How to modify existing Word documents using Jet Express for Word

Overview

Microsoft introduced a new feature with Dynamics NAV 2015 which makes it easy and inexpensive for partners and end users to create and customize visually attractive document reports in NAV using Microsoft Word.

In collaboration with Microsoft, Jet Reports developed Jet Express for Word – an application that supports this process by providing users an easy-to-use interface inside Microsoft Word to create and modify these documents.

Microsoft Dynamics NAV 2015 includes a sample set of Word reports which can be customized to meet the unique needs of your organization. This document describes how to modify existing Word reports from Dynamics NAV.

Pre-requisites

To be able to customize a Microsoft Dynamics NAV Word report you must have:

- Microsoft Dynamics NAV 2015 or later
- The Jet Express for Word sample report set installed in your NAV system
  (These include reports 14125500-503)
- Office 2013 (desktop version)
- The Jet Express for Word add-in installed
- A download file of sample layouts from the Jet Express for Word website
  Details about this are available at https://expresswordsupport.jetreports.com/

Definitions

There are several terms used in this document which may be helpful to define.

Report layout (or layout) - the Report layout is a Word document which includes the formatting and layout of the report and an **.XML Part**. The Report Layout must be imported into Dynamics NAV where it can be used for generating **Reports**.

XML Part – the .XML Part is a component of a Report Layout. This is embedded within the Word document itself and is not directly viewable. Jet Express for Word is used to display the fields that are contained in the .XML part and to create content controls to map these to the Report Layout.

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Report – a Report is a document which is generated from the Report Layout using Microsoft Dynamics NAV. When a report is generated, it is populated with data.

Report Layout

Completed Report with data populated

Process Overview

Creating a Word layout includes five steps:

1. Create a custom layout for the report you wish to use

2. Import the sample layout into Microsoft Dynamics NAV

3. Customize the layout using Jet Express for Word

4. Select the custom layout for the report
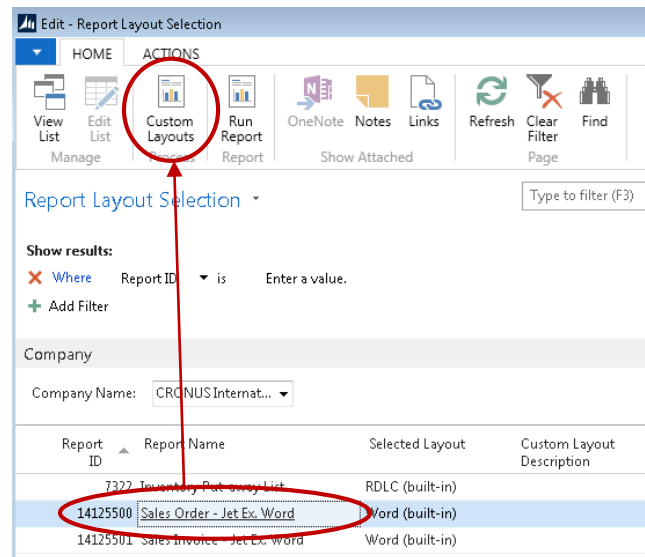
5. Set the Report Selection

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1. Create a custom layout for the report you wish to use

In your NAV client navigate to **Report Layout Selection** (Administration/IT Administration/Reports).

Microsoft Dynamics NAV 2015 includes several sample Word reports including:
- 14125500 Sales Order – Jet Ex. Word
- 14125501 Sales Invoice – Jet Ex. Word
- 14125502 Sales Cr. Memo - Jet Ex. Word
- 14125504 Sales Quote – Jet Ex. Word

- **Select** the report that you wish to customize.

- Click **Custom Layouts**

To create a new Report Layout, click **New**. A pop-up window will appear and allow you to choose the layout type.

