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MICROSOFT DYNAMICS NAV – TRADE

Course Outline

Module 1: Creating Reports

This module explains how to create reports.

Lessons

- 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

This module explains the visibility options for reports.

Lessons

- 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

This module explains how coding can be used in reports.

Lessons

- 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 I

Lab : Adding Conditional Formatting to a Report - Part II

Lab : 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

This module explains how to use the techniques from the previous modules to build advanced reports.

Lessons

- Report Patterns and Recipes

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- 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

This module explains the options on how to run the reports.

Lessons

- 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.
- 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

This module explains the different types of reports that can be upgraded.

Lessons

- 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.