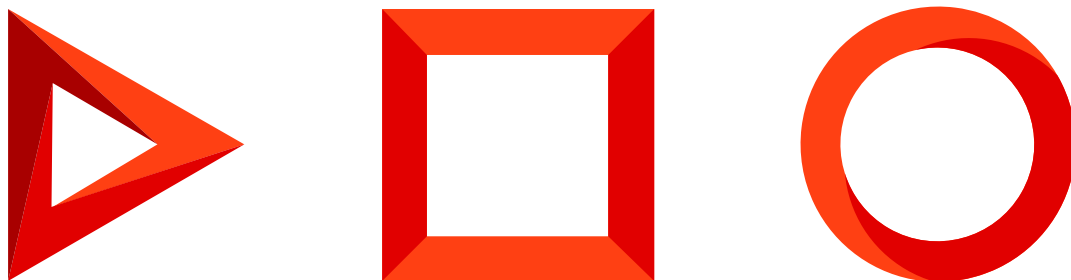


Print-ready reports

Version 8.0



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Set up MS Word report - general procedure

PRODUCTS: ALL CREATIO PRODUCTS

Use the MS Word reports to generate print-ready documents based on the section records. For example:

- Use reports of the [*Contracts*] section to print contracts.
- Use reports of the [*Contacts*] section to print contact summaries.
- Use reports of the [*Activities*] section to print out emails, minutes of meetings, etc.

You can export reports as *.docx files. Use [Microsoft guides](#) to protect the exported report files from editing.

To set up an MS Word report as per the standard procedure:

1. Install Creatio plug-in for MS Word [Read more >>>](#)
2. Create a new MS Word report in Creatio Select the section where the report will be available. Set up a list of Creatio database columns whose data will be pulled to your report. [Read more >>>](#)
3. Set up the report in the MS Word plug-in and upload it in Creatio Here you can set up the report layout: page layout, text formatting, tables, etc. [Read more >>>](#)

Install Creatio plug-in for MS Word

PRODUCTS: ALL CREATIO PRODUCTS

Before you start creating reports, install the Creatio plug-in for MS Word.

Select the plug-in depending on whether your MS Word application is 32 or 64 bit. You can determine whether your system is 32 or 64 bit using the [Microsoft instructions](#). Most often, the 32-Bit MS Word plug-in is installed on the 64-bit Windows.

Plug-in for **Creatio version 7.16.2 and later:**

- [Download Creatio plug-in for 32-bit MS Word](#)
- [Download Creatio plug-in for 64-bit MS Word](#)

Plug-in for **Creatio version 7.16.1 and earlier:**

- [Download Creatio plug-in for 32-bit MS Word](#)
- [Download Creatio plug-in for 64-bit MS Word](#)

For proper installation of the plugin unpack the archive with installation files. If the installation is started directly from the archive, the archiver application can cause failures in the work of the installer.

1. Before installing the Creatio plug-in for MS Word, make sure that your computer runtime environment meets the plug-in software requirements.
 - a. Operating system: Windows 7 or higher Operating system (32-bit and 64-bit editions are supported):

Note. The installation wizard will check whether the .NET Framework is installed, which is necessary for the plug-in to work. You can download .NET Framework free from the Microsoft website.

- b. The plug-in supports: MS Word 2010 and up MS Word 2003 and MS Word 2007 are not supported.
2. Make sure that the MS Word application installed on your computer is closed.
If you have the “MS Word Report Designer” plug-in installed, uninstall it.
3. Run the Creatio MS Word Report Designer.exe installer as Administrator. If you try installing the new plug-in and do not uninstall the old one, Creatio will return an error message. In this case, stop the installation, uninstall the old plug-in and run the installer again.
4. Run MS Word as Administrator after installing the plug-in. You only need to do it once in order to update the application's settings.

When the plug-in installation is over, you can start [creating reports](#).

Add a new MS Word report in Creatio

PRODUCTS: [ALL CREATIO PRODUCTS](#)

After you [install the MS Word plug-in](#), you can start setting up the report.

To add a new report:

1. Add a new report record in Creatio. [Read more >>>](#)
2. Navigate to the record's page and set up the fields and tables to display in the report. [Read more >>>](#)

Example. Set up a “Meeting minutes” report in the [*Activities*] section.

Add a new MS Word report record in Creatio

Note. If you plan to migrate the package to a different environment, [create a new package](#) and set it as current.


