MIRACLE SERVICE
Simplified Service Management
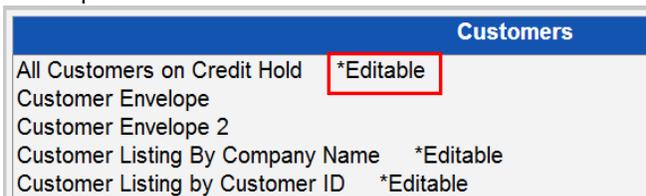
Report Editor
Quick Start Guide

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Quick Start Guide

Overview

The **Report Editor** module is used to modify the Standard Reports in Miracle Service. Reports which can be modified are marked as *Editable in the **Reports** menu.

Example:

Report Editor Installation

The installation file can be obtained from our web site at:
https://www.miracleservice.com/customer-center/rdreference/

The Report Editor is installed on individual workstations; not on a shared server. It is only necessary to install it on the workstations of the users who will be creating reports. (Once the reports are created, any Miracle Service user can see them regardless of whether they have Report Editor installed or not.) Report Editor can be installed on multiple computers as long as they have Miracle Service installed.

Launching Report Editor

From **Reports** menu within Miracle Service click on the [Report Editor] button to launch the Report Template Manager window.

Set-up a Test Report for Practice

Copy an existing report to use as your test. From the **Standard Layouts** section, take one of the **Standard Reports** and drag and drop it to the **Custom Layouts** box. This will make a copy for you to test with. To do this, simply point the mouse to the report you want to copy and then click and hold the left mouse button. While holding the left mouse button drag the report to the **Custom Layouts** pane and release the mouse button once you hover the item over the group where you would like to add the report.
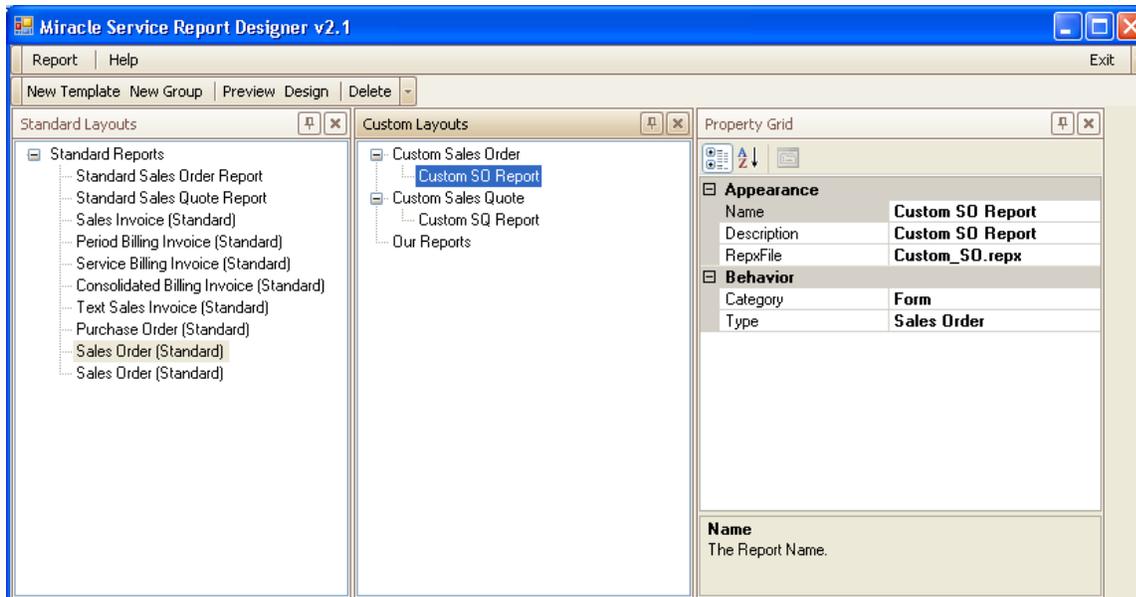

IMPORTANT: Standard Reports can't be changed. You will only be modifying a copy without any worries that the original will be altered. You can always delete your test and just drag and drop a fresh copy of a report to start over at any time.

When you create your Test Report, the correct properties for the report are automatically created in the **Property Grid**. As you are just getting started, the only properties you should change now are:

- **Name:** Rename your test report to a new report name. Press [Enter] to save.
- **Description:** Modify the description of this report. Press [Enter] to save.

Click on the [Design] button to open your test report in Design mode.
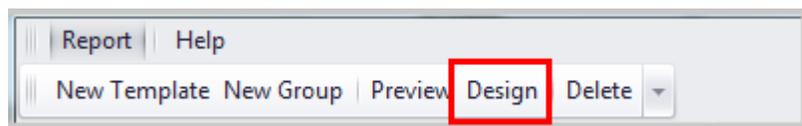
You can skip ahead to the Modifying Reports section on page 9 to modify your test report.

