TUTORIAL: Creating a Detailed Service Workorder Report Template

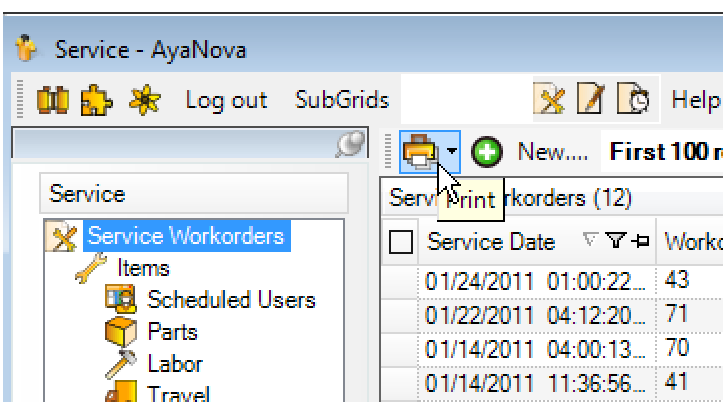
This lesson will go through the basic steps to create a service workorder report template using the **Detailed** Report Template Summary and the XtraReports internal report designer for AyaNova 7

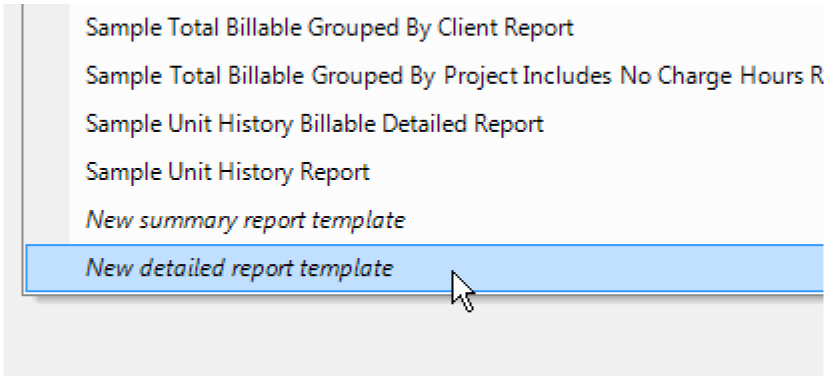
Such a report would be useful to print an individual workorder from the workorder entry screen, or to print off all workorders displaying the Service Workorders grid.

This tutorial will go over many features – inserting detail bands, grouping, selecting the correct datafield from the correct dataset, placing the correct datafields into the appropriate Detail bands, etc,

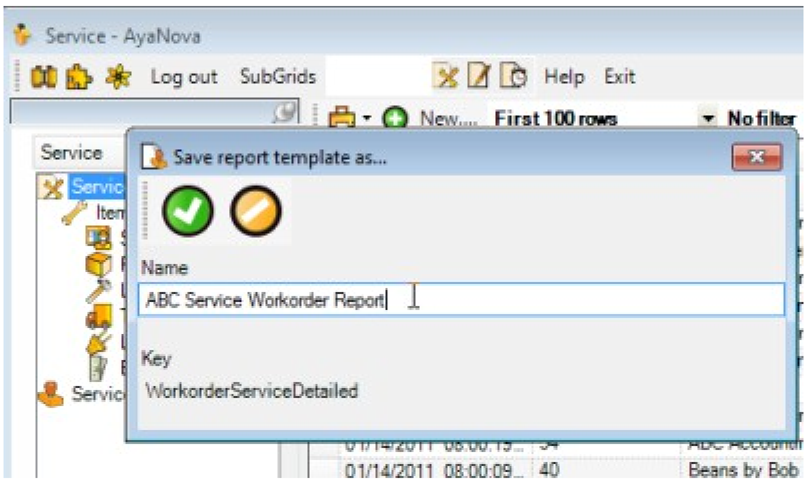
> Screenshots displayed in this lesson may not be exactly as that displayed in your program.
>
> It is highly recommended that you review the entire section on Report Templates in the AyaNova Help file **before** proceeding, as well as the How do I…?'s regarding customizing report templates
>
> We also highly recommend that you refer to the sample report templates that come with AyaNova, identifying layout, scripts and more of these samples

1. From the Service Workorders grid menu in the Service navigation pane, drop down the Print menu option, and select the *New detailed report template*

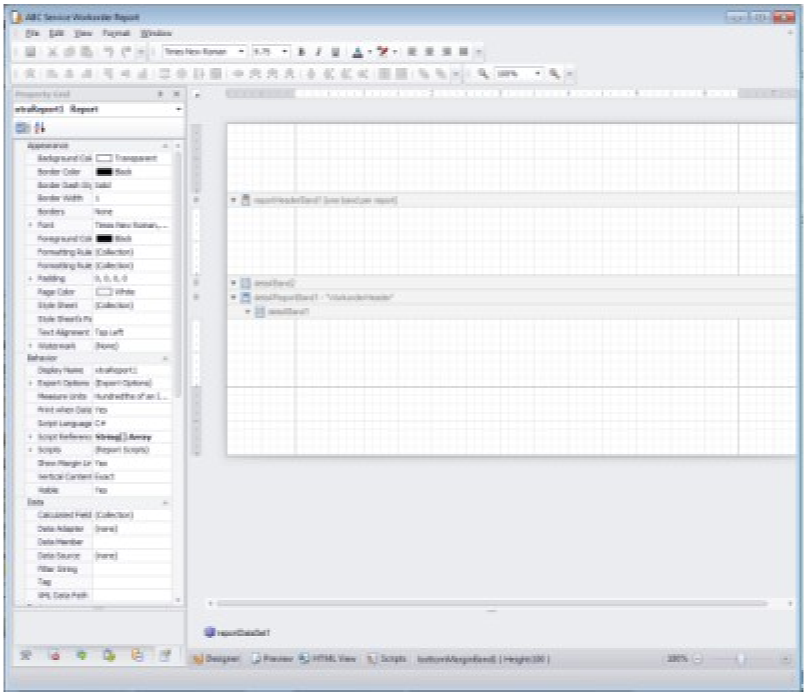




2. Enter in a descriptive name for this custom report – for example *Your Company Name* Workorder Report



3. The XtraReports internal report designer opens



4. A workorder is made up of different levels and the fields from each would only be placed in a band in a detailed report template for that particular "level":

   a. WorkorderHeader fields (includes all fields such as Client, Summary, Project, Workorder Status, Client Reference #, Service Date, etc) would be placed in the WorkorderHeader detailBand

      i. WorkorderItem (includes Custom Fields, Unit and Outside Service as well as fields from the workorder item record such as Workorder Item Status, Workorder Item Summary, etc) would be placed in the WorkorderHeaderWorkorderItem detailBand

         1. WorkorderItemScheduledUser (includes all fields from a scheduled user record in the workorder item) would be placed in the WorkorderItemWorkorderItemScheduledUser detailBand

         2. WorkorderItemTask (includes all fields from a Tasks record in the workorder item) would be placed in the WorkorderItemWorkorderItemTask detailBand

         3. WorkorderItemPart(includes all fields from a Parts record in the workorder item) would be placed in the WorkorderItemWorkorderItemPart detailBand

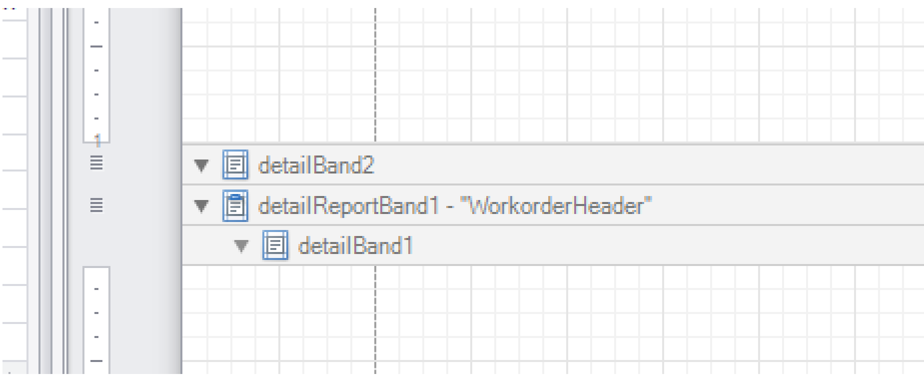
         4. WorkorderItemLabor(includes all fields from a Labor record in the workorder item) would be placed in the WorkorderItemWorkorderItemLabor detailBand

5. WorkorderItemTravel(includes all fields from a Travel record in the workorder item) would be placed in the WorkorderItemWorkorderItemTravel detailBand

6. WorkorderItemMiscExpense (includes all fields from a Misc Expense record in the workorder item) would be placed in the WorkorderItemWorkorderItemMiscExpense detailBand

7. WorkorderItemLoan(includes all fields from a Loan record in the workorder item) would be placed in the WorkorderItemWorkorderItemLoan detailBand

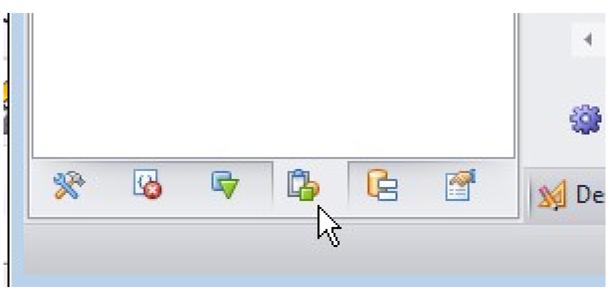
5. As you can see, when you first create a Detailed Report Template, the WorkorderHeader band is already created for you with its detailBand1 band where datafields from the workorder header would be placed

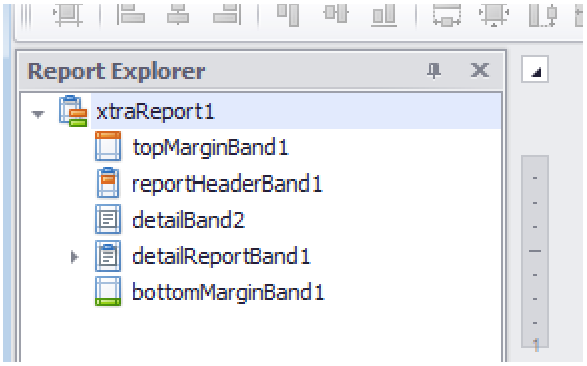


6. You should at this point insert the bands for WorkorderItem, for WorkorderPart, or WorkorderLabor etc – for all of the bands you will be using.

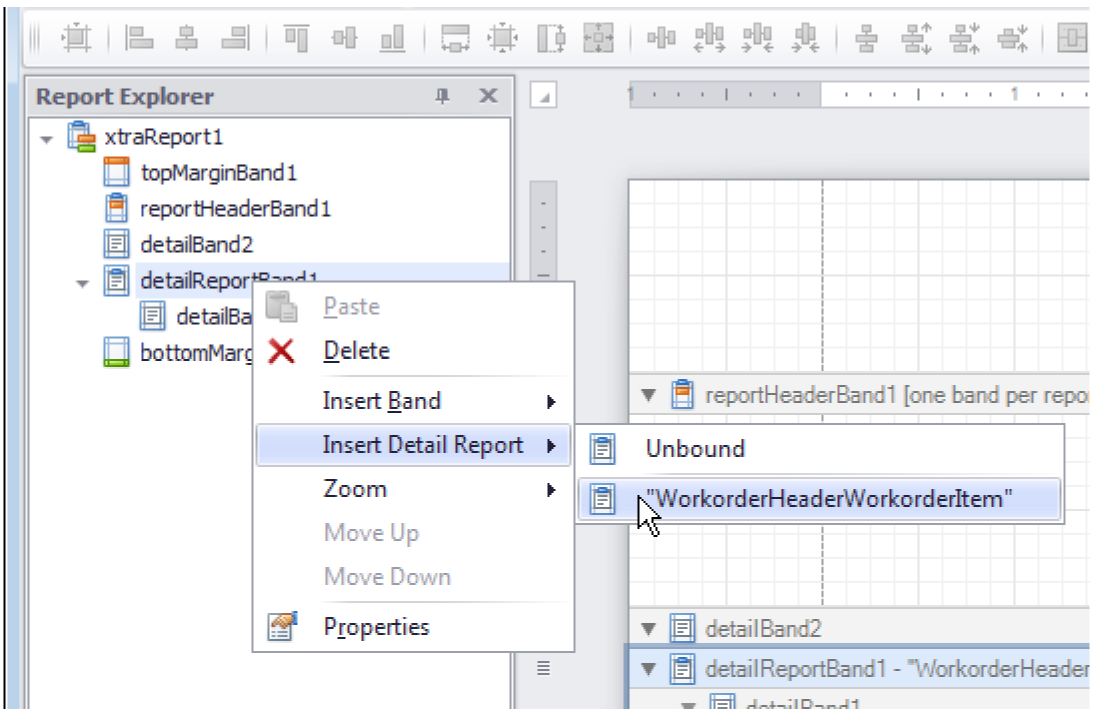
7. Two ways to do this – first way is by using the Report Explorer tab

8. Click on the Report Explorer tab at the bottom left (it will say Report Explorer at the top or if you widened the panels enough)

