Reports Forms Reference

Manage and reuse report form templates.

Reference **Modules** **Reports** **UI** Forms Editor | Forms | Monitor | WebData | WebData Editor

---

Reports Forms (Reference) define text-based and PDF report templates with dynamic data integration from tags and queries. ReportForm enable:

- Text and PDF report generation
- Dynamic tag value insertion
- Scheduled report creation
- Header/footer templates
- Multiple output formats
- Automatic file saving

Forms are created using the integrated Reports Forms Editor with real-time preview.

Configuration Properties
Creating Report Forms
Forms Editor
Output Formats
File Naming
Runtime Display
Triggering Reports
Headers and Footers
Padding Options
Security Configuration
Best Practices Checklist
Troubleshooting

Configuration Properties

Property	Description	Required
Name	Unique form identifier	Yes
SaveFormat	Output format. Windows target: Text, HTML, Unicode, ASCII or PDF. Multiplatform target: Text, Unicode or ASCII. A Multiplatform report form that carries another format keeps it, with a warning, and saves it only when the runtime runs on Windows.	Yes
SaveFileName	Full path for saved reports	Yes
SaveTrigger	Tag/property to trigger save	No
Padding	Text alignment (Compact/PadRight/PadLeft)	No
Append	File to append content to	No
Header	Header template reference	No
Footer	Footer template reference	No
Length	Document size configuration	No
EditSecurity	User group permissions	No
Description	Documentation text	No

Creating Report Forms

1. Navigate to **Reports Forms**
2. Click first row to create new form
3. Configure:
    - **Name**: Unique identifier
    - **SaveFormat**: Select output type
    - **SaveFileName**: Target file path
4. Double-click to open Forms Editor

Forms Editor

Text Formatting

- Font selection and sizing
- Bold, italic, underline
- Text alignment
- Color selection

- Bullet points and numbering

Dynamic Content

Insert tag values:

```
Production Report
Date: @Info.Date@
Shift: @Tag.Shift_Number@
Total Units: @Tag.Production_Count@
Quality Score: @Tag.Quality_Score@%
```

Tables

```
| Product | Quantity | Status |
|---------|----------|--------|
| @Tag.Product1@ | @Tag.Qty1@ | @Tag.Status1@ |
| @Tag.Product2@ | @Tag.Qty2@ | @Tag.Status2@ |
```

Output Formats

The formats a report form offers depend on the solution's Target Platform. Windows target solutions save reports as Text, HTML, Unicode, ASCII or PDF. Multiplatform solutions, which also run on Linux, offer Text, Unicode and ASCII. A Multiplatform report form that already carries HTML, PDF or XPS keeps it: it saves when the runtime runs on Windows and fails on Linux or macOS (see Reports Module Reference, Output Formats by Target Platform).

Text Format

Plain ASCII text:

- Fixed-width fonts
- No formatting
- Smallest file size
- Universal compatibility

HTML Format

Web-ready reports:

- Full formatting support
- Images and links
- CSS styling
- Browser viewing

PDF Format

Professional documents:

- Exact layout preservation
- Print-ready output
- Digital signatures
- Security options

File Naming

Static Names

```
C:\Reports\DailyReport.pdf
\\Server\Reports\Production.txt
```

Dynamic with Tags

```
C:\Reports\Report_@Tag.Date@.pdf
C:\Reports\@Tag.Shift@_@Tag.Line@.txt
```

Using Macros

```
@ExecutionPath@\Reports\Current.pdf
@SolutionPath@\Output\Report.txt
```

Runtime Display

Windows WPF Clients

- **ReportViewer Control** - Native report display
- **PdfViewer Control** - PDF rendering

Web HTML5 Clients

- **PdfViewer Control** - Browser-based viewing

Control Configuration

xml

```xml
<ReportViewer ReportName="ProductionReport" />
<PdfViewer Source="@Report.Form.DailyReport.FileName" />
```

Triggering Reports

Manual Generation

csharp

```csharp
// Generate report on button click
@Report.Form.ProductionReport.Generate();
```

Scheduled Generation

Using SaveTrigger property:

csharp

```csharp
// Trigger at shift change
@Tag.ShiftChange = 1;  // Triggers if SaveTrigger = Tag.ShiftChange
```

Script-Based

csharp

```csharp
public void GenerateDailyReport()
{
    // Set report data
    @Tag.ReportDate = DateTime.Today;
    @Tag.TotalProduction = CalculateTotal();

    // Generate and save
    @Report.Form.DailyReport.Generate();
    @Report.Form.DailyReport.Save();
}
```

Headers and Footers

Header Template

Create standard header:

```
========================================
     ACME Corporation
     Production Report
     @Info.Date@ @Info.Time@
========================================
```

Footer Template

Standard footer:

```
--------------------------------------
Page @Page.Number@ of @Page.Total@
Generated by: @Client.UserName@
======================================
```

Linking Templates

1. Create header/footer forms
2. Reference in main report:
    - **Header**: Select header form
    - **Footer**: Select footer form

Padding Options

Option	Effect	Use Case
Compact	No extra spacing	Data files
PadRight	Right-align with spaces	Fixed-width reports
PadLeft	Left-align with spaces	Numeric columns

Security Configuration

EditSecurity

Control who can modify reports:

- Set user groups with edit rights
- Restrict runtime modifications
- Protect report templates

File Permissions

Ensure write access to:

- Report output directories
- Network shares
- Temporary folders

Best Practices Checklist

- [ ] **Use templates** - Create reusable headers/footers
- [ ] **Test paths** - Verify file locations exist
- [ ] **Handle errors** - Check generation status
- [ ] **Archive reports** - Implement retention policy
- [ ] **Validate data** - Check tags before generation
- [ ] **Schedule wisely** - Avoid peak load times
- [ ] **Monitor disk space** - Clean old reports

Troubleshooting

Report not generating:

- Verify form configuration
- Check SaveTrigger conditions
- Confirm file path exists
- Review user permissions

Missing data:

- Check tag names

- Verify tag values populated
- Review timing of generation
- Confirm data availability

Format issues:

- Match SaveFormat to viewer
- Check padding settings
- Verify encoding (ASCII/Unicode)
- Review template formatting

File access errors:

- Check write permissions
- Verify network connectivity
- Close open report files
- Review antivirus settings

In this section...