Report Template Manager

The Report Template Manager window is used to manage and organize your various custom reports and documents, and to link the documents to Miracle Service.
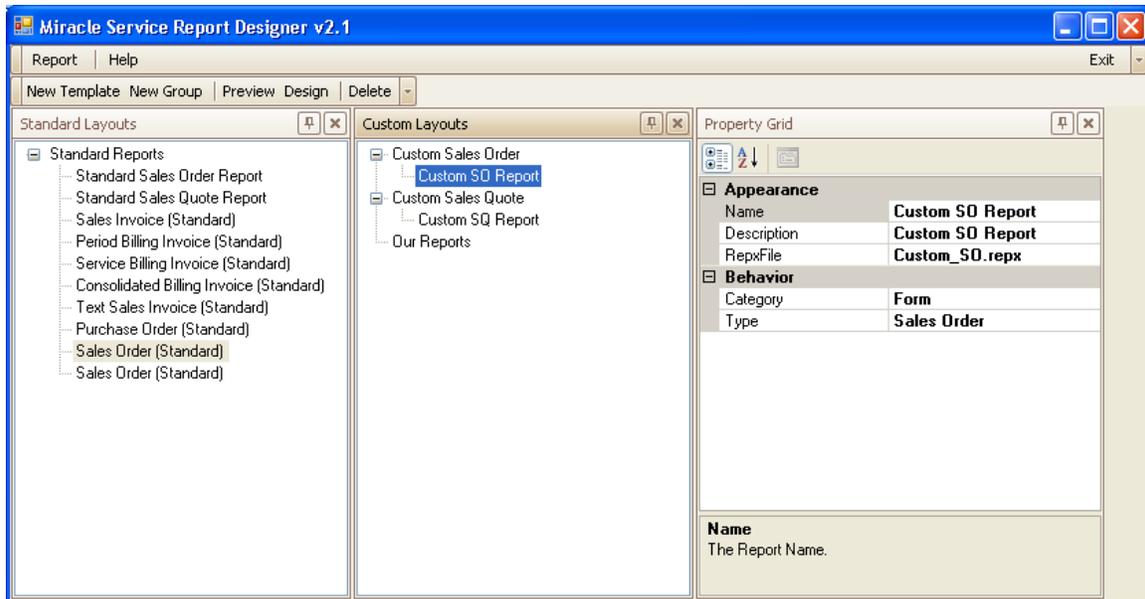
Standard Layouts

Standard Layouts is a listing of the standard documents created for Miracle Service. These documents cannot be modified, but can be used to create new documents by dragging and dropping a report from the Standard Layout pane to the Custom Layouts pane.

Custom Layouts

This is a listing of the custom reports used by Miracle Service.

Property Grid

Displays the properties of a report selected in the Custom Layouts pane. The properties include:
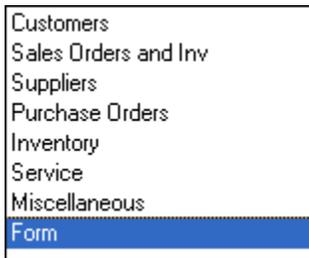
Appearance

Name: The name of the report displayed in the Custom Layouts Pane
Description: The name of the report displayed in Miracle Service.
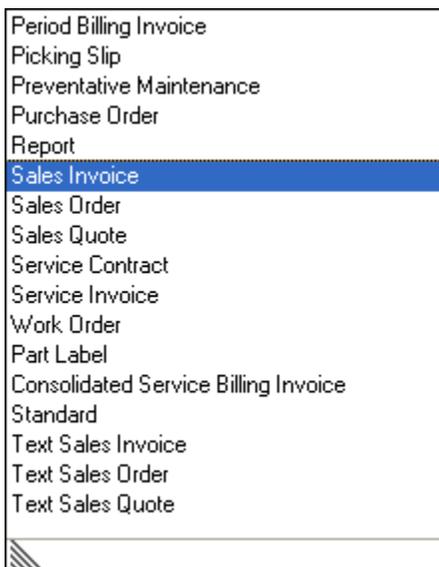**RepxFile:** The name of the file stored in your 'Reports' folder.

Behavior

Category: Defines the category where the report will be displayed in Miracle Service. If it is defined as a 'Form', it will be available to be selected from the Default Report listing. The Type below defines the dropdown where the report will be listed. When other categories are selected, the document is intended to be displayed in that category. These categories are directly related to the existing report categories in Miracle Service and include the following:

```
Customers
Sales Orders and Inv
Suppliers
Purchase Orders
Inventory
Service
Miscellaneous
Form
```

Type: Defines if the report is a 'Report' or the type is a Form for the report. If it is defined as a 'Report', it will be available to be selected from the Report Group set in the Category above. If the report is define as a 'Form' in the Category above, the 'Type' will define the type of form and ultimately which dropdown the report will be listed in the Default Report listing.

```
Period Billing Invoice
Picking Slip
Preventative Maintenance
Purchase Order
Report
Sales Invoice
Sales Order
Sales Quote
Service Contract
Service Invoice
Work Order
Part Label
Consolidated Service Billing Invoice
Standard
Text Sales Invoice
Text Sales Order
Text Sales Quote
```

New Template

Use [New Template] to create a place holder for a new report you are creating. The New Template button does not create an actual document, it is only used to create a place holder to link to an existing document. This would be used if you have made a copy of a report file on your server and want to link that file into Miracle Service.