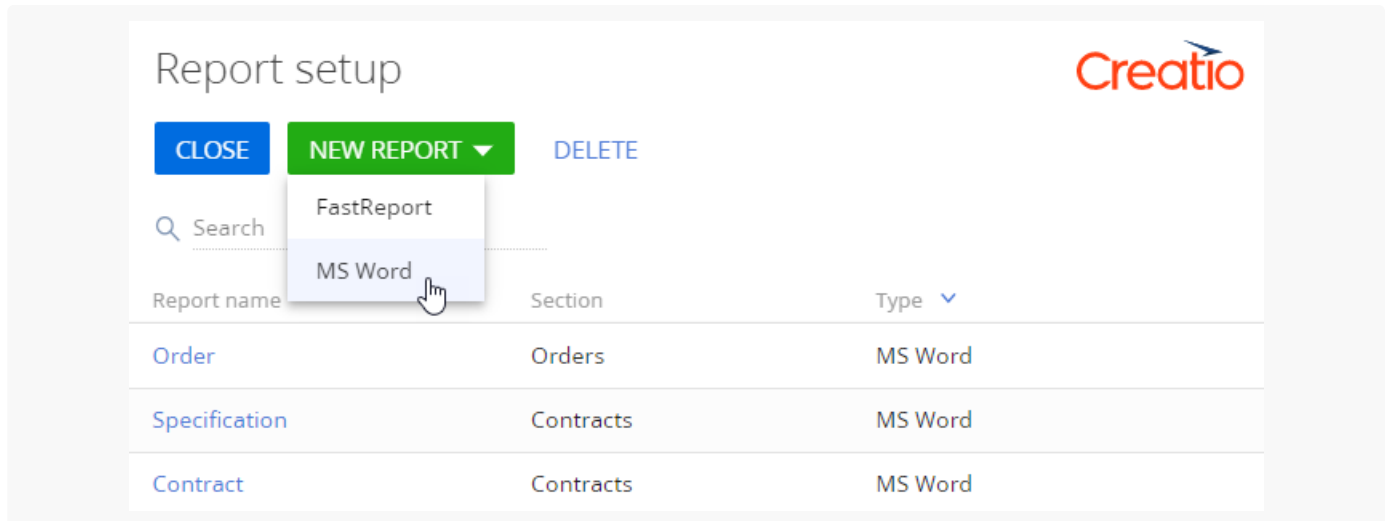
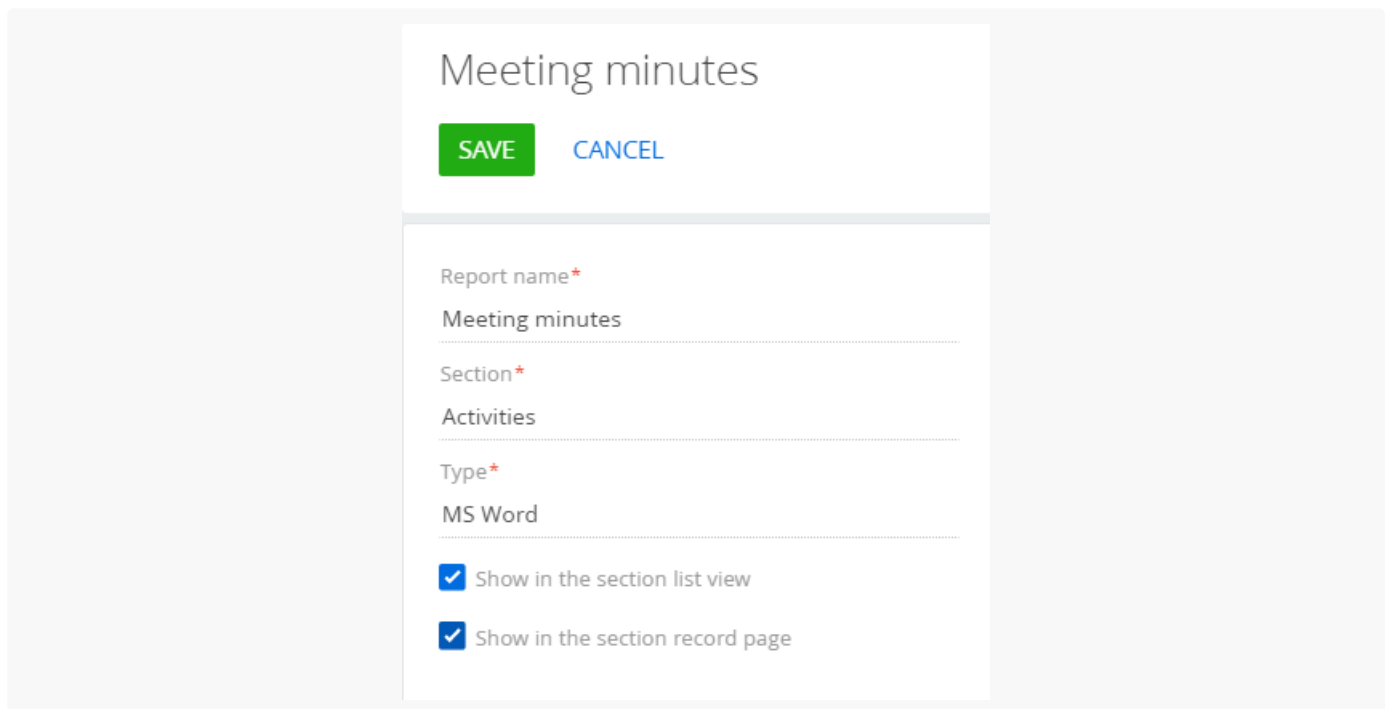
1. Click  to open the System Designer.
2. Navigate to the “System setup” block and click “**Report setup.**”
This will open the [*Report setup*] section.
3. Click [*New report*] → **MS Word** (Fig. 1).