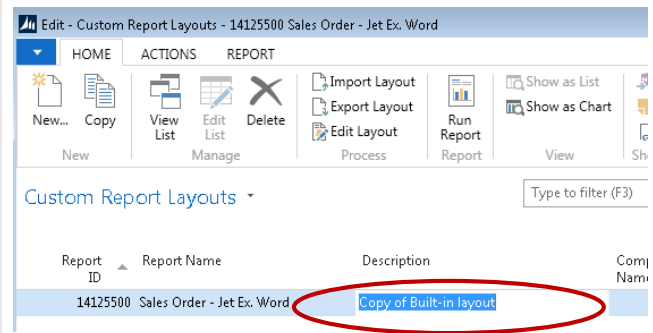Check the **Insert Word Layout** box and click **OK**.
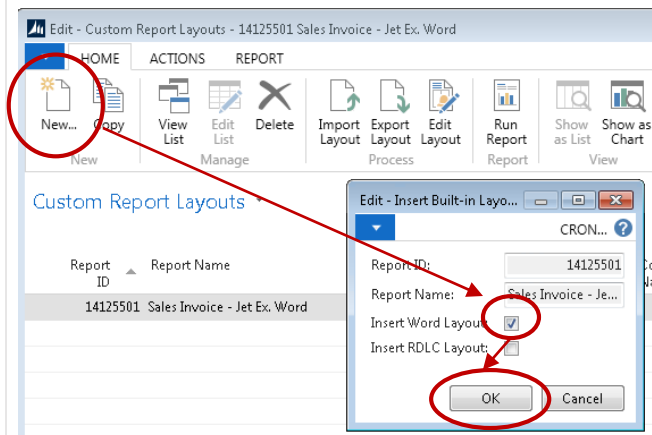
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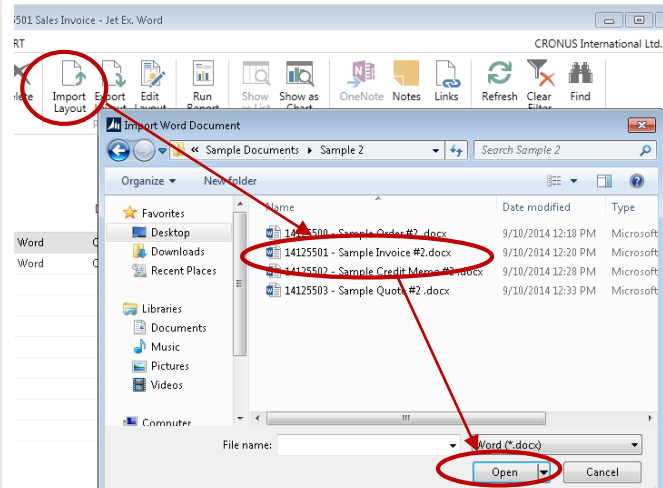In the Report Layouts window, you can change the Description.

Click **OK**

2. Import the sample layout into Microsoft Dynamics NAV

In the NAV Custom Report Layouts window, highlight the layout you wish to use and click the **Import Layout** button from the ribbon.

Browse to the **Jet Express for Word** Sample Documents, choose the template you want and click **Open**
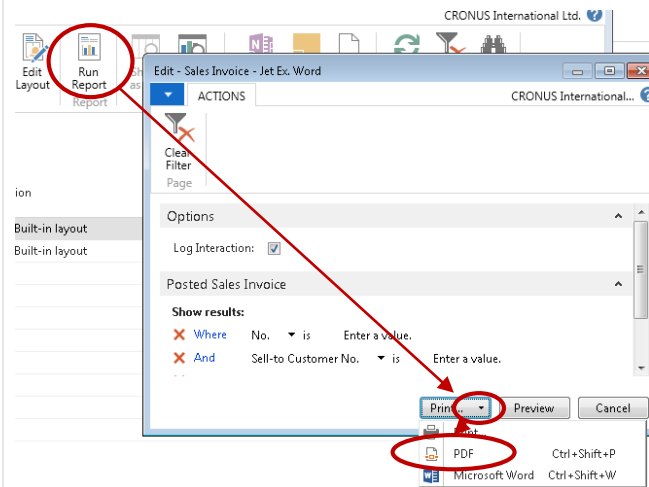
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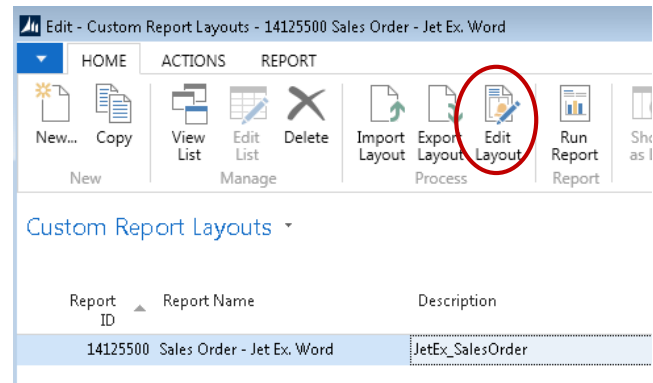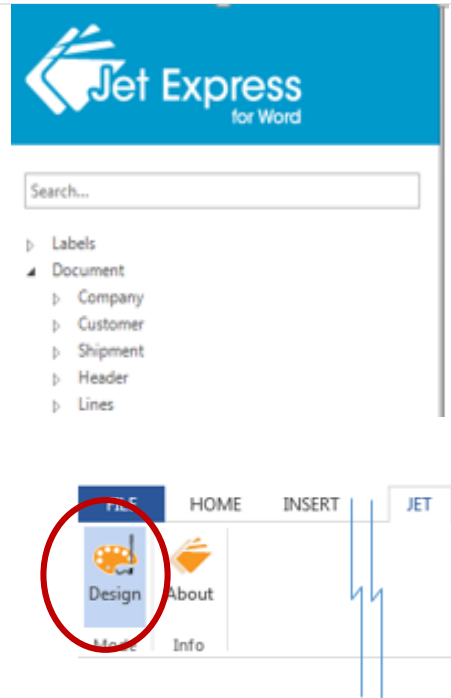|	
To test this report you can click the **Run Report** button in the ribbon Choose **Print** **Review the report to see if there are any changes required** When done previewing **Close** the report	
If changes are required, click **Edit Layout** to customize this layout	