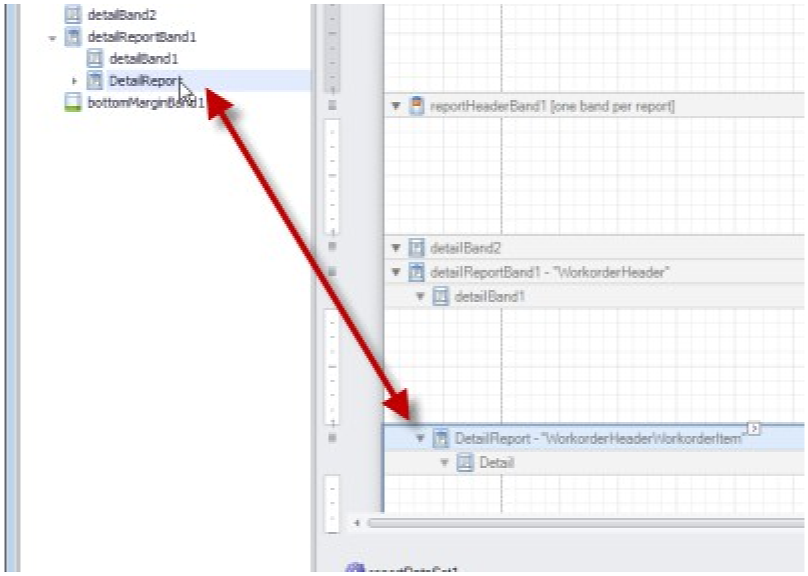




9. Right-click on the **detailReportBand1** and select **Insert Detail Report -> WorkorderHeaderWorkorderItem**

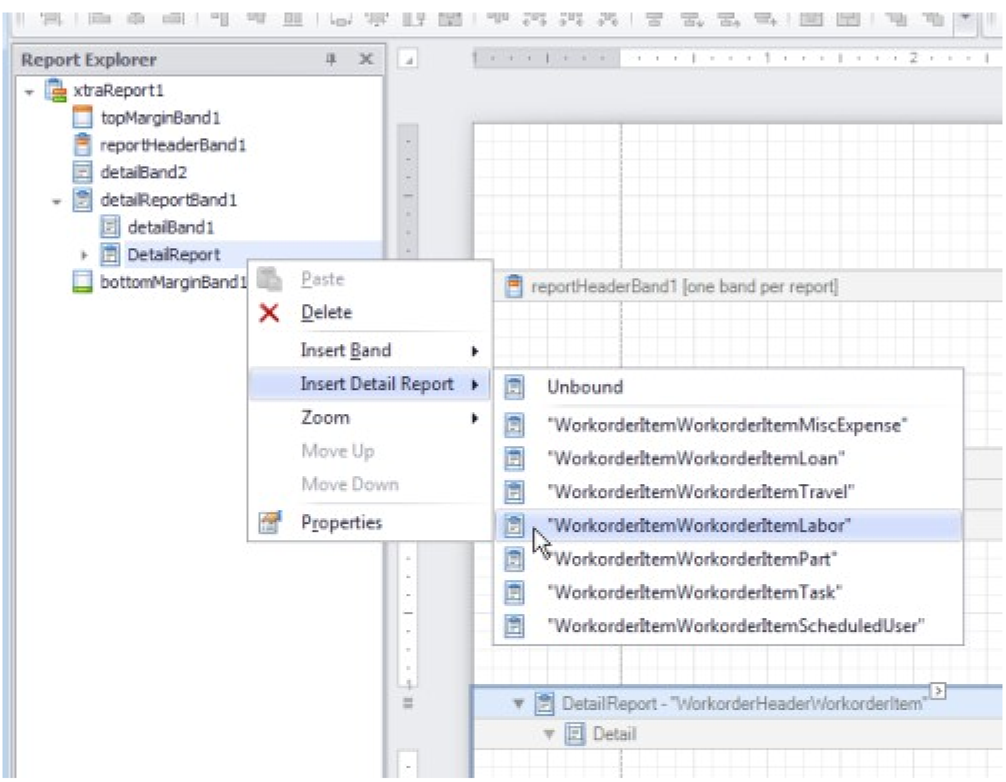


a. This creates the area on the report template where fields from workorder item would be placed – the DetailReport for the WorkorderHeaderWorkorderItem and its Detail band



10. Now we will insert the areas for Labor datafields and for Part datafields to be placed in a detailed report template

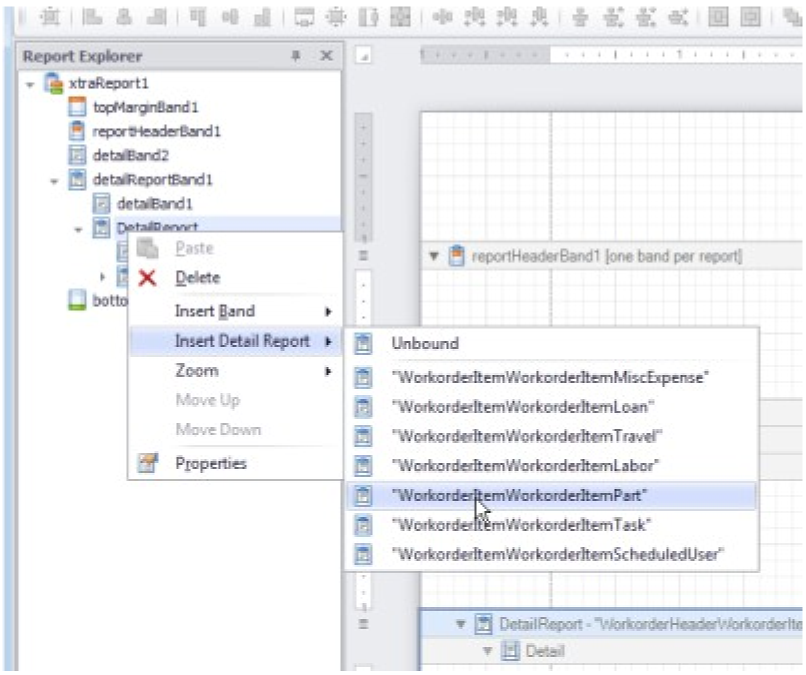
  a. Right-click on the **DetailReport** (which is for the WorkorderItem and the Labor, Part, etc bands are all sub of the workorder item so would go under it) and select **Insert Detail Report -> "WorkorderItemWorkorderItemLabor"**



b. This creates the area on the report template where fields from the workorder items Labor would be placed

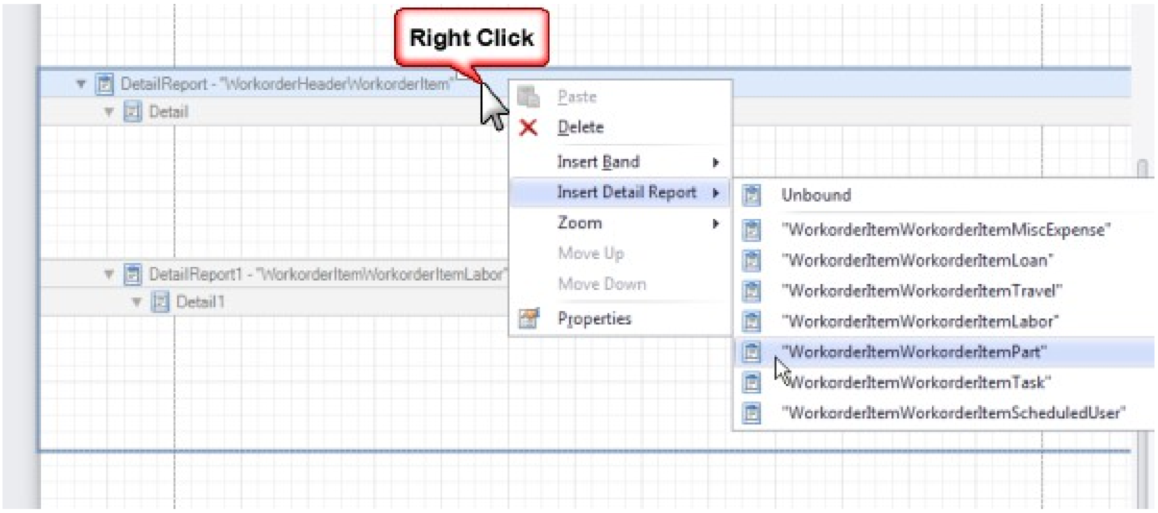
11. Right-click on the **DetailReport** again and select **Insert Detail Report -> "WorkorderItemWorkorderItemPart"**

a. Note that you right-clicked on the Item band to do this (the one presently called DetailReport) – as both part and labor are under Item



b. This places the area also under workorder item area for where data fields from Part would be placed.

12. Note you could also have right-clicked on the band itself in the Designer panel and done the following to insert the bands.



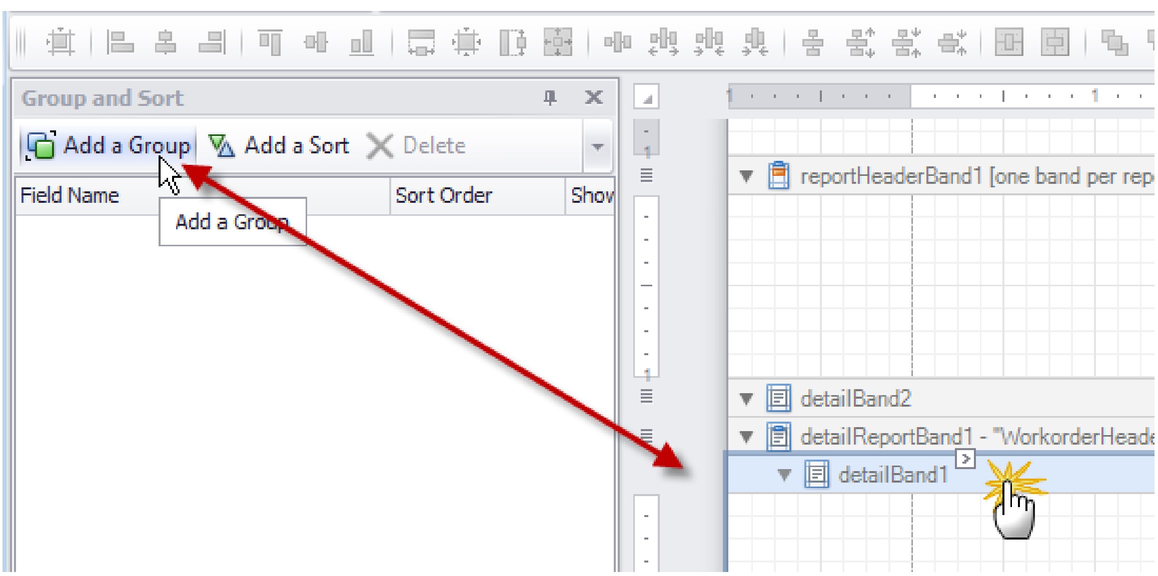
13. In this tutorial we want any reports to print off in alphabetical order of the selected client in the workorder, not necessarily by the order of the workorders displayed in the grid so we will want to group the Detail of the WorkorderHeader by the client name

Two ways to set up grouping – A. using the Group and Sort panel tab on the left, and the other way is B. right-click on the band itself and select GroupHeader

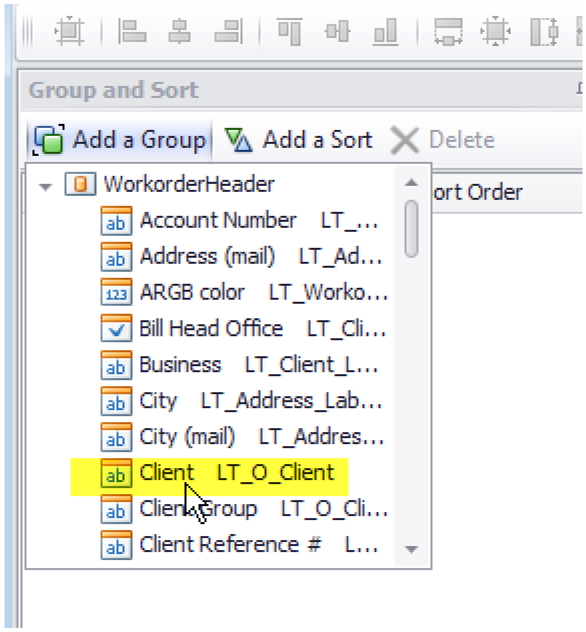
A. Grouping using the Group and Sort panel tab:

a. Click on the **detailBand1** band of the **detailReportBand1 – "WorkorderHeader" to select it**

