

# 2020 Report Designer User Guide



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# About Report Designer

2020 Report Designer is 2020 Worksheet's powerful reporting tool. With 2020 Report Designer, you can build customized internal or external reports, and modify an existing report from a template to build a personalized report.

To get started quickly, see [Getting Started](#).

## Hints and procedures

As in other Windows applications, there are many ways to do specific tasks in 2020 Report Designer. You can:

- ▶ Use the [menu bar](#) to select the command
- ▶ Click on an icon on the [toolbar](#)
- ▶ Right-click to access the [context menu](#)

Instead of showing different ways of performing the same task, procedures in this help file show you only one way so that you can quickly learn how to use the application.

**Note:** Make sure all Report Designer toolbars are displayed for procedures directing you to click icons.

# Getting Started

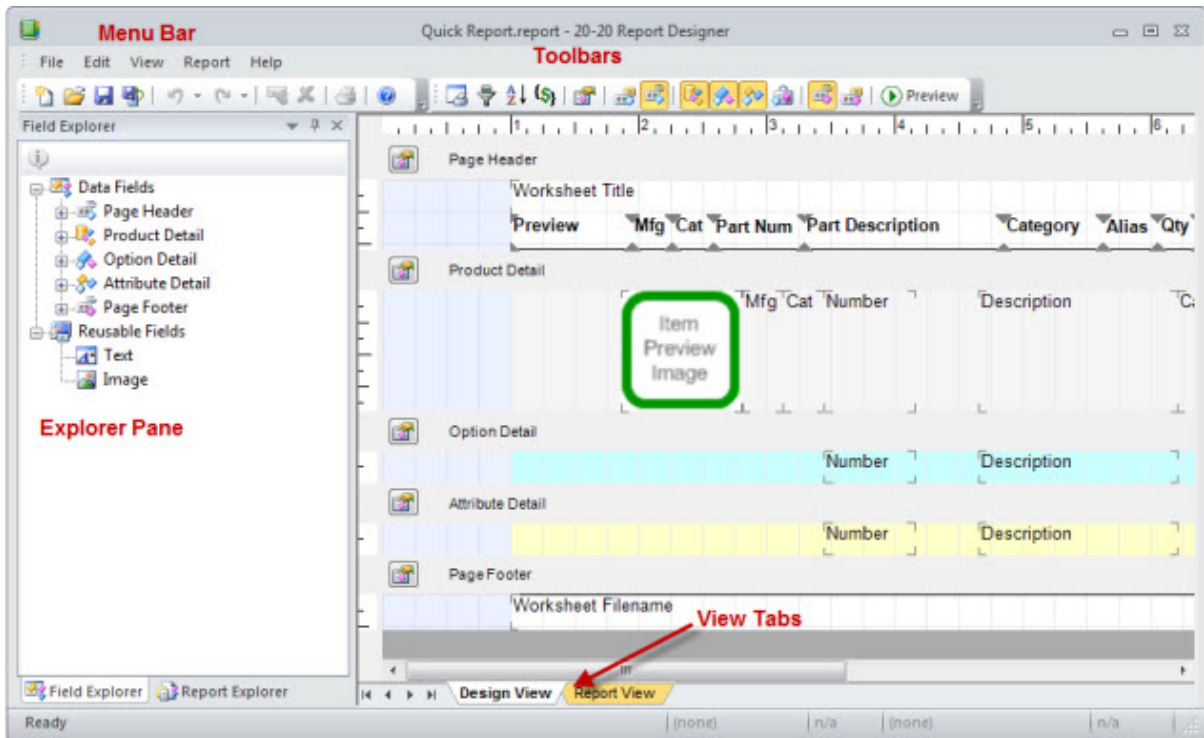
To get started quickly, follow the steps below:

1. [Create a report design based on an existing one](#) or [Create a blank report design](#).
2. Add [sections](#) to your report design.
3. Add [fields](#) to each section in the design.
4. [Save the report design](#).
5. [Generate \(preview\) the report](#).
6. [Print the report](#) or [Export the report to a PDF file](#).

## Screen components

The 2020 Report Designer screen contains:

- ▶ [Menu bar](#)
- ▶ [Toolbars](#)
- ▶ [Explorer Pane](#) with two tabs
- ▶ [View tabs](#)
- ▶ [Status Bar](#)



See also: [Context menus](#)

## Menu bar

Located on top of the 2020 Report Designer screen are menu names (from File to Help). They list the tasks you can do in 2020 Report Designer.

Click a menu to open it.

Underlined letters in menu and command names indicate they can be accessed through a shortcut.

For example, to quickly open the **File** menu:

1. Press ALT+F to open the **File** menu.
2. Type in a letter corresponding to the underlined letter of the command you need.  
For instance, type the letter "S" to save.

Some commands have even quicker shortcuts. Instead of opening menus, you can directly access a command by pressing CTRL plus a letter. For example, CTRL + letter "O" displays the **Open** dialog.

To quickly find the help topics and shortcuts that correspond to each menu item, see the following under [Command reference](#):

- ▶ [File menu](#)
- ▶ [Edit menu](#)
- ▶ [View menu](#)
- ▶ [Report menu](#)
- ▶ [Help menu](#)

**Note:** You can hide the menu bar by choosing **View, Menu Bar**.

## Toolbars

As in standard Windows applications, toolbars in 2020 Report Designer allow you to perform frequent operations quickly with icons (images representing an action or a command).

You can easily customize toolbars. See the topics below:

- ▶ [Show or hide a toolbar](#)
- ▶ [Move a toolbar](#)
- ▶ [Custom toolbars](#)



There are two built-in toolbars in 2020 Report Designer, each representing a category of commands. See the topics below:

▶ [Standard toolbar](#)

▶ [Report toolbar](#)

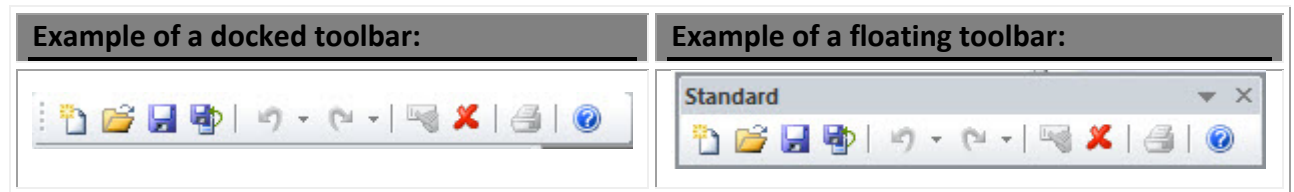
## Show or hide a toolbar


1. From the **View** menu, select **Toolbars**.
2. Select the toolbar name to toggle the toolbar on and off.

If it is off (no ☐ next to the name), click it and the toolbar will appear on your screen (a ☒ will also appear next to its name). Selecting it again will turn it off.

## Move a toolbar

A toolbar can be docked or floating. It is docked when no title bar appears and a move handle is available on the left side or on top of the toolbar.



▶ To undock a toolbar and leave it floating, click and hold the left mouse button on the move handle on the left side of the toolbar  , then move the toolbar anywhere you want and release the mouse button.

- ▶ To dock a floating toolbar, click and hold the left mouse button on the title bar, then move the toolbar to the desired spot and release the mouse button.
- ▶ To remove a floating toolbar from the screen, click the x in the title bar; to remove a docked one, use **View, Toolbars**.

## Custom toolbars

Creating a toolbar consists of using buttons from existing 2020 toolbars to make up a custom toolbar.

1. Click **View, Toolbars, Customize**.
2. From the Customize dialog, click the **Toolbars** tab.
3. Click the **New** button to create a toolbar.
4. Type in a toolbar name and click **OK**.

A blank toolbar appears. This toolbar will expand as you add buttons to it.

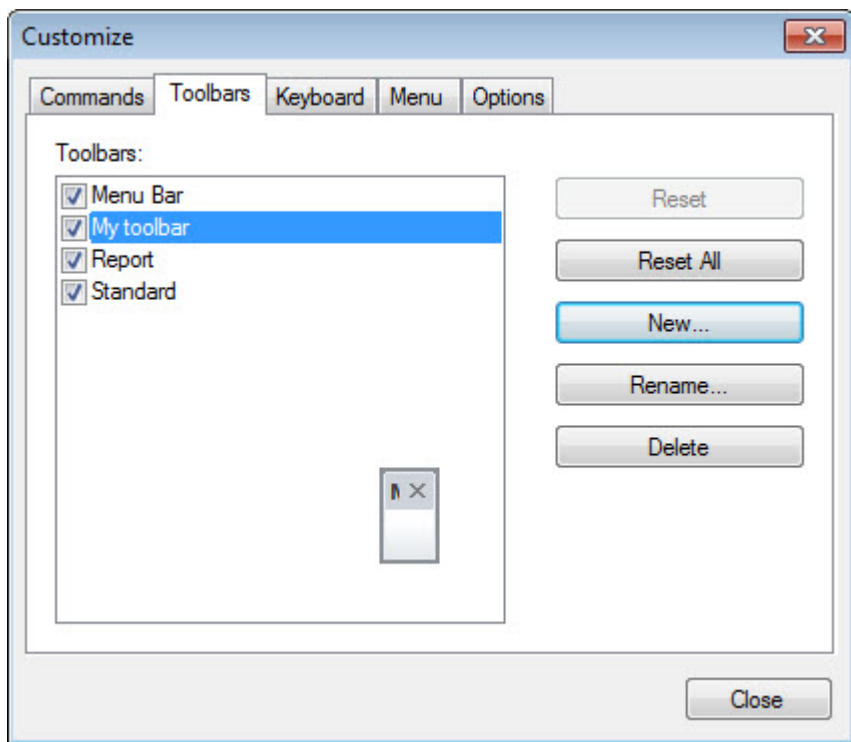


5. From the Customize dialog, click the **Commands** tab.
6. Under Categories, highlight the toolbar you want to choose buttons from. Click on a button to see its description at the bottom of the dialog.
7. Drag the required buttons to the empty toolbar you just named.
8. Click Close to end.

**See also:** [Delete a Custom Toolbar](#)

### Delete a custom toolbar

1. Choose **View, Toolbars, Customize**.
2. From the Customize dialog, click the Toolbars tab.
3. Select the custom toolbar from the list.



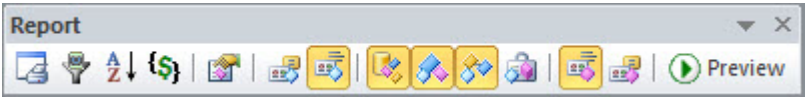
4. Click the **Delete** button.
5. Click **Close**.









