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## MODIFYING LAYOUTS

### Supplementary Information For Users

The following should be read in conjunction with the sections of the OrderWise User Manual or on-screen User Guide that relate to layouts.

#### IMPORTANT INFORMATION

**It is our policy not to support modifications made by customers; we are unable to offer specific assistance with modifications, neither can we assist you if you experience problems with layouts following user modification.**

As long as they have back up files to revert to in case of errors, many users are happy to modify text labels, graphical items and pictures in layouts. Field modification is, however, a complex area and we strongly advise that you do not attempt this.

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#### 1.PRECAUTIONS YOU MUST TAKE PRIOR TO MODIFYING LAYOUTS

**You must ensure that no users utilise layouts whilst you have them open in the Layout Editor; this applies even where you make no changes to the layout.**

**It is essential that you make a back up copy of the layout files you are going to modify, prior to making any layout modifications.**

To make back up copies you can;

- i. back up OrderWise data (using the facility in the Data Input module)
- ii. make a copy of your entire \Reports folder or
- iii. make copies of the files for the specific layouts which you are going to modify.

Note that layout files are located in your Data\Reports folder. To locate your DATA folder, please look at the path shown on the OrderWise log on screen for any module.

If you elect to make copies of the files for the specific layouts which you are going to modify you need to identify the files related to the layouts you are going to modify; open the layout in the Layout Editor (having first ensured that no users will utilise the layout) and note the .frx file name shown at the top of the screen. Then, without making any changes to the layout, close the Layout Editor. Note that each layout has 2 files; the .FRT file and the .frx file and you must make copies of both these files. For example the files for the "Copy Invoice" layout are "invoice\_copy.frx" & "invoice\_copy.FRT".

### 2.GENERAL MODIFICATION METHODS

#### Layout Sections:

The “Title” section of the layout only appears on the first page. The “Page Header” and “Page Footer” sections appear on every page (however, if you have Visual FoxPro programming experience, you may elect to control this using a “Print When” on specific layout items).

#### The Report Controls Tool:

When the Report Designer opens, it will usually display the Report Controls Toolbar. If the Report Controls Toolbar does not automatically appear, click on its icon (which is located on the toolbar below the Menu bar).

Note that illustrations of the Report Controls Toolbar and the tools it contains are shown in the User Manual & User Guide.

The Select Objects tool (from the Report Controls Toolbar) can be used to select a layout item (more than one item can be selected by using the shift or control keys). The layout item can then be dragged to the required position or resized (the latter does not apply to Text Labels which are sized to fit their content).

#### Selecting Layout Items:

If a layout item is positioned on top of another, click on the top one with the Select Objects tool and drag it aside to edit the item underneath, alternatively use Bring to Front / Send to Back options on the Format menu.

A layout item may be grouped with other items (see Group / Ungroup on the Format menu); note that grouped items need to be ungrouped to prior to editing individual items.

### 3.TEXT LABELS

To add a label; select the Label tool from the Report Controls Toolbar, click anywhere on the layout, and type the required text.

To edit text in an existing label; select the Label tool from the Report Controls Toolbar, click anywhere on the label and type or delete text as required.

Note that the font can be amended by selecting Font from the Format menu.



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#### 4. GRAPHICAL ITEMS

To add a graphical item; from the Report Controls Toolbar, select the required graphical tool;

- Line
- Rectangle
- Rounded Rectangle

Click anywhere on the layout and drag to generate the item. Then use the Select Objects tool to drag it to the required position and adjust the size.

Refer to the available options on the Format menu to customise the style of the graphical item.

#### 5. PICTURES

**NB** We recommend that any picture files, such as logos, used in layouts are kept in the same folder as the layout files i.e. the \Reports folder.

To add a picture; from the Report Controls Toolbar, select the Picture/ActiveX Bound Control tool. Click anywhere on the layout and drag to produce a “frame” of approximately the size and shape you require; the Report Picture screen will then open.

Under “Picture from” select “File” then use the browse button [...] to locate the required picture file. Note that you will probably wish to select the “Scale picture, retain shape” option (under “If picture and frame are different sizes”).

#### 6. MODIFYING FIELDS

Using the techniques outlined above in General Modification Methods, you can resize fields or move them within the same layout section e.g. a field in the Detail section of a layout should only be repositioned within the Detail section. However please note the following warning.