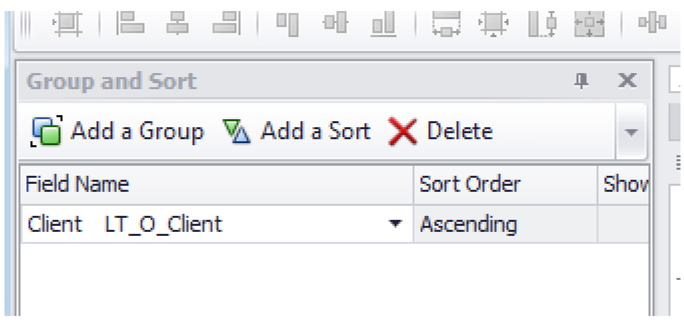
b. View the Group and Sort panel tab



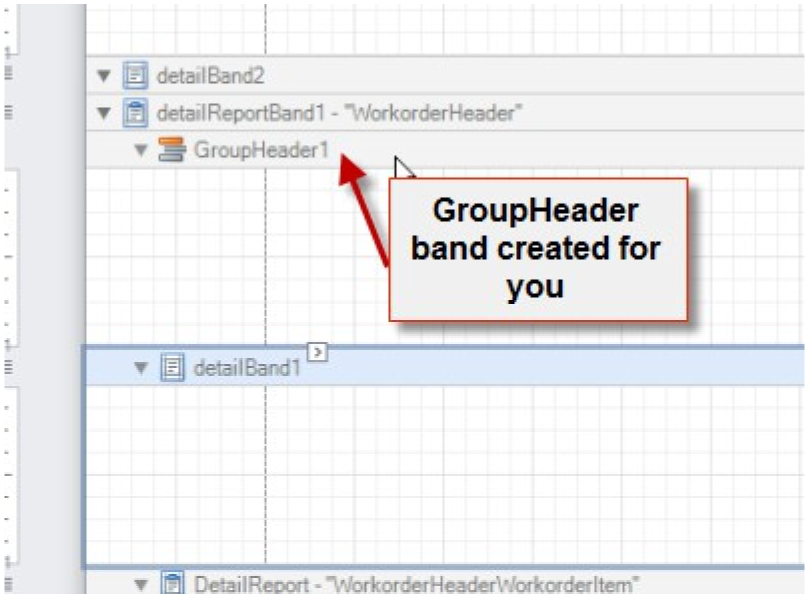
c. Select to Add a Group, which drops down the list of the available datafields to group by, and select Client



d. It will now show that you are grouping by the client in Ascending order

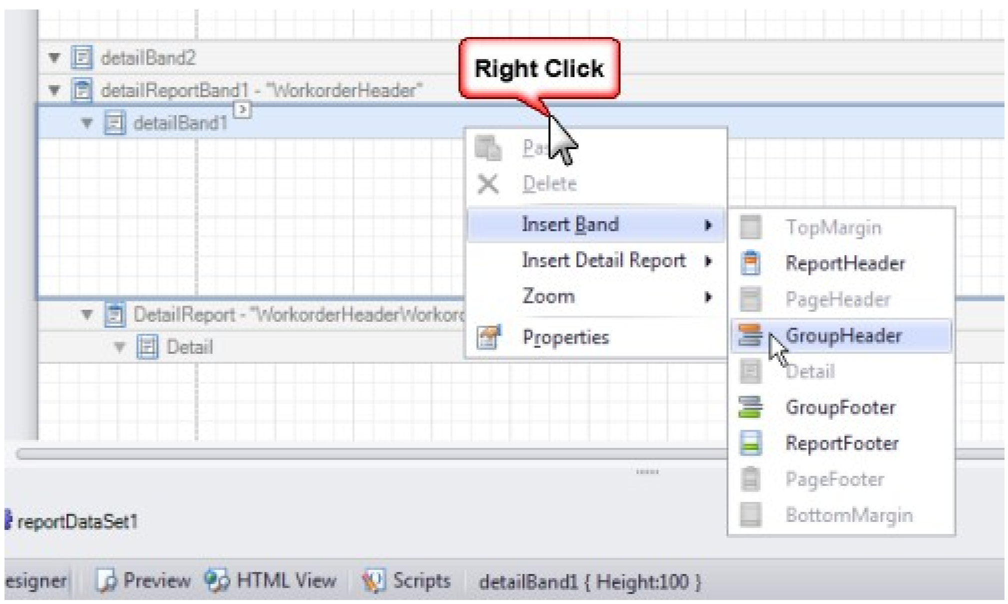


e. And in the Design Panel, you will now see that there is a new Group Header for the detailReportBand1's detailBand1



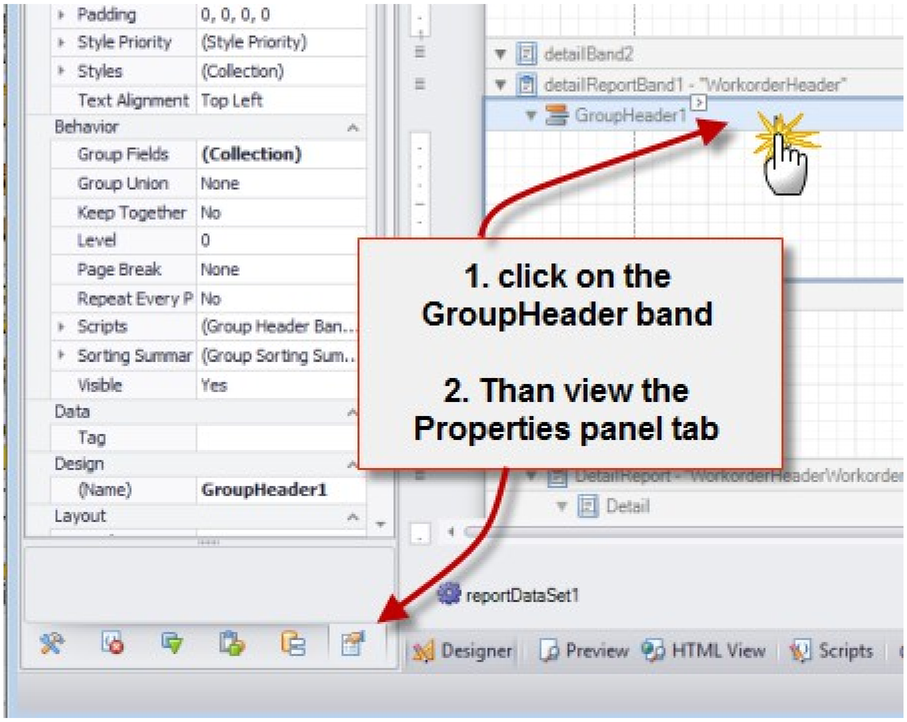
B. Grouping using the right-click on the band itself:

a. Right-click on the **detailBand1** band of the **detailReportBand1 – "WorkorderHeader"** and select **Insert Band -> GroupHeader**

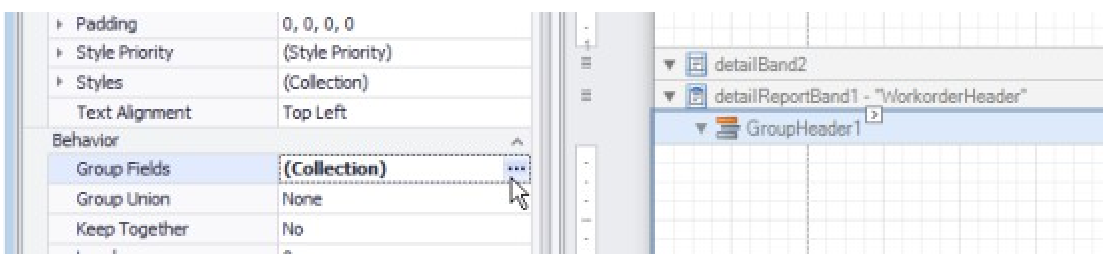


b. We want to view the **Properties** of the GroupHeader band we just made for the WorkorderHeader

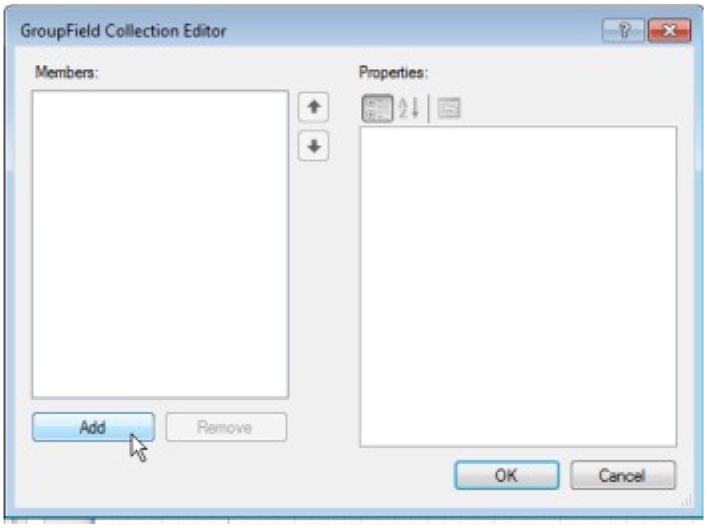
So on the design panel, **click** on the GroupHeader band (may be called GroupHeader1) to select it if it is not already (the band is will show a darker color when selected), and then select the **Properties** tab on the left to view the properties of this GroupHeader band



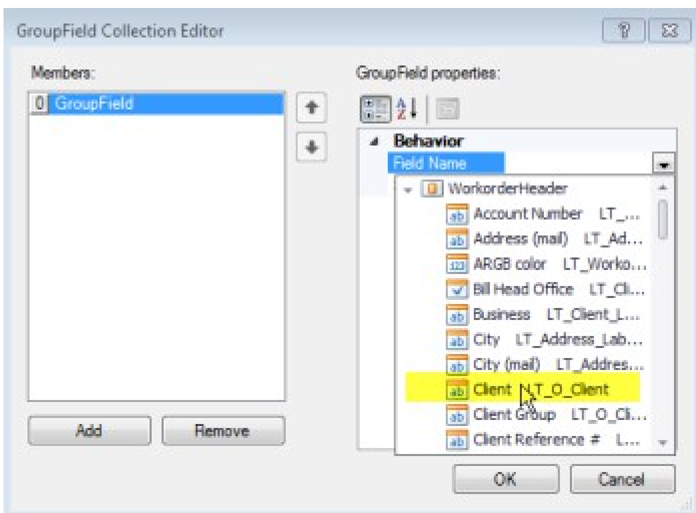
c. Edit the **GroupFields** property by clicking in its **(Collection)** and select the browser button as per the screenshot below



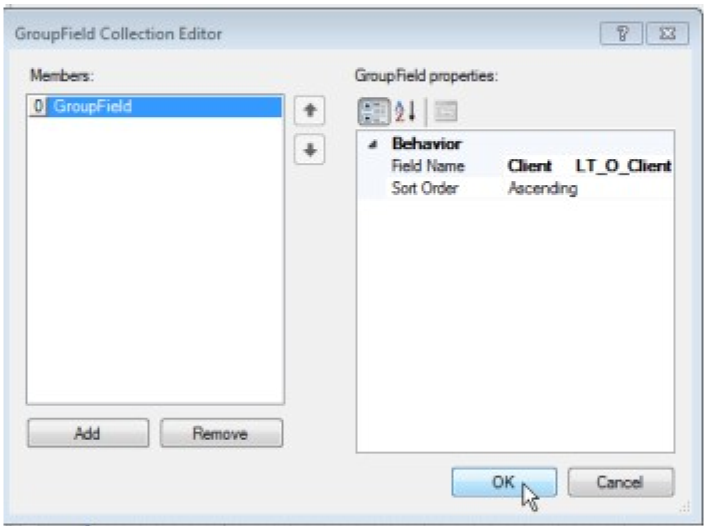
d. The GroupField Collection Editor opens. Select **Add** in the GroupField Collection Editor



e. Drop down the **FieldName** property and scroll to the data field for the client name, and select it.

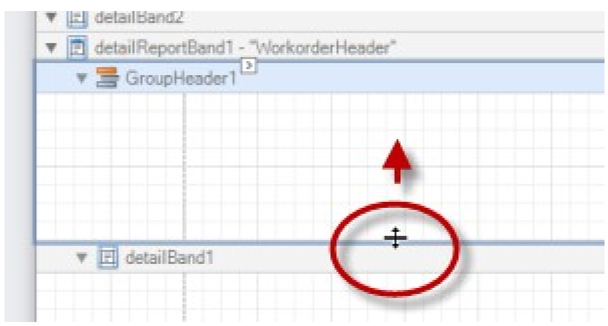


f. Select OK to close the GroupField Collection Editor

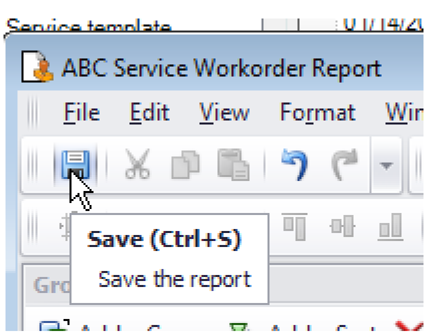


g. Also note that we could have grouped by Dispatch Zone, or Service Date or another datafield from the WorkorderHeader list.

h. Change the height of the GroupHeader1 area by selecting to highlight the detailBand1 band below it so its not so tall, placing your mouse over the top edge of the detailBand1 band, click hold down and drag up. Note how your mouse changes to a different symbol and when you drag it a line shows where you are dragging it to.