Fig. 1 MS Word report setup



4. Enter the new report name, e. g. "Meeting minutes."
5. Select a section where the report should be available. For example, specify the [*Activities*] section for the "Meeting minutes" report.
6. Select the [*Show in the section list view*] and/or [*Show in the section record page*] checkboxes, depending on where the report should be available (Fig. 2).

Fig. 2 Add the "Meeting minutes" report



Proceed to configure the report data fields and tables.

Set up the content of a MS Word report

You can add simple data, such as a contact name or activity date, as well as table data. In the table data, you can display records that are directly connected to the primary report object, as well as records of objects with the reverse connection.

Set up the report fields

1. Open a MS Word report in the [*Report setup*] section. For example, open the “Meeting minutes” report created earlier.
2. Click + on the report page in the [*Set up report data*] block.
3. This will open a column selection window. Select all columns that hold the data required for the report (Fig. 3). For example, select the [*Subject*] column to display the activity name in the report. Add the [*Start*] and [*Due*] columns to display the activity time frame, etc.

Fig. 3 The report page field setup

As a result, the added columns will become available when setting up the report layout in the Creatio MS Word plug-in.

If necessary, add Boolean fields, such as the [*Do not use phone*] contact checkbox or [*Confirmed*] activity checkbox, to your report. Use special macros to set up displaying of the Boolean fields in the report. Learn more: [Basic macros in the MS Word reports](#).

Set up the report tables

In the tables, you can display a number of records connected to the primary report object. The displayed records can belong to objects that are connected to the report object directly, as well as to objects with the reverse connection.

Set up a table by the connected object's data

Example. The primary object of the “Meeting minutes” report is an activity. The report must display a table with the list of activity participants (records of the “Activity participant” object connected to the corresponding activity).

1. Open a MS Word report in the [*Report setup*] section. For example, open the “Meeting minutes” report created earlier.
2. Click + on the report page in the [*Set up report tables*] block.
3. Fill out the fields on the report table page (Fig. 4):
 - a. In the [*Table object*] field, select an object whose data will be used to create a table. For example, select the “Activity participant” object to add a table containing the list of the meeting participants.
 - b. In the [*Table name*] field, specify the table title that will display when setting up the report layout in the Creatio MS Word plug-in.
 - c. In the [*Column of report table object*] field, specify the column that will link the records in the table object to the primary object of the report. For example, the “Activity” column.
 - d. In the [*Column of the primary report object*] field, specify the column that Creatio will use to filter the table records. In most cases, the column of the report table object is “Id.”
 - e. Select the [*Hide the table if it contains no data*] checkbox to avoid displaying empty tables in the report.

Fig. 4 The general settings of the “Activity participants” table


4. On the [*Table parameters*] tab, set up the list of report table columns. Click + and select the columns to add to the list. For example, to create a list of activity participants with their names and roles, add the [*Participant*] and [*Role*] columns.
5. Set the sorting order of the table records. Click  next to a column and select “Ascending” or “Descending” in the menu to sort the table records based on the values in that column. For example, set the “Ascending” sorting order for the “Participant” column to sort the list of participants alphabetically by name (Fig. 5).

