



Advanced Report Designer

Version: 6.16

User Guide



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Table of Contents

CHAPTER 1 Report Designer	7
Installing Report Designer Plug-ins	8
Creating a Report with Report Designer	9
Editing a Report with Report Designer	10
Report Designer Panels	11
Report Designer Toolbars	13
<i>Basic Toolbar in the Report Designer</i>	13
<i>Formatting Toolbar in the Report Designer</i>	14
<i>Layout Toolbar in the Report Designer</i>	15
<i>Standard Controls Toolbar in the Report Designer</i>	18
Layout Panel in the Report Designer	20
<i>Element Groupings in the Report Designer</i>	22
Field List and Report Explorer Panel in the Report Designer	23
Property Grid Panel in the Report Designer	25
Modifying Report Elements in Report Designer	27
Accessing the Report Designer Tasks Menu	28
<i>Report Designer Label Properties</i>	29
Accessing an Element's Property Grid	31
Editing Chart Components with the Report Designer Chart Wizard	33
Modifications with the Report Designer Chart Wizard	35
Making Common Changes with the Report Designer	36
Adding a Logo to the Report	37
Adding Borders and Shapes to a Report	38
Changing Font Size, Color and Type	39
Arranging Objects on the Page	41
Changing the Page Orientation and Modifying the Grid	42
Adding Trend Lines to a Bar Chart	43
Modifying Point Labels	45
Adding Minor Grid Lines to the Chart Wall	47

Rotating X-Axis Labels	49
Adding a Constant Line to a Bar Chart	50
Index	53

CHAPTER 1

Report Designer

The Report Designer allows users to modify even the most basic elements of the charts, graphs or tables that exist in your reports, such as the background color, margins, borders, x- and y-axis, labels and legend attributes. While reports can be created from scratch with the Report Designer, RLDatix recommends that you use this tool for editing the existing reports you have created with the Question Wizard or Report Editor.

Note: The Report Designer is a separate module that must be purchased by your organization.

Prerequisites: To use the Report Designer tool, Internet Explorer must be used with ActiveX and a web component ("Installing Report Designer Plug-ins" on the next page) installed on your computer.

This section contains the following topics:

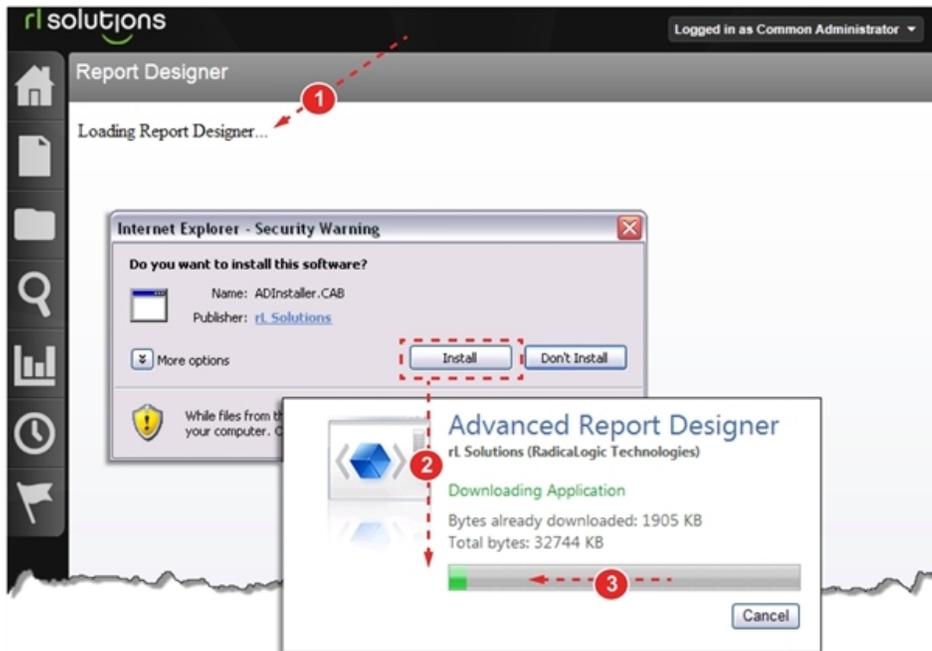
- "Editing a Report with Report Designer" on page 10
- "Installing Report Designer Plug-ins" on the next page
- "Report Designer Panels" on page 11
- "Modifying Report Elements in Report Designer" on page 27
- "Editing Chart Components with the Report Designer Chart Wizard" on page 33
- "Making Common Changes with the Report Designer" on page 36

Installing Report Designer Plug-ins

In order to use the Report Designer, you must install an ActiveX plug-in, which is contained in the `ADInstaller.CAB` file; you will be prompted to do so the first time you access the Report Designer.

To install Report Designer plug-ins:

1. Access the Report Designer (page 10) or create a new report (page 9). The “Loading Report Designer...” message displays while RL6 determines if the plug-in has already been installed.
Note: Your browser’s security settings may display an ActiveX security message at top of the browser window. Click the message and choose **Allow Blocked Content...** from the menu; then click **Yes** to continue.
2. The Security Warning dialog displays. Click **Install**.
A progress bar appears, showing you how many bytes have been downloaded out of the total. When finished, the Report Designer page displays (“Report Designer Panels” on page 11).



Creating a Report with Report Designer

Note: In order to use the Report Designer, your organization must purchase licensing for this feature and users must use Internet Explorer.

Prerequisites: You must download and install a web component ("Installing Report Designer Plug-ins" on the previous page) to your computer.

To create a report using Report Designer:

1. Open Report Manager (page 1).
2. Click the **More** button, and click **Create - Report Designer**.
3. Use the various tools (page 11) to create the report.
4. Run the report.

Editing a Report with Report Designer

Editing a generated report with the Report Designer allows you to view and modify all of the report's elements ("Report Designer Panels" on the facing page).

Note: In order to use the Report Designer, your organization must purchase licensing for this feature and users must use Internet Explorer.

Prerequisites: You must download and install a web component ("Installing Report Designer Plug-ins" on page 8) to your computer.

To edit a report using the Report Designer:

1. Generate a report (page 1).
2. Open Report Designer.
 - a. If the report was created with the Question Wizard or Report Editor, right-click on the report and choose **Open in Report Designer** from the menu.
 - b. If the report has been modified and saved with the Report Designer, the ruler icon appears in the report toolbar. Click the icon to view the details in the Report Designer.

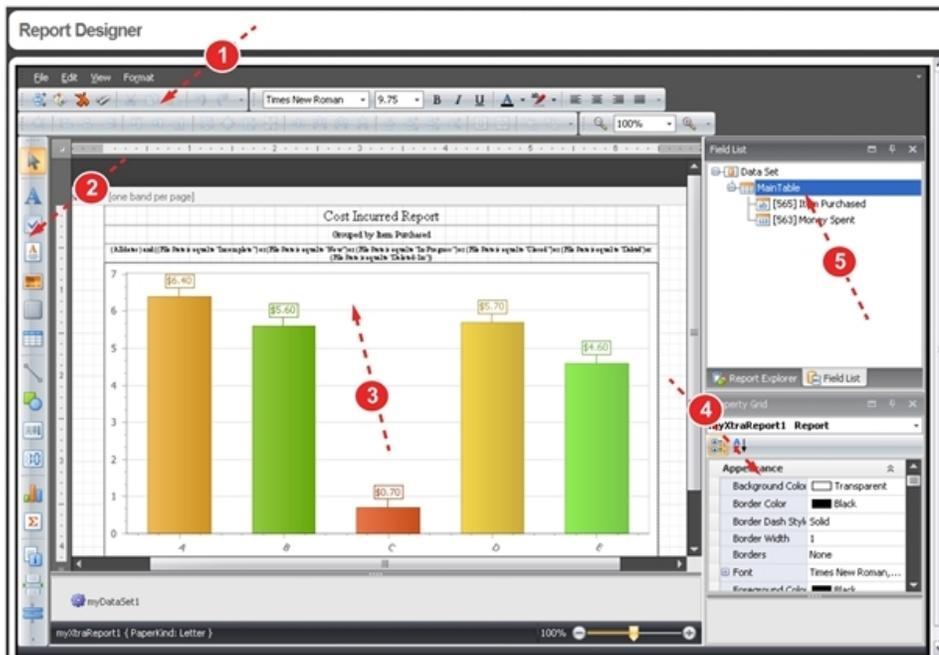
Report Designer Panels

The Report Designer is made up of a series of panels. When an element is selected in the Report Elements panel, buttons may become active in the Toolbar panel and the attributes listed in the Property Grid panel will change.