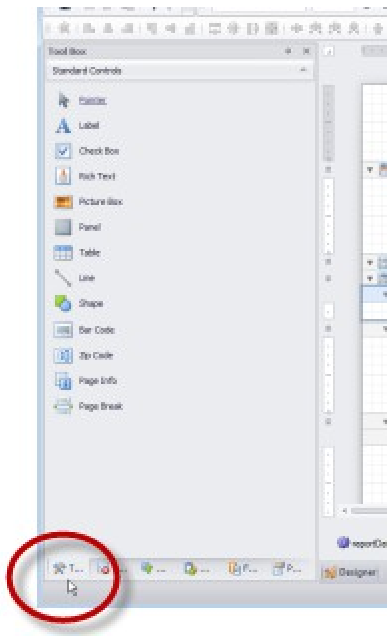
14. Don’t forget to Save every once in a while



15. We will now add labels and datafields to the WorkorderHeader area to display information from the header area of a workorder.

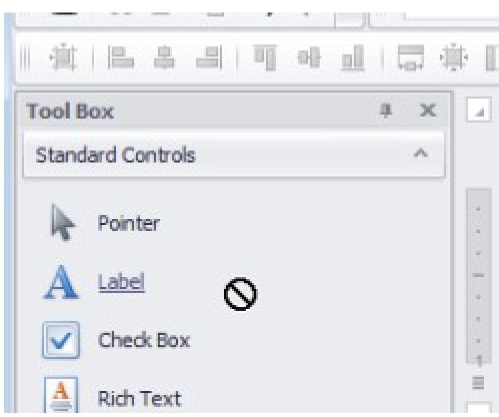
16. In this tutorial we will only display the workorder number, client name and client phone number from the workorder header information. Of course you can have whatever fields from the WorkorderHeader dataset you want, as well as format etc. Refer to the other sample report templates that come standard with AyaNova to see other examples.

17. Click on the Toolbox panel tab on the left

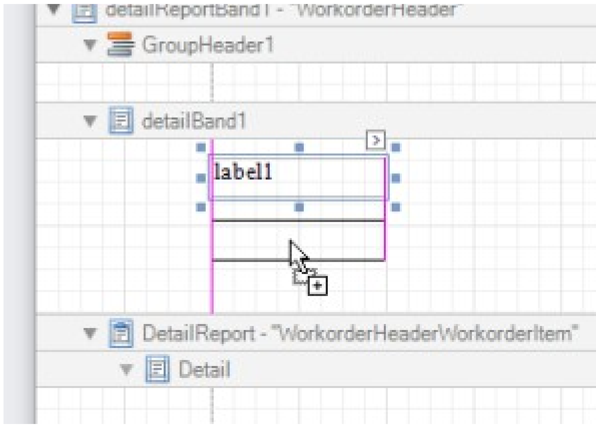


a. We're going to include text labels identifying the words WO# and Client

b. Click and drag the Label control to the detailBand1 of the WorkorderHeader (your mouse turns to a funky circle with line through it when you are dragging)

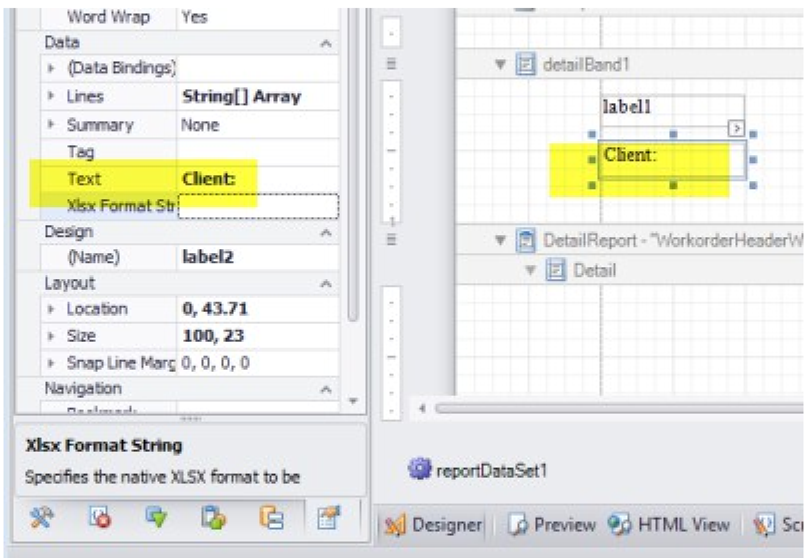


c. Click and drag a second Label



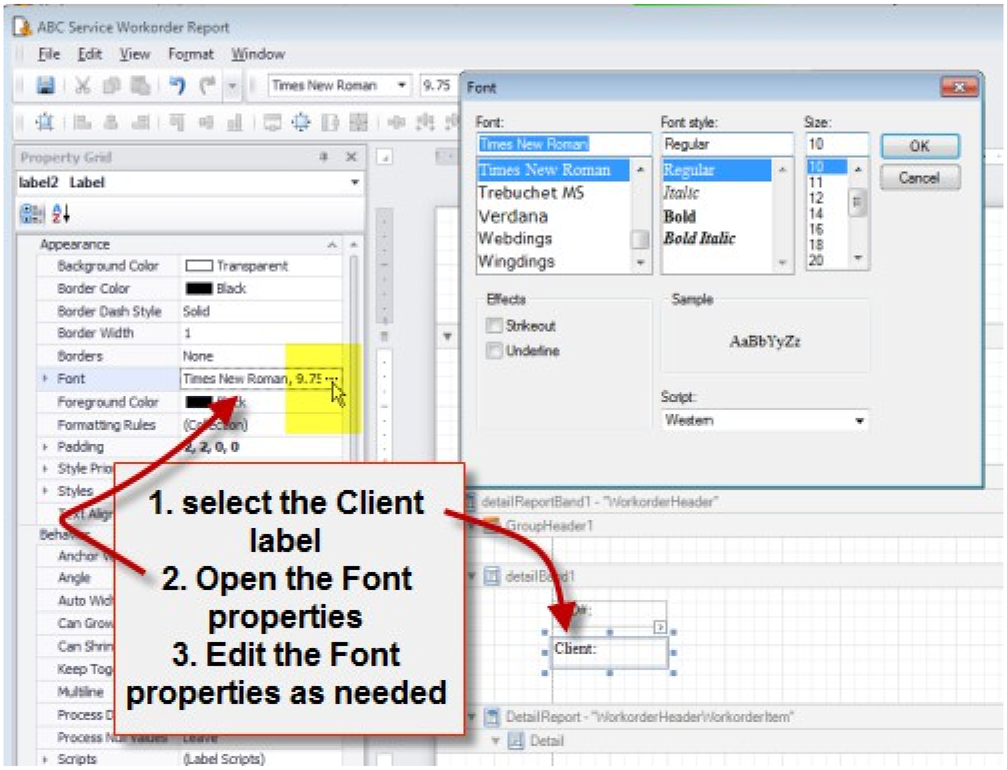
d. We will now edit the text that displays for these two labels

e. With label2 highlighted, select the Properties tab, and edit the Text property to Client: (tab off of the Properties Text field after editing to update the design panel)



f. With the label1 highlighted, edit the Text property to WO#:

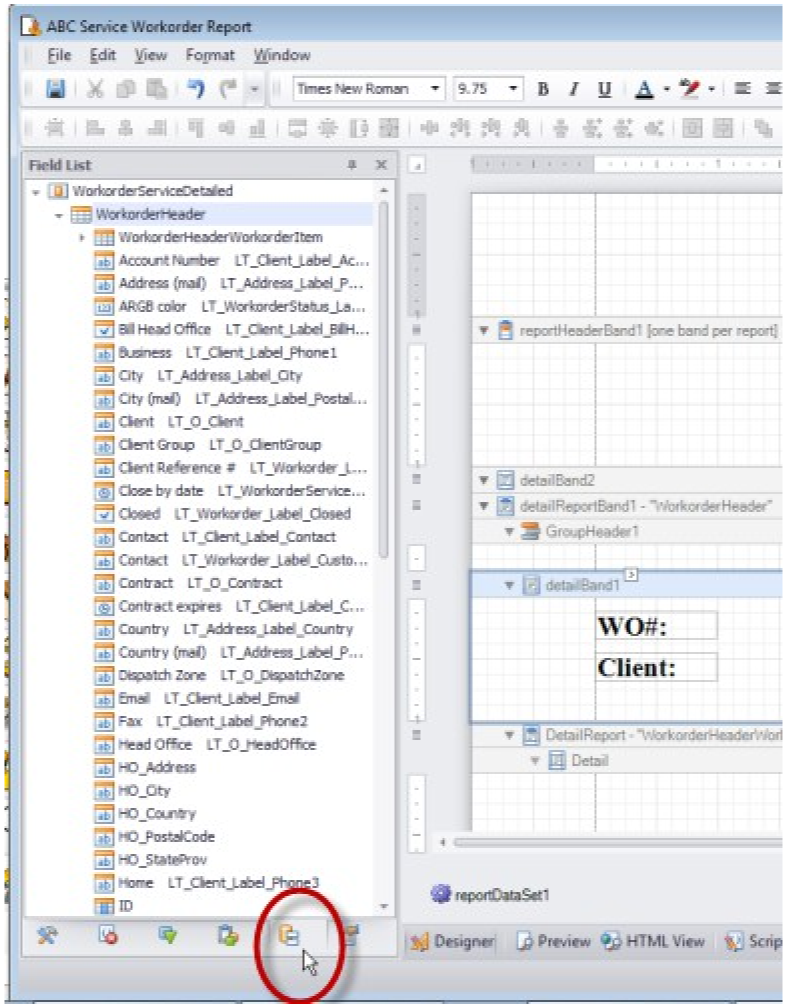
g. Change the font properties of each by selecting the field on the design panel to highlight it, and then in the **Properties** tab, click within the **Font** property field, select the browser to open the Font screen and edit as you wish.



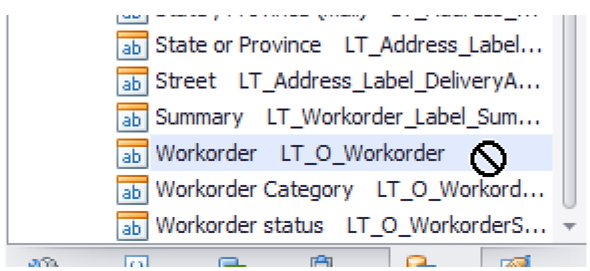
h. Now we will drag over the data fields for the workorder number, the client name and the phone number of the client

i. Select the **Field List** tab

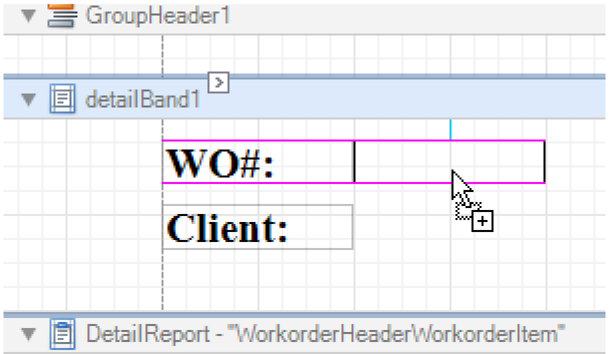
j. As you were already in the detail band for Workorder, it will already be expanded to show you the available fields for the WorkorderHeader dataset

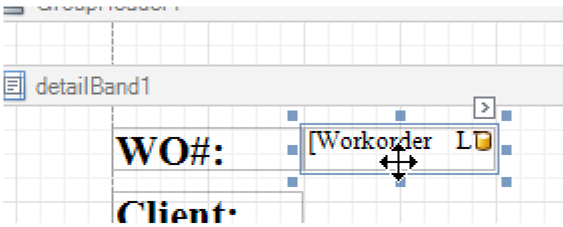


k. Scroll down and find Workorder datafield



l. Click, drag and drop onto the area next to the WO#: text label



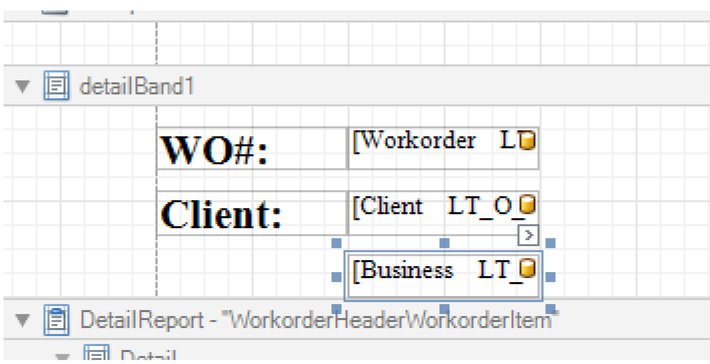


m. Scroll and find Client datafield

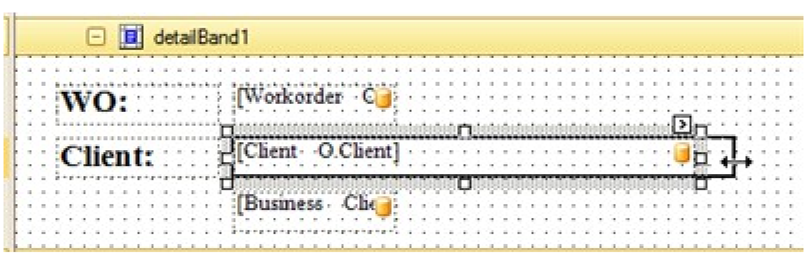
n. Click, drag and drop onto the area next to the Client: text label

o. Scroll and find the Business phone number datafield

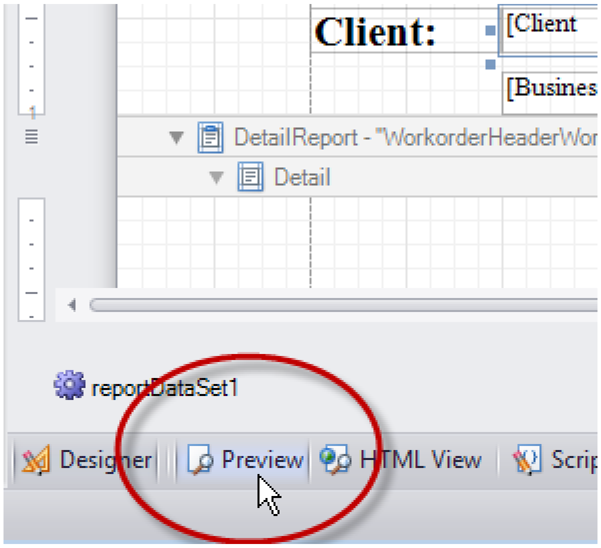
p. Click, drag and drop underneath the Client data field