## Standard toolbar






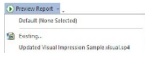


Icon	Name	Shortcut	Description
	New	Ctrl+N	<a href="#">Create a new report design</a>
	Open	Ctrl+O	<a href="#">Open a report design</a>
	Save	Ctrl+S	<a href="#">Save the report design</a>
	Save as		<a href="#">Save the report design</a> under a different name
	Undo	Ctrl+Z or Alt+Backspace	<a href="#">Undo an action</a> . Click on the dropdown arrow beside it to undo more than one action at a time.
	Redo	Ctrl+Y	<a href="#">Redo an action</a> you just undid. Click on the dropdown arrow beside it to redo more than one action at a time.
	Field Properties	Alt+Enter	Modify the selected <a href="#">field's properties</a>
	Delete	Delete	<a href="#">Delete the selected field</a>
	Print	Ctrl+P	<a href="#">Print a report</a>
	Help Topics	F1	View the 2020 Report Designer online help

## Report toolbar



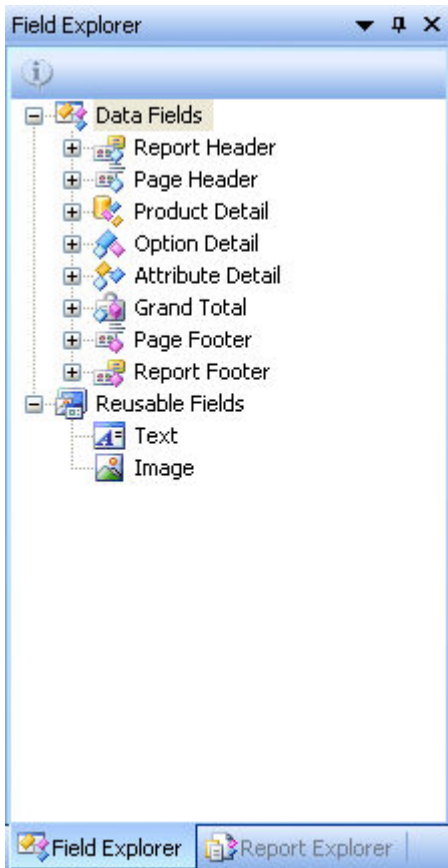
Icon	Name	Shortcut	Description
	Page Setup		<a href="#">Set up the page</a> paper size, watermark, margins and orientation
	Filtering		Select the criteria used to filter the data in a worksheet when it is applied to a report design
	Sorting		Select the fields used to <a href="#">sort the data</a> in a worksheet when it is applied to a report design
	Grouping		Add <a href="#">group</a> header/footers containing subtotals to the Item Detail section of the report
	Section Properties	Ctrl+Enter	Modify report <a href="#">section properties</a>
	Toggle Report Header		Show or hide the Report Header section of the report
	Toggle Page Header		Show or hide the Page Header section of the report
	Toggle Product Detail		Show or hide the Product Detail section of the report

Icon	Name	Shortcut	Description
	Toggle Option Detail		Show or hide the Option Detail section of the report
	Toggle Attribute Detail		Show or hide the Attribute Detail section of the report
	Toggle Grand Total		Show or hide the Grand Total section of the report
	Toggle Page Footer		Show or hide the Page Footer section of the report
	Toggle Report Footer		Show or hide the Report Footer section of the report
	Report Preview		<a href="#">Generate (preview) a report</a>

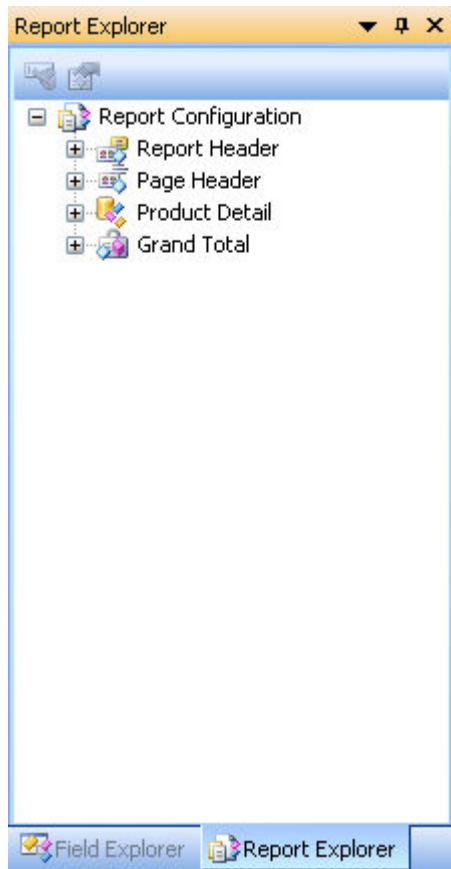
## Explorer Pane

The Explorer Pane has two tabs:

Use the **Field Explorer** tab to view all the fields that can be added to a report design. From here you can drag and drop fields to the report design.



Use the **Report Explorer** tab to view fields that are placed in the report design. From here you can customize each field property: font, size, alignment, justification, border and background color.





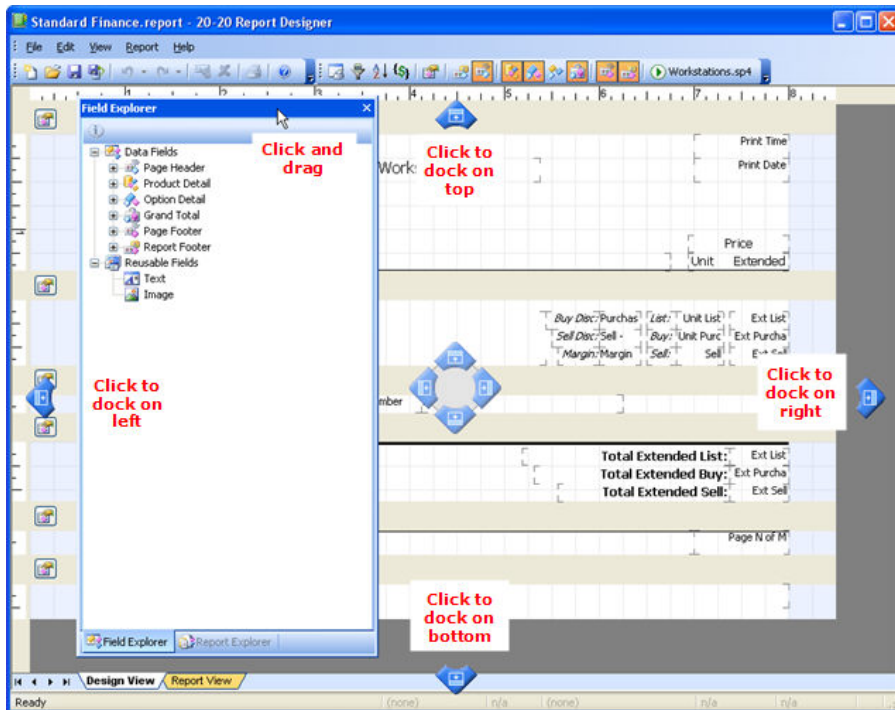
**See also:**

- ▶ [Move the Explorer pane](#)
- ▶ [Show or hide Explorer pane tabs](#)
- ▶ [Fields](#)
- ▶ [Field properties](#)

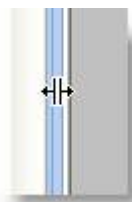
## Move the Explorer pane

You can move and configure the Explorer pane to meet your preferences. Explorer is normally docked on the left of the screen but you can undock it and drag it elsewhere.

1. To move Explorer, click and drag on the title bar at the top.
2. Drag the Explorer pane to the location you prefer. The pane can be floating or docked. To dock on either side, top or bottom move the mouse as you are dragging to the control buttons.



3. When Explorer is docked you can resize it by dragging on its vertical bar on the right edge.



See also: [Show or hide Explorer pane tabs](#)

## Show or hide Explorer pane tabs

By default, both Explorer pane tabs are visible when you open 2020 Report Designer.

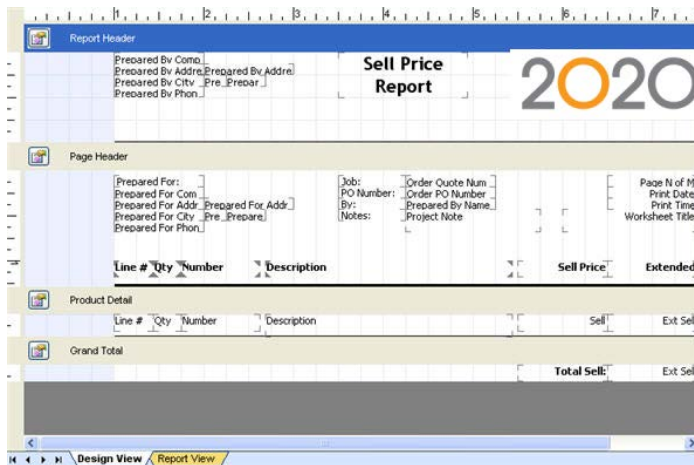
You can close and open each of the different tabs individually by doing any of the following:

- ▶ From View menu select the Field Explorer Bar or Report Explorer Bar.
- ▶ Right-click on any toolbar or button in 2020 Report Designer then select the bar you wish to show or hide.

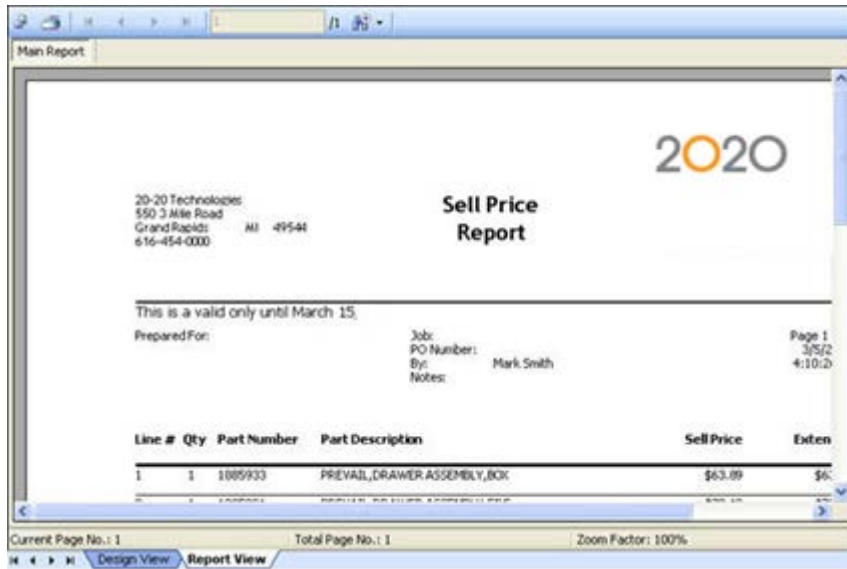
## View tabs

There are two view tabs in the 2020 Report Designer work area:

- ▶ Use the Design View to design your report. From here you can add fields and sections, filter or sort data, and add group headers and footers containing subtotals.



- ▶ Use the Report View to see how the report looks with data extracted from the worksheet. From here you can print or export a report.



See:

- ▶ [Design a report](#)
- ▶ [Generate \(preview\) a report](#)
- ▶ [Print a report](#)
- ▶ [Export a report to a PDF file](#)

# Status bar

The Status bar displays the 2020 Report Designer program status, the selected section's name and height, and the selected field's name, position and size.

Also, when you hover the mouse pointer over an icon on the [toolbar](#) or a [Menu](#) item, the Status bar displays a brief command description.

Status or Command description	Section name	Section height	Field name	Field position	Field size
Ready	Page Header	1.29 in	Order PO Number	4.25, 0.19 in	1.00 x 0.13 in

# Context menus

Context menus—sometimes called pop-up menus—display a subset of commands that are specific to the context or the element selected.