Fig. 5 The report table record sorting settings

Activity participant

APPLY CANCEL

Table object*	Activity participant	Column of report table object*	Activity
Table name*	Activity participant	Column of the primary report object*	Id

Hide the table if it contains no data

< TABLE PARAMETERS TABLE FILTERS >

Set up table columns ⓘ +

Column name	Sort	Actions
Participant	Ascending	↓ ✎ 🗑
Role	No sorting	

Make sure that your MS Word template includes all the report table columns involved in the sorting rules to apply the sorting rules when printing the report. Learn more about adding table data to the template using the plug-in: [Set up the report in the MS Word plug-in and upload it in Creatio](#).

You can also sort the table records by several columns. The sorting is performed by the column with a higher position in the group of settings of the table columns.

- If necessary, go to the [*Table filters*] tab and set up an additional filter whose conditions will define which records should appear in the report table. For example, use the following filter to display only those participants who are the company's employees: "Participant.Type = Employee; Customer" (Fig. 6).

Fig. 6 Report table record filters

Activity participants

APPLY
CANCEL

▾ Table object* Activity participant	▾ Column of report table object* Activity
▾ Table name* Activity participants	▾ Column of the primary report object* Id

Hide the table if it contains no data

< TABLE PARAMETERS
TABLE FILTERS

Actions ▾

Participant.Type = Customer; Employee

AND

+ Add condition

7. Click [*Apply*] to save the report table settings.

8. Save the settings on the report page.

As a result, the added table columns will become available when setting up the report layout in the Creatio MS Word plug-in.


Set up table by data of object with reverse connection

Example. The primary object of the “Meeting minutes” report is an activity. Besides the table with the list of activity participants, the report must display a list of participants of the opportunity connected to the current meeting.

1. Open an MS Word report record in the [*Report setup*] section. For example, open the “Meeting minutes” report created earlier.
2. Click + in the report page under [*Set up report tables*].
3. Fill out the fields on the report table page (Fig. 7):
 - a. In the [*Table object*] field, select an object whose data will be used to create a table. For example, to add a table with the opportunity participants, select “Opportunity participant.”
 - b. In the [*Table name*] field, specify the table title that will display when setting up the report layout in the Creatio MS Word plug-in.

- c. In the [*Column of report table object*] field, specify the column that will link the records in the table to the primary object of the report – the activity. In our example, it is the “Opportunity” column of the “Opportunity participant” objects.
- d. In the [*Column of the primary report object*] field, specify the column of the primary report object that connects the object with the table. In our example, it is the “Opportunity” column of the “Activity” object.
- e. Select the [*Hide the table if it contains no data*] checkbox to avoid displaying empty tables in the report.

Fig. 7 The general settings of the “Opportunity participants” table

4. On the [*Table parameters*] tab, set up the list of report table columns. Click + and select the column to add it to the list. For example, select the [*Contact*], [*Role*], and [*Account*] columns to display the addresses of the meeting participants.
5. Set the sorting order of the table records. Click  next to a column and select “Ascending” or “Descending” in the menu to sort the table records based on the values in that column.
6. If necessary, go to the [*Table filters*] tab and set up an additional filter whose conditions will define which records should appear in the report table. For example, use the following filter to display the participants who are the company's customers: “Account.Type = Customer.”
7. Click [*Apply*] to save the report table settings. Save the settings on the report page.

As a result, the added table columns will become available when setting up the report layout in the Creatio MS Word plug-in.

After you create a report in Creatio, you can [set up the report](#) in the MS Word plug-in.

Copy the MS Word report


Copy the report to set up similar reports faster.

The report copy keeps the original report template and the following settings:

- columns
- macros
- tables

- filters.

Click [*Copy*] in the [*Report setup*] section to copy a report.

Click  next to the table's name to copy a table to the same report.