The Report Designer panels are described below:

1. **Report Designer Toolbar** ("Report Designer Toolbars" on page 13) – this panel stretches across the top of the report designer page. Buttons and list boxes become active when report elements are selected or acted upon.
2. **Tool Box** ("Standard Controls Toolbar in the Report Designer" on page 18) – this panel contains the elements you can add to your report.
3. **Report Layout** ("Layout Panel in the Report Designer" on page 20) – the largest area of the page where report elements are arranged. When you select an element (or a component within a chart) buttons may activate on the toolbar and the values in the Properties Grid change.
4. **Property Grid** ("Property Grid Panel in the Report Designer" on page 25) – contains a list of the selected element's properties that can be modified. The first column is the property name, which may also contain sub-properties (click the [+] to view). The second column contains the drop-down lists, text boxes and selection panels used to modify the property.
5. **Field List / Report Explorer** ("Field List and Report Explorer Panel in the Report Designer" on page 23) – this panel contains two views. *Field List* is the default view, which shows you the metabase fields that are bound to the chart, table or other report elements. The *Report Explorer* provides a hierarchical view of the elements and sub-elements contained within the report.

CHAPTER 1 Report Designer



Report Designer Toolbars

There are many toolbars in the Report Designer. They contain functions with which many Microsoft Word® users will be familiar: copy and paste, undo and redo, font selection and justification. Some buttons are always active while others are active only when certain types – or multiple – elements are selected. There are five toolbars, four of which are described in this section:

- "Basic Toolbar in the Report Designer" below
- "Formatting Toolbar in the Report Designer" on the next page
- "Layout Toolbar in the Report Designer" on page 15
- "Standard Controls Toolbar in the Report Designer" on page 18

Basic Toolbar in the Report Designer

The basic toolbar appears at the top of the Report Designer page:



Table 1-1: Understanding Toolbar Buttons

Element	Image	Description
New		Creates a new blank report.
Run		Generates the current report.
Cancel		Returns you to the Report Center.
Filter		Allows you to set conditions on the report with a version of the Expression Editor.
Cut		This button is only active when an element or portion of text has been selected. Click to remove the selection from the report and put it on your computer's clipboard; the Paste button becomes active.
Copy		This button is only active when an element or portion of text has been selected. Click to store it on your computer's clipboard; the Paste button becomes active.

Understanding Toolbar Buttons (continued)

Element	Image	Description
Paste		This button is only active after you have used the Cut or Copy buttons. It places the contents of your computer's clipboard into the active band or label element.
Undo		This button is only active after your perform an action (such as deleting a report element). You can click it multiple times to step backwards through your recently completed actions.
Redo		This button is only active after click the Undo button. You can click it multiple times to move forward through your recently undone actions.

Formatting Toolbar in the Report Designer

The formatting toolbar is used to change character attributes, such as weight, font, color, etc., for an entire label element (i.e., a label element cannot have some text bold and other text italics). This toolbar appears at the top of the report designer:



Table 1-2: Understanding Formatting Toolbar Buttons

Element	Image	Description
Bold		Makes the text in the selected label element a heavier weight to denote emphasis.
Italics		Angles the text slightly in the selected label element to denote emphasis.
Underline		Adds a line beneath the text in the selected label element.
Font Color		Allows you to pick the color that should be used for the text in the selected label element.
Background Color		Allows you to choose a color that fills the background of the selected label element.

Understanding Formatting Toolbar Buttons (continued)

Element	Image	Description
Left Align		Aligns the text in the selected label element to the left side of the box.
Center Align		Aligns the text in the selected label element to the center of the box.
Right Align		Aligns the text in the selected label element to the right side of the box.
Justify Text		Prevents the text inside the selected label element from having jagged edges on either the left or right sides. Extra spaces are often added within a line to ensure that the text extends to the left and right margins.

Layout Toolbar in the Report Designer

The layout toolbar is used to arrange the various report element within a band of the report. Some button activate with one element is selected; the other activate when multiple elements are selected:



Table 1-3: Understanding Layout Toolbar Buttons

Element	Image	Description
To Grid		Aligns the selected element to the grid intersection closest to the top-left corner of the element.
Left Align		Aligns the left edges of the selected elements to the element that was first selected. Note: See "Arranging Objects on the Page" on page 41 for details on using the alignment buttons.
Vertical Center Align		Aligns the selected elements at their vertical center to the element that was first selected. Note: See "Arranging Objects on the Page" on page 41 for details on using the alignment buttons.

Understanding Layout Toolbar Buttons (continued)

Element	Image	Description
Right Align		Aligns the right edges of the selected elements to the element that was first selected. Note: See "Arranging Objects on the Page" on page 41 for details on using the alignment buttons.
Top Align		Aligns the top edges of the selected elements to the element that was first selected. Note: See "Arranging Objects on the Page" on page 41 for details on using the alignment buttons.
Horizontal Center Align		Aligns the selected elements at their horizontal center to the element that was first selected. Note: See "Arranging Objects on the Page" on page 41 for details on using the alignment buttons.
Bottom Align		Aligns the bottom edges of the selected elements to the element that was first selected. Note: See "Arranging Objects on the Page" on page 41 for details on using the alignment buttons.
Size to Grid		Expands or decreases the size of the element to fit the nearest grid marks. Note: See "Changing the Page Orientation and Modifying the Grid" on page 42 for details on setting the grid size.
Match Height		Increases or decrease the height of the selected elements to the height of the element that was first selected. Note: See "Changing the Page Orientation and Modifying the Grid" on page 42 for details on setting the grid size.
Match Size		Makes the height and width of the selected elements the same size as the element that was first selected. Note: See "Changing the Page Orientation and Modifying the Grid" on page 42 for details on setting the grid size.

Understanding Layout Toolbar Buttons (continued)

Element	Image	Description
Distribute Horizontally		This option is used when three or more elements have been selected. It arranges the elements between the left-most and right-most selected elements and spreads them out an equal distance along the horizontal plane.
Increase Horizontal Space		Increases the spacing of two or more elements along the horizontal plane. All but the last element selected are nudged one grid space apart.
Decrease Horizontal Space		Decreases the spacing of two or more elements along the horizontal plane. All but the last element selected are nudged one grid space closer.
Remove Horizontal Space		Gets rid of all the space between the selected elements along the horizontal plane. All elements are moved towards the left-most selected element.
Distribute Vertically		This option is used when three or more elements have been selected. It arranges the elements between the top-most and bottom-most selected elements and spreads them out an equal distance along the vertical plane.
Increase Vertical Space		Increases the spacing of two or more elements along the vertical plane. All but the last element selected are nudged one grid space apart.
Decrease Vertical Space		Decreases the spacing of two or more elements along the vertical plane. All but the last element selected are nudged one grid space closer.
Remove Vertical Space		Gets rid of all the space between the selected elements along the vertical plane. All elements are moved towards the top-most selected element.
Center Horizontally		Centers the element within the band along the horizontal plane. When two or more elements are selected, it treats them as one object – centering the group within the band.

Understanding Layout Toolbar Buttons (continued)

Element	Image	Description
Center Vertically		Centers the element within the band along the vertical plane. When two or more elements are selected, it treats them as one object – centering the group within the band.
Bring to Front		Changes the order of the element to the front-most. When elements overlap, this one will appear on top.
Send to Back		Changes the order of the element to the back-most. When elements overlap, this one will appear on the bottom.

Standard Controls Toolbar in the Report Designer

The Standard Controls Toolbar is used to add design elements to a report. Click and drag an element from the panel and release it in the Report Layout area, where its properties can then be configured ("Layout Panel in the Report Designer" on page 20).