To display a context menu, right-click.

## Example:

Right-click on a field then select **Delete** to delete it.

# Preferences

Report Designer Preferences allow you to control specific characteristics of the program.

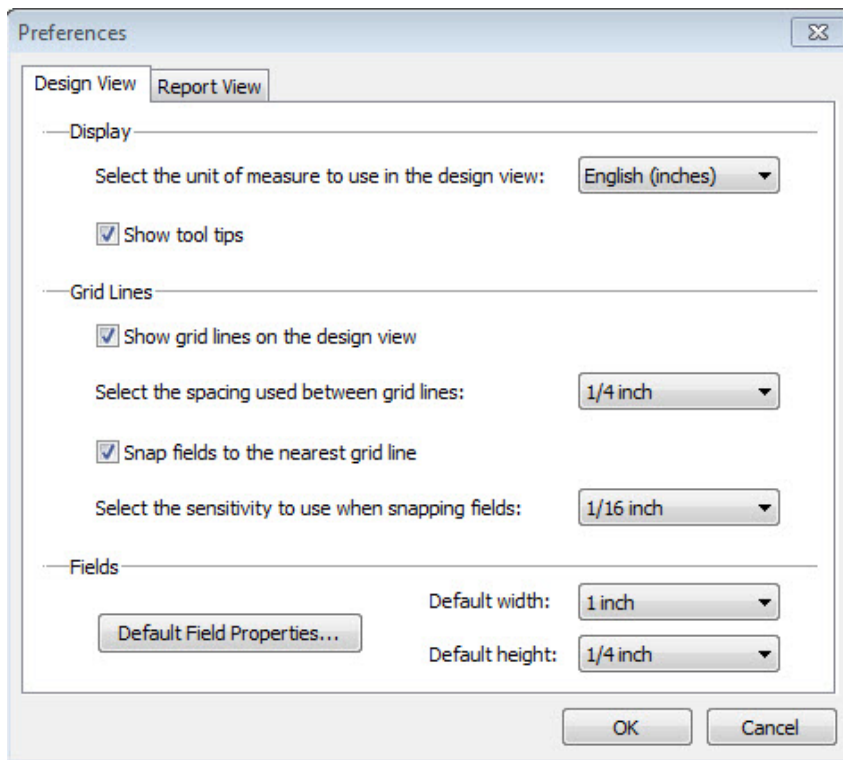
See the topic [Design View Tab](#) to modify preferences related to the Design View.

See the topic [Report View Tab](#) to modify preferences related to the Report View.

## Design View Tab

The Design View tab in the Preferences dialog changes settings related to the [Design View](#).

1. From the **View** menu, select **Preferences**.
2. Click the **Design View** tab.



3. Modify any of the settings shown below and then click **OK**:

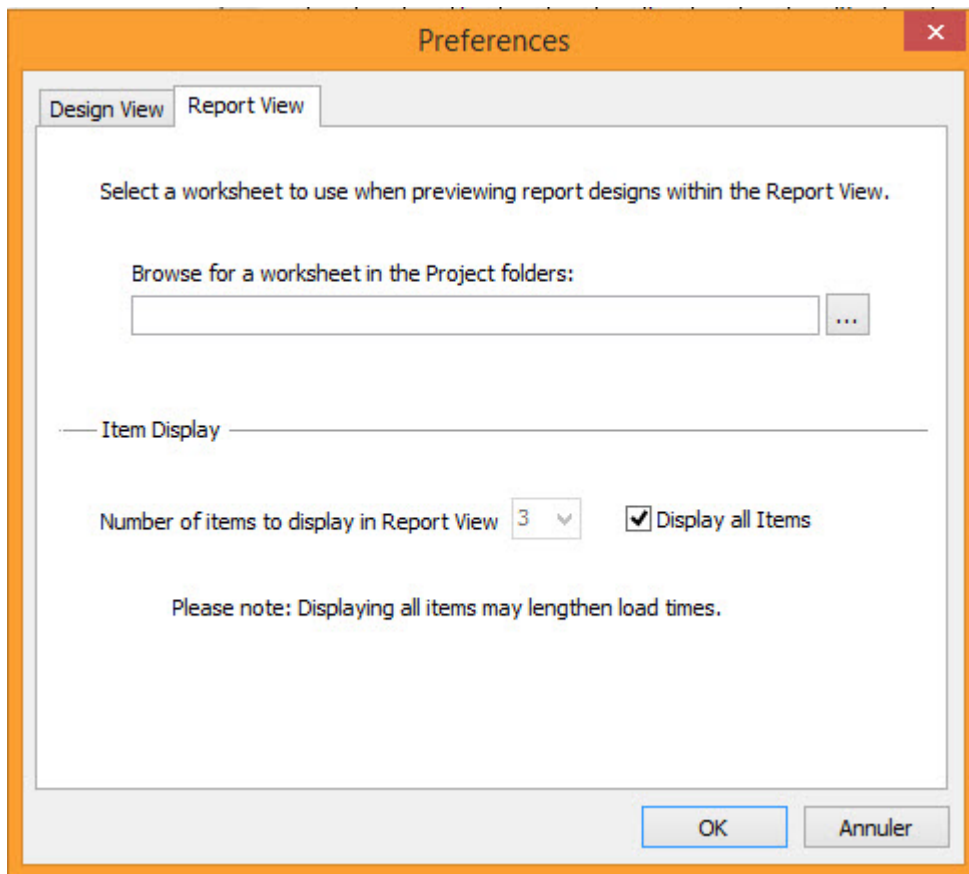
Category	Settings
Display Units	<ul style="list-style-type: none"> <li>▶ Select the unit of measure to use in the design view</li> <li>▶ Show tool tips</li> </ul>
Grid Lines	<ul style="list-style-type: none"> <li>▶ Show grid lines on the design view</li> <li>▶ Select the spacing used between grid lines</li> <li>▶ Snap fields to the nearest grid line</li> <li>▶ Select the sensitivity to use when snapping fields</li> </ul>
Fields	<ul style="list-style-type: none"> <li>▶ <b>Default Field Properties</b> - click to select the default formatting (font, size, style, alignment, background color, border) for fields that you will add to the report design</li> <li>▶ Default field width</li> <li>▶ Default field height</li> </ul>

▶ See also: [Design a report](#)


## Report View Tab

The Report View tab in the Preferences dialog changes settings related to the [Report View](#).

1. From the **View** menu, select **Preferences**.
2. Click the **Report View** tab.





3. Click  to choose the default worksheet to use when previewing the report.
4. Under **Item Display**, leave **Display all Items** checked to display all worksheet items on the report.  
Or, to generate a report more quickly with a limited number of items, uncheck this box and select the number of items to appear on the report.

5. Click **OK**.  
▶ See [Generate - Preview a report](#)

## Create a blank report design


To create a new blank report design click  on the [Standard toolbar](#).

**See also:**

▶ [Sections](#)

▶ [Fields](#)

## Open a report design

1. Click  on the [Standard toolbar](#).
2. In the **Look in** field, choose the disk/folder where the file is located.


By default, user report designs are saved under *My Documents\CAP\UserReports*.

3. In the **List of files and folders** area, select the file then click **Open**.

**Note:** To open a report design you worked on recently, select the **File** menu. Right before the **Exit** command are the last five files you worked on. Select the file to open it.

## Create a report design based on an existing one

The quickest way to create a report design is to use any of the Standard report designs available and then save it as a user report design.

1. Click  on the [Standard toolbar](#).
2. In the **Look in** field, browse to the folder *Documents and Settings\All Users\Application Data\CAP\StandardReports*.
3. Click **Open**.
4. From the **File** menu, select **Save As**.
5. Beside **Save In**, browse to the user report designs folder. By default, this should be *My Documents\CAP\UserReports*.
6. Type a new file name.
7. Click **Save**.


You can also create a new report based on an existing one from 2020 Worksheet. See Create, edit and manage reports in the 2020 Worksheet online help for details.

### See also:

▶ [Sections](#)


▶ [Fields](#)

# Save the report design

1. Click  on the [Standard toolbar](#).
2. If this is the first time you are saving the report design, enter the file name in the **Save As** dialog.

By default, user report designs are saved under *My Documents\CAP\UserReports*.

## To save under a different name:

1. Click **Save As**  on the [Standard toolbar](#).
2. Enter the new file name in the **Save As** dialog.

By default, user report designs are saved under *My Documents\CAP\UserReports*.

# Design a report

To design your report, you must be in Design View.

1234567

Report Header

Prepared By Comp  
Prepared By Addr  
Prepared By City  
Prepared By Phon

Sell Price  
Report

2020

Page Header

Prepared For:  
Prepared For Com  
Prepared For Addr  
Prepared For City  
Prepared For Phon

Job:  
PO Number:  
By:  
Notes:

Order Quote Num  
Order PO Number  
Prepared By Name  
Project Note

Page N of M  
Print Date  
Print Time  
Worksheet Title

Line #

Qty

Number

Description

Sell Price

Extended

Product Detail

Line #

Qty

Number

Description

Sell

Ext Sell

Grand Total

Total Sell

Ext Sell

Design View

Report View

25

From here you can do the following to customize your report:

- ▶ Add [Sections](#)
- ▶ Add [Fields](#) into each section
- ▶ [Filter data that will appear on a report](#)
- ▶ [Group data and show subtotals](#)
- ▶ [Sort data](#)

**See also:**

- ▶ [Undo an action](#)
- ▶ [Redo an action](#)
- ▶ [Generate \(preview\) a report](#)
- ▶ [Print a report](#)
- ▶ [Export a report to a PDF file](#)

## Sections

A report design is divided into sections. Different data fields can be added to specific sections.

- ▶ Report Header - prints at the top of the first page of a report
- ▶ Page Header - prints at the top of every page of a report
- ▶ Item Detail - prints line item information (Product Detail, Option Detail and Attribute Detail)
- ▶ Grand Total - prints the grand total
- ▶ Page Footer - prints at the bottom of every page
- ▶ Report Footer - prints at the bottom of the last page

In addition, you can group data in the report and display Group 1 Header and Group 1 Footer sections.







See the following topics:



- ▶ [Show or hide a section](#)
- ▶ [Resize a section](#)
- ▶ [Section Properties](#)
- ▶ [Fields](#)
- ▶ [Group data and show subtotals](#)

Show or hide a section

From the **Report** menu, select **Sections**, then select the section you want to display.  
Or, click the section icon on the **Report** toolbar.