New Group

Use [New Group] to create a group in the Custom Layouts area. This is helpful to help categorize and organize your documents in the Report Template only. The Group feature does not affect how the report functions in Miracle Service or where they can appear in Miracle Service. The Type and Category are the only setting that will determine how and where reports will work in Miracle Service.
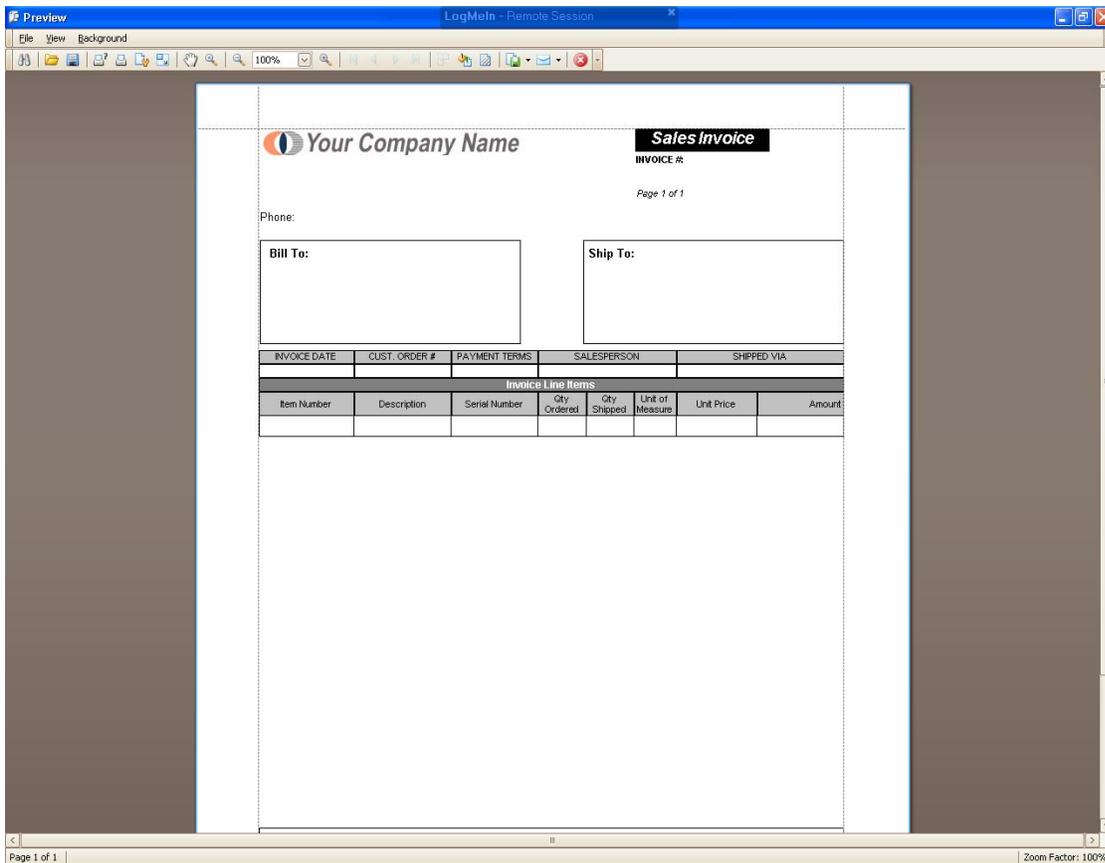
To create a new Group, click [New Group]. The following Window will display.
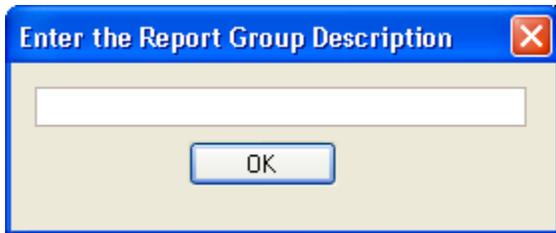
Enter the Group name in the window and Click OK.

Preview

Select [Preview] to view an existing document. This will display the document without any data as shown in the following example. (Figure 2)

Design

Select [Design] to open a document in the actual Report Editor tool. See Modify Reports section on the next page.

Delete

Use [Delete] to delete a report from the Report Template Manager. This will remove the report from the Report Template Manager as well as the link in Miracle Service, however the actual report file (.repx file) will not be deleted. This deletion just removes the link. If you do not want to retain the actual report document it must be deleted from the 'Reports' folder on your server using Windows Explorer. This was designed to protect the actual document from being accidently deleted and losing considerable work.

Modifying Reports

Modifying reports gives you the complete control over the look of any report in Miracle Service and the information that is presented on the report. The following is an overview of the control elements available within the Report Editor.

Element	Description
Design Panel	This main element of the Designer represents a panel used for reports creation and editing. It displays report bands and controls, allowing end-users to rearrange them, bind them to data and so on. Also, an end-user can switch to either the **Preview**, **Scripts** or **HTML View** tab, to access scripts of a report, or view its print or html output.
Main Menu	Contains a set of items and subitems which enable end-users to perform common actions over the report currently shown in the Design Panel. In general, it duplicates all the toolbar buttons available on the Main, Formatting and Layout toolbars.
Main Toolbar	Represents the main file management toolbar in the Designer. It contains buttons that allow end-users to create new reports, save and load report layouts, cut, copy and paste controls, and undo and redo actions in the Designer.
Formatting Toolbar	Contains buttons for text formatting. Note that this toolbar can be also used when a control's text (or a section) is edited via the In-Place editor.
Layout Toolbar	Represents the toolbar for positioning report elements, similar to the **Layout Toolbar** in the Visual Studio IDE, and contains buttons which provide the ability to change the size and location of groups of controls.
Zoom Toolbar	Provides means for zooming in and out of your report (both in design and preview modes).
Component Tray	Shows components (non-visual report helpers) related to report data binding. You can click them to display and edit their settings using the Property Grid Panel.
Status Bar	Provides tips and specific information about the Designer element being hovered by a cursor, or an action being currently performed by an end-user.

Element	Description
Toolbox	Allows end-users to add controls to a report, by dragging and dropping their icons onto a report's area. Note that you can also add custom controls to this toolbox.
Group and Sort Panel	Allows you to quickly perform grouping and sorting operations throughout a report, and visually represents the report's grouping structure.
Report Explorer	Represents the visual tree of a report. It shows a report's structure in a tree form, and makes navigation through the report easy.
Field List	Shows the structure of a report's data source, and is used to bind report controls to data.
Property Grid Panel	Represents the Property Grid in the Designer, used to access and modify properties of a report and its elements (bands and controls).

