Vision Report Setup

Printer & Paper Setup

1. In Vision, go to Maintenance and then Report Setup. Click onto List at the top Toolbar and Select the report you want to customise. If you are not sure which report it is, just do that printing first (either to screen or to printer), then go straight to the Report Setup, it will automatically take you to the report you just printed.

2. Click onto the "Printer & Paper Setup" button in the middle of the screen. A Printer screen will come up where you can change the printer, and click OK. Then a Page Setup screen will come up where you can set up the paper tray etc.

3. If you want to set up the report to go to the default printer instead, click the "Clear Printer & Paper Setup" button.

Modify Report Layout

(**Important**: *While you are modifying any report, make sure that no one prints or uses that particular report. Therefore, it is best to customise reports after work.*)

1. In Vision, go to Maintenance and then Report Setup. Click onto List at the top Toolbar and Select the report you want to customise.

2. Click onto the "Modify Report Layout" button near the bottom of the screen, and click OK.

3. At the Report Page Setup screen, you usually do not need to change anything unless you want to increase the Left Margin *(Note: do not increase the Left Margin too much otherwise the printings at the right side will drop off the page)*.

4. At the Report Designer screen, you can modify the report design:
   (**Important**: *Only **Single**-click to select a field. Do **NOT** double click to change the Expression or anything inside unless you know what you are doing, because Vision will crash if you make any mistake in the Expression.*)

   To move or delete a field:
   Single-click onto the field you want, and then press the arrow keys to move or delete key to delete the field.

   To move the whole report down:
   Click onto "Edit" at the top menu, and then "Select All". Move everything down by pressing the ↓ on the keyboard. However, if the report consists of.different sections such as Title, Page Header, Detail, Page Footer, Summary etc, you have to make sure everything stays in the original section and does not get moved to the next section. In other words, instead of "Select All" and moving everything at the same time, you have to move a bit or a group at a time.

   To change the Font or size of a field:
   Click onto the field you want to change. Then click onto Format at the top menu and then Font

5. If you have made customisation in the report, it is best to rename your report such that it will not get overwritten by future updates. To rename a report, at the Report Designer screen, click onto File at the top menu. Then onto "Save As" in the drop-down menu. In the big white box in the middle, double click onto Reports. The "Save in" box above should now say "Reports". At the "Save Report" box below, type in the name you want the report to be and then click Save.

    (**Important**: all reports have to be in the Reports folder of V2K and all names have to be unique)

6. When finished, click onto the X at the top right hand corner of the Report Designer to close the window. You will then be asked to save. Click onto Yes to save.

7. If you had just renamed the report, you need to tell Vision to use the new report you created instead of the standard one. To do so, at the Report Setup screen, click Modify and type the report name you just use (without the .FRX extension) in the Optional Report File field.

Note:

• If you have set up Vision to use a report different to the Standard one (in Optional Report File), your customised report will not get overwritten by future updates. However, what that means is if SUNIX changes that report in the future, you will not get the new changes. To change back to use SUNIX's standard report instead, all you need to do is to empty the Optional Report File, Save and then click onto Restore Report.

• If you make mistakes at any time while customising the report, you can start from scratch again, by emptying the Optional Report File (if any), Save and then click onto Restore Report. This will give you back the original report given by SUNIX.

To add or edit text in a report:
(e.g. Customising Letterhead, Outstanding Account Letter, Appointment Card)

1. Exit completely out of Vision and go back in and log in as SXR. *(If you do not have a Login Id called SXR, go to Maintenance and then Login Id & Password. Then create a **New** record with Login Id called "SXR")*

   Note: To access this "adding or editing text" feature, you must exit out of Vision and then re-start. Just change Login by clicking onto the File menu and Login with a new User Id is not good enough.

2. In Vision, go to Maintenance and then Report Setup. Click onto List and Select the report you want to customise.

3. Click onto the "Modify Report Layout" button near the bottom of the screen. In the screen with the warning message, click onto OK

4. At the Print Setup screen, check the Printer, Paper size, Tray and Orientation setup and then click OK

5. At the Page Setup screen, you usually do not need to change anything unless you want to increase the Left Margin *(Note: do not increase the Left Margin too much otherwise the printings at the right side will drop off the page)*. Then click OK.

6. At the Report Designer screen, if there is no Report Controls Toolbar, you can enable it by-clicking onto View at the top menu and then Report Controls Toolbar.

7. At the Report Controls Toolbar, click onto A and then at the spot where you want the text, and then start typing.

8. When finish typing one set of text, click onto the arrow in the Report Controls Toolbar. Then you can select the text you just typed, to move it, or to change the font and size by clicking onto Format at the top menu and then Font.

9. To type another set of text, repeat the above steps.

10. To draw a box with rounded corners, at the Report Controls Toolbar, click onto the button with the oval shape. Then at the spot where you want, click-and-drag from one corner to the opposite corner.

11. When finished, click onto the X at the top right hand corner of the Report Designer to close the window. You will then be asked to save. Click onto Yes to save.

To insert a picture in a report:
(e.g. company logo)

Important: the picture must be put in the V2K folder, and must be in bitmap format.

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5. At the Page Setup screen, you usually do not need to change anything unless you want to increase the Left Margin *(Note: do not increase the Left Margin too much otherwise the printings at the right side will drop off the page).* Then click OK

6. At the Report Designer screen, if there is no Report Controls Toolbar, you can enable it by-clicking onto View at the top menu and then Report Controls Toolbar

7. At the Report Controls Toolbar, click onto the button for Picture/ActiveX Bound Control and then at the spot where you want to insert the picture

8. A Report Picture screen will come up. At File, click onto the square button to select the bitmap file of the picture.

   Important*:   For network, you MUST selct through "My Network Places". At File, it should say something like \\ComputerName\C\v2k\Filename*

9. Further down in the screen, select "Scale Picture, retain shape" and then click OK

10. The picture will be displayed in the report. To re-size it, click-and-drag at one of the dots at the 4 corners. To move it, click-and-drag at the middle of the picture to wherever you want it to be

11. When finished, click onto the X at the top right hand corner of the Report Designer to close the window. You will then be asked to save. Click onto Yes to save

Pre-customised Reports

In Vision, there are optional reports that are already pre-customised. All you need to do is to go to Report Setup, enter in the "Optional Report File" for the report you want to change:

Report Name	Optional Report File	Description
Invoice	vInvoiceBC	With Barcode
Invoice & Rx	vInvoice_RxBC	With Barcode
Invoice / Payment	vInvoice_PaymentBC	With Barcode
Invoice / Payment & Rx	vInvoice_Payment_RxBC	With Barcode
Account Statement	vBPStatmBC	With Barcode
Account Statement & Rx	vBPStatmRxBC	With Barcode