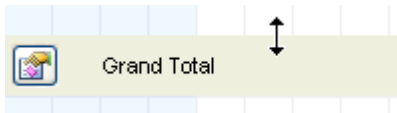
Icon	Description
	Show or hide the Report Header section of the report
	Show or hide the Page Header section of the report
	Show or hide the Product Detail section of the report
	Show or hide the Option Detail section of the report
	Show or hide the Attribute Detail section of the report
	Show or hide the Grand Total section of the report

Icon	Description
	Show or hide the Page Footer section of the report
	Show or hide the Report Footer section of the report

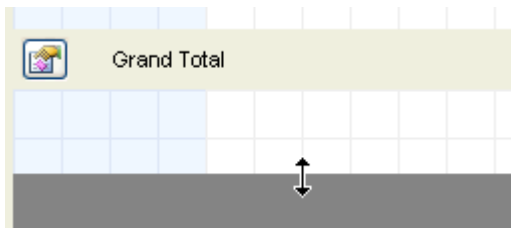
## Resize a section

1. Hover the mouse pointer over the top or bottom edge of the section:

Example - resize from the top:



Example - resize from the bottom:



2. Drag the mouse to resize.




## Section Properties

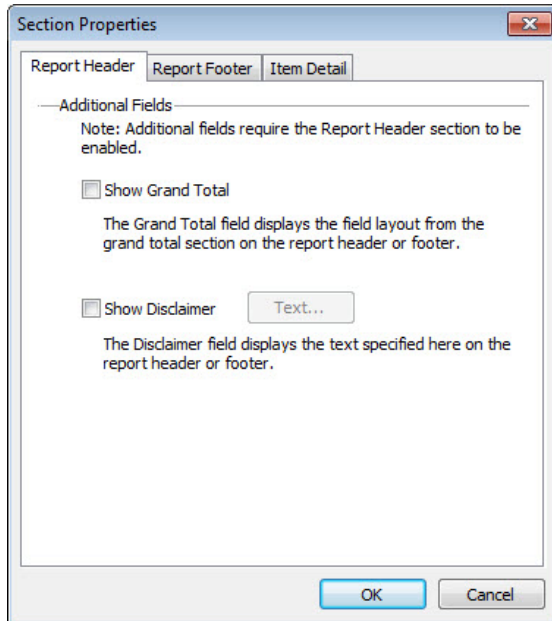
Use Section Properties to modify the appearance of a section.

From the Product Detail's section properties you can also check to show price adjustments or control the display of outline and standard levels.

Different tabs are available in the Section Properties dialog, depending on where it is called from:

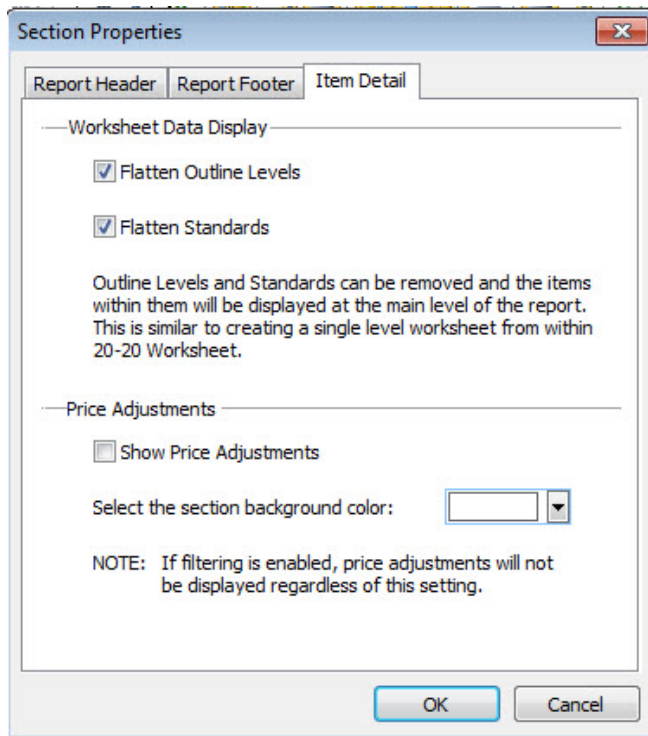
Click  on the [Report toolbar](#).

The **Section Properties** dialog opens with the tabs Report Header, Report Footer and Item Detail.



Click on a section and then click  on the [Report toolbar](#).

Only the tabs applicable to that section are displayed. For instance, from the Product Detail section, the Section Properties displays the Item Detail, Common and Fields tabs.



The image shows a 'Section Properties' dialog box with a title bar and a close button. It contains three tabs: 'Report Header', 'Report Footer', and 'Item Detail'. The 'Item Detail' tab is selected. The dialog is divided into two main sections: 'Worksheet Data Display' and 'Price Adjustments'. The 'Worksheet Data Display' section has two checked checkboxes: 'Flatten Outline Levels' and 'Flatten Standards'. Below these is a text block explaining that outline levels and standards can be removed to display items at the main level, similar to creating a single level worksheet. The 'Price Adjustments' section has an unchecked checkbox for 'Show Price Adjustments'. Below this is a label 'Select the section background color:' followed by a color selection box and a dropdown arrow. At the bottom, there is a 'NOTE' stating that if filtering is enabled, price adjustments will not be displayed regardless of the setting. The dialog ends with 'OK' and 'Cancel' buttons.

Section Properties

Report Header Report Footer Item Detail

Worksheet Data Display

☒ Flatten Outline Levels

☒ Flatten Standards

Outline Levels and Standards can be removed and the items within them will be displayed at the main level of the report. This is similar to creating a single level worksheet from within 20-20 Worksheet.

Price Adjustments

☐ Show Price Adjustments

Select the section background color:  ▼


NOTE: If filtering is enabled, price adjustments will not be displayed regardless of this setting.

OK Cancel

See:

- ▶ [Report Header tab](#)
- ▶ [Report Footer tab](#)
- ▶ [Item Detail tab](#)
- ▶ [Common tab](#)
- ▶ [Fields tab](#)

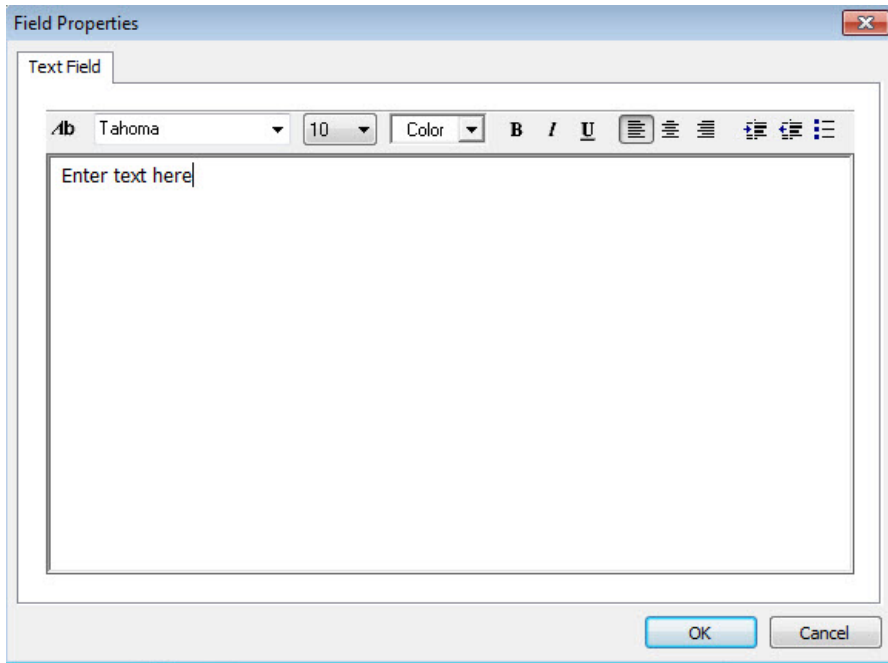
### Report Header tab

1. Click  on the [Report toolbar](#).

The **Section Properties** dialog opens, with the **Report Header** tab selected by default.

2. Check **Show Grand Total** to display fields from the **Grand Total** section on the Report header.
3. Check **Show Disclaimer** to display a disclaimer field on the report header.
4. If you checked **Show Disclaimer**, click the **Text** button to enter the disclaimer text.

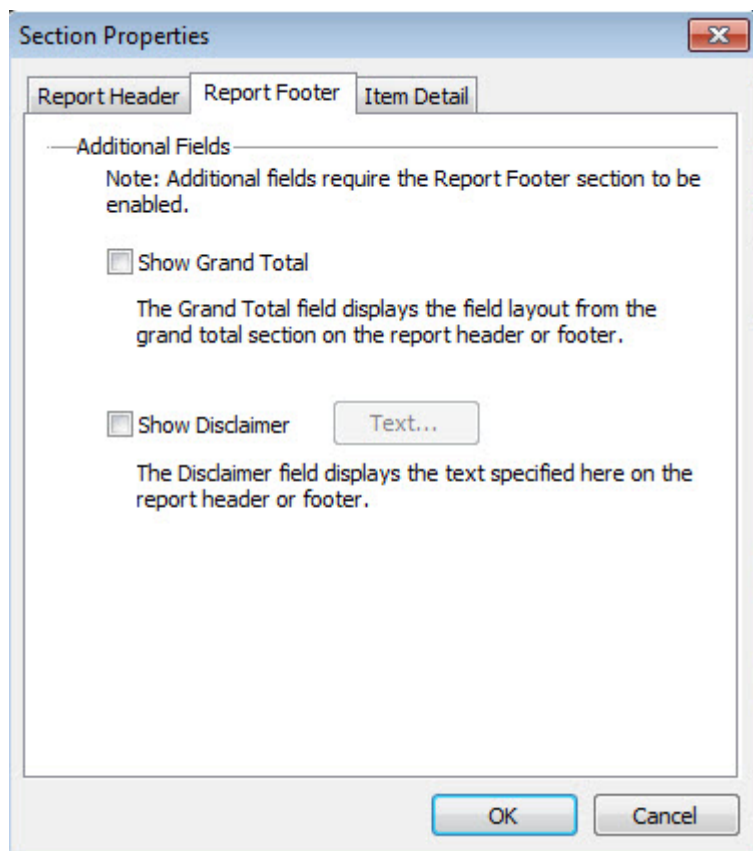
In the **Field Properties** dialog, enter the text and select its font, size, color, style, alignment. You can also change its indentation or create a bulleted list. Click **OK**.



**Note:** You can also access this tab by right-clicking on the **Report Header** section of the report design then selecting **Section Properties**.

## Report Footer tab

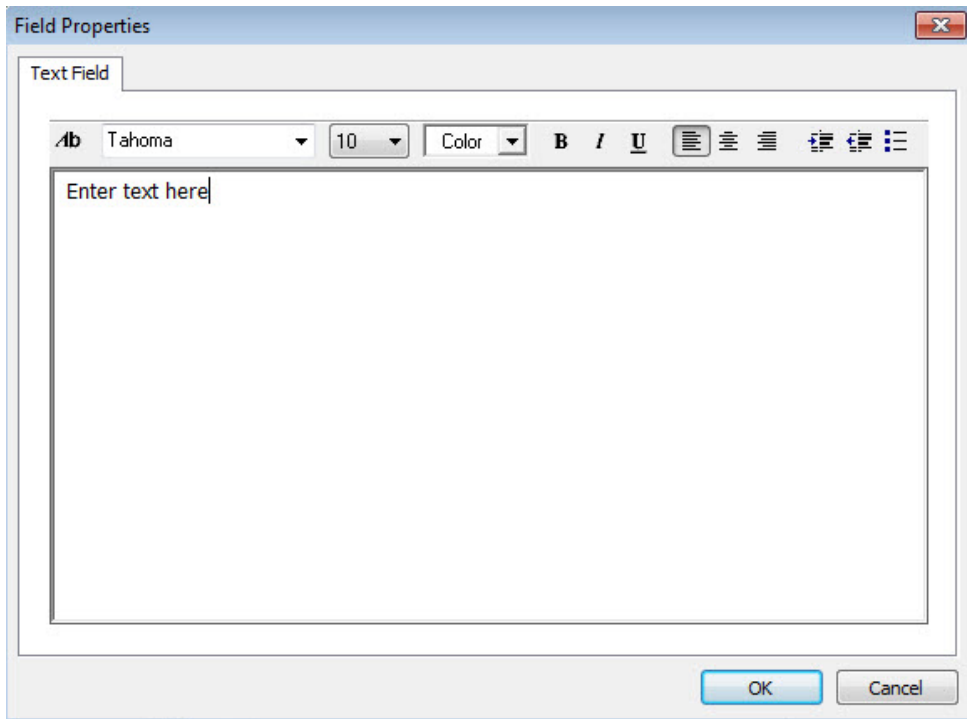
1. Click  on the [Report toolbar](#).
2. Click the **Report Footer** tab.