Here are the locations of these various controls in the Report Editor interface:
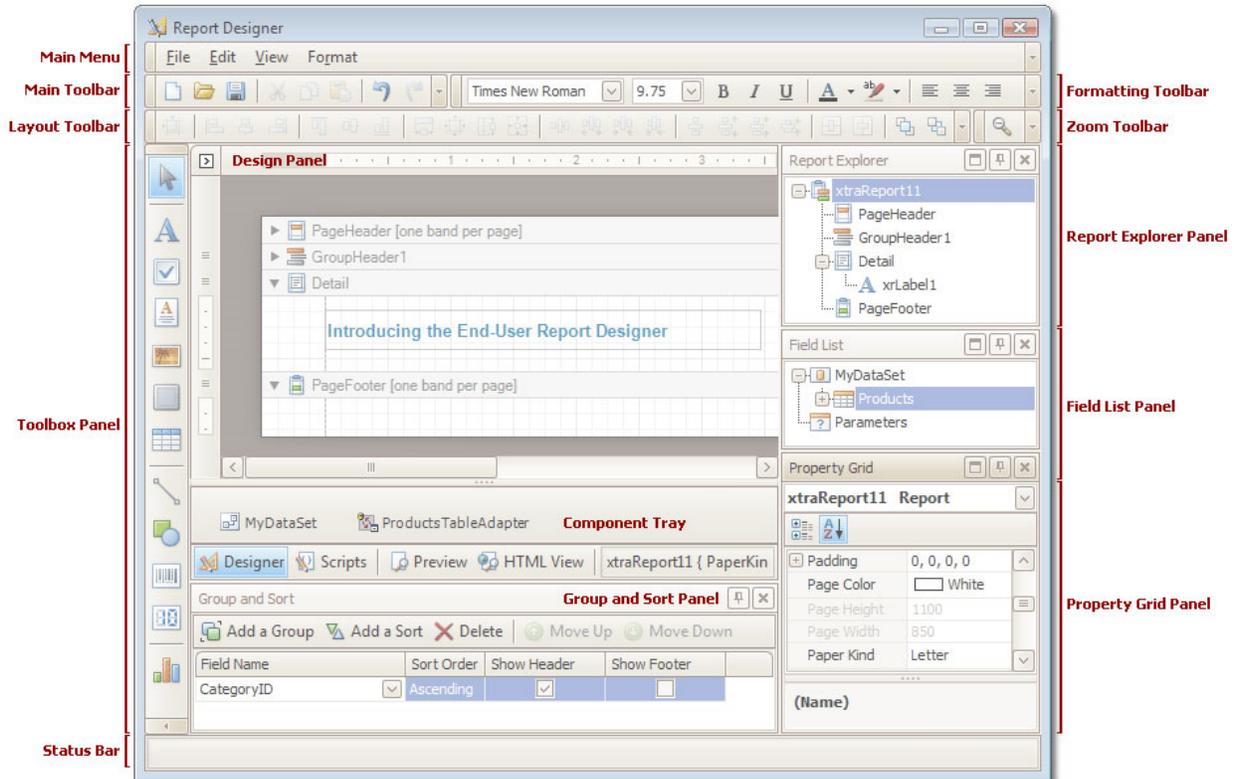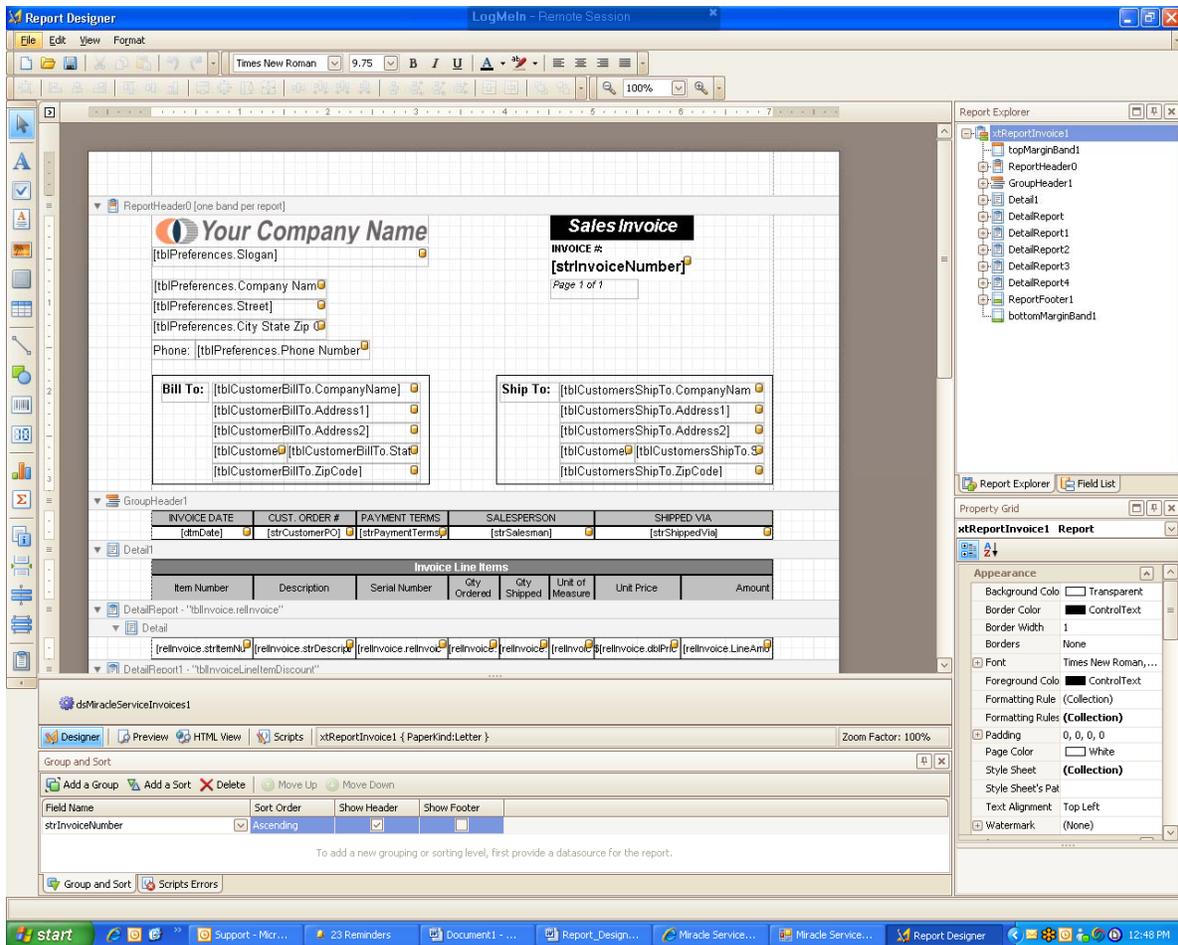
Tool Bar