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3. Customize the layout using Jet Express for Word

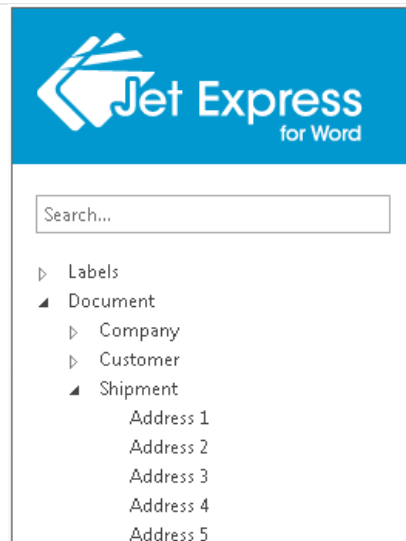|	
The Jet Express for Word action panel may automatically open when this word file is opened. If not, select the Jet Ribbon Click on the **Design** icon	
This presents a tree hierarchy of the fields from the selected report. Click on the icons on the hierarchy to expand or contract the lists. The Search field makes it easy to find the fields you need.	

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To add a field select the desired location in the Word document and double-click on the field.

Alternatively, you can select the field and click on the Insert button in the Jet Express for Word action panel.
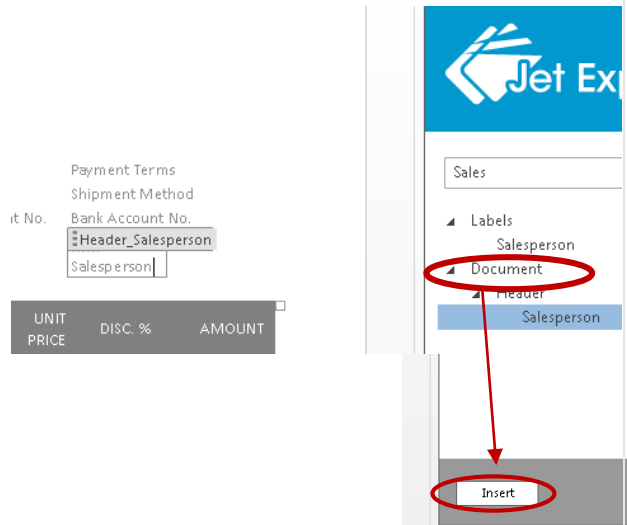
To Add a picture to a document, **right-click** on the item and select Insert Picture
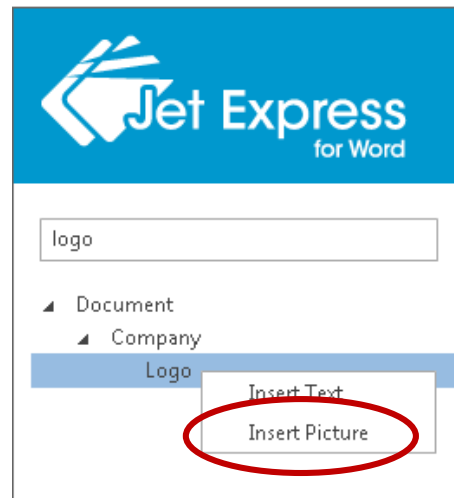
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Labels – NAV reports which were created by Jet Reports include a section for Labels. These fields are the **descriptions** of the fields themselves.

