

Installation and configuration

1. Install the application.

Add the section "Reports setup" to the workplace.

Note. If the section is not added to the workplace, try adding another section to this workplace, and then add the section "Reports setup".

Creating a report in Creatio.

1. Go to the "Reports setup" section and add a new report. Fill in the card fields:

Field name	Description
Report title	The field value will be shown in the drop-down menu of the [Print] button on the section and / or card page.
Section	Downloading the report will be available in the drop-down menu of the [Print] button of the selected section and / or its card.
Show in section	Select on which page the report will be available for uploading.
Show in page	

2. Add the data source(s) to the detail of the report card.

Fill in the data source card:

Field name	Description
Name	Data source name in FastReport designer.
Entity schema	Data source entity
Only selected records	<i>The flag is available if the entity of the data source matches the entity of the section specified in the report card.</i> If flag is specified, then only the records selected in the section grid will be uploaded to the report, or only one record if the report is unloaded from the card.
Select top	<i>The field is available if the [Selected records only] flag is not checked.</i>
Skip row count	<i>The field is available if the [Selected records only] flag is not checked.</i>

Add fields to the "Columns setup" detail that will be uploaded to the report.

3. Add a table part(s) of the data source, if necessary. (For example, "Product in invoice" for a invoice printable).

The table part card is similar to the report data source card, with the exception of additional fields:

Field name	Description
Parent data source column	<i>You must first add the desired column to the parent data source and then specify it in this field.</i> The records in the table part will be filtered by the value of this field. (In most cases, the parent column is "Id")
Table part column	<i>You must first add the desired column to the table part and then specify it in this field.</i>

The table will be linked to the main object of the report by the value of this field. (For example, for the table part "Product in order" the column is "Order")

If at least one of the two fields above is not filled in, all records from the table part will be uploaded to the report.

4. Configure filtering of data sources and tabular sections.
If filters are specified for a data source or table part, they will always be applied, regardless of the values of other fields.

5. Setting up templates in the FastReport Designer

To install the FastReport Designer, use the following [link](#) and download the zip archive.

Download the file with data sources. Click the [Download file] button in the report page. The file must have the *.frx extension.

Double click the downloaded file to open it in FastReport and configure the template layout. Learn more about configuring the template in the [FastReport documentation](#).

Attention. The FastReport Designer is a third party application. The template preview function is not available.

6. Uploading the configured template to Creatio
Click the [Upload file] button in the report page to upload the prepared template to Creatio. After you upload the template, you can generate a report in the section or on a record page.

7. Transferring the package to another development environment
To transfer the package with the report to another environment, go to the [Configuration] section -> the [Data] tab and [bind the data](#) of the following elements:

1. AprFastReportTemplate_ReportName – the report. To bind it, use the template Id from the [dbo. AprFastReportTemplate] database table.

2. SysSchema_ReportName – the schema of data source entity. To bind it, use the template Id from the [dbo.SysSchema] database table.

3. AprFastReportDataSource_ReportName – the report data source(s). To bind it, use the template Id from the [dbo. AprFastReportDataSource] database table.

Attention. To bind table part data source, first bind it without fields [Parent data source column] and [Table part column]. Then bind data from the [dbo.AprFastReportDataSourceColumn] table. Then back to binding [dbo.AprFastReportDataSource] table and add fields [Parent data source column] and [Table part column].

4. AprFastReportDataSourceColumn_ReportName – the report data source columns. To bind it, use the template Id from the [dbo. AprFastReportDataSourceColumn] database table.

5. FastReportTemplate_ReportName – the report template. To bind it, use the template Id from

the [dbo.FastReportDataSource] database table.

Id value in [FastReportTemplate] is equal to Id of record in [AprFastReportTemplate].

6. FastReportDataSource_ReportName – the source of the report data. To bind it, use the source Id from the [dbo.FastReportDataSource] database table.

[TemplateId] value in [FastReportDataSource] is equal to Id of record in [AprFastReportTemplate]/

7. SysModuleReport_ReportName – the report. To bind it, use the report Id from the [dbo.SysModuleReport] database table.

[SysReportSchemaUid] value in [SysModuleReport] is equal to Id of record in [AprFastReportTemplate]