The Toolbar allows you to easily perform formatting of controls' text (font, size, style, color and alignment) and zoom in or out of a report. Note that with Reports Toolbar, you can customize multiple controls at a time (to select multiple controls, press SHIFT and select them with a mouse).

Toolbox Bar

The Toolbox contains the list of available controls, from where they can be added to a report. This can also arrange its items in a horizontal layout.


Saving your Report:

When you are satisfied with your report, make sure you click the SAVE icon.

Company Logo

If you are editing a report that contains your company logo, you will notice that your logo doesn't appear directly on the report. The logo link is stored in the Picture Box on the report and links to your logo file that is indicated in Miracle Service Administration > 10. Email & Reports > Report Settings > Logo File for Reports. The logo will appear when you run the report from Miracle Service.

If you like the way the logo appears, do not alter the picture box. If you would like to change the way your logo appears, or want to insert a new logo, save a new logo file on your network in the MiracleDB folder.

Click on the Smart Tag at the top of the logo picture box. Under Image URL, browse to the location of the logo file in the MiracleDB folder on your network. Once you do this the logo will appear on your design screen.
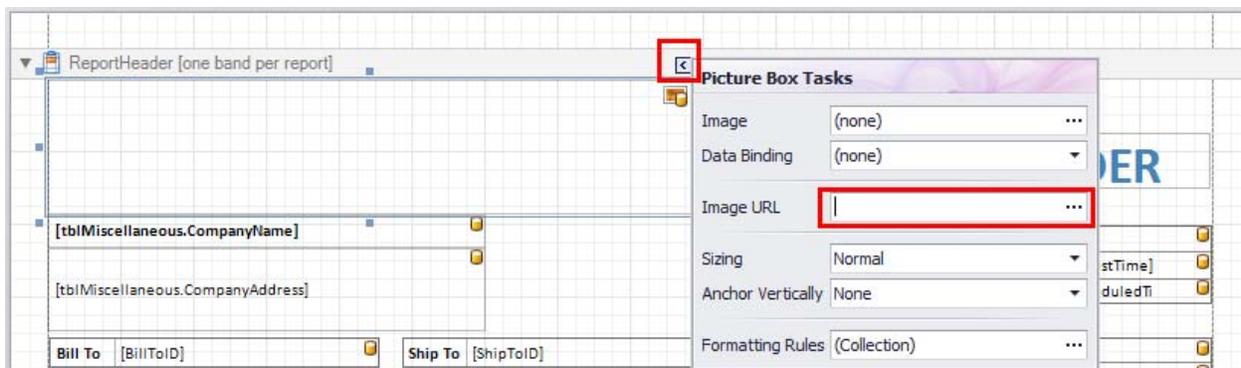
IMPORTANT: You have to use a UNC path to this file on your network so that the path works for all users otherwise the logo will only appear on your computer. Once you have done this the logo will appear on your design screen.

Preview

Use the [Preview] button to preview the report.
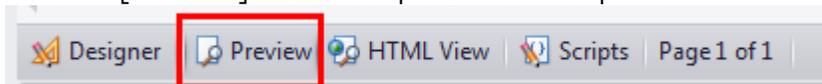
To see what the report looks like with data, you will need to run the report from Miracle Service. You can have both Miracle Service and the Report Editor open at the same time so that you can make changes within Report Editor, Save and then rerun the report to view it.

If the report is a template (example: Sales Order, Work Order, Invoice) you would need to save the report as a Default Report first.

Saving as Default Report

When you are satisfied with your report, go to Miracle Service > Options pull-down menu > Default Reports > and change your default report to the new one.

Group and Sort

This topic gives you a brief overview of the **Group and Sort** panel, and its main features.