Transfer the package with the report to another development environment (optional)


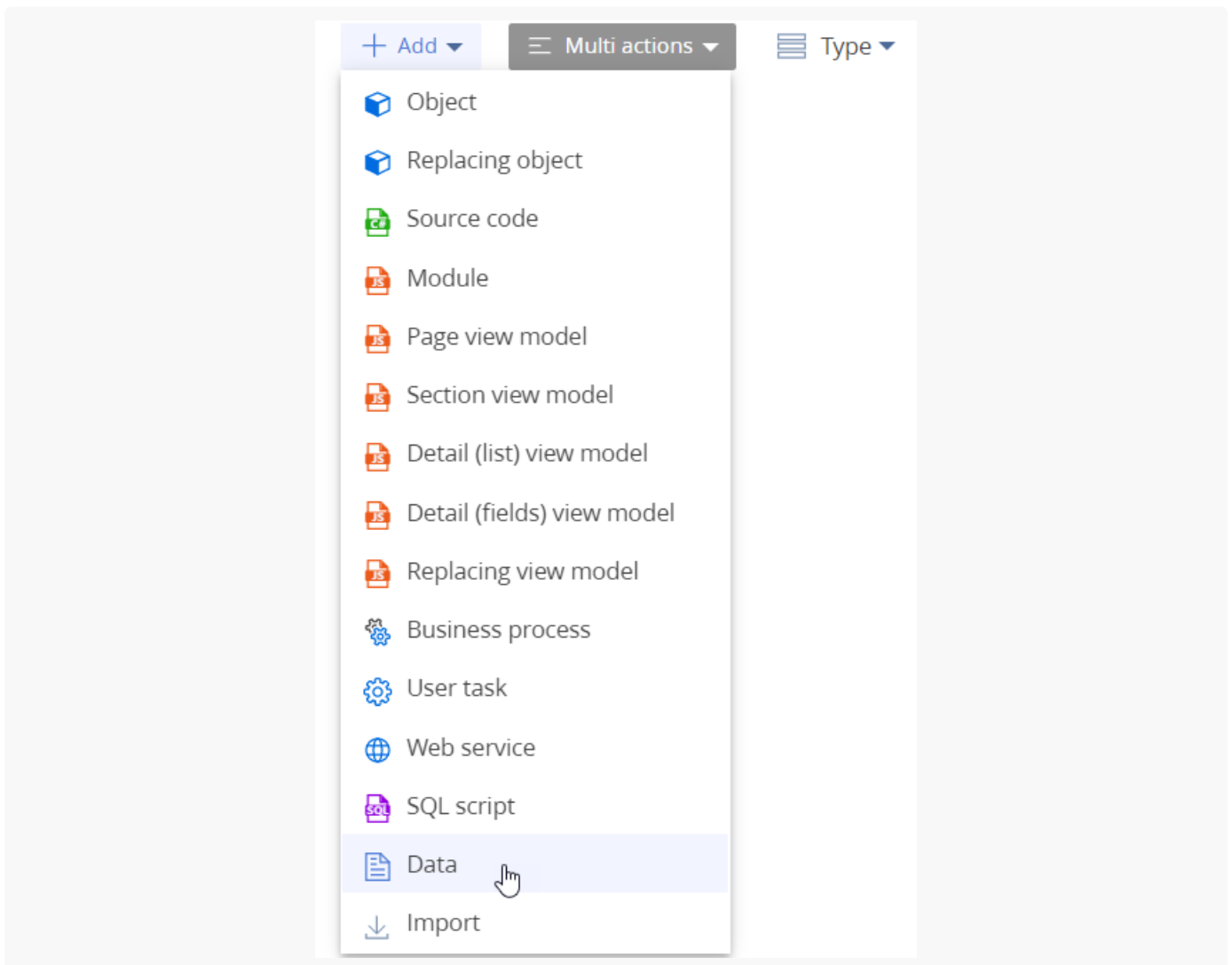
1. Click  to open the System Designer.
2. Click “**Advanced settings**” in the “Admin area” block.
3. Click [*Add*] → [*Data*] in the section list's toolbar (Fig. 8).