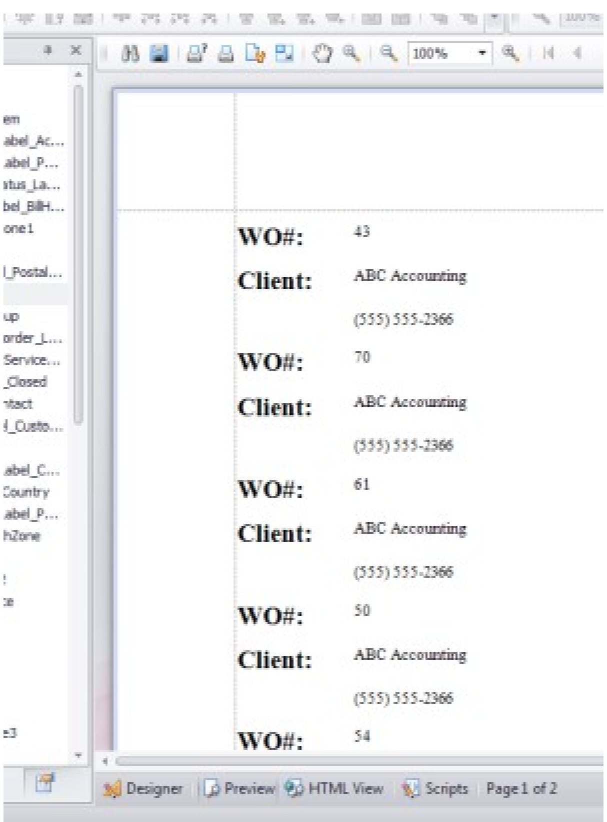


q. You may want to lengthen the Client datafield to accommodate long client names by selecting the field, place your mouse to the side, drag and drop as well as shorten, lengthen the other fields

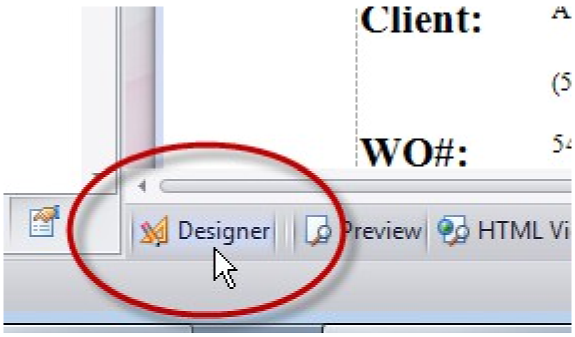


r. Click on the Preview hyperlink so you can see what it looks like right now in a report

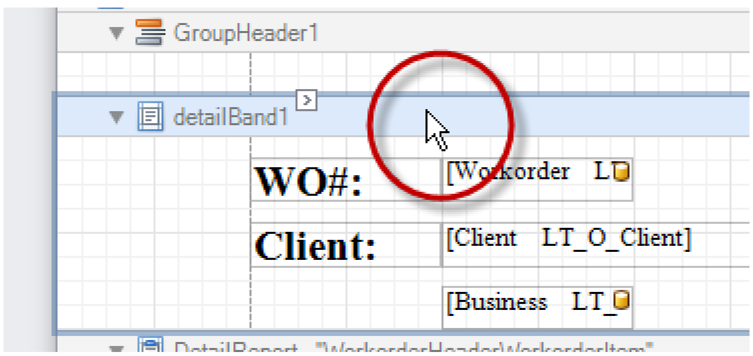




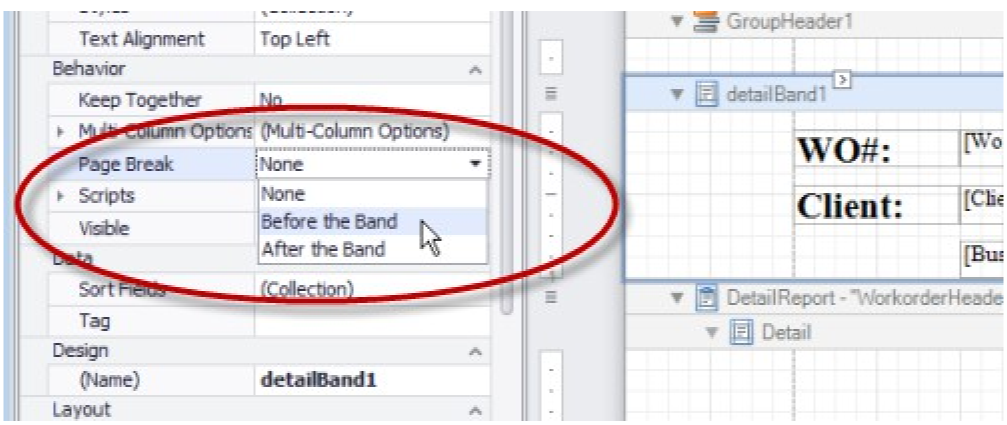
18. Right now you can see that the information from the workorder header is displaying, and every workorder follows every other. As we want only one workorder on its own page, we need to identify to the report to break for every workorder *a.* Select Designer again to go back to viewing the design panel



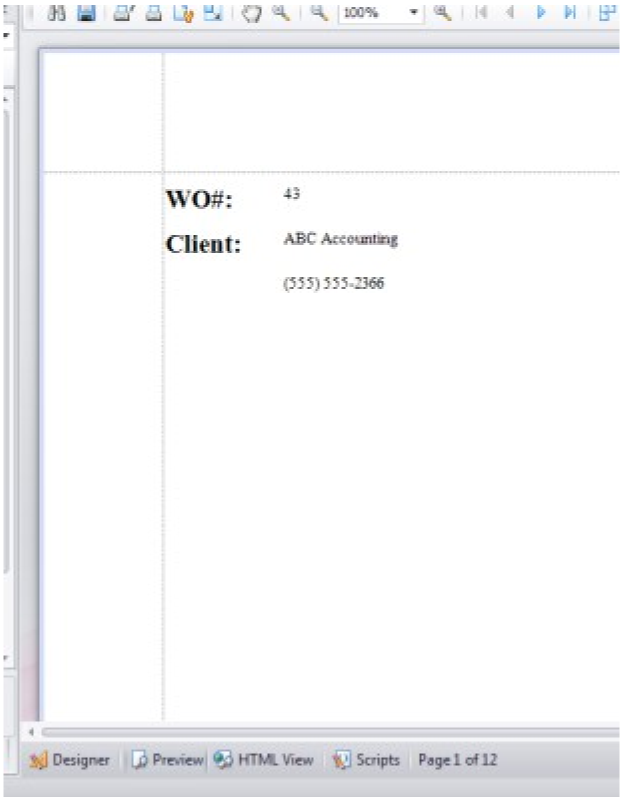
b. Click on the detailBand1 band for the WorkorderHeader in the design panel and select to view the Properties tab for this band



c. Edit the PageBreak property of this band to use Before the Band



d. If you preview you will see that each workorder is now on its own page

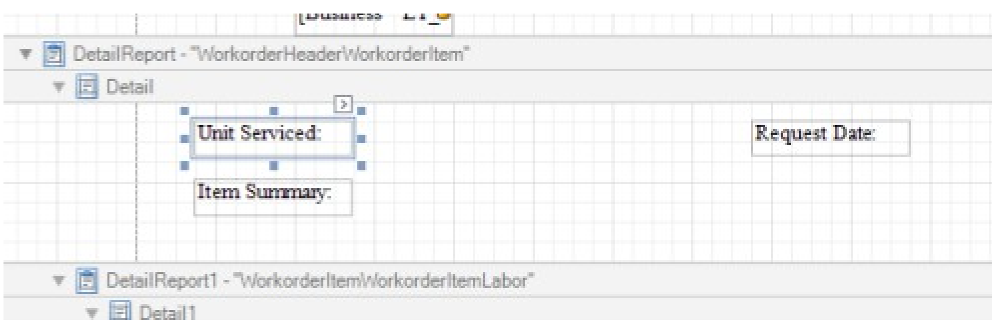


19. Now let's enter fields for the workorder item (s) of the workorder.

20. In this tutorial we want to identify the Item Summary, the Request Date, and the Unit being serviced if selected.

21. Let's place text labels for these three fields into the Detail area of the WorkorderHeaderWorkorderItem band and place a line at the top to differentiate multiple workorder items from each other.

a. Drag over Label controls from the ToolBox panel tab, and edit their Text properties so that they are labeled for Unit Serviced, Request Date and Item Summary



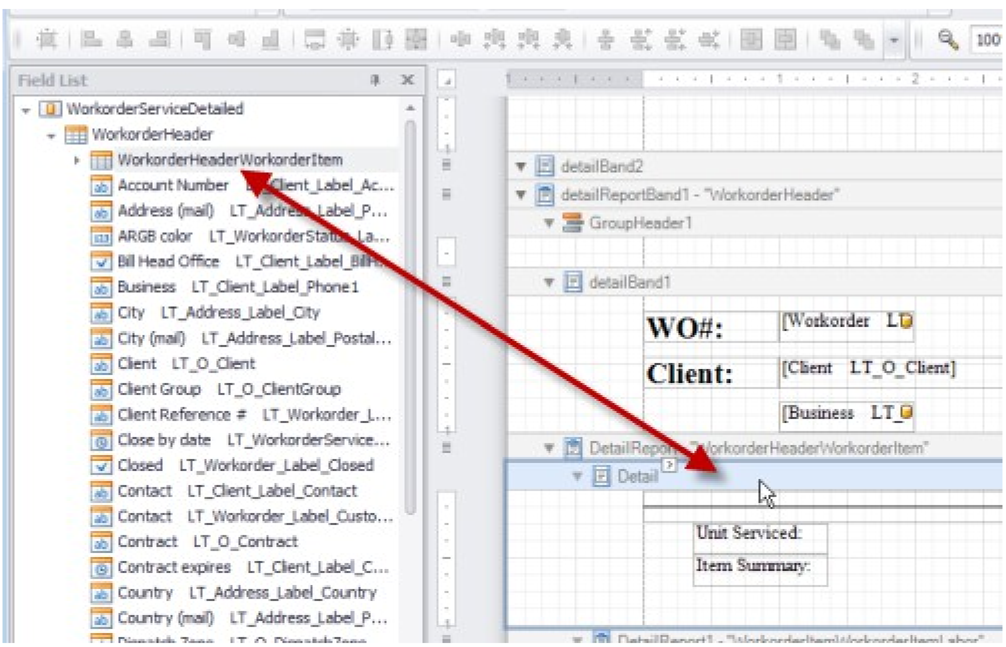
b. From the ToolBox panel tab, drag the Line control to the Detail area, and click and drag it to change the length

c. In the above screenshot, the fields are showing in red, and a warning is showing that fields are overlapping. Move fields around as needed so they do not overlap.