The Group and Sort panel makes it easier to apply grouping and sorting to your report. With this panel, you don't need to manually add Group Header and Footer bands, invoke their Group Fields editor, create grouping fields and define their properties. The Group and Sort panel does this automatically when you add a new grouping or sorting level.
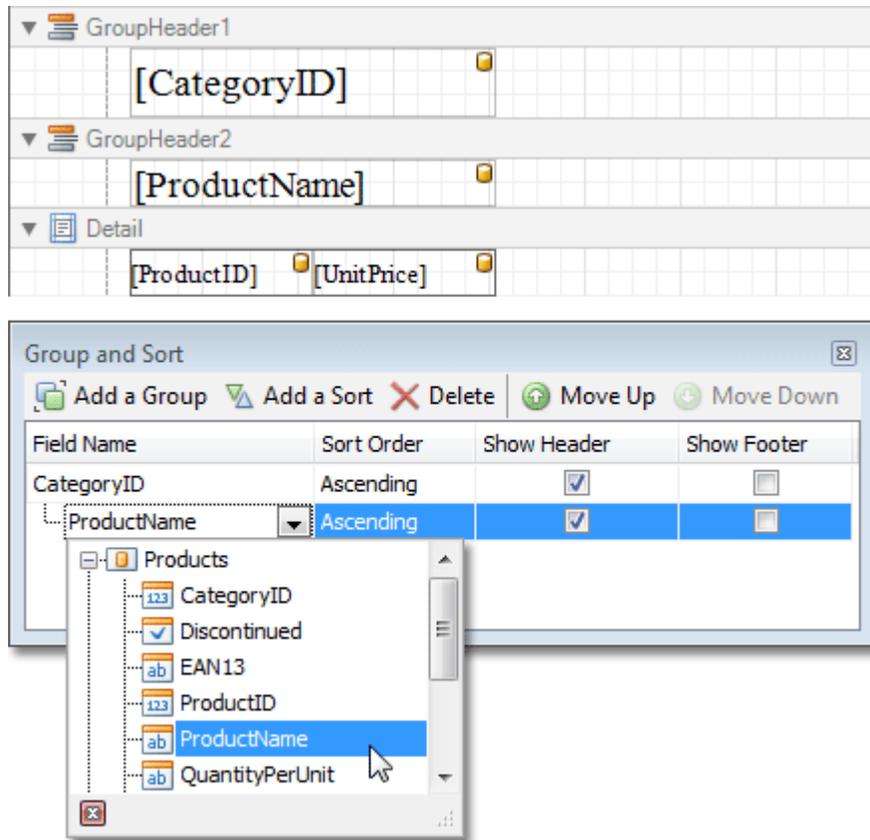
The Group and Sort panel is inactive unless your report isn't bound to a data source.

After you've bound your report to data, you can use the **Add a Group** and **Add a Sort** buttons, to choose new grouping and sorting criteria. You can adjust the precedence of these criteria, using the **Move Up** and **Move Down** buttons.

Then, you can specify the sorting order for each level (ascending or descending), and choose whether the corresponding Group Header and Footer bands should be displayed.
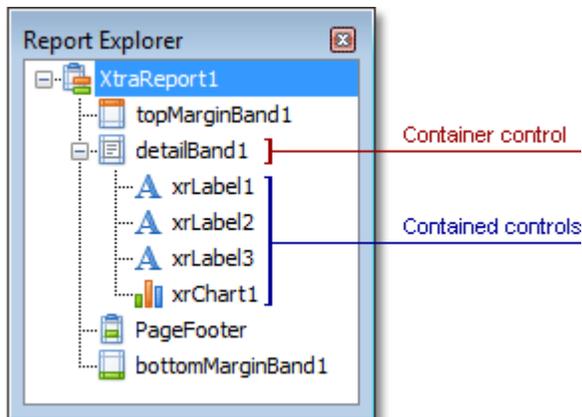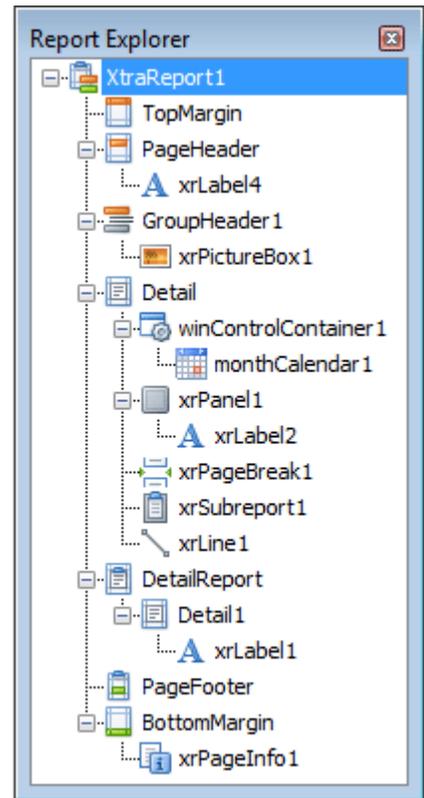
Report Explorer

Report Explorer is a helpful tool which provides easy navigation through report elements. You can use it when building a report to quickly access all the elements of a report and their properties, and to see the whole report's structure.

The Report Explorer can be moved, sized or docked in the same manner as other windows, and usually has the following look.

The Report Explorer displays a created report's structure as a tree. Report elements in the tree are displayed in a vertical order, which corresponds to their vertical position in a report. When you choose an element in the Report Explorer tree, the selected report element receives focus, so you can edit this element and its properties.

Usually, a standard report consists of several report bands containing report controls.

All child nodes in the tree view of the Report Explorer window are contained in their corresponding parent nodes. As the Report Explorer shows the report's structure, note that there are special rules for report building. The image below illustrates these relations.