Table 1-4: Understanding Report Elements

Element	Image	Description
Pointer		Selects elements in the Report Layout area. Hold Shift or Ctrl keys and click to select multiple elements.
Label		Creates a text box into which you can type additional report titles, descriptions or more ("Changing Font Size, Color and Type" on page 39).
CheckBox		Similar to a Label but preceded with a checkbox, its state can be set to checked or unchecked if desired.
RichText		Like a Label but allows you to import an existing RTF file as the contents, preserving formatting and graphics.
PictureBox		Provides a placeholder for a graphic file, such as your organization's logo ("Adding a Logo to the Report" on page 37).
Panel		A frame into which you can place report elements, grouping them so they can be moved together.

Understanding Report Elements (continued)

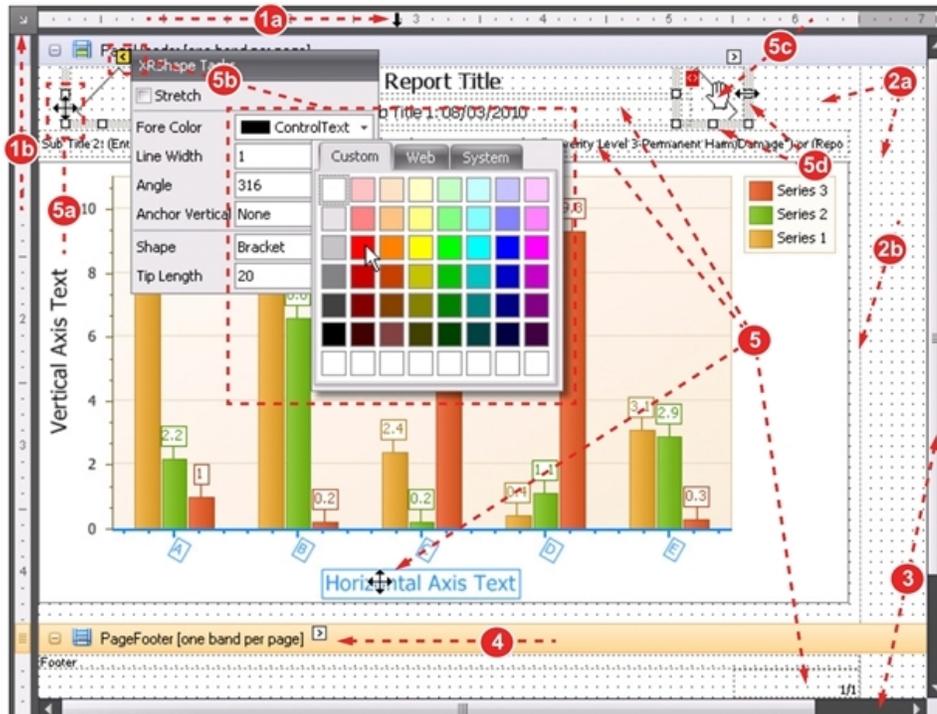
Element	Image	Description
Table		Creates a three-column table that you can bind to metabase fields. You may add more columns, if desired.
Line		Creates a vertical, horizontal or slanted line that resides within one report band ("Adding Borders and Shapes to a Report" on page 38).
Shape		Adds one of many pre-defined shapes to the report, such as an arrow, bracket or star ("Adding Borders and Shapes to a Report" on page 38).
BarCode		Adds one of the many barcode symbologies to the report, which can be bound to a database field.
ZipCode		Transforms the field contents into an easy-to-read zip code format. Only numbers and dashes are allowed.
Chart		Creates a graphic representation of the metabase fields ("Field List and Report Explorer Panel in the Report Designer" on page 23) and starts the Chart Wizard ("Editing Chart Components with the Report Designer Chart Wizard" on page 33).
PivotGrid		Like a Microsoft Excel® pivot table, each cell displays a summary for the corresponding row and column.
PageInfo		A text box used in the report header/footer to show the page or date and time when the report was run.
PageBreak		Moves the elements below to the next pages.
CrossBandLine		Similar to a Line but is allowed to extend beyond the band in which it was placed.
CrossBandBox		A rectangle that can extend beyond the band in which it was placed (e.g., a page border ("Adding Borders and Shapes to a Report" on page 38)).

Layout Panel in the Report Designer

The largest area of the Report Designer is like a canvas, onto which you place, arrange and modify report elements. When you select elements, buttons in the Toolbar become active ("Report Designer Toolbars" on page 13) and its properties display in the Properties Grid ("Property Grid Panel in the Report Designer" on page 25).

Additional features, described below, help you design the report:

1. **Rulers** – click in the ruler [a] to select all elements that intersect that point on the page. Click in the upper left corner [b] to view the page properties ("Changing the Page Orientation and Modifying the Grid" on page 42).
2. **Grid** – used to [a] align report elements. It can be modified in the report page properties. The page margin [b] is shown as a dashed line.
3. **Scroll Bars** – appear when the report design doesn't fit within the panel.
4. **Bands** ("Element Groupings in the Report Designer" on the next page) – divides the page into sections, such as the header or footer, and are automatically created.
5. **Elements** – select an element to view its properties ("Property Grid Panel in the Report Designer" on page 25). Most elements have following features:
 - a. **Borders** – click and drag the border to move the element or use your keyboard's arrow keys.
 - b. **Smart Tags** – allows quick access to edit some element properties.
 - c. **Rotation** – some shapes can be rotated by holding the **Ctrl** key while clicking and dragging the mouse.
 - d. **Handles** – click and drag to resize the element.

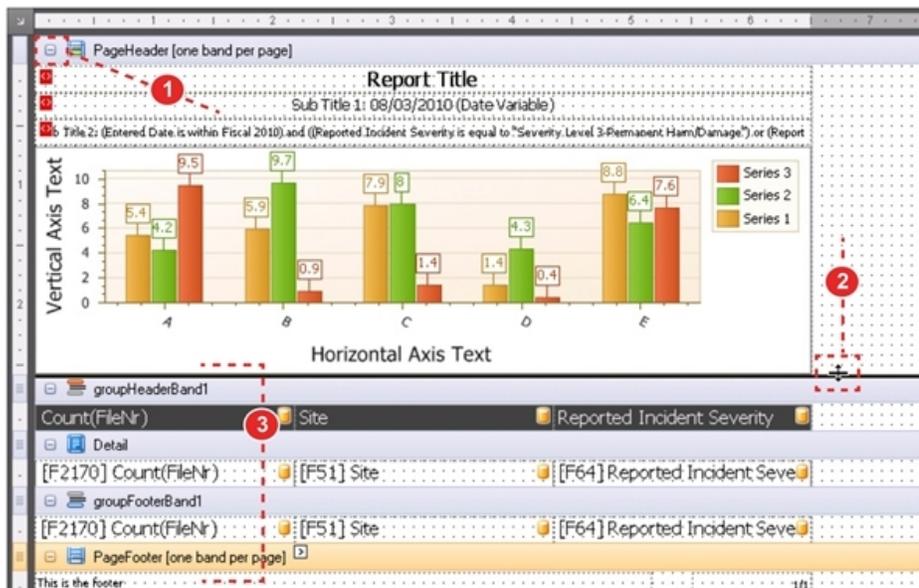


Element Groupings in the Report Designer

Bands divide the report page into different areas, such as the header, footer or details area. When a report is opened in the designer, its elements are grouped into the appropriate bands. If the chart contains a data grid (Generated Report Attributes), as shown below, the `GroupHeader`, `Detail` and `GroupFooter` bands are added to the report design.

Note: As long as existing reports are edited in the Report Designer, you do not have to create or reorder bands – simply work with bands that already exist.