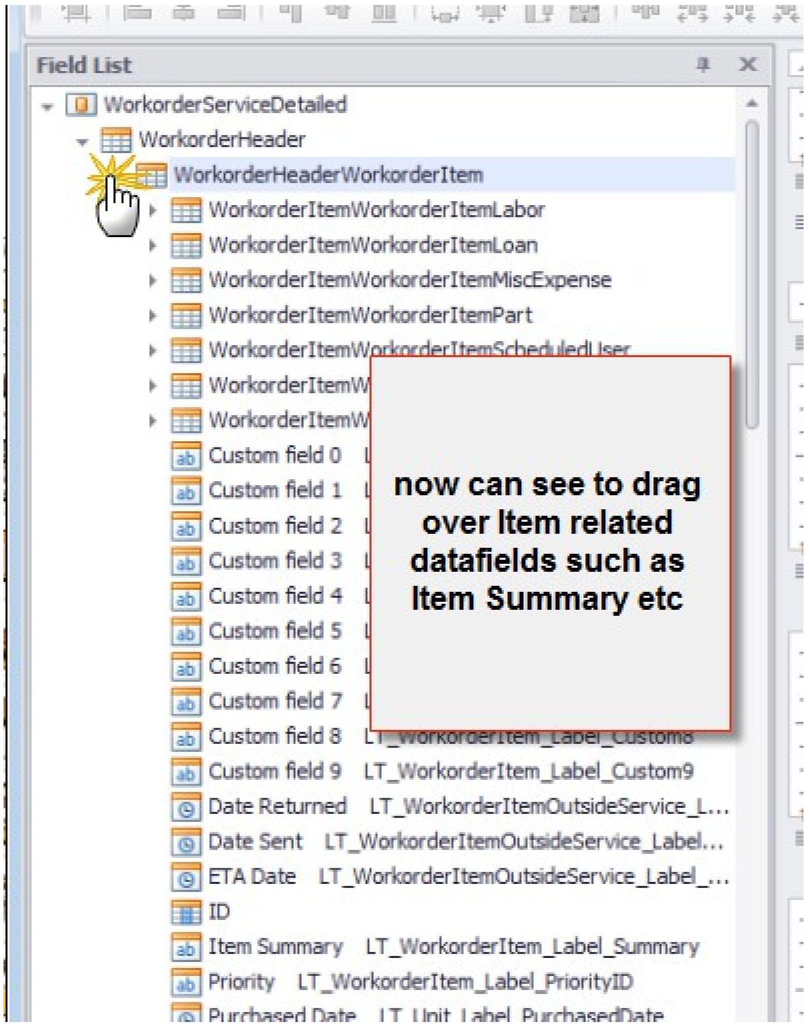
d. Click on the Detail band of the WorkorderHeaderWorkorderItem

e. Now select the Fields tab

f. You will note that it displays highlighted by default the correct area WorkorderHeaderWorkorderItem from where we would drag data fields from

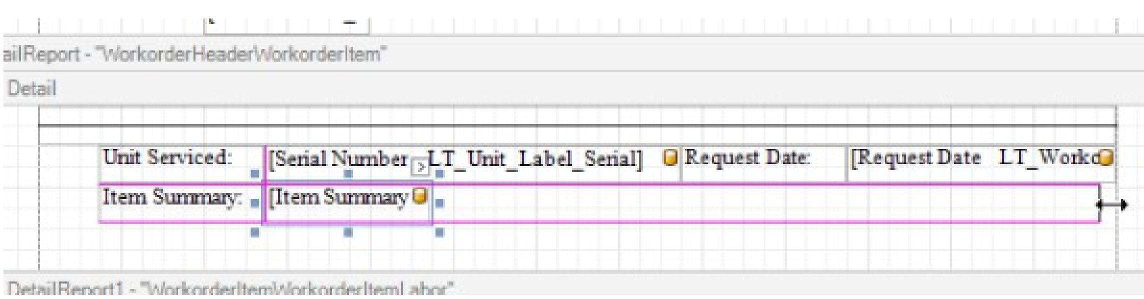


g. Double-click on the WorkorderHeaderWorkorderItem to expand it



h. You will also note that the fields available for the WorkorderHeaderWorkorderItem, includes the datafields from the workorder item grid in a workorder, as well as the Unit sub-screen, and the Outside Service sub-screen

i. Drag, drop and edit size font etc as needed the fields for Serial Number (which includes the serial number, unit name and model if set so in Global Settings for Unit Display Format), Request Date and Item Summary



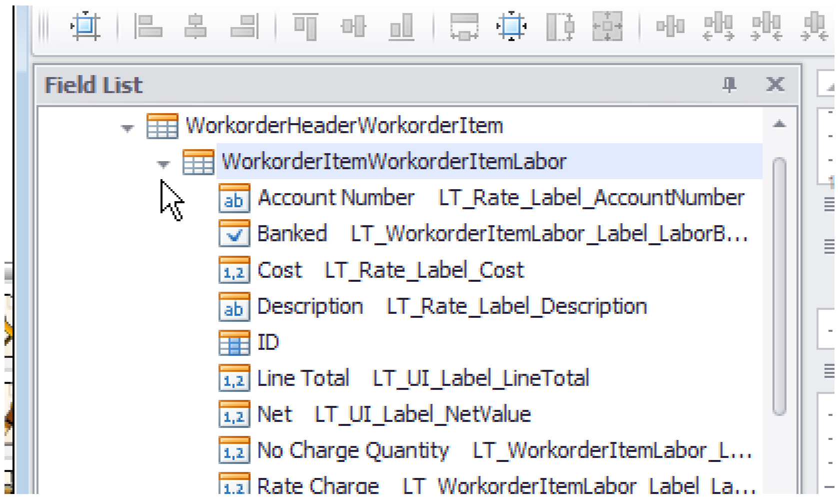
22. Preview to see what it looks like

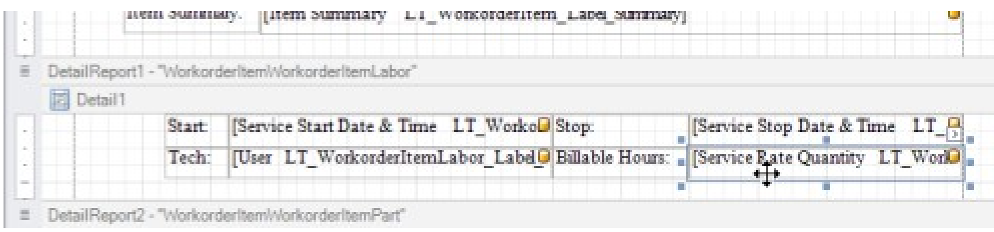
23. Now we will enter datafields for the Labor area

24. In this tutorial we want to identify the User that performed the service, the date & time they started and stopped, the hours they entered in Service Rate Quantity

a. Drag over Label fields as needed to for labels from the ToolBox tab

b. Select to highlight the Detail1 of the Labor (WorkorderItemWorkorderItemLabor) and then select the Fields tab, thus ensuring you are obtaining the data fields from the correct area.



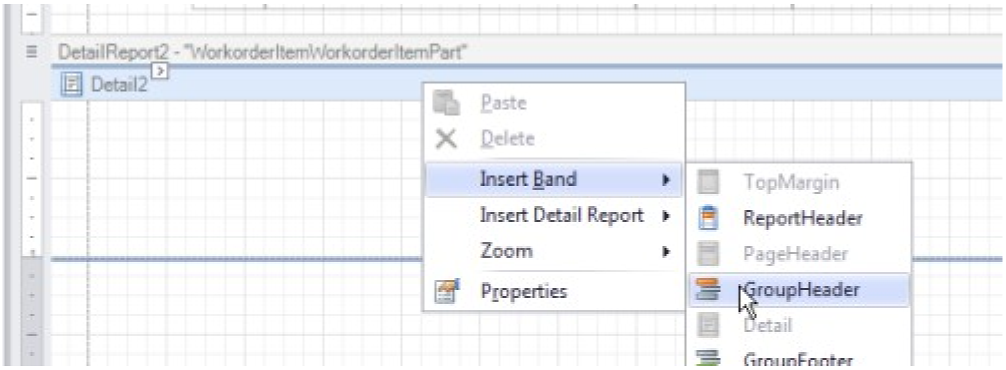


25. Now enter datafields for the Part area

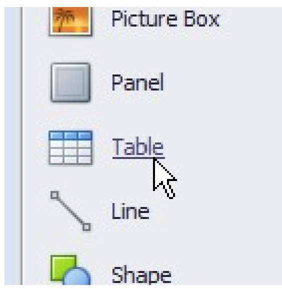
26. In this tutorial we will identify the quantity, the part, the price for that part, and whether the part has been set to Used In Service or not.

a. We will make a GroupHeader for the Part area where we will place the text labels and then in the Detail4 area we will place the data fields

b. Right-click the detail band for the Part band, select Insert Band -> GroupHeader

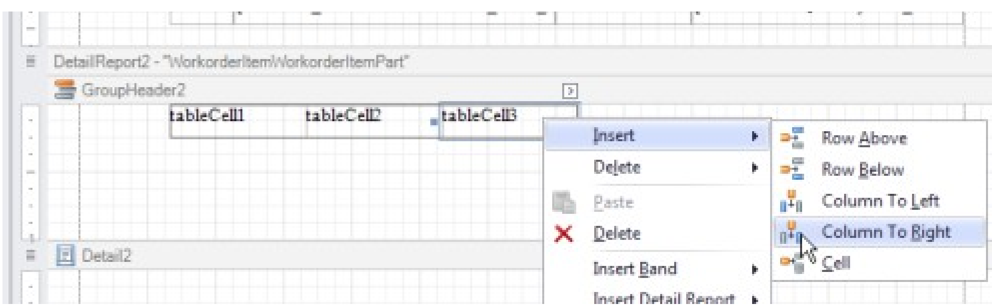


c. From the **ToolBox** tab, drag over a Table control into the GroupHeader2 for this part area

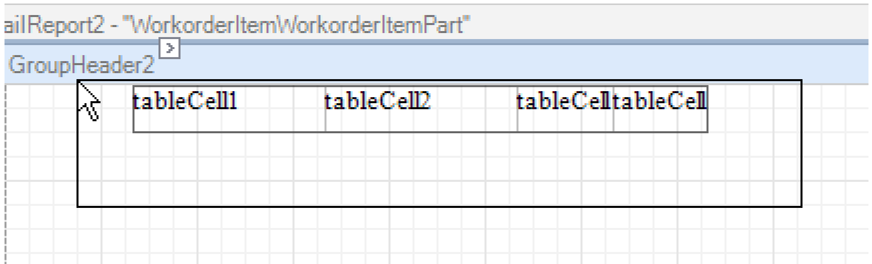


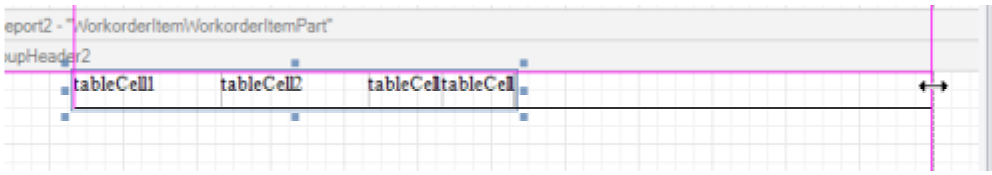
d. A Table control defaults to showing 3 fields – we will add one more field

e. Right-click on the further most right field of the table, select Insert -> Column to Right so that now our table has four columns



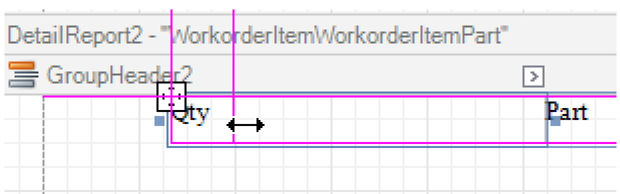
f. Highlight the entire table (click and drag your mouse to highlight the entire table), and than hover your mouse over the right so that the cursor changes to a left – right arrow, click and drag to the right to lengthen the table



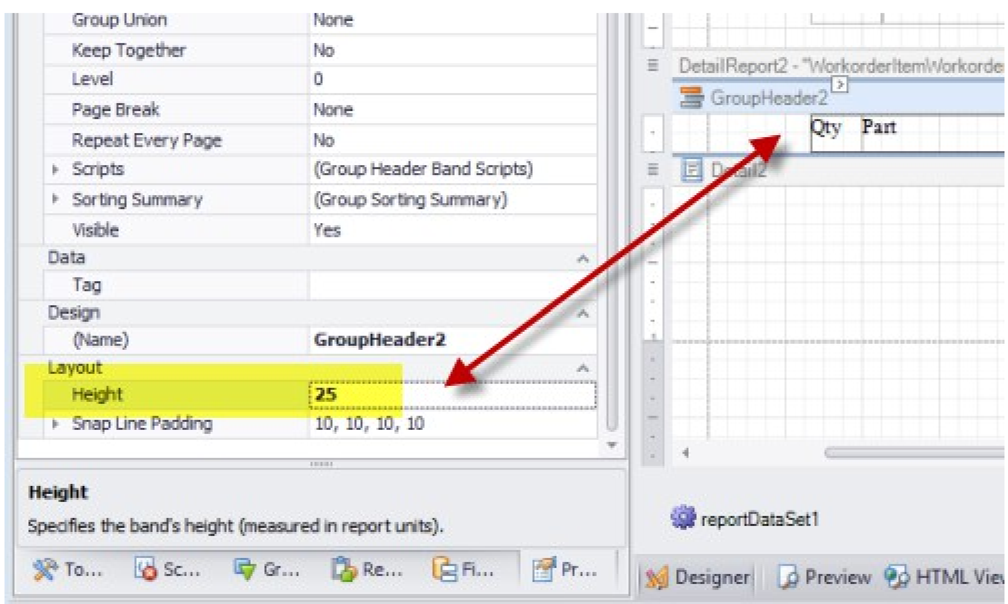


g. Via the Properties tab, edit the text for each column for QTY, Part, Price and Used in Service by highlighting a field and editing its **Text** property