#### **WARNING**

**We strongly advise that you do not attempt to change field code contents, move fields from one section of a layout to another section or (with the exception of adding Layout Banners) add new fields unless you have the necessary knowledge of database theory and Visual FoxPro programming experience.**

If you do have the necessary skills to modify or add fields, note that, as OrderWise is an evolving system, we do not have documentation to identify layout field names. However, you may be able to identify a field name by consideration of existing layout fields combined with reference to the relevant table in MS-Query. Note that all fields from a table may not be available to a given layout.



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## 7.ADDING LAYOUT BANNERS

In the Data Input module you will find the Layout Banners screen. The text entered here can be shown on certain layouts by adding fields. The "Field Expressions for Layout Banners" table shows the layouts to which these fields can be added together with the field expressions to be entered in the layout fields.

To add Layout Banners to your layouts, select the Field tool from the Report Controls Toolbar. Click anywhere on the layout and the Report Expression screen will open. Enter the required expression, exactly as shown in the "Field Expressions for Layout Banners" table.

e.g. To add the Retention of Title Clause to an Acknowledgement; add a field containing the expression: `invoicetext.s_ret_cl`

### Field Expressions for Layout Banners:

LAYOUTS		
Sales Layouts	Despatch Layouts	Invoicing Layouts
Quote Acknowledgement Pro Forma	Delivery Note	Invoice Credit Note
FIELD EXPRESSIONS		
Sales Top Invoice Banner	Despatch Top Invoice Banner	Invoicing Top Invoice Banner
<code>invoicetext.s_top_1</code>	<code>invoicetext.d_top_1</code>	<code>invoicetext.topline1</code>
<code>invoicetext.s_top_2</code>	<code>invoicetext.d_top_2</code>	<code>invoicetext.topline2</code>
<code>invoicetext.s_top_3</code>	<code>invoicetext.d_top_3</code>	<code>invoicetext.topline3</code>
<code>invoicetext.s_top_4</code>	<code>invoicetext.d_top_4</code>	<code>invoicetext.topline4</code>
<code>invoicetext.s_top_5</code>	<code>invoicetext.d_top_5</code>	<code>invoicetext.topline5</code>
Sales Bottom Invoice Banner	Despatch Bottom Invoice Banner	Invoicing Bottom Invoice Banner
<code>invoicetext.s_bot_1</code>	<code>invoicetext.d_bot_1</code>	<code>invoicetext.bottomline1</code>
<code>invoicetext.s_bot_1</code>	<code>invoicetext.d_bot_2</code>	<code>invoicetext.bottomline2</code>
<code>invoicetext.s_bot_1</code>	<code>invoicetext.d_bot_3</code>	<code>invoicetext.bottomline3</code>
<code>invoicetext.s_bot_1</code>	<code>invoicetext.d_bot_4</code>	<code>invoicetext.bottomline4</code>
<code>invoicetext.s_bot_1</code>	<code>invoicetext.d_bot_5</code>	<code>invoicetext.bottomline5</code>
Sales Retention Of Title Clause	Despatch Retention Of Title Clause	Invoicing Retention Of Title Clause
<code>invoicetext.s_ret_cl</code>	<code>invoicetext.d_ret_cl</code>	<code>invoicetext.retentionclause</code>

## 8.USING THE LAYOUT SORT ORDER FEATURE

**NB** The Layout Sort Order feature is not available on all layouts.

**NB** If all users have the same Sort Order requirements for all layouts; follow the steps below for one user then duplicate their Sort Order to all other users by clicking on the “people” icon at the bottom left to the Layout Editor screen. If, however, different users have different Sort Order requirements for layouts; you must log on to the Data Input module for each user and repeat the steps below.

1. In the Data Input module, select Modify Layouts; the Layout Editor screen will open.
2. Select the required layout from the list (just click once to highlight the layout name i.e. don't open the layout in the Report Designer).
3. Click on the “A->Z” button and the Layout Sort Order screen will open.

**NB** The Layout Sort Order screen will only show the layout fields if you have output the layout previously.

4. Select a field on the “Available Fields” list & use the “>” button to add fields to the sort list.

To delete a field from the sort list select the field on the “Sort Layout Using” list & use the “<” button.

5. Select a field on the “Sort Layout Using” list then click on the “A->Z” button for ascending order or the “Z->A” button for descending order.



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