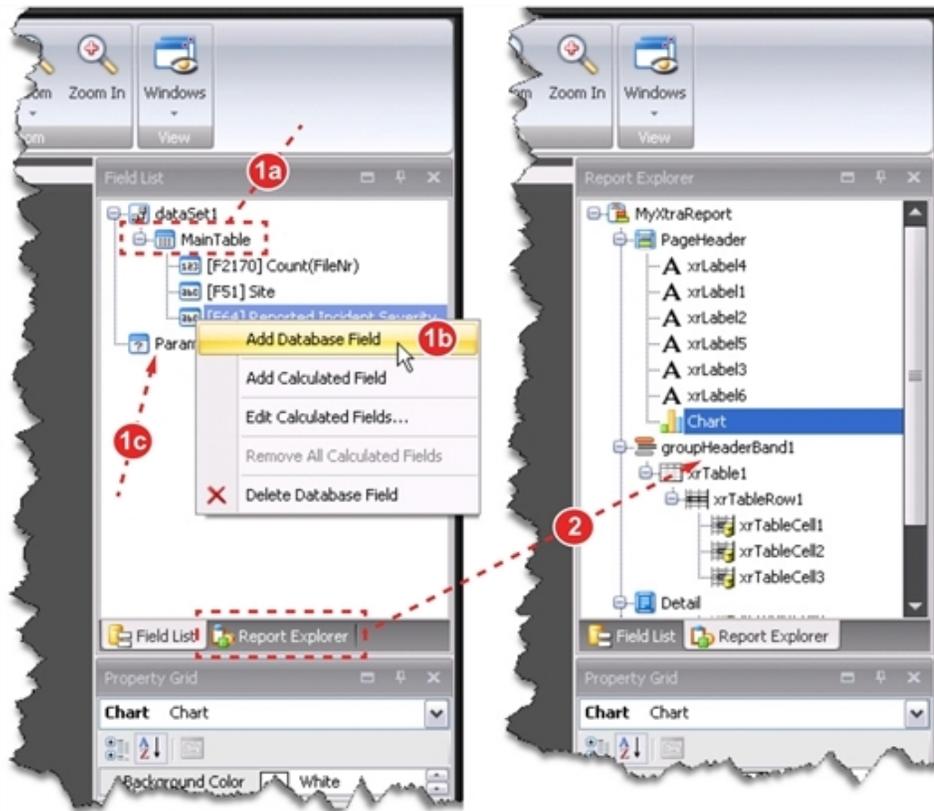
1. **Collapse / Expand** – click the [-] next to the band title to collapse the band. When collapsed, the [+] icon appears next to the band title.
2. **Resize** – click and drag the top of the band to resize the space available in the preceding band for report elements. In this example, the **PageHeader** band will be resized.
3. **Data Grids** – when a data grid has been added to the report (Report Details Section), three additional bands appear on the report page:
 - a. **GroupHeader** – used to create the table’s header row.
 - b. **Detail** – used to define the contents of the table.
 - c. **GroupFooter** – signifies that the data grid has ended.



Field List and Report Explorer Panel in the Report Designer

One panel in the upper-right corner of the Report Designer page displays the *Field List* and *Report Explorer*. Use the tab at the bottom of the panel to switch between the two views. Users who are editing reports created with the Question Wizard or Report Editor do not need to use this panel and can close it by clicking the **X** in the upper-right corner of the panel.

1. **Field List** – displays the fields used to populate the charts and tables of the report:
 - Note:** Only the very advanced report designers will use the field list.
 - a. **DataSet** – expand the **MainTable** to view the fields that are available for binding to report elements. Only one DataSet is allowed, meaning that you *cannot* display multiple series on one chart.
 - b. **Adding Fields** – right click on the MainTable (or a field contained within) and select **Add Database Field** from the menu. You may then select a field from the metabase and choose an aggregate function, if desired.
 - c. **Parameters** – parameters are not used in this version.
2. **Report Explorer** – provides a hierarchical view of the elements contained within the report. Select an item from the list and the corresponding element is selected in the *Report Layout* and *Property Grid* panels.

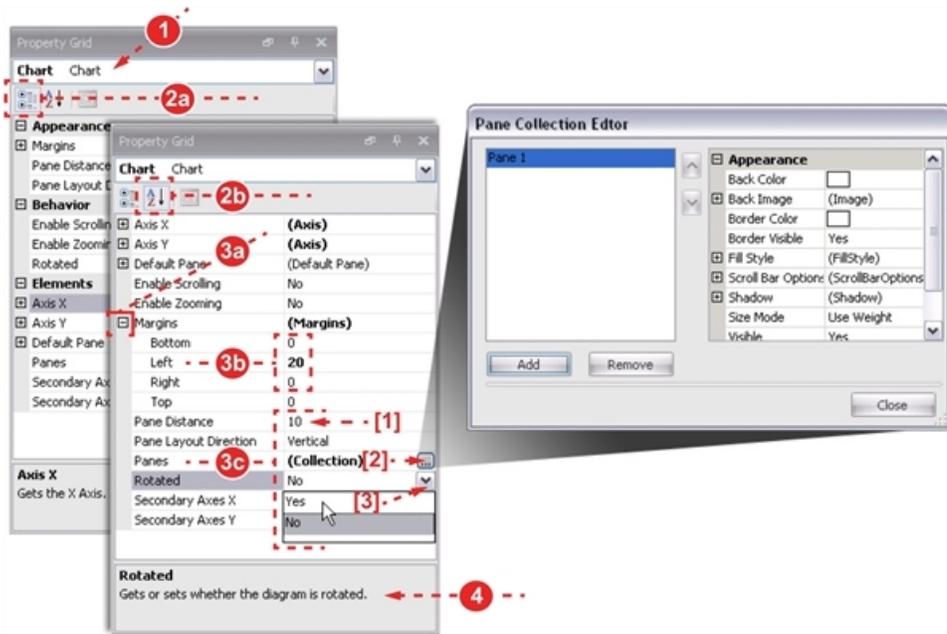


Property Grid Panel in the Report Designer

The *Property Grid* panel provides a quick way to modify the many attributes of each report element. When you select an element from the Report Layout panel ("Layout Panel in the Report Designer" on page 20), all the attributes you can modify are displayed in this panel. To modify the Chart properties, you may also use the Chart Wizard ("Editing Chart Components with the Report Designer Chart Wizard" on page 33).

The Property Grid panel is made up of the following:

1. **Element List** – use the drop-down list to select the report element whose attributes you wish to change.
 - Note:** Select an element in the Report Layout panel to view its properties.
2. **Views** – the list of attributes can be sorted two different ways:
 - a. **Categorized** – group the attributes by topic, such as Appearance, Behavior, Layout, etc. Category names appear in bold with a grey background.
 - b. **Alphabetical** – sort the list of attributes in ascending order.
3. **Properties** – a list of properties and their settings appear in two columns:
 - a. **Expand/Collapse** – some properties have multiple attributes. Click the [+] to view them all.
 - b. **Bold/Normal** – when the value in the second column appears in **bold**, it has been modified from the default.
 - c. **Edit Properties** – in the value column [1] type a value, [2] use the collection editor or [3] select it from a list.
4. **More Info Area** – provides a description of the selected property and links that can be used to modify the element.



Modifying Report Elements in Report Designer

The Report Designer provides multiple ways to edit report elements. The Task Menu ("Accessing the Report Designer Tasks Menu" on the next page) provides access to a handful of properties while the Property Grid ("Accessing an Element's Property Grid" on page 31) shows them all. For a Chart element, you can also use the Chart Wizard ("Editing Chart Components with the Report Designer Chart Wizard" on page 33) to modify many of the properties.

Accessing the Report Designer Tasks Menu

Every report element has a *Task Menu*. The properties available for editing on the tasks menu, however, vary from one element type to the next.

To use the Tasks menu:

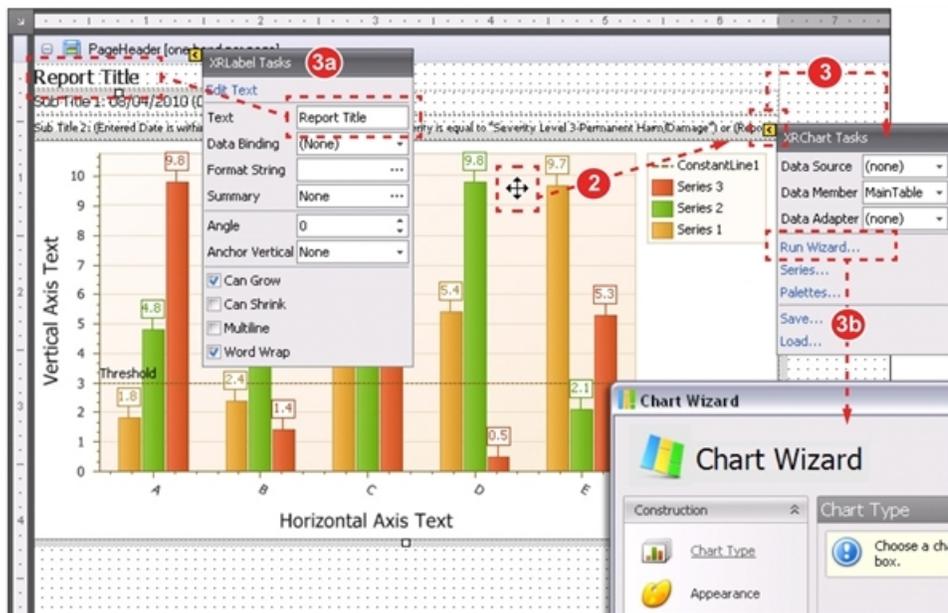
1. Open a report in the designer (not shown, see "Editing a Report with Report Designer" on page 10).
2. Select a report element. Handles appear around the border and the smart tag appears at the upper-right corner.
3. Click the smart tag. A menu appears next to the report element:

Note: While only one task menu can be opened at a time, this graphic shows two different task menus for comparison purposes.