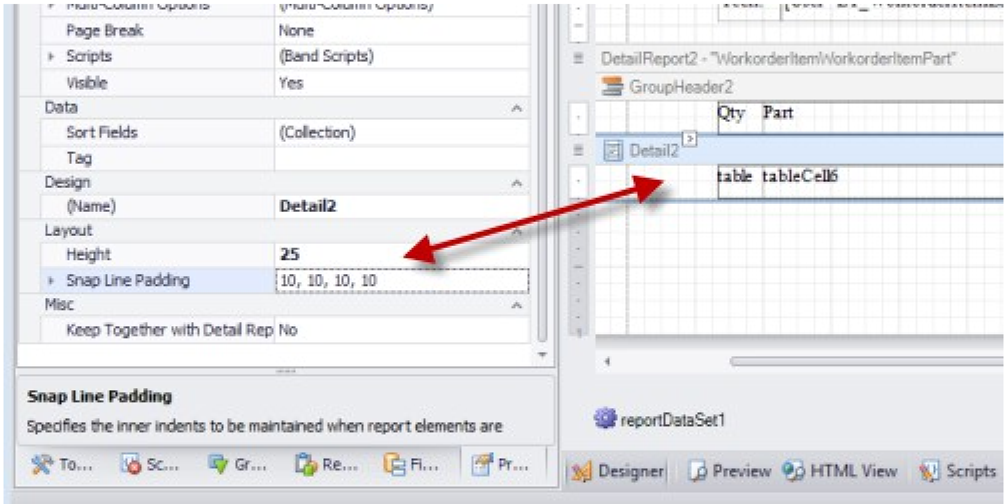
h. And then starting from the left most field, click to highlight, place your cursor on the edge and lengthen or shorten the field as you may need it



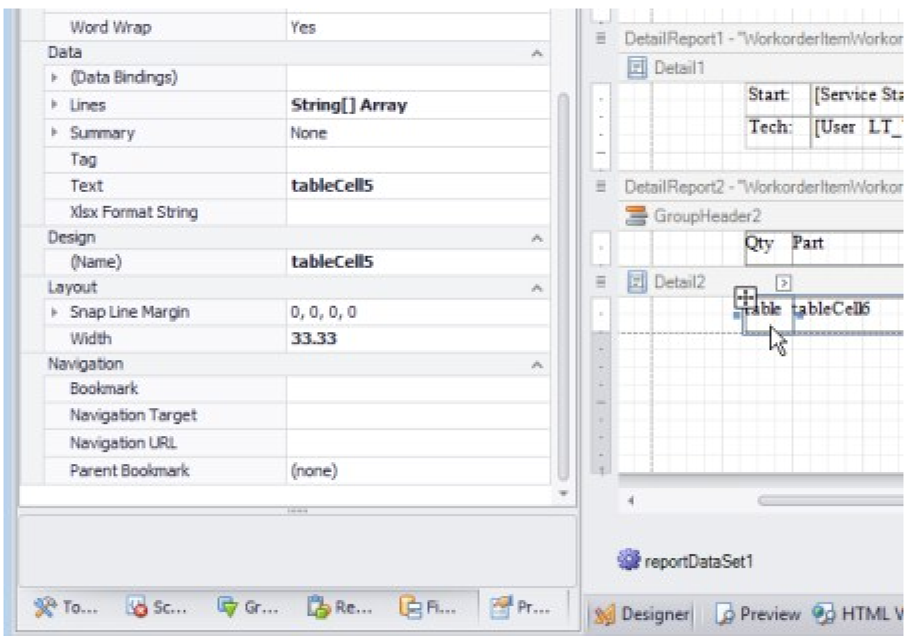
i. Change the height of the GroupHeader2 band by selecting the GroupHeader2 band, and changing the Height property for it from 100 to 25



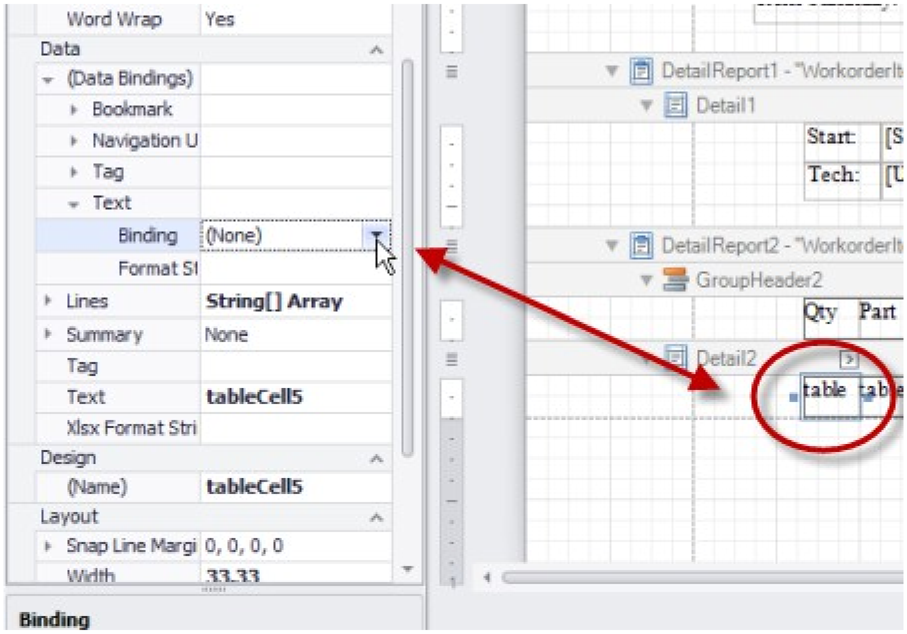
j. Drag over a Table control into the Detail2 band for Part that has three columns, and set the width etc for each column same as above for Qty, Part and Price. And set the Height of the Detail2 band too



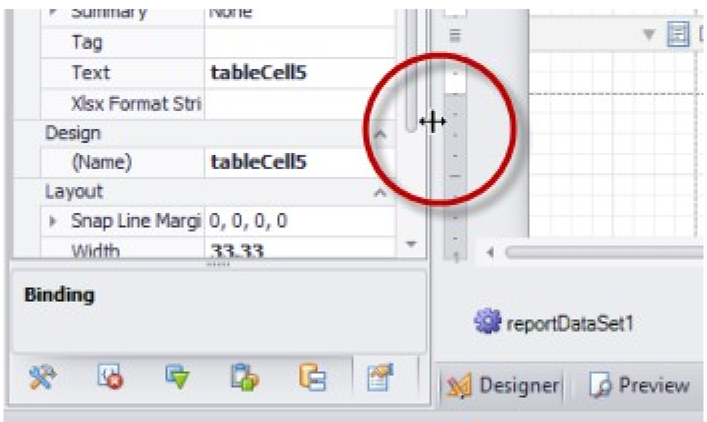
k. Use your mouse to click on the first column of the table and then view its Properties tab. You can also tell that you have selected the field by its Name displaying in the Properties tab



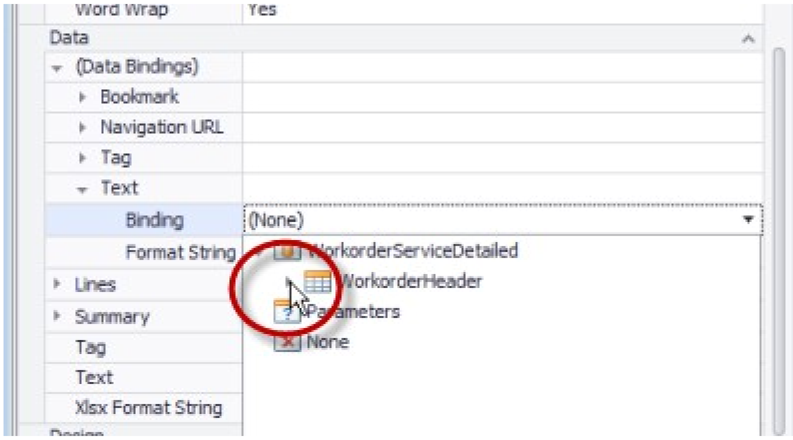
l. Expand the (Data Bindings) -> Text -> Binding property for this field



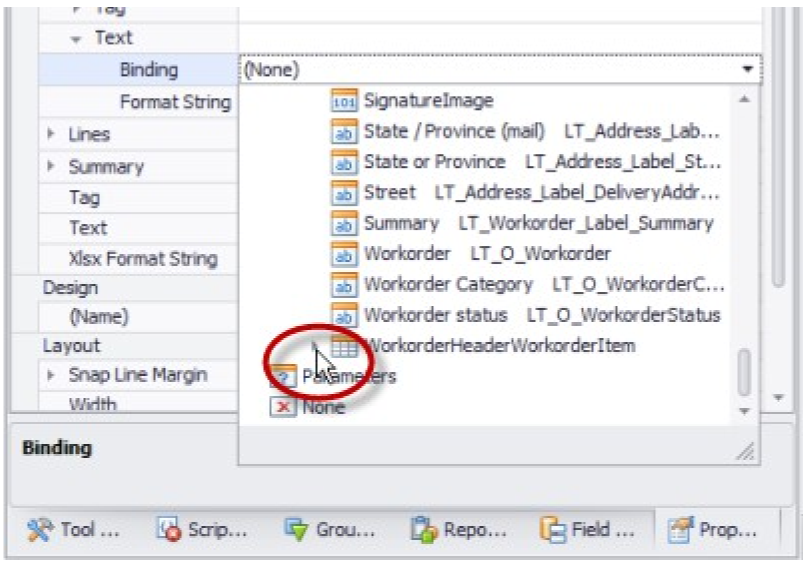
m. It might be suggested to widen the Properties pane on the left so that you can scroll and select



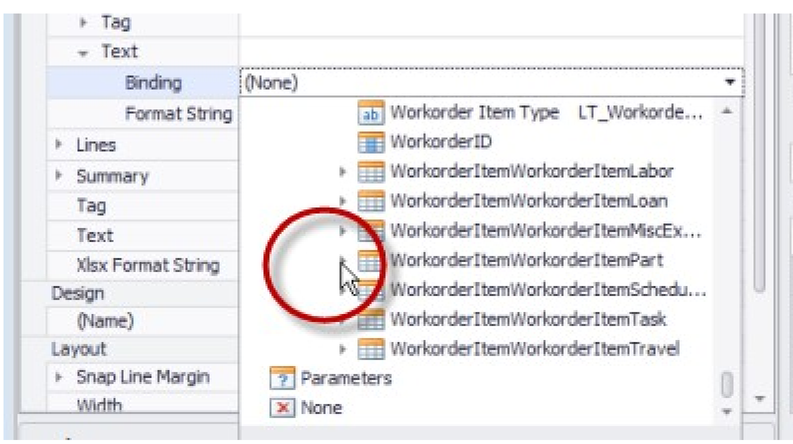
n. Click in the Binding property and expand the WorkorderHeader by clicking on the + with your mouse.

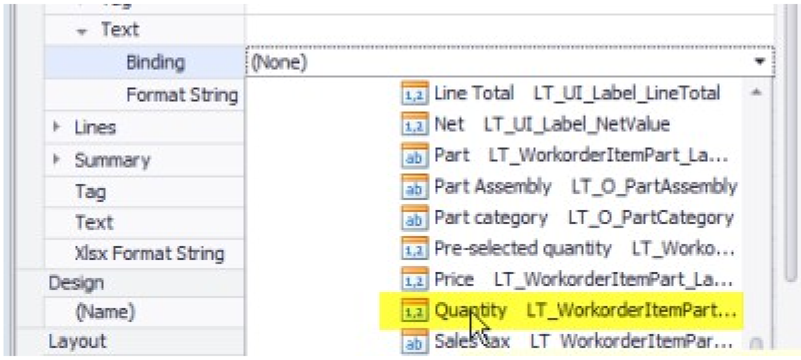


o. Scroll down and expand the WorkorderHeaderWorkorderItem

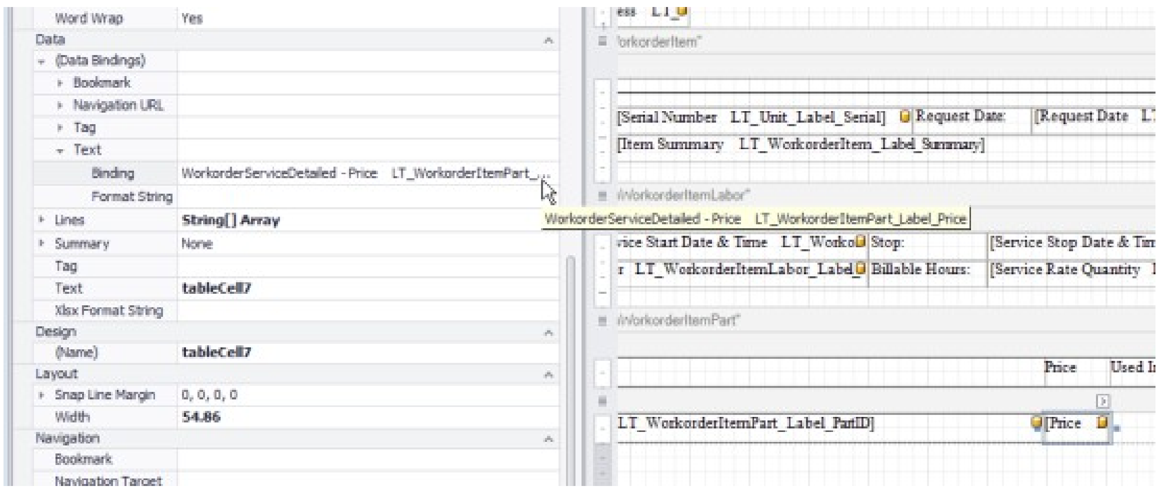


p. Scroll down and expand the WorkorderItemWorkorderItemPart and select the Quantity datafield

