u></code>	Underlined text.	<code>style</code> – (see below)
<code><s>...</s></code> <code><strike>...</strike></code>	Strikeout text.	<code>style</code> – (see below)
<code><sub>...</sub></code>	Subscript.	<code>style</code> – (see below)
<code><sup>...</sup></code>	Superscript.	<code>style</code> – (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
<code>text-align</code>	Text-alignment of the underlying paragraph. If both the <code>align</code> and <code>text-align</code> CSS attribute are defined, the CSS attribute has higher precedence.	<code>p</code> , <code>div</code> , <code>h#</code> , <code>li</code>
<code>text-indent</code>	Indent of the first line of a paragraph.	<code>p</code> , <code>div</code> , <code>h#</code> , <code>li</code>
<code>font-family</code>	Font face of the underlying text.	"all"
<code>font-size</code>	Font size of the underlying text.	"all"
<code>color</code>	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.

```
<p style="padding-left: 1cm">
  Document Creator is a fully functional .NET report designer for Microsoft
  Dynamics NAV, compatible with <strong>NAV2015</strong> 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 <i>QR
  codes</i>.
</p>
<p style="padding-left: 1.5 cm">Your benefits:</p>
<ul style="padding-left: 2 cm">
  <li>Saves a <span style="font-weight: bold">huge amount</span> of time</li>
  <li>Easy to use</li>
  <li>Rich in functionality<ul type="square">
    <li>An easy-to-use report designer with endless possibilities</li>
    <li>Conversion of <i>Classic</i> and <i>RDLC</i> report layouts</li>
  </ul>
  </li>
</ul>
```

```
<li>Fully integrated in Dynamics NAV</li>
</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 **high amount** of time
- Easy to use
- Rich in functionality
 - An easy-to-use report designer with endless possibilities
 - Conversion of *Classic* and *RDL* report layouts
 - Fully integrated in Dynamics NAV
- *Fantastic reports as outcome!*