- a. **XRLabel Tasks** – see "Report Designer Label Properties" on the facing page for details. Modify one or more fields.
- b. **XRChart Tasks** – click **Run Wizard...** to access the Chart Wizard ("Editing Chart Components with the Report Designer Chart Wizard" on page 33) where all report attributes can be modified.

Tip: Use the **Save...** button to store your report settings in an XML file on your computer. Use the **Load...** button to apply those saved settings to another chart.

4. Click outside of the Tasks Menu to close it.



Report Designer Label Properties

The table below describes the properties that can be edited with the Label element's task menu:

Table 1-5: Understanding Label Properties

	Property	Description
	Edit Text	Click this link to close the Task Menu and change the static text directly in the text box. You may also double click on a label element to modify the text within.
	Text	Allows you to change the static text that appears within the text box without closing the task menu.
Note: These advanced features should not be used when modify existing reports with the Report Designer.	Data Binding	Ignore this field.
	Format String	Ignore this field.
	Summary	Ignore this field.
	Angle	Determines the rotation of the text within the box. When set to 0 there is no rotation. Increase the value to rotate the text counter-clockwise. Enter 90 or 270 to display the text vertically within the box.
	Anchor Vertical	Ensures that the text box retains its position, relative to the object above or beneath it, when the report is rendered. Since the label text is usually static (and will not increase in size when the report is generated), you should not have to modify the default setting, <i>None</i> .

Understanding Label Properties (continued)

	Property	Description
<p>Note: If an element overlaps the growing/ shrinking Label by even one pixel, it will not be pushed down/ up by the growing/ shrinking Label.</p>	Can Grow	When checked, a height can be automatically increased, if required, to display the text. If there are other elements below the current Label, they will be pushed down to prevent them from overlapping.
	Can Shrink	When checked and the text does not completely fill a Label, then the Label's height will be decreased to the height of its text. If there are other elements below the current Label, they will be moved up to fill the gap.
	Multiline	When checked, a Label processes new line characters found in the text to start a new line. For example, when editing a Label's text, you can insert a new line by pressing Enter , which automatically checks the Multiline property.
	Word Wrap	When checked, text entered into the multiline Label is wrapped to the next line if it doesn't fit the line or comes across a new line character. If this property is not checked, text entered into the multiline Label will be displayed on the same line until a new line character is entered.

Accessing an Element's Property Grid

The attributes seen on the *Property Grid* vary from element to element. For chart elements, you may also select a specific component, such as the horizontal axis, legend or point labels, to view and modify the most specific details.

To using the Property Grid:

1. Open a report in the designer (not shown, see "Editing a Report with Report Designer" on page 10).
2. Select a report element to display its attributes in the *Property Grid*:
 - a. **Label** – the name of the element appears in the drop-down list.
 - b. **Chart Component** – when you hover over a chart component it is highlighted; in this example, the point labels are outlined in blue. Selecting a component usually changes the border color to red (not shown).
3. If necessary, use the scroll bar to locate the property you would like to change.
4. If necessary, expand a property to view all the associated attributes.
5. Click in the property column for the property you would like to change:
 - a. **Label Borders** – click the drop-down list and choose the sides to which you would like to add borders.
 - b. **Label Point FillMode** – click the drop-down list and choose a fill mode. Selecting `Hatch` or `Gradient` will enable two additional setting under the *Options* property.
6. After making a selection or pressing the **Enter** or **Tab** key, the element is updated.



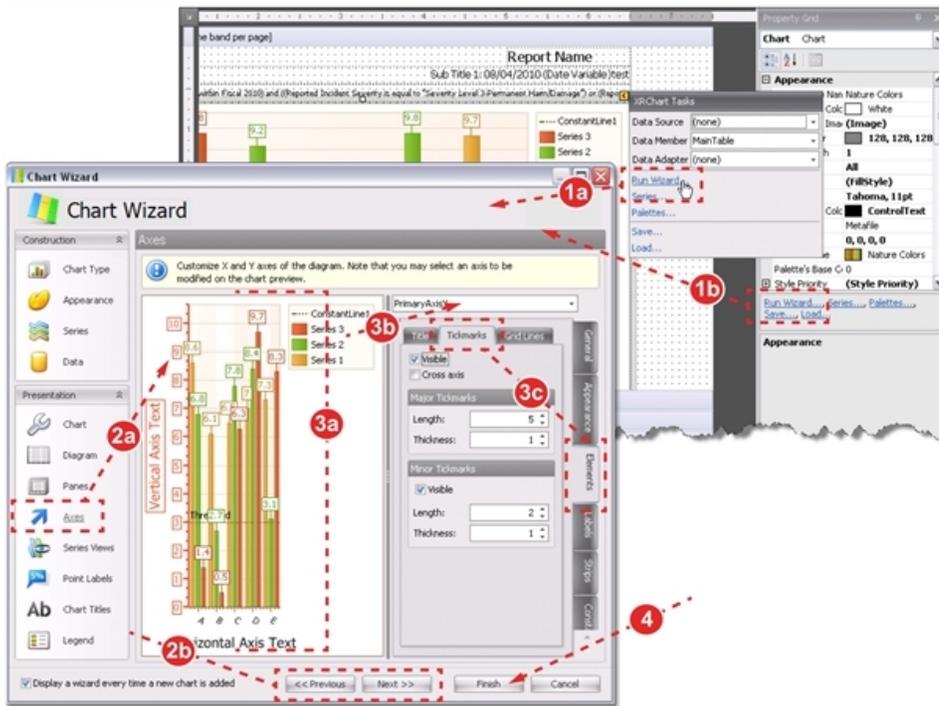
Editing Chart Components with the Report Designer Chart Wizard

The *Chart Wizard* provides a user-friendly interface for updating chart components, such as the axes, chart titles, legend and more.

To edit a component using the Chart Wizard:

1. Select the chart element and:
 - a. **Tasks Menu** – click the smart tag above the chart and choose **Run Wizard...** from the Tasks Menu.
 - b. **Property Grid** – in the middle section of the Property Grid, click the **Run Wizard...** link.
2. To navigate through the Chart Wizard:
 - a. **Links** – use the links along the left to jump to a specific page, as shown.
 - b. **Buttons** – use the **<<Previous** or **Next>>** buttons to move through the wizard pages ("Modifications with the Report Designer Chart Wizard" on page 35) in a linear path.
3. Each page may contain the following:
 - a. **Preview Area** – when a change is made, it is immediately seen here.
 - b. **Selection Box** – when more than one of a component exists, such as the x- and y-axes, select which one you would like to modify.
 - c. **Nested Tabs** – vertical tabs group the properties by type; horizontal tabs groups the properties by attribute.
4. Click **Finish** to close the wizard and apply your changes.

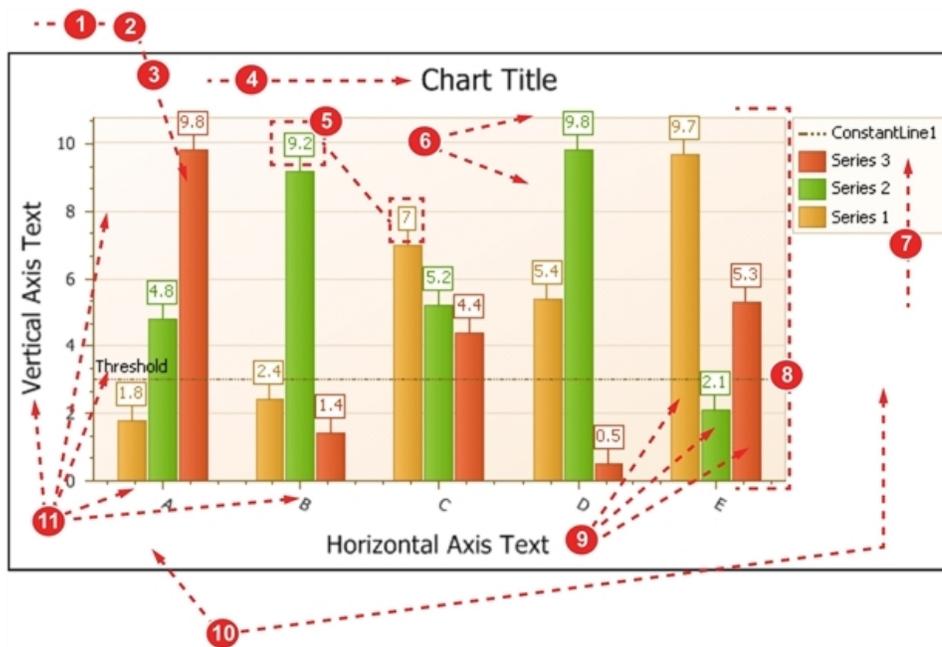
CHAPTER 1 Report Designer



Modifications with the Report Designer Chart Wizard

The graphic below describes the modifications that can be made with the Chart Wizard:

1. **Chart Type** – change the chart to a pie, line, spline, area, radar or any number of three-dimensional charts.
2. **Appearance** – view, create or select a color scheme for the chart.
3. **Series / Data** – since reports are created with the Question Wizard or Report Editor, you will not need to access these pages.
4. **Chart Titles** – add and format the text that appears above the chart.
5. **Point Labels** – determine the position and appearance of the labels that appear for each data series ("Modifying Point Labels" on page 45).
6. **Panes** – update the chart wall and border of the chart.
7. **Legend** – modify the position and appearance of the chart's legend.
8. **Diagram** – rotate the chart, change its margins and add secondary x- and y-axes.
9. **Series Views** – change the appearance of the bars, pie slices or other data series representations.
10. **Chart** – modify the entire background of the chart, including the area beneath the axis titles and legend.
11. **Axes** – modify the appearance of the x- or y-axis ("Rotating X-Axis Labels" on page 49) or add constant lines ("Adding a Constant Line to a Bar Chart" on page 50) and strips to the chart.



Making Common Changes with the Report Designer

This section covers some of the common modifications that are made with Report Designer. While nearly every aspect of the report can be modified, these topics will help you feel comfortable with the Report Designer – then you can experiment with your own changes:

- "Adding a Logo to the Report" on the facing page
- "Adding Borders and Shapes to a Report" on page 38
- "Changing Font Size, Color and Type" on page 39
- "Arranging Objects on the Page" on page 41
- "Changing the Page Orientation and Modifying the Grid" on page 42
- "Adding Trend Lines to a Bar Chart" on page 43
- "Modifying Point Labels" on page 45
- "Adding Minor Grid Lines to the Chart Wall" on page 47
- "Rotating X-Axis Labels" on page 49
- "Adding a Constant Line to a Bar Chart" on page 50

Adding a Logo to the Report

Many organizations require that their logo be placed in a specific location on all communications. With reports that are automatically generated, emailed or printed, it is important to brand the report according to your organization's requirements.

To add a logo to the report:

1. Open a report in the designer (not shown, see "Editing a Report with Report Designer" on page 10).
2. Make space in the PageHeader band for the logo. One way to do this is to hold the **Shift** key down while clicking on all the elements in the band; then press the down arrow to nudge the elements down until enough space is left for the logo.
3. In the Tool Box, click and drag the **PictureBox** element, releasing it in an open space in the band.
4. Click the smart tag to open the Task Menu.
5. Click the button at the end of the **Image** field.
 - a. Navigate to the directory where the logo is stored and select the file.
 - b. Click **Open**. The text `System.Drawing.Bitmap` displays in the field.
6. Select `Zoom Image` from the **Image Sizing** field to automatically resize the logo to fit in the PictureBox element.
7. Close the Tasks Menu to view and, if necessary, resize and move the logo to the appropriate place in the band.



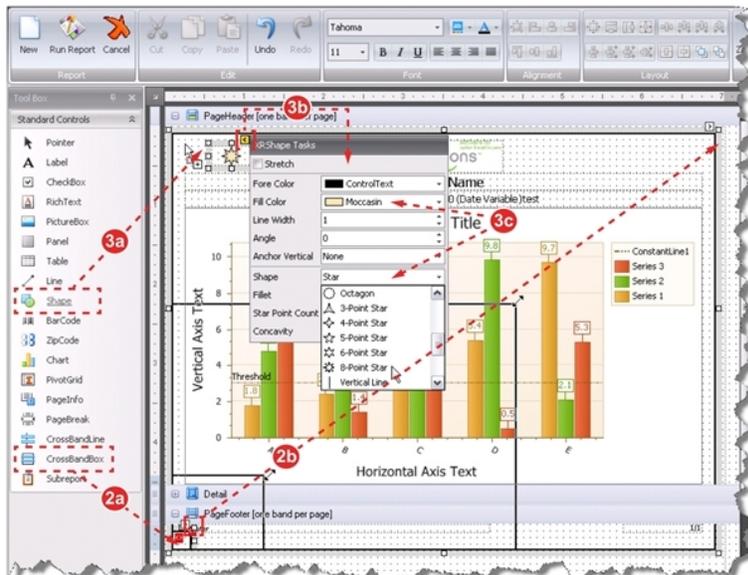
Adding Borders and Shapes to a Report

Borders and shapes are design elements that, when used effectively, make your reports easy to read and pleasing to view. A shape cannot straddle a band – it must be placed completely within; the CrossBandBox and CrossBandLine elements, however, can span the entire page, crossing over multiple bands.

To add borders and shapes to a report:

1. Open a report in the designer (not shown, see "Editing a Report with Report Designer" on page 10).
2. To add a page border to the Report:
 - a. Click and drag the **CrossBandBox** element from the Tool Box to one of the corners in the Report Design area. Release the mouse button to place the element on the page.
 - b. Click and drag the diagonal handle to expand the box, releasing the mouse button when you reach the opposite corner of the page.
 - c. If necessary, use the arrow keys to nudge the border into place.
3. To add a shape to the report:
 - a. Click and drag the **Shape** element from the Tool Box to the Report Design area. Release the mouse button to place the element on the report.
 - b. Click the smart tag to edit the shape.
 - c. Change the shape properties; in this example, the **Fill Color** and **Shape** have been changed.

Based on the selected shape, additional attributes, such as **Fillet**, **Star Point Count** and **Concavity**, may appear on the menu.



Changing Font Size, Color and Type

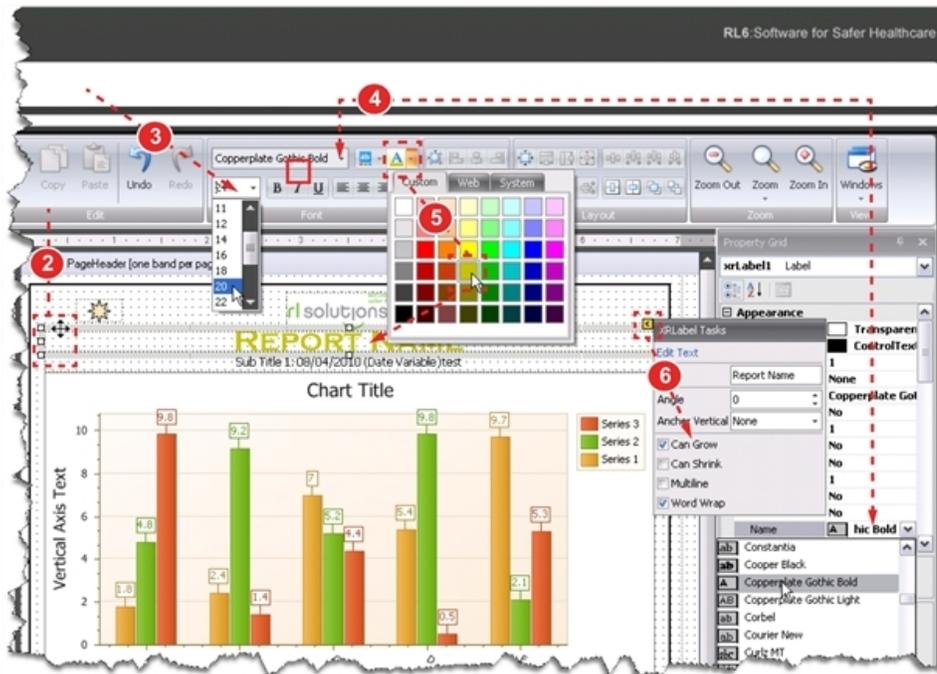
The text contained within label elements can be modified in a number of ways. Determining the appropriate font, size and color can help in producing a visually pleasing report that meets your organization's requirements. To modify the text that appears within a chart element, however, you must use the Chart Wizard ("Editing Chart Components with the Report Designer Chart Wizard" on page 33) or Properties Grid ("Property Grid Panel in the Report Designer" on page 25).

To change font size, color and type in Report Designer:

1. Open a report in the designer (not shown, see "Editing a Report with Report Designer" on page 10).
2. Select the text element that you would like to modify.
3. In the *Font* toolbar, use the drop-down list to select the new size.
4. Select a font from the drop-down list or use the *Properties Grid* to choose the font name, as shown.
5. In the *Font* toolbar, click the font color button to display the color palettes. Select a color from the list.
6. In this example, the font size is larger than the height of the text box. Use the *Tasks Menu* to view the settings: when the **Can Grow** property is checked, the height of the text box will automatically increase to fit the contents when the report is generated. When this text box grows, the other elements are pushed down on the page.

Note: The text elements within the chart, such as the chart title or vertical and horizontal axes titles cannot be modified with the Font toolbar. You must use the Chart Wizard or Properties Grid to modify these elements.

CHAPTER 1 Report Designer



Arranging Objects on the Page

There are many tools you can use to create the optimal layout for elements in your report. In the procedure below, the Alignment and Layout toolbars will be used to quickly distribute and align report elements within the band.

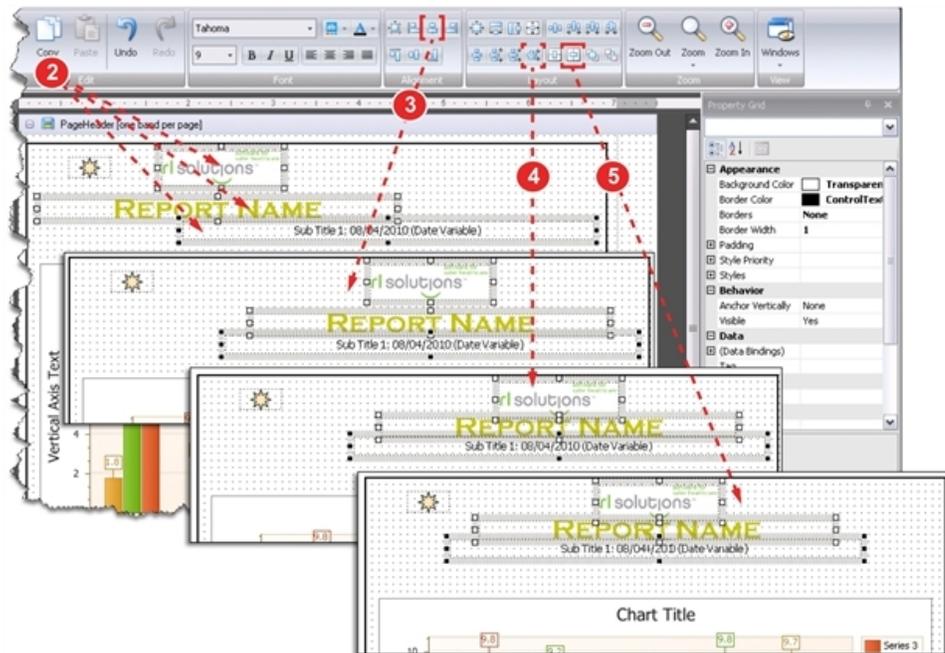
To arrange objects on a report page:

1. Open a report in the designer (not shown, see "Editing a Report with Report Designer" on page 10).
2. Hold the **Shift** key and select the elements you would like to arrange. The last one you select is the anchor, meaning the other objects are aligned or resized in relation to this object.

Note: In this example, the element with the text "Sub Title 1..." was the last one selected.

4. In the *Alignment* toolbar, click the center align button. The elements are aligned to the center of the element that was last selected.
5. In the *Layout* toolbar, click the vertical align button. The vertical space between elements is removed.
6. In the *Layout* toolbar, click the center to page width button. The selected elements are moved along the horizontal plane to the center of the page.

Tip: You may also click and drag the selected items to place them on the page. Use the arrow keys to nudge them to the next grid mark.



Changing the Page Orientation and Modifying the Grid

The default page orientation is portrait with the size set to letter (i.e., 8.5" by 11"). In some cases, charts are better displayed in the landscape format, such as when there are many items being display on the x-axis; setting the page to landscape will allow you to increase the size of the chart so that it is easier to read. After you change the page orientation, you will need to rearrange the elements. By default, the elements snap to the grid, which is defined in one hundredths of an inch, when they are moved.

To change the page orientation or modify the grid in Report Designer:

1. Open a report in the designer (not shown, see "Editing a Report with Report Designer" on page 10).
2. Click in the upper-left corner of the report layout area or select `Report` from the **Property Grid** list.
3. In the Property Grid panel, scroll down until you reach the *Page Settings* category. For the **Landscape** property select `Yes` from the list.

Note: Before changing the orientation, the dashed margin line was red, indicating that some objects overlapped the margin line; after changing the orientation, the page width expands and the margin is adjusted.

4. Expand the *Grid Size* property and modify the **Height** and **Width** settings. In this example, the values have been increased from 8 to 25 hundredths of an inch (i.e., 1/4 inch).

Tip: If **Snap to Grid** is set to `Yes`, which is the default setting, when you move an element it will adhere to the grid lines. Set this value to `No` to maintain complete control over where the element is placed on the page.



Adding Trend Lines to a Bar Chart

Trend lines are used on bar charts and usually connect the first column to the last in a straight, diagonal path. For example, say you chart the number of reported incidents from the day your organization starts using RL6. You would expect to see the system use increase steadily over time; columns that drop below or spike above the trend line might help you determine if training or incentive programs put in place have had the desired effect.

To add trend lines to a bar chart:

1. Open a report in the designer (not shown, see "Editing a Report with Report Designer" on page 10).
2. Click the smart tag to display the Tasks Menu.
3. Click the **Run Wizard...** link. The *Chart Wizard* dialog opens.
4. Click **Series Views**.
5. Click the **Trendlines** tab.
6. Click the **Add** button. In this example, three trend lines appear – one for each series – that connect the bars from the first group through the last.

Tip: Click the Appearance tab to change the color, dash style or thickness of the trend lines.

7. Click **Finish** apply the changes to the chart.

Note: You can also add trend lines from the Report Center by going to the Report Editor area's Chart Details section (Understanding Chart Details).



Modifying Point Labels

Point labels are used to show the exact value represented by the graphical elements, such as a bar or pie slice. By default, these labels appear outside of the graphical element; in some cases, repositioning the labels to the interior means that there is more space to display the chart. Other attributes, such as font size, color or border, can also be modified for the point labels.

To modify point labels:

1. Open a report in the designer (not shown, see "Editing a Report with Report Designer" on page 10).
2. Click the smart tag to display the Tasks Menu.
3. Click the **Run Wizard...** link. The *Chart Wizard* dialog opens.
4. Click **Point Labels**. A preview of the chart appears with the point labels highlighted.
5. Make modifications on the *General* tab. In this example:
 - a. The **Position** was set to *Inside*.
 - b. **Antialiasing**, which smooths the appearance of the text, was checked.
 - c. The **Color** was changed to black.
 - d. The **Font** was made bold and increased to 10pt.
6. For the *Appearance* tab, the following modifications were made:
 - a. **Visible** was unchecked to remove the border.
 - b. **Fill Mode** was set to *Empty* to remove the background color.
7. Click the **Finish** button to apply your changes to the chart.

CHAPTER 1 Report Designer



Adding Minor Grid Lines to the Chart Wall

For bar charts, major grid lines appear on the y-axis by default. You may also add grid lines for the x-axis or tweak the settings for both. If point labels have been removed from the chart, adding minor grid lines will help the report consumer determine the total value represented by each bar.

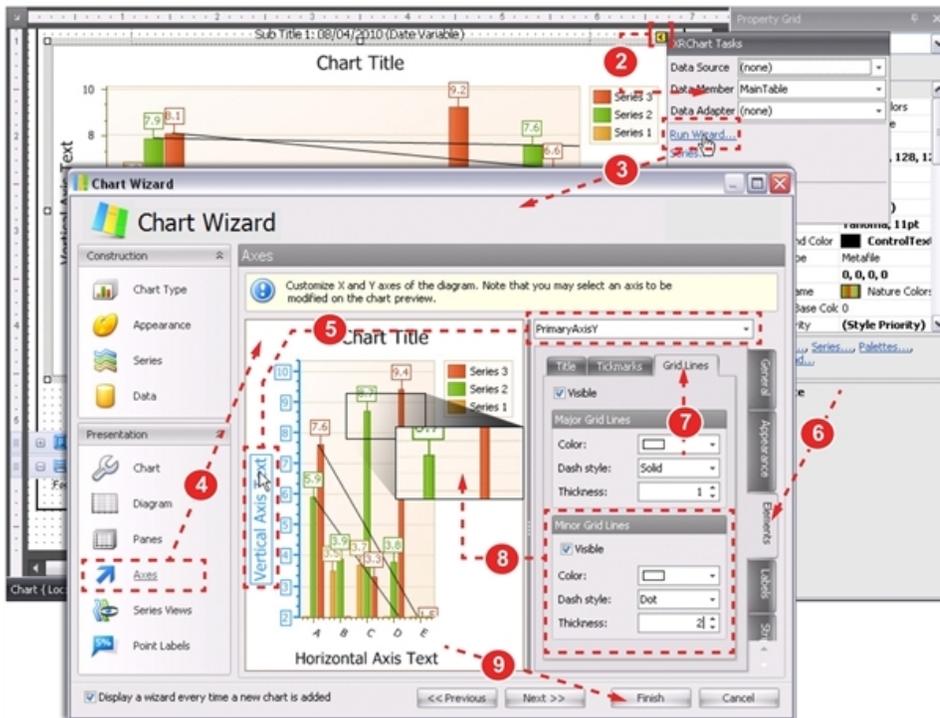
To add minor grid lines to the Chart wall:

1. Open a report in the designer (not shown, see "Editing a Report with Report Designer" on page 10).
2. Click the smart tag to display the Tasks Menu.
3. Click the **Run Wizard...** link. The *Chart Wizard* dialog opens.
4. Click **Axes**.
5. Select the axis to which you would like to add the minor grid lines. You can click the axis in the preview area or select it from the drop-down list.
6. Click the **Elements** tab.
7. Click the **Grid Lines** tab.
8. Check the **Visible** box in the *Minor Grid Lines* section. In this example, the following modification were made:
 - a. The **Dash Style** was set to `Dot`.
 - b. The **Thickness** was increased to 2.

Note: Your modifications are displayed in the chart preview area.

9. Click the **Finish** button to apply your changes to the chart.

CHAPTER 1 Report Designer



Rotating X-Axis Labels

By default, the labels along the x-axis are rotated by 30 degrees. The chart wizard allows you to modify this setting, in addition to staggering their positions and modifying color, font and anti alias attributes.

To rotate the x-axis label:

1. Open a report in the designer (not shown, see "Editing a Report with Report Designer" on page 10).
2. Click the smart tag to display the Tasks Menu.
3. Click the **Run Wizard...** link. The *Chart Wizard* dialog opens.
4. Click **Axes**.
5. Select the axis whose labels you would like to rotate. You can click the axis in the preview area or select it from the drop-down list.
6. Click the **Labels** tab.
7. In the **Angle** box, enter the number of degrees by which the text should be rotated. The text rotates in a clockwise direction.

Note: Your modifications are displayed in the chart preview area.

9. Click the **Finish** button to apply your changes to the chart.

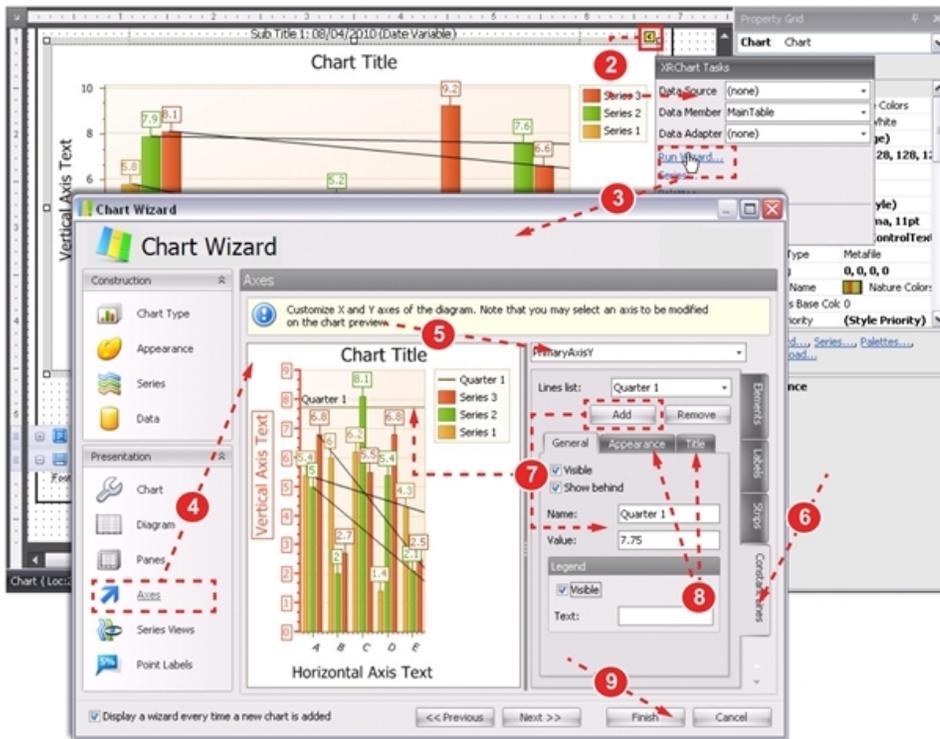


Adding a Constant Line to a Bar Chart

The Chart Wizard allows you to add one or more static constant lines to the chart. This provides a quick visual so the report consumer can identify if goals or thresholds are being met or exceeded. In the example below, a constant line that represents the goals for the first quarter has been added to the chart.

To add a constant line to a bar chart:

1. Open a report in the designer (not shown, see "Editing a Report with Report Designer" on page 10).
2. Click the smart tag to display the Tasks Menu.
3. Click the **Run Wizard...** link. The *Chart Wizard* dialog opens.
4. Click **Axes**.
5. Select the axis to which you would like to add the constant lines. You can click the axis in the preview area or select it from the drop-down list. In this example, the y-axis is selected.
6. Click the **Constant lines** tab.
7. Click **Add** to create a constant line. In this example, the following modifications have been made:
 - a. **Name** was changed to `Quarter 1`.
 - b. **Value**, or where the line appears on the chart, was set to `7.75`.
8. If desired, use the **Appearance** tab to modify the line attributes and the **Title** tab to change the position, color, alignment and font used.
Your modifications are displayed in the chart preview area.
9. Click the **Finish** button to apply your changes to the chart.



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B

Bar chart

- adding constant line to 50
- adding trend lines to 43

C

Charts

- wizard 33, 35

L

Logo 3, 18, 37

- in a report 37

R

Report Designer 7, 11, 20, 36

- arranging report elements 41
- bands 22
- bar chart 43, 47
- changing font color and type 39
- changing page orientation 42
- element properties 28
- formatting toolbar 14
- grid lines 47
- label properties 29
- layout toolbar 15
- modifying labels 49
- modifying report elements 27
- plug-ins 8
- point labels 45
- populating charts 23

property grid 25, 31

Report Explorer 23

toolbars 13

trend lines 43

Reports

design elements 38