3. Check **Show Grand Total** to display fields from the **Grand Total** section on the Report footer.

4. Check **Show Disclaimer** to display a disclaimer field on the report footer.
5. If you checked **Show Disclaimer**, click the **Text** button to enter the disclaimer text.

In the **Field Properties** dialog, enter the text and select its font, size, color, style, alignment. You can also change its indentation or create a bulleted list. Click **OK**.




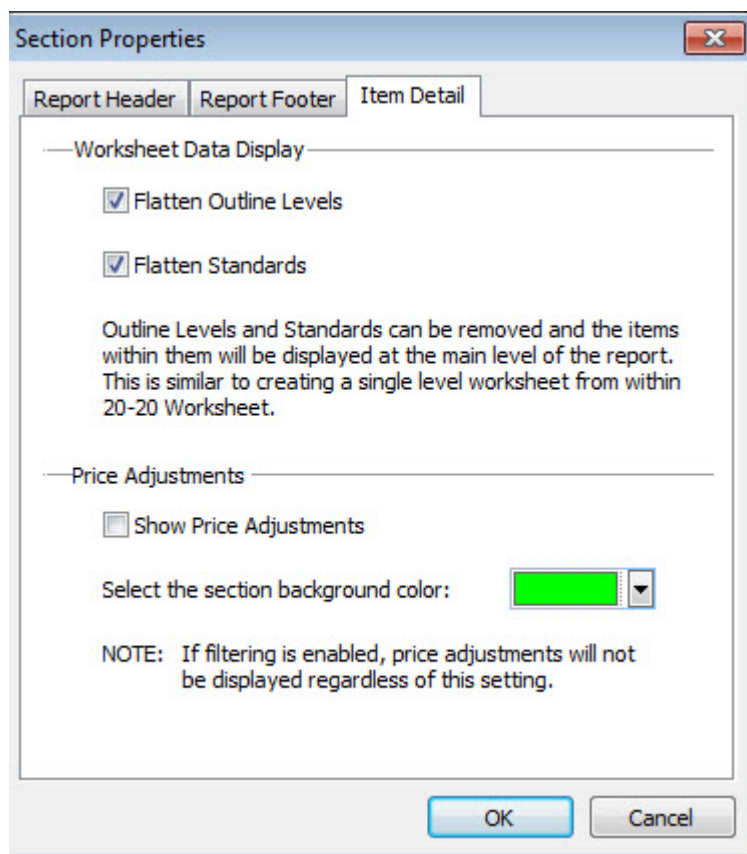
6. Click **OK**.

**Note:** You can also access this tab by right-clicking on the **Report Footer** section of the report design then selecting **Section Properties**.

## Item Detail tab

Use the Section Properties' Item Detail tab to show price adjustments or control the display of outline or standard levels.

1. Click  on the [Report toolbar](#).
2. Click the **Item Detail** tab.



3. By default, **Check Flatten Outline Levels** is checked so that items within outline levels are displayed on the report. Clear the check if you only want to see Outline Levels.
4. By default, **Check Flatten Standards** is checked so that items within standards are displayed on the report. Clear the check if you only want to see Standards.
5. Check **Show Price Adjustments** to display price adjustments (ex. taxes, installation, freight) on the report. Click the **Color** dropdown to select a background color for price adjustments, in order to highlight them in the report.

**Note:** If filtering is enabled, price adjustments will not be displayed.

6. Click **OK**.

**See also:**

- ▶ Outline Levels in the 2020 Worksheet online help
- ▶ Standards in the 2020 Worksheet online help
- ▶ Price Adjustments in the 2020 Worksheet online help

[Filter data that will appear on a report](#)

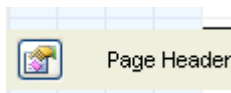
**Note:** You can also access this tab by right-clicking on the **Product Detail** section of the report design then selecting **Section Properties**.



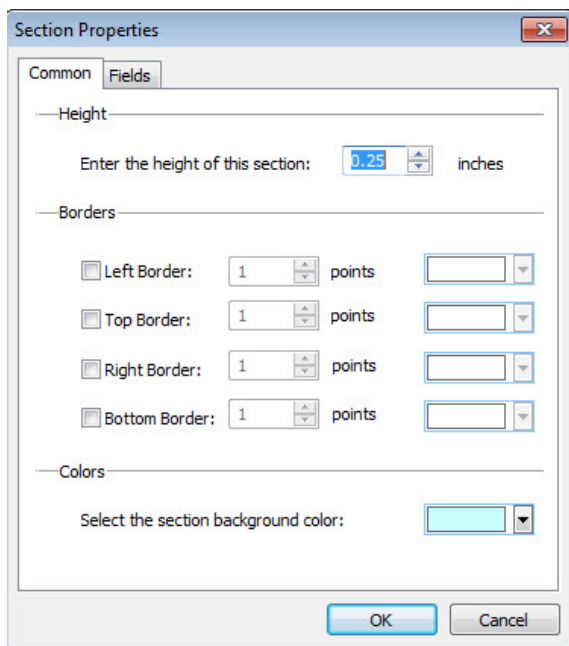
## Common tab

Use the Section Properties' **Common** tab to add borders around the section, change its height, or select a background color.

1. Click the **Section Properties** icon beside the Section Name.



2. In the **Section Properties** dialog, click the **Common** tab.



3. Under **Height**, enter the height of the section.

4. Under **Borders**, check **Left Border**, **Top Border**, **Right Border** and/or **Bottom Border**.

Specify the line thickness and the color.

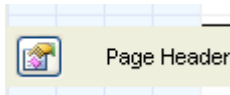
5. Under **Colors**, select the section background color.
6. Click **OK**.

**Note:** Depending on the section you selected, other tabs are available in the **Section Properties** dialog: [Report Header](#), [Report Footer](#), or [Item Detail](#).

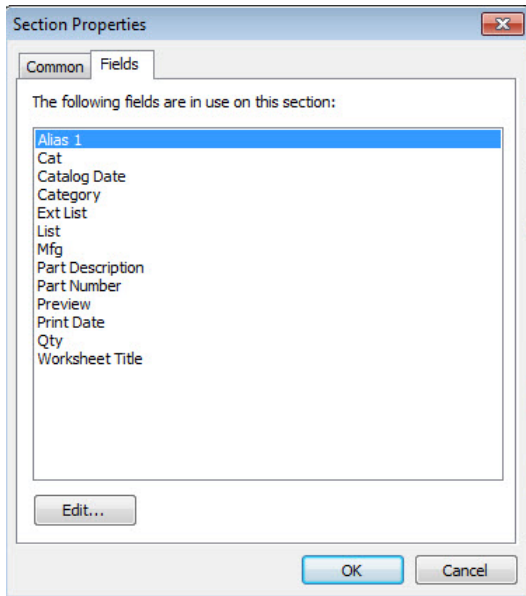
### Fields tab

Use the Section Properties' **Field** tab to see a list of fields included in the section and edit each field.

1. Click the **Section Properties** icon beside the Section Name.



2. In the **Section Properties** dialog, click the **Field** tab.



3. Select a field then click **Edit** to change its appearance.
4. Change the settings in the **Field Properties** dialog then click **OK**.
5. Click **OK** in the **Section Properties** dialog.

**Note:** Depending on the section you selected, other tabs are available in the **Section Properties** dialog: [Report Header](#), [Report Footer](#), or [Item Detail](#).

## Fields

From the Field Explorer tab of the [Explorer bar](#), you can add five types of fields into your report design:

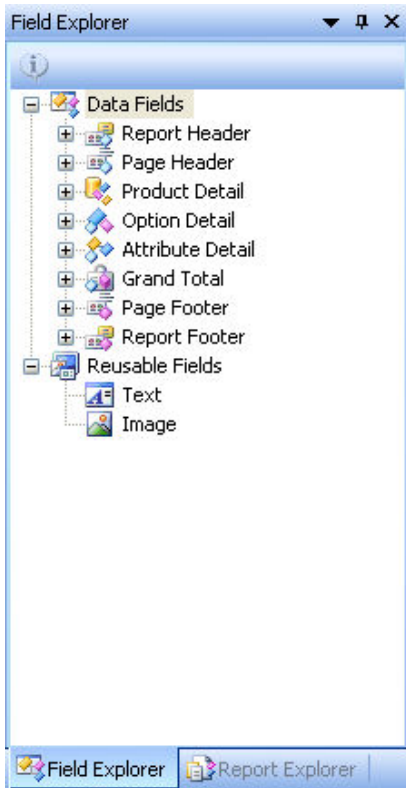
- ▶ Data fields - these are linked to data in a worksheet
- ▶ Product image fields
- ▶ Column header fields
- ▶ Rich text fields
- ▶ Images

**See the following topics:**

- ▶ [Add a data field](#)
- ▶ [Add a product image field](#)
- ▶ [Field properties](#)
- ▶ [Add a column header field](#)
- ▶ [Add a rich text field](#)
- ▶ [Add an image](#)
- ▶ [Select a field](#)
- ▶ [Delete a field](#)

## Add a data field

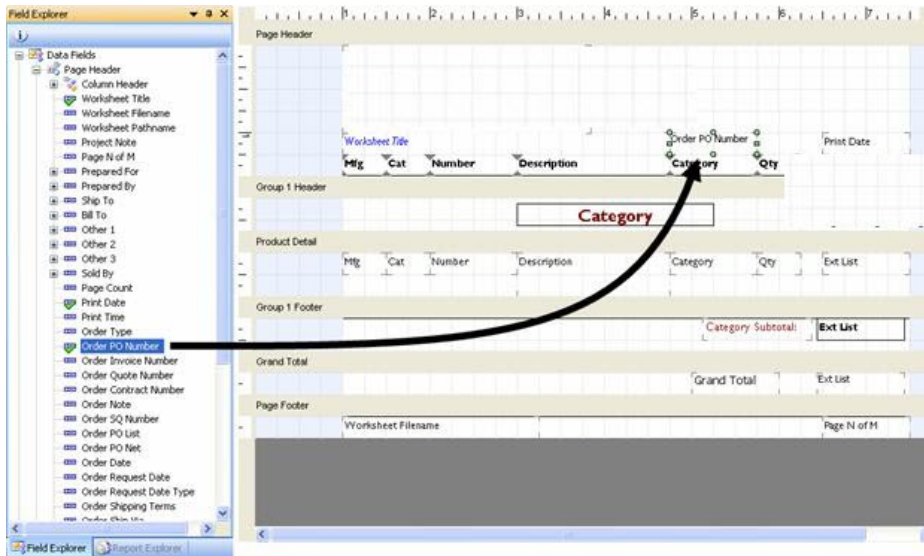
1. Click the **Field Explorer** tab.