Fig. 8 The [*Add*] menu in the [*Configuration*] section

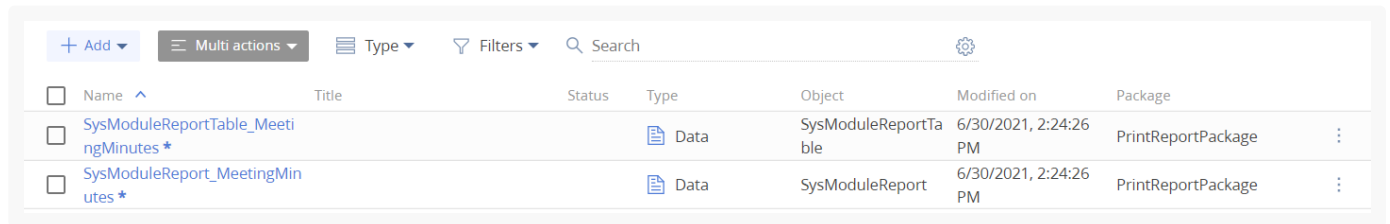


4. [Bind the data](#) to the following elements (Fig. 9):

- SysModuleReport_ReportName - the report. Use the report Id from the [*dbo.SysModuleReport*] database table to bind it. For example, it is “SysModuleReport_MeetingMinutes” for the “Meeting minutes” report.

- SysModuleReportTable_ReportName - the table part of the report. Use the report Id from the [*dbo.SysModuleReportTable*] database table to bind it. For example, it is “SysModuleReportTable_MeetingMinutes” for the “Meeting minutes” report.

Fig. 9 The bound report data in the [*Configuration*] section list



Name	Title	Status	Type	Object	Modified on	Package
SysModuleReportTable_MeetingMinutes *			Data	SysModuleReportTable	6/30/2021, 2:24:26 PM	PrintReportPackage
SysModuleReport_MeetingMinutes *			Data	SysModuleReport	6/30/2021, 2:24:26 PM	PrintReportPackage

Proceed to [transfer the package](#) with the report to another environment.

Set up the report in the MS Word plug-in and upload it in Creatio

PRODUCTS: [ALL CREATIO PRODUCTS](#)

After you [install the MS Word plug-in](#) and [create a report](#) in Creatio, you can start setting up the report layout. You can customize the layout by editing the standard MS Word template.

MS Word report template setup includes the following general steps:

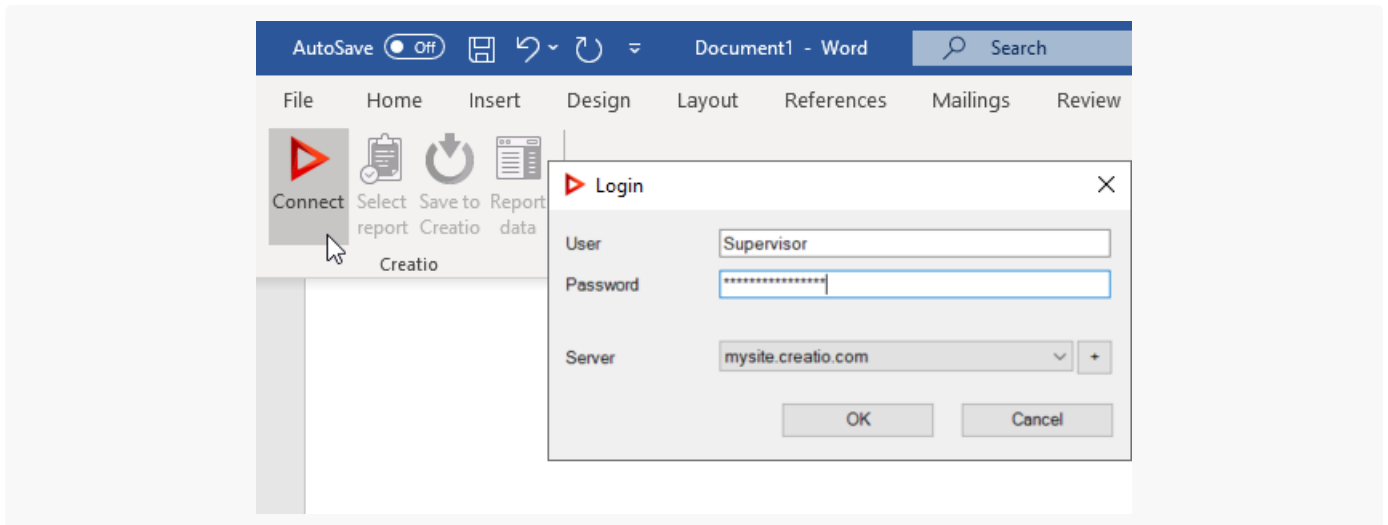
1. Download and edit the template in the Creatio MS Word plug-in. [Read more >>>](#)
2. Modify the ready template in the Creatio MS Word plug-in if needed. [Read more >>>](#)
3. Upload the updated template file to Creatio. [Read more >>>](#)

You can also use macros to set up reports. For more information about custom macros and adding them to the MS Word reports, please see the “[MS Word reports](#)” article.