The Report Explorer supports dragging-and-dropping of its elements between different nodes. This means that items representing report controls can be dragged and dropped onto band items or onto control items. The corresponding report control will then be moved.
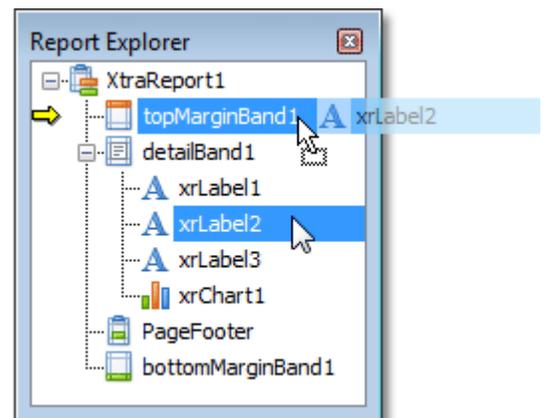
Additionally, any item in the Report Explorer can be right clicked to invoke the context menu for this report element (the same as in the Report Editor). Use this menu to quickly perform commonly used functions for the report element. An example of this menu is shown in the image below.
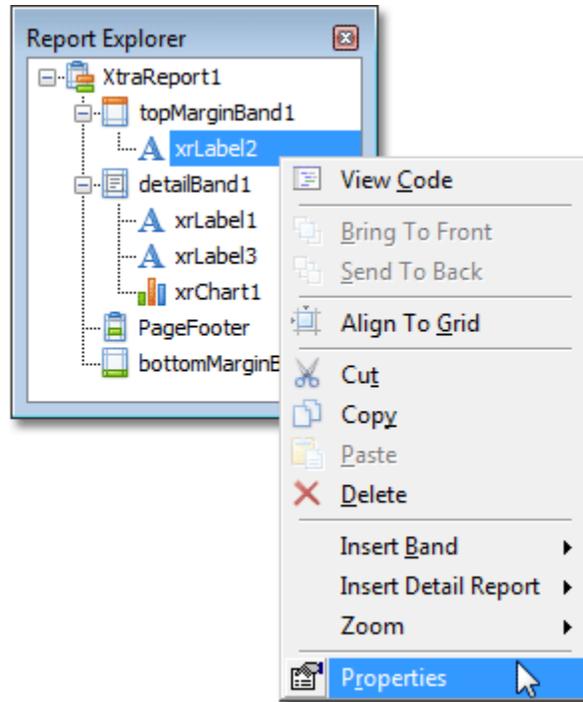
If there are any data-bound controls in a report, they will be marked in the Report Explorer with the yellow database icon, as shown in the image below. Note that when a mouse pointer hovers over a bound item, a tooltip displaying the binding information is shown.
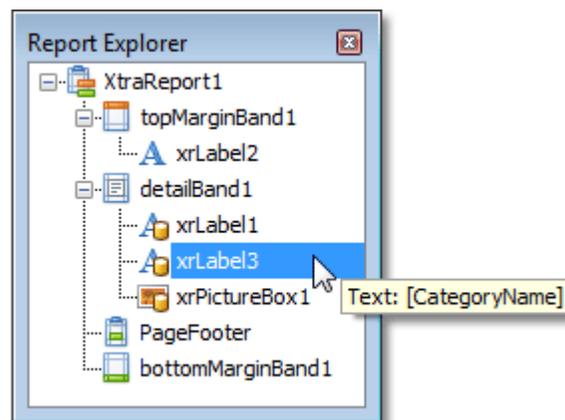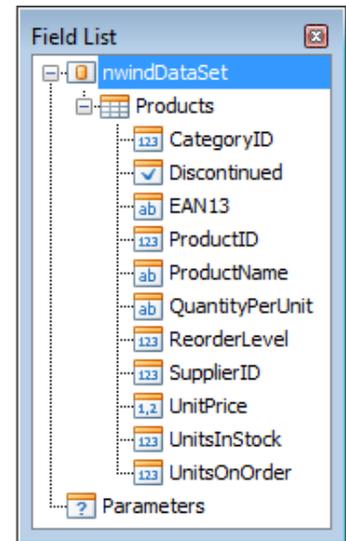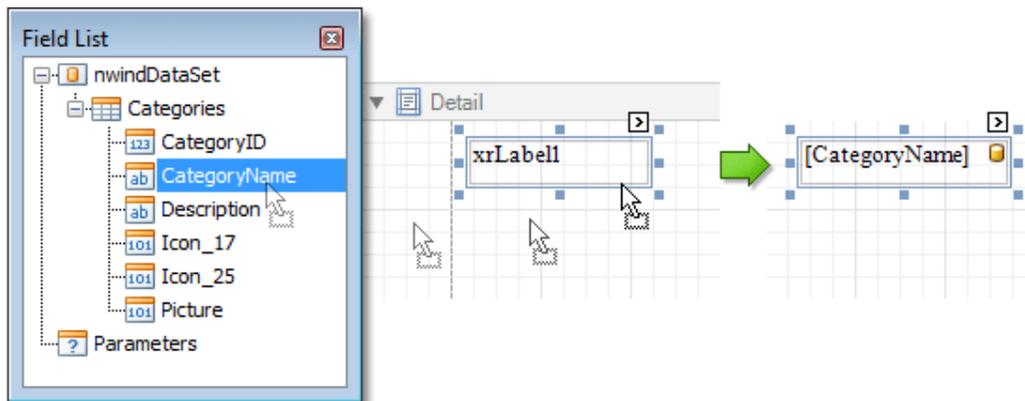
Field Lists

When you click on each section of the report, the Field List will show you what fields are available for that section. The Field List displays the schema of the datasource which is currently bound to a report. Also, this window may be used to bind existing report controls to data, or to create new bound report controls.

The Field List is shown when you edit a report at design time. It can be moved, sized or docked and usually has the following look.

After binding a report to data, the Field List window will show the structure of the primary data source (a primary data source is the object set by the DataSource property). Then, the Field list can be used for two purposes: adding new bound controls or binding existing controls.