2. Click on the + sign to open [the section](#). You will see all the fields that you can add to that section in the report design.

The section must be displayed on the report design before you can add fields to it. See [Show or hide a section](#) to display a section.

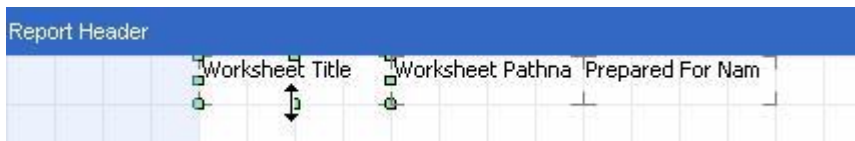
3. Drag the desired report fields into that section of the **Design view**.



A green check should appear next to field names as they are added to the sections.

 Order PO Number

4. You can resize each field by selecting it then hovering over the green box to stretch or shrink the field.



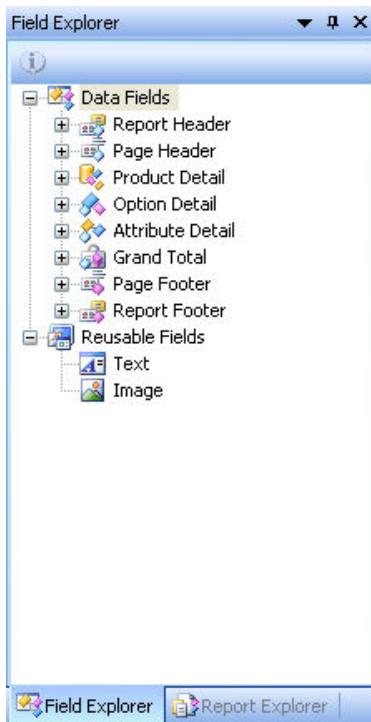
5. Double-click the field to change its properties. See [Field properties](#) for details.

**Note:** If you have [column header fields](#) in the Page Header section, you can copy these **as data fields** to the Product Detail, Option Detail, Attribute Detail or Grand Total sections by right-clicking on the destination section then selecting **Insert Column Header Field Design**.

Only column header fields that have equivalent fields in the destination section will be copied.

## Add a product image field

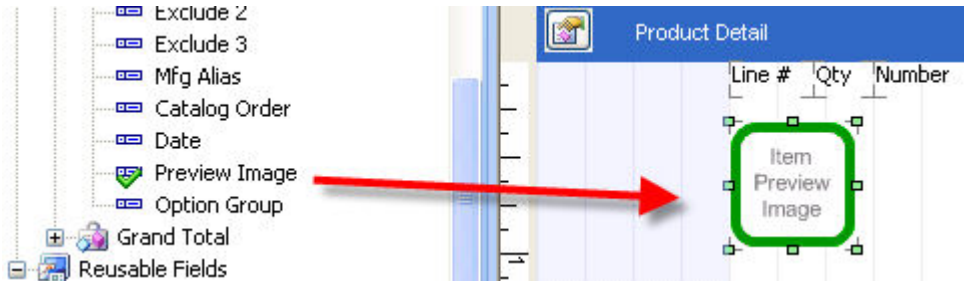
1. Click the **Field Explorer** tab.



2. Click on the + sign to open the **Product Detail** section.

The **Product Detail** section must be displayed on the report design before you can add fields to it. See [Show or hide a section](#) to display a section.

3. Drag the **Preview Image** field into the **Product Detail** section of the **Design view**.



4. You can resize the preview field by selecting it then hovering over the green box to stretch or shrink the field.

**Note:** By default, the image dimensions in the report are 64x64, but the image can be enlarged. However, since the resolution of the stored image is 256x256, the image may look poor if stretched above that resolution.

## Field properties

To change a text field's properties, see the topic [Add a rich text field](#).

To change an image field's properties, see the topic [Add an image](#).

1. To change a data field's appearance, double-click on the field.
2. From the Field Properties dialog modify any of the following settings and then click **OK**.

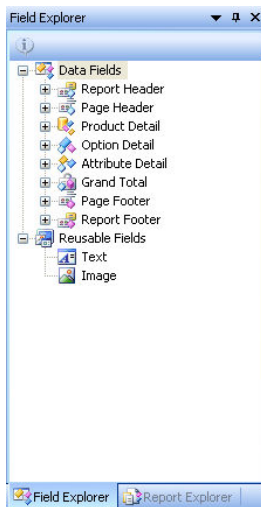


- ▶ Font
- ▶ Size
- ▶ Styles
- ▶ Alignment
- ▶ Color
- ▶ Border

## Add a column header field

You can add column header fields into the **Page Header** section only.

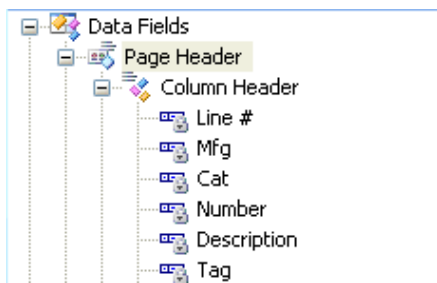
1. Click the **Field Explorer** tab.



2. Click on the + sign to open the **Page Header** [section](#).

The section must be displayed on the report design before you can add fields to it. See [Show or hide a section](#) to display a section.

3. Click on the + sign beside **Column Header** to see all the column header fields you can add to the Page Header section.



4. Drag the desired fields into the **Page Header** section of the **Design view**.

A green check should appear next to field names as they are added to the sections.

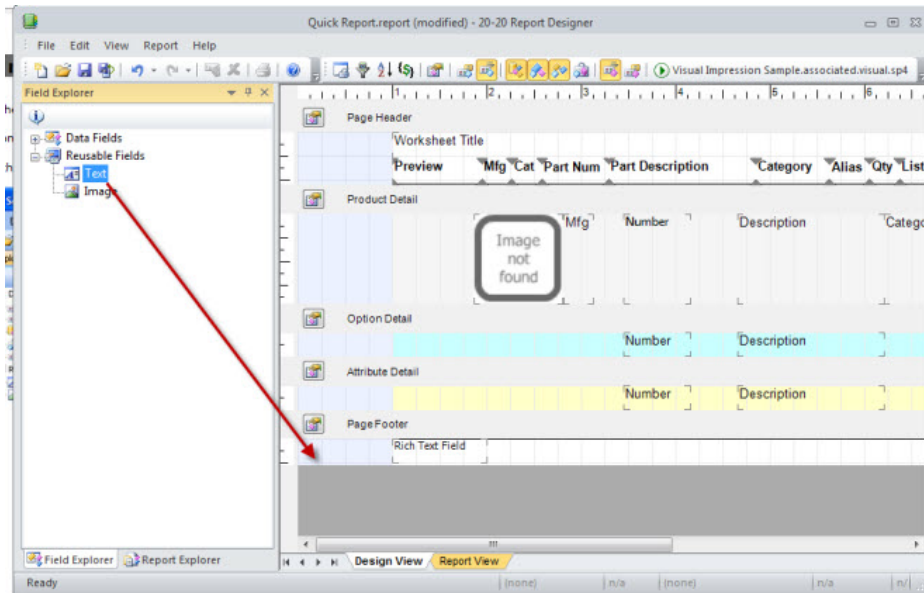
You can resize each field by selecting it then hovering over the green box to stretch or shrink the field.

5. Double-click the field to change its properties. See [Field properties](#) for details.

## Add a rich text field

1. Click the **Field Explorer** tab.
2. Click on the + sign beside **Reusable Fields**.

3. Drag the **Text** field into a section of the **Design view**.



4. You can resize the field by selecting it then hovering over the green box to stretch or shrink the field.

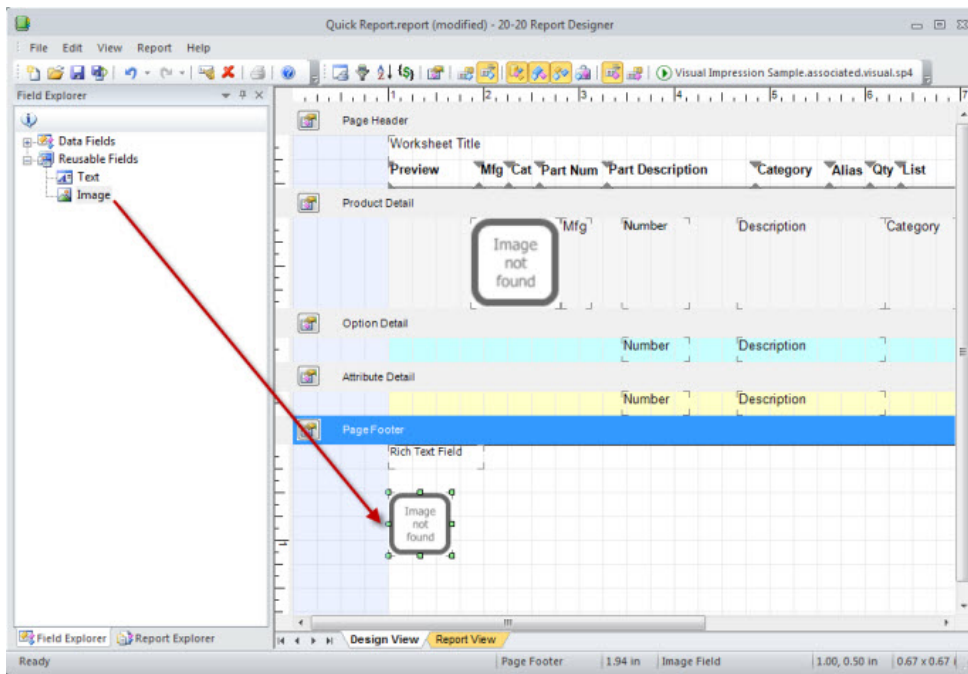


5. Double-click the field to enter text.
6. In the **Field Properties** dialog, enter the text and select its font, size, color, style, alignment. You can also change its indentation or create a bulleted list.
7. Click **OK**.

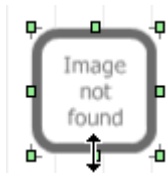
**Note:** You can add up to 10 rich text fields in a section.


## Add an image

1. Click the **Field Explorer** tab.
2. Click on the + sign beside **Reusable Fields**.
3. Drag the **Image** field into a section of the **Design view**.




4. You can resize the field by selecting it then hovering over the green box to stretch or shrink the field.



5. Double-click the field to select an image.
6. In the **Field Properties dialog**, click  to select an image.

Or, click  to use the current **Prepared By** image as set in 2020 Worksheet Preferences.

7. By default, the image is automatically resized to fit the size of the field. Click  to restore the image to its original size. Note that the image may no longer fit the page.
8. Click **OK**.