Download and edit the template in the Creatio MS Word plug-in

1. Open an empty MS Word document on your computer.
2. Click [*Connect*] on the Creatio plug-in toolbar.
3. Log in to the system with your Creatio credentials ([Fig. 1](#)).

Fig. 1 Connecting the plug-in and authorization.



4. Select the needed report from the list by clicking [*Select report*].

As a result, a list of columns for the selected report will be displayed in the right part of the MS Word window.

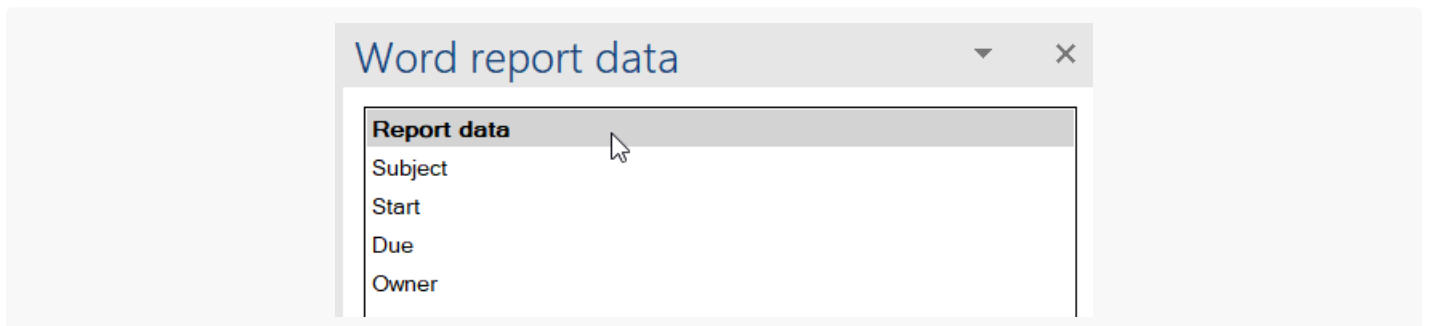
Add fields to the template

In the template, the report fields are represented as the MS Word fields. When the report is generated, the field will contain data from the corresponding Creatio record. The list of available fields is displayed in the [*Word report data*] window ([Fig. 1](#)).

Add all fields to the template

To add all the fields [configured in the report designer](#) to a template, drag a group of fields to the template page ([Fig. 1](#)).

Fig. 1 Adding a field group to a template



As a result, all fields and names of the corresponding Creatio columns will be added to the template ([Fig. 2](#)).

Fig. 2 A report template with a field group

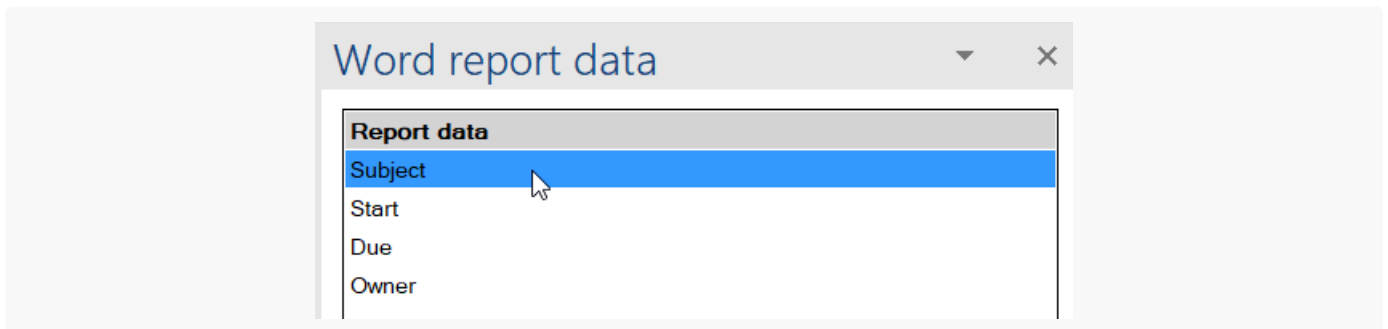
Subject : «Subject»
Start : «Start»
Due : «Due»
Owner : «Owner»
Result details : «Result details»

You can use standard MS Word tools to customize the added fields.

Add separate fields to the template