- To bind an existing report control, control click the desired field item in the Field List window, and then drag and drop it onto the bindable report control. This control will then be bound to the selected data field.


- To add a new bound report control, simply click the desired field item in the Field List window, and then drag and drop it onto the report band. Then, a control bound to the selected data field will appear.
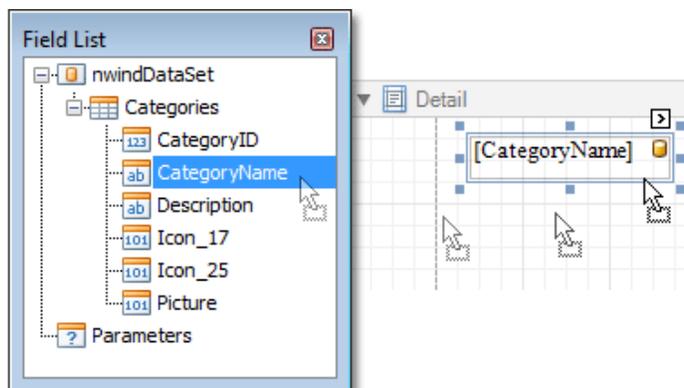
- Another way of creating new bound report controls is to right-click a Field List item, and then drag and drop it onto a report. This will invoke the context menu shown in the image below. Simply choose the item you need from the list, and the selected control bound to the appropriate data field will be created and added to the report.
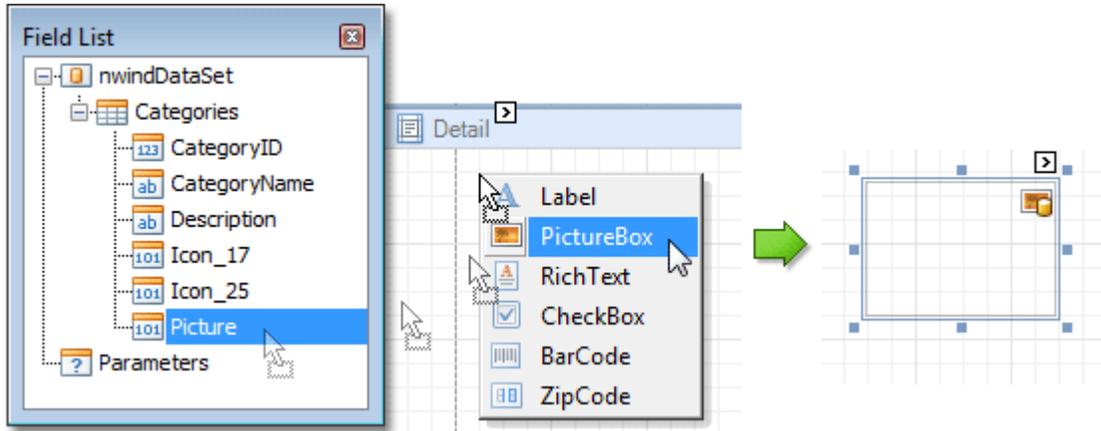
It is possible to customize the look of Field List items. For this purpose, the bound datasource should implement the DataDictionary interface. Then, the customized Field List will have a custom appearance, as shown in the image below.
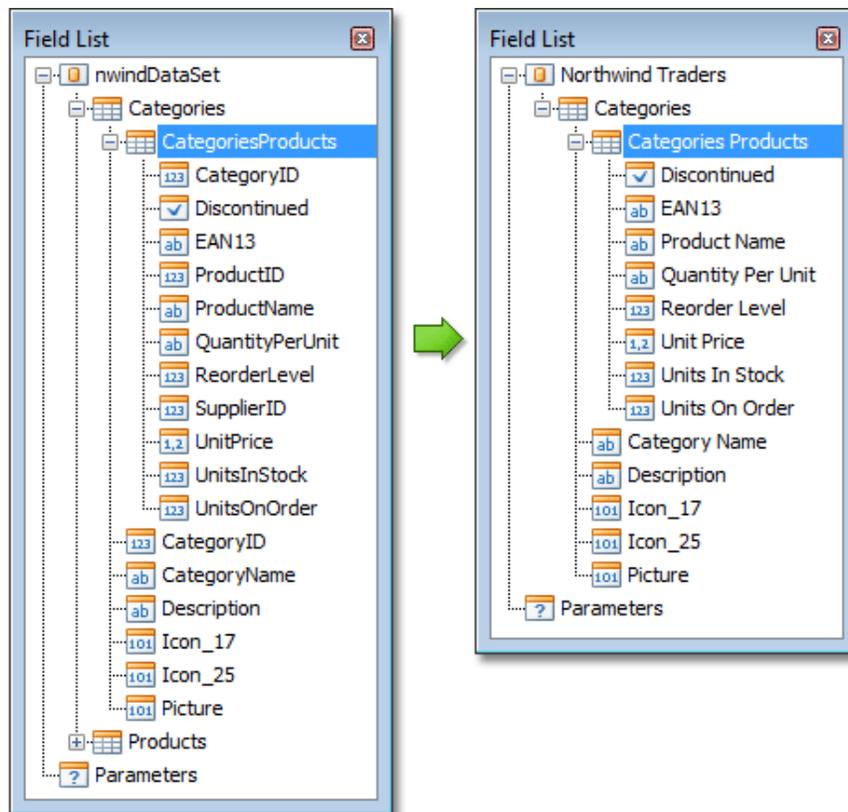
Where to Find More Information

More resources including the full Report Editor User Manual and training videos can be found on our website:
https://www.miracleservice.com/customer-center/rdreference/