If you have multiple languages in your NAV instance, these labels can be helpful for creating multi-language documents.

Other Groupings – NAV reports which were created by Jet Reports include sections for Company, Customer, etc. These fields include the **values** of the fields.

The user can select from fields including Header or Lines in the hierarchy and insert an item, typically into a table in the Word document.

The Lines fields are also inserted as text and can be replicated by a Right-click, and choosing "Insert Repeater".

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Repeating items (such as Sales lines on a Sales order) can be added to a document.
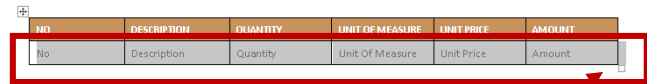
Best practice for this is to create a table in Word that is two rows high.

The first row contains the Labels of the fields that you wish to include.
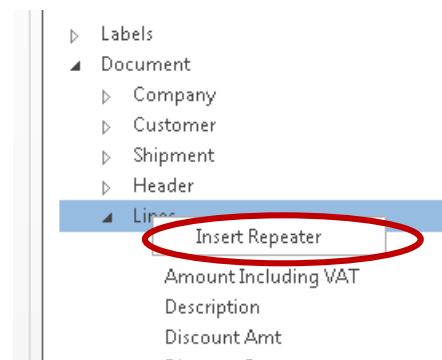
The second row contains the values of the fields.

Select the entire second row- include the area just to the right of the last column.

Right-click on the item in the hierarchy that you want to repeat and select **Insert Repeater**.

NO	DESCRIPTION	QUANTITY	UNIT OF MEASURE	UNIT PRICE	AMOUNT
No	Description	Quantity	Unit Of Measure	Unit Price	Amount

▷ Labels
▲ Document
   ▷ Company
   ▷ Customer
   ▷ Shipment
   ▷ Header
   ▲ Lines

           Insert Repeater
    Amount Including VAT
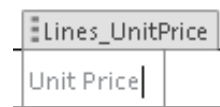   Description
    Discount Amt

To **delete** an item, click on it, and then click on its **Title**.

When you click on the Title it will change color.

Then press the Delete Button on your keyboard.

Note: It's important to select the Title when deleting to avoid any leftover data.

Item **without** Title selected:

Lines_UnitPrice

Unit Price

Item **with** Title selected:

Lines_UnitPrice

Unit Price
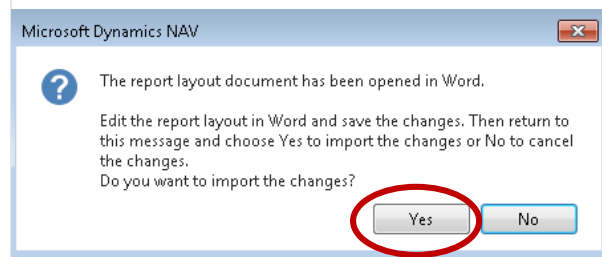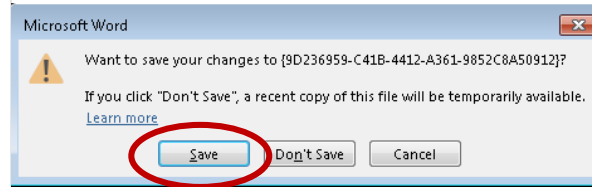
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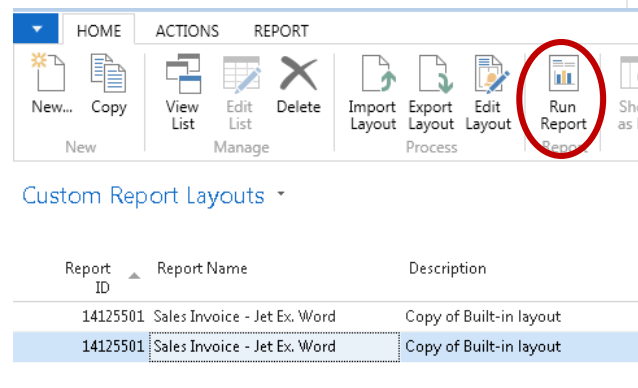
When you have completed your changes **Save** your Word document

This will return you to NAV and prompt you to import the report layout changes.