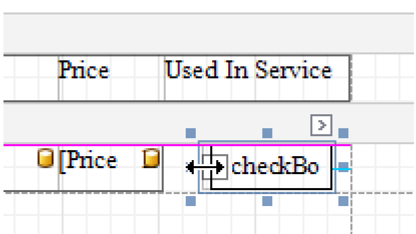




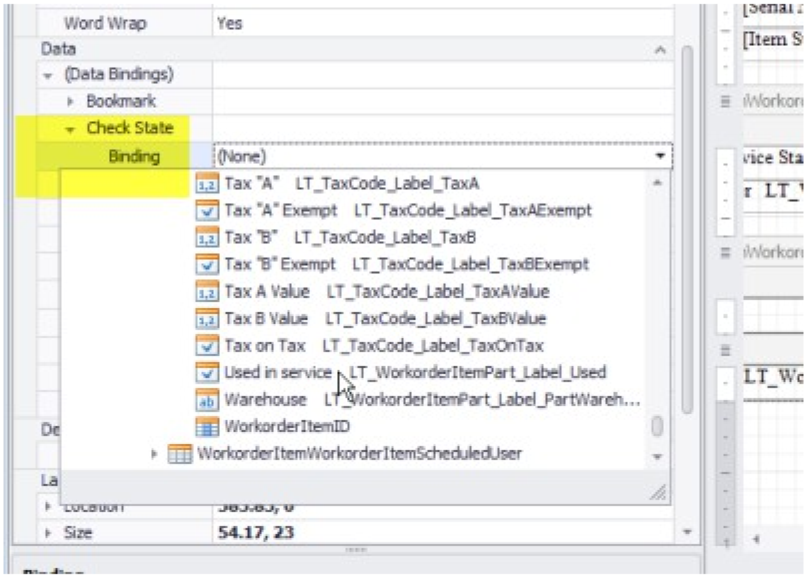
q. Do the same for the Part datafield and the Price datafield



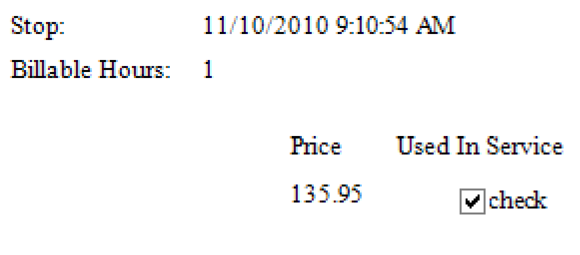
r. Drag over a CheckBox control from the ToolBox panel tab placing it to the right of the Price table column. You may need to adjust its width so that it does not overlap or go outside of the page.



s. With the checkbox field you just dragged over still selected, expand the (Data Bindings) -> Check State -> Binding property and select the Used in Service datafield from WorkorderHeader -> WorkorderHeaderWorkorderItem -> WorkorderItemWorkorderItemPart

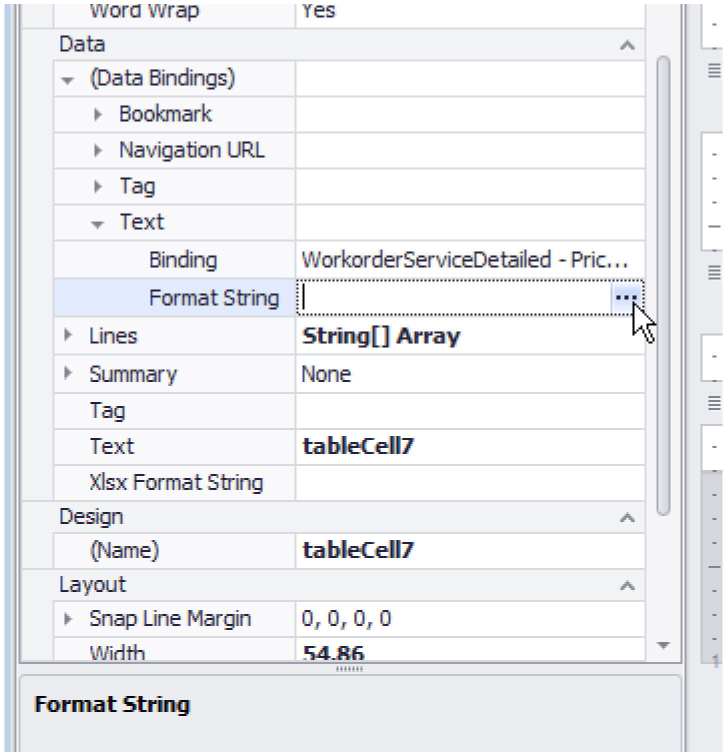


27. Select the Preview hyperlink, you will note that Price is not actually showing the cents, nor your currency symbol. Rather than placing a text label for example showing the $ sign, you can format the field so it displays with the currency you have set in your Windows Regional settings



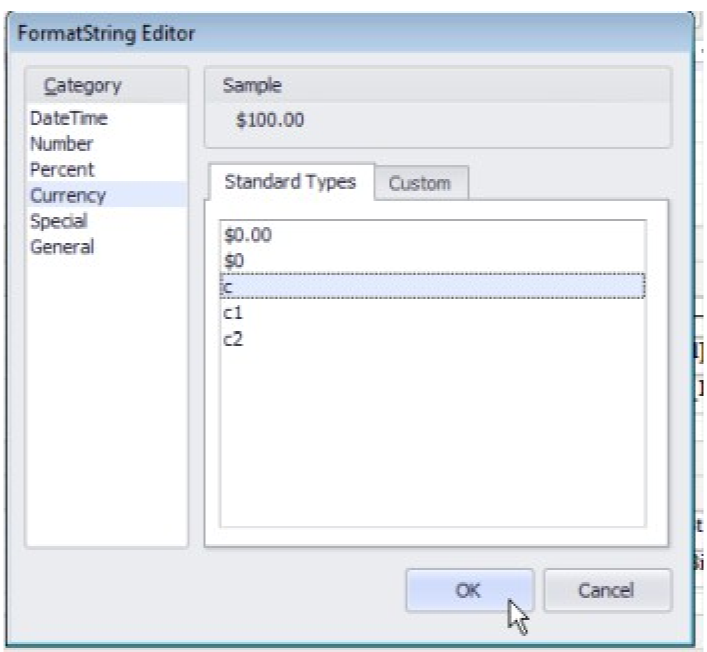
a. Go back to the design panel, select to highlight the Price data field, and select Properties

b. Expand the (DataBindings) property for this Price datafield, expand the Text sub-property, click within the FormatString property to display the browse button, and click on the browser button

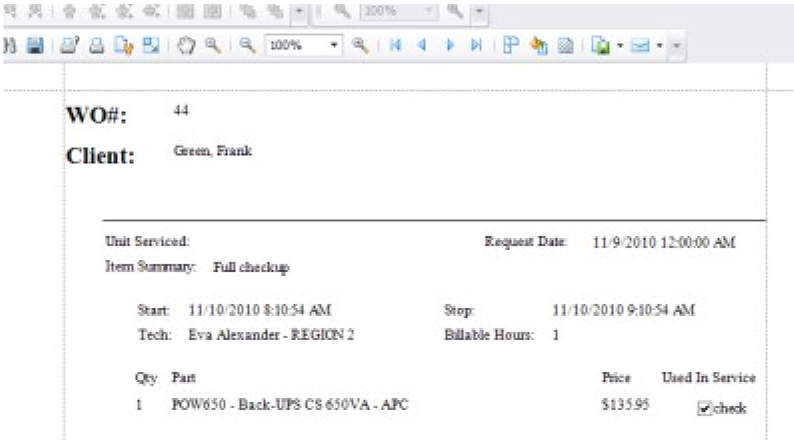


c. Select the Category of Currency and select the Standard Type of c and then select OK

d. The Standard Type c means it will take the symbol set in your Windows regional settings. You could also have selected $0.00

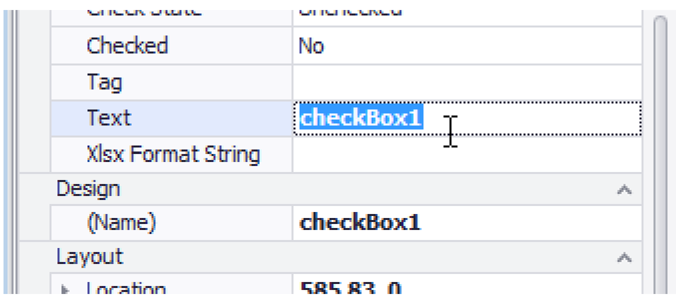


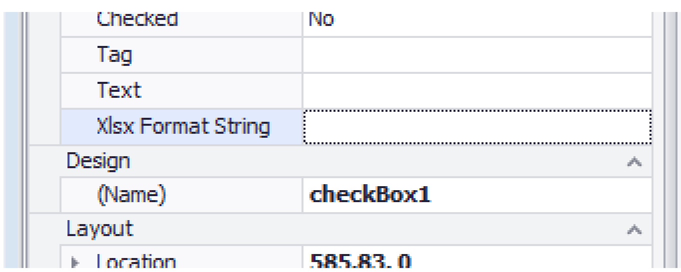
e. Now Preview again and you will see that the prices now show with your currency symbol as well as show the cents properly



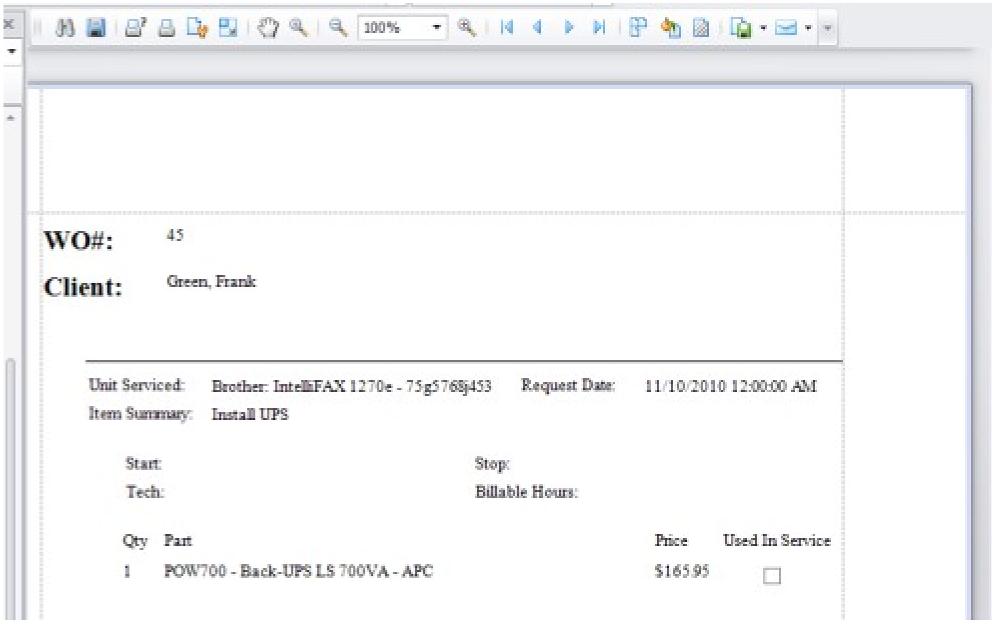
28. You will also note that the text checkBox1 is showing whereas we just want the checkbox itself to show checked if the part was used in service

a. Click to select and highlight the data field for Used in Service and edit the **Text** property for this field so no text displays

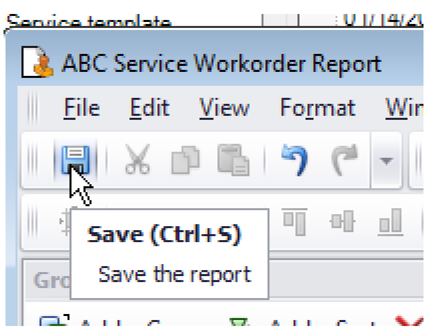




b. Now when we view the report, it only displays a checkmark if the part was used in service



29. Don't forget to Save!



Thank you for completing this report template tutorial.

We encourage you to further design the report to your exact needs, including other data fields, changing font, layout size, etc.

As this tutorial showed the basics only, we recommend reviewing the entire section on Report Templates and the How do I…?'s in the AyaNova Help fil.

We also highly recommend that you refer to the sample report templates that come with AyaNova – open the existing report templates in the report designer and take a look at their layout, scripts, etc.