**Note:** You can add up to 5 image fields in a section.

## Select a field

To select one field, click on it. Green squares will appear around the field.



**To select more than one field do either of the following:**

1. Click on the first field you want to select.
2. Press and hold the Shift key, then click on the other fields you want to select.

OR

1. Click and hold the left mouse button.
2. Drag the mouse to draw a box around the fields you want to select, then release the mouse button.




## Delete a field

[Select the field\(s\)](#) then press the **Delete** key.

## Filter data that will appear on a report

You can filter data based on any column available within worksheet. You can select more than one column.

In the example below, we will filter data so that only panels appear on the report:

1. Click  on the [Report toolbar](#).
2. On the **Filtering** dialog, scroll down the list and check **Category**.
3. In the **Value** column, type `Panel`.
4. In the **Operator** column leave the value as `Equals`.

**Note:** You can click on the field to select other operators. For text fields, you can select Equals or Not Equals. For numeric fields you can select Equals, NotEquals, LessThan, LessThanEqual, GreaterThan or GreaterThanEqual.


5. Click **OK**.

**Note:** When you [generate \(preview\) a report](#), 2020 Report Designer informs you that data has been filtered by displaying a brief message on the right side of the [Status bar](#).



## Group data and show subtotals

2020 Report Designer gives you the flexibility to group data by field and create subtotals for each group.

1. Click  on the [Report toolbar](#).
2. On the **Grouping and Subtotals** dialog, click **Add** under **Groups**.

3. Under **Group Details**, check the field you want to group with.

You can add more than one field to each group. Data will be sorted first by using the first field checked, then the second field. If you want to change the sort order use any of the arrow buttons: **Move to top**, **Move up**, **Move down** and **Move to bottom**.

4. Under **Group Header**, check **Show** to insert a Group Header section in the report design.

If you want to start each group on a new page, check the box.

5. Under **Group Footer**, check **Show** to insert a Group Footer section in the report design.
6. Repeat steps 2 to 5 if you want to add another group.

If you want to change the group order, click the **Move up** or **Move down** buttons.

If you want to remove a group, select it then click **Remove**.

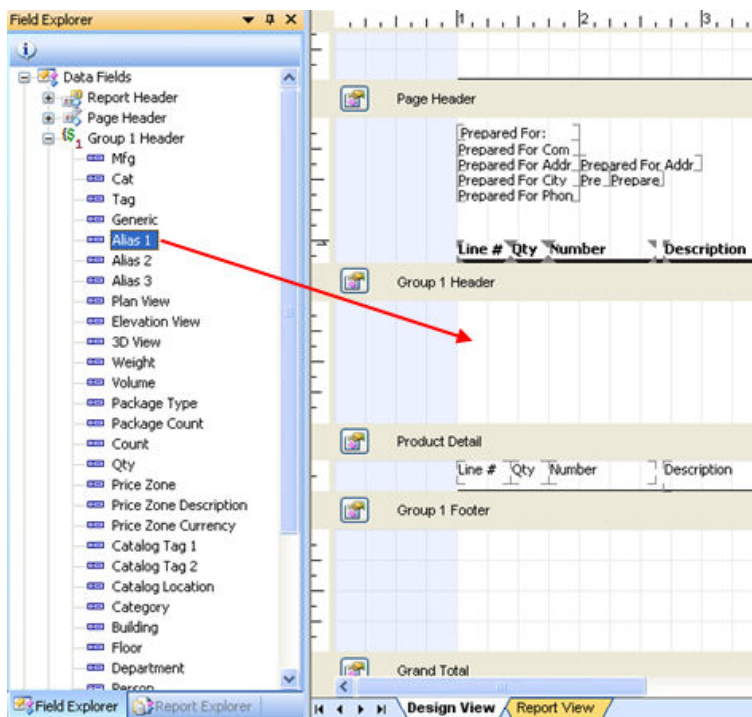
7. Click **OK**.

Notice that new sections are added to your report design. Now you will need to add the fields you want to display to the **Group Header** and **Group Footer** sections.

8. From the **Field Explorer** tab expand the + sign beside **Group 1 Header**.
9. Drag fields to the **Group 1 Header** section of the report design.

For example, if you are grouping by **Alias 1**, add this field.





10. From the **Field Explorer** tab, expand the + sign beside **Group 1 Footer**.

11. Drag fields to the **Group 1 Footer** section.


For example, if you want to show the **Ext List** subtotal, add this field.

See the topic [Exercise - Group and Subtotal by Category](#) for a step-by-step example of grouping and subtotalling by category.

## Exercise - Group and Subtotal by Category

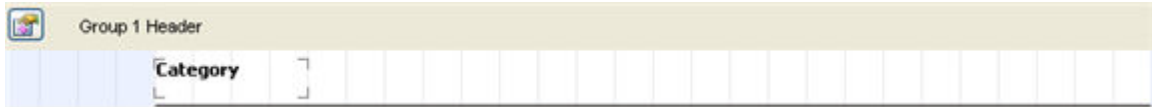
In this exercise, you will group data by category and show subtotals for each category. Note that the products in your worksheet must have information assigned in the **Category** column.

Before you start this exercise, [create a user report based](#) on the Standard report called **List Price Report**.

1. Click  on the [Report toolbar](#).
2. On the **Grouping and Subtotals** dialog, click **Add** under **Groups**.
3. Under **Group Details**, check **Category**.
4. Under **Group Header**, check **Show** to insert a Group Header section in the report design.
5. Under **Group Footer**, check **Show** to insert a Group Footer section in the report design.
6. Click **OK**.

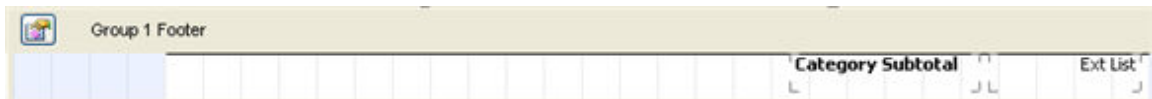
Now you will add the fields you want to display in the **Group Header** and **Group Footer** sections.

7. From the **Field Explorer** tab expand the + sign beside **Group 1 Header**.
8. Drag the field **Category** to the **Group 1 Header** section.
9. Double-click on the field to display its properties. Change the style to **Bold** then click **OK**.
10. Double-click on the section to change its properties. Under **Borders**, check **Bottom** border then click **OK**.
11. [Resize the section](#) from the bottom to remove the empty space. The **Group Header** section should look like this:



Group 1 Header											
Category											

12. From the **Field Explorer** tab, expand the + sign beside **Group 1 Footer**.
13. Drag the field **Ext List** to the righthand side of the **Group 1 Footer** section.
14. Double-click on **Ext List** to change its properties. Under **Alignment**, choose **Right** then click **OK**.
15. Add a [text](#) field to the left of the **Ext List** field you just added. Double-click on it then type **Category Subtotal**. Change the **Size** to 8 and display it in **Bold**. Resize the field so that the text is displayed one line.
16. Double-click on the section to change its properties. Under **Borders**, check **Top** border. Click **OK**.
17. Resize the section to remove the empty space at the bottom. The **Group Footer** section should look like this:




Group 1 Footer											
										Category Subtotal	Ext List

18. [Generate \(preview\) the report.](#) It should look similar to the following:

20-20 Technologies  
550 3 Mile Road  
Grand Rapids MI 49544  
616-454-0000

## List Price Report



Prepared For:

Job:  
PO Number:  
By: Mark Smith  
Notes:

Page 1 of 1  
3/6/2007  
4:58:31PM

Line #	Qty	Part Number	Part Description	List Price	Extended
<b>FREESTANDING TABLE</b>					
1	1	72-F5B	Mtl. Tube Base-Spider (1 base) 39 X 39 X 28	\$755.00	\$755.00
2	1	42-F5B	Mtl. Tube Base-Spider (1 base) 32 X 32 X 28	\$365.00	\$365.00
<b>Category Subtotal</b>					<b>\$1,120.00</b>
<b>PANEL</b>					
3	1	MPTAM3342	PANEL-TACK ACOUST, MED TOP CAP, 42-5/16X33	\$585.00	\$585.00
4	1	MPTAM3342P4	PANEL-TACK ACOUST, 4 CIRCT, MED TOP CAP 42-5/16X33	\$764.00	\$764.00
<b>Category Subtotal</b>					<b>\$1,349.00</b>
<b>Total List</b>					<b>\$2,469.00</b>

Current Page No.: 1
Total Page No.: 1
Zoom Factor: 100%


Design View
Report View

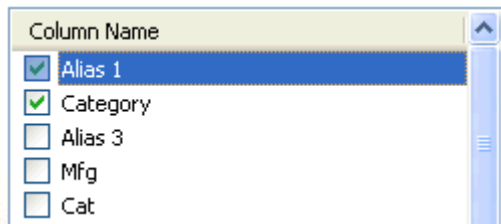
## See also:

- ▶ [Group data and show subtotals](#)
- ▶ [Add a data field](#)
- ▶ [Field properties](#)
- ▶ [Add a rich text field](#)
- ▶ [Section Properties](#)

## Sort data

The Sorting command sorts data within the report view. It does **not** re-sort the worksheet.

1. Click  on the [Report toolbar](#).
2. In the **Sorting** dialog, check the column names you want to sort by.



Data will be sorted according to the order the checked names appear on the list.

For example, according to the image above, data will be sorted first by **Alias 1** then by **Category**.

3. Use any of the arrow buttons to change the sort order: **Top**, **Move up**, **Move down** and **Bottom**.

4. Check **Ascending** to sort by ascending order (0..9, A..Z) or **Descending** to sort by descending order (9..0, Z..A).
5. Click **OK**.


**See also:**

- ▶ [Filter data that will appear on a report](#)
- ▶ [Group data and show subtotals](#)

## Undo an action


To undo the last action, click  on the [Standard toolbar](#)

To undo more than one action:


1. Click the arrow next to  to see a list of the most recent actions you can undo.
2. Click the action you want to undo. If you don't see the action, scroll through the list.




When you undo an action, you also undo all actions above it in the list.

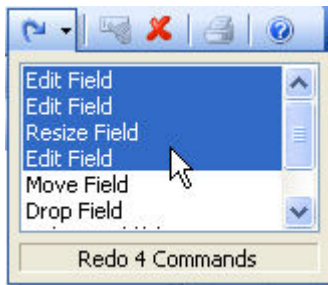
**Note:** If you later decide you didn't want to undo an action, click [Redo](#) .

## Redo an action


To redo the last action you [undid](#), click  on the [Standard toolbar](#).

To redo more than one action:

1. Click the arrow next to  to see a list of the most recent actions you can redo.
2. Click the action you want to redo. If you don't see the action, scroll through the list.



When you redo an action, you also redo all actions above it in the list.

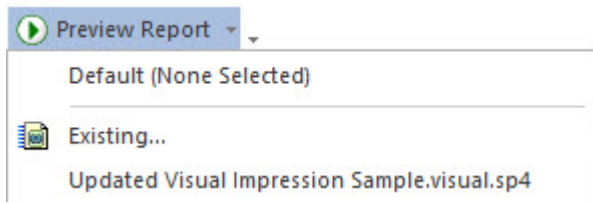
**Note:** If you later decide you didn't want to redo an action, click .