Click **Yes**

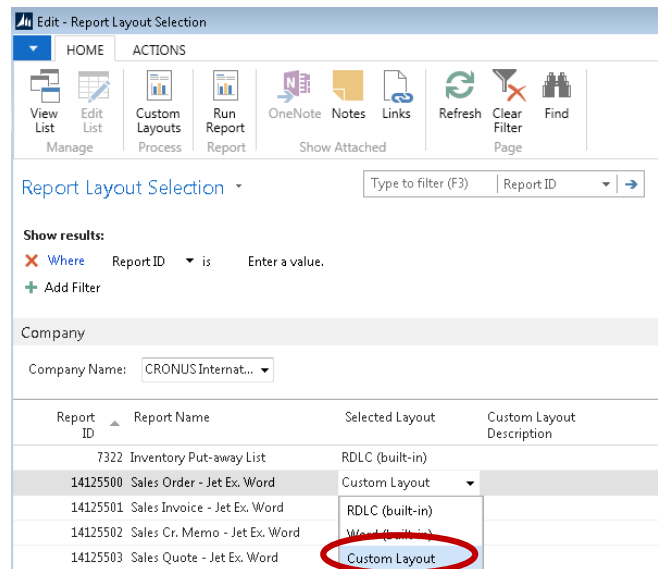You can **Run Report** to review your changes

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4. Select the custom layout for the report

You can set your newly created layout as the default layout for this report.

Click **OK** in the Edit Custom Report Layouts window to return to the Report Layout Selection window.

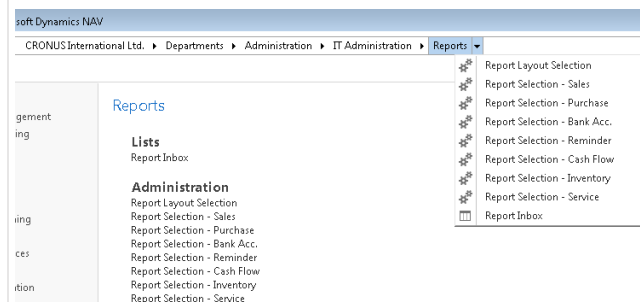Choose **Custom Layout** from the Selected Layout type(s)

5. Set Report Selection

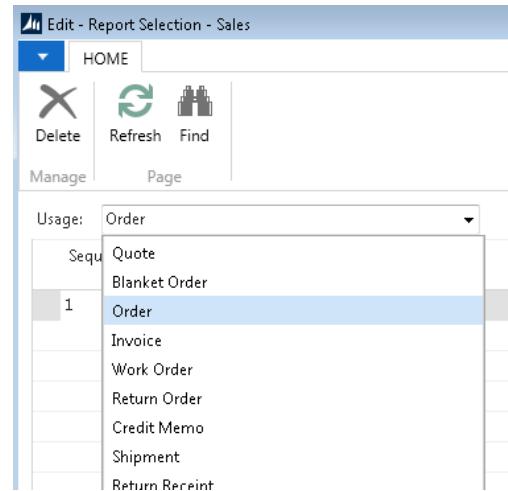You can set this report number to be the default for the document type (e.g. for a Sales Order).

In your NAV client navigate to **Report Selections** and choose one of the categories (i.e. Report Selection – Sales)
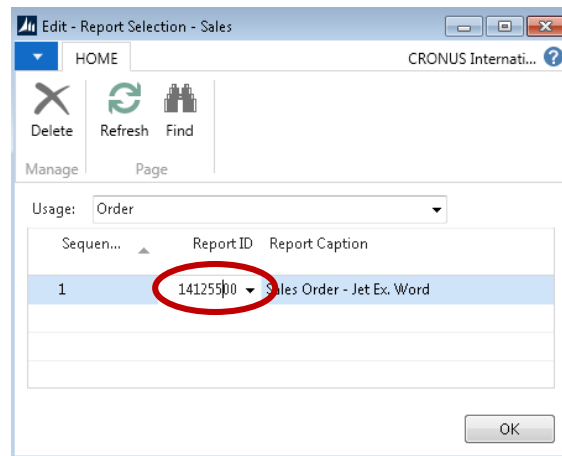
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For **Usage**, choose the type of document from the dropdown list	
Enter the **Report ID** that you wish to use. Click **OK** to set as the default report layout for your Report Selection category.	

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