## Generate (preview) a report

The **Preview Report** command generates the report, applying worksheet data to the report design. You must generate a report at least once before you can [print it](#).


The report design must be [saved](#) before you preview a report. If it is not yet saved, you will be prompted to do so.

1. Generate the report by clicking the following icon on the toolbar and then select the currently open worksheet or any other preset worksheet that may be in the drop-down list:

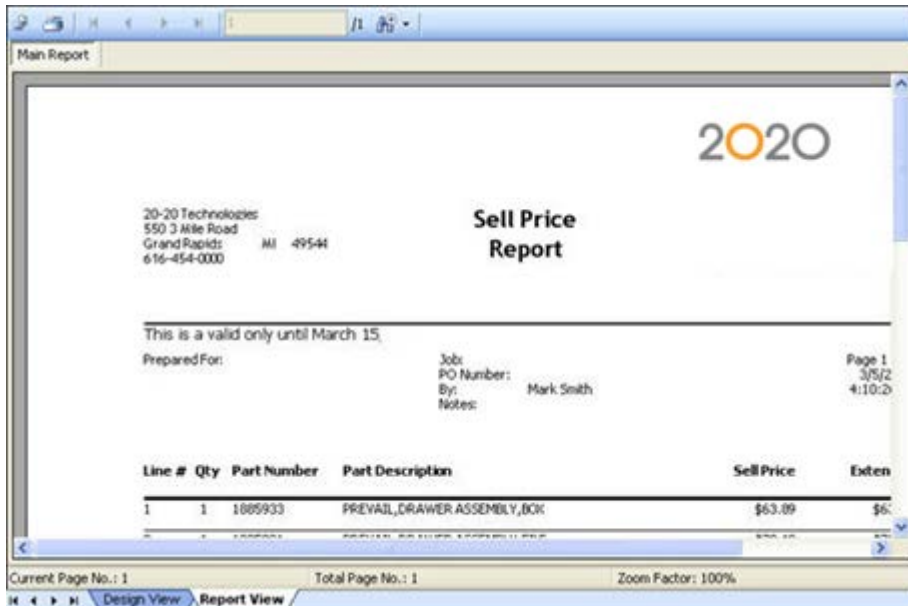


The report generation may take a few minutes, please wait.

2. The **Report View** displays the report using the worksheet specified in **Preferences**.

If you want to change the default worksheet to use when previewing a report, go to the **View** menu, select **Preferences** and click the **Report View** tab. Click  to select the worksheet, click **Open** in the **Open** dialog, then click **OK**.






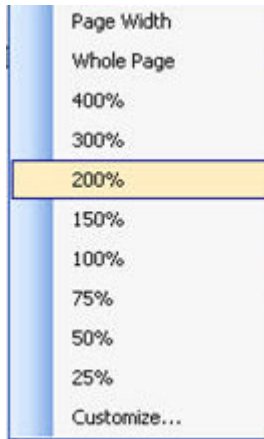
See also:

- ▶ [Zoom the preview](#)
- ▶ [Go to a page in the preview](#)

**Note:** Whenever you make changes to the report design, you must re-generate it before printing or exporting to PDF so that your changes are applied to the report.

## Zoom the preview

1. In the [Report View](#), click  on the toolbar.
2. Select the level you want to zoom.



**Note:** Select **Customize** if you want to specify a level that is not available on the list.

# Go to a page in the preview

In the [Report View](#), click any of the arrow buttons to go to the first page, the previous page, the next page or the last page.



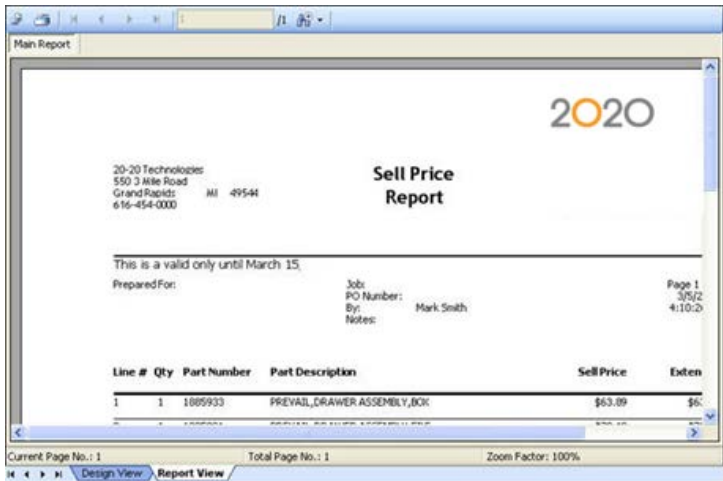
Or, type the page number in the Go To Page box:

3

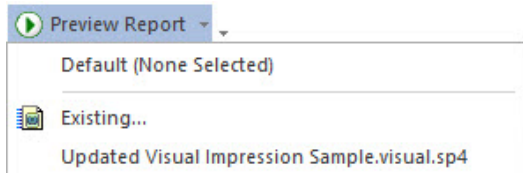
/3


# Print a report

1. Click the **Report View** to display the report.



**Note:** If you never previewed the report or if you made changes to the report design, you must generate the report by clicking **Preview Report** in the toolbar.




2. Click  on the Report View toolbar.
3. Select the **Printer**, **Print Range** and **Number of Copies** then click **OK**.

**See also:**

- ▶ [Page Setup](#)
- ▶ [Generate \(preview\) a report](#)
- ▶ [Export a report to a PDF file](#)

## Page Setup

Use Page Setup to change the page layout used for the report.

1. Click  on the [Report toolbar](#).
2. On the **Page Setup** dialog, select the paper **size**.
3. Under **Watermark**, click the **Browse** button to select a watermark image file.

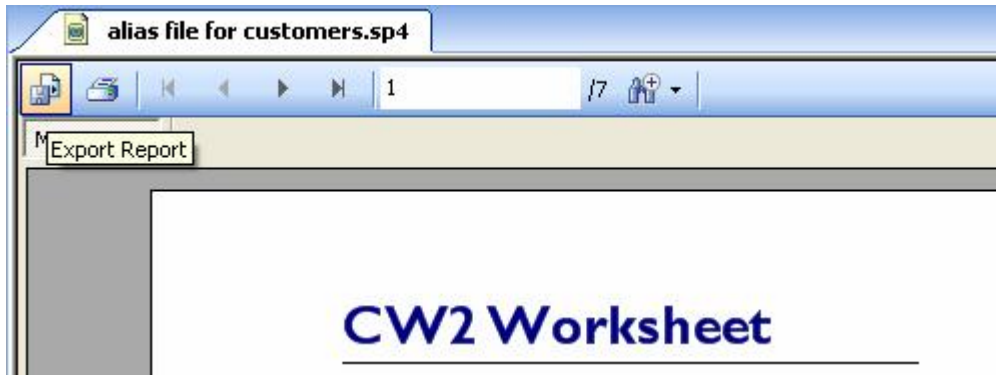
Check the **Location**: Header, Report Body or Footer.

4. Under **Margins**, type in the left, right, top or bottom margin or use the dropdown arrows to change the margin by 0.01 inch increments.
5. Under **Orientation**, select **Portrait** or **Landscape**.
6. Click **OK**.

## Export a report to a PDF file

You can export a report to PDF format.

1. On the **Report View** tab, click the **Export Report** button.



2. In the **Save As Type** dialog, choose the folder to save in, type the **File Name** then click **Save**.

The exported file will now be in the location you specified.

# Command reference

This section lists commands available through the various menus. All commands are already referenced by their respective tasks in this document. The following topics give you a brief description of menus and commands and provide links to corresponding topics.

See:

- ▶ [File menu](#)
- ▶ [Edit menu](#)
- ▶ [View menu](#)
- ▶ [Report menu](#)
- ▶ [Help menu](#)

## File menu

Name	Shortcut	Description	Topic
New	Ctrl+N	Create a new report design	<a href="#">Create a blank report design</a>
Open	Ctrl+O	Open a report design	<a href="#">Open a report design</a>
Save	Ctrl+S	Save the report design	<a href="#">Save the report design</a>
Save as		Save the report design under a different name	<a href="#">Save the report design</a>
Print	Ctrl+P	Print a report	<a href="#">Print a report</a>

Name	Shortcut	Description	Topic
Export		Export a report to a PDF file	<a href="#">Export a report to a PDF file</a>
<Recent files>		Open any of the last five report designs you worked on	<a href="#">Open a report design</a>
Exit	Alt+X	Close 2020 Report Designer	

## Edit menu

Name	Shortcut	Description	Help topic
Undo	Ctrl+Z or Alt+Backspace	Undo an action. Click on the drop-down arrow beside it to undo more than one action at a time.	<a href="#">Undo an action</a>
Redo	Ctrl+Y	Redo an action you just undid. Click on the dropdown arrow beside it to redo more than one action at a time.	<a href="#">Redo an action</a>
Section Properties	Ctrl+Enter	Format a specific section of a report design	<a href="#">Section Properties</a>

Name	Shortcut	Description	Help topic
Field Properties	Alt+Enter	Format text or data fields once they are in a report design	<a href="#">Field properties</a>
Insert Column Header Field Design		Insert data fields into the current section that mirror the column header fields in the Page Header section	<a href="#">Add a data field</a>
Delete	Delete	Remove the selected item from the report design	<a href="#">Delete a field</a>

## View menu

Name	Description	Help topic
Menu Bar	Show or hide the Menu bar	<a href="#">Menu bar</a>
Status Bar	Show or hide the Status bar	<a href="#">Status Bar</a>
Tool Bars	Show or hide a toolbar; create a custom toolbar	<a href="#">Show or hide a toolbar</a> <a href="#">Custom toolbars</a>



Name	Description	Help topic
Field Explorer Bar	Shows a list of all of the available fields for each of the sections that are turned on in the current report design	<a href="#">Show or hide Explorer bar tabs</a>
Report Explorer Bar	Shows a list of the fields that are currently placed in a report design	<a href="#">Show or hide Explorer bar tabs</a>
Design View	Shows the fields that have been selected to be seen in the current report design	<a href="#">View tabs</a>
Report View	Shows the current report design applied to either generic data or a default worksheet	<a href="#">View tabs</a>
Preferences	Allows you to set up default settings for any report design	<a href="#">Preferences</a>

## Report menu

Name	Description	Help topic
Page Setup	Set up the page paper size, watermark, margins and orientation	<a href="#">Page Setup</a>
Filtering	Pull only selected information from a worksheet	<a href="#">Filter data that will appear on a report</a>
Sorting	Select the fields used to sort the data in a worksheet when it is applied to a report design	<a href="#">Sort data</a>
Grouping	Create groupings by department, category and other worksheet columns	<a href="#">Group data and show subtotals</a>
Sections	Show or hide sections in various locations in a report design	<a href="#">Show or hide a section</a>
Report Preview	Generate a preview using pre-selected worksheet	<a href="#">Generate (preview) a report</a>

# Help menu

Name	Shortcut	Description
Topics	F1	Opens the 2020 Report Designer Help file
About 2020 Report Designer		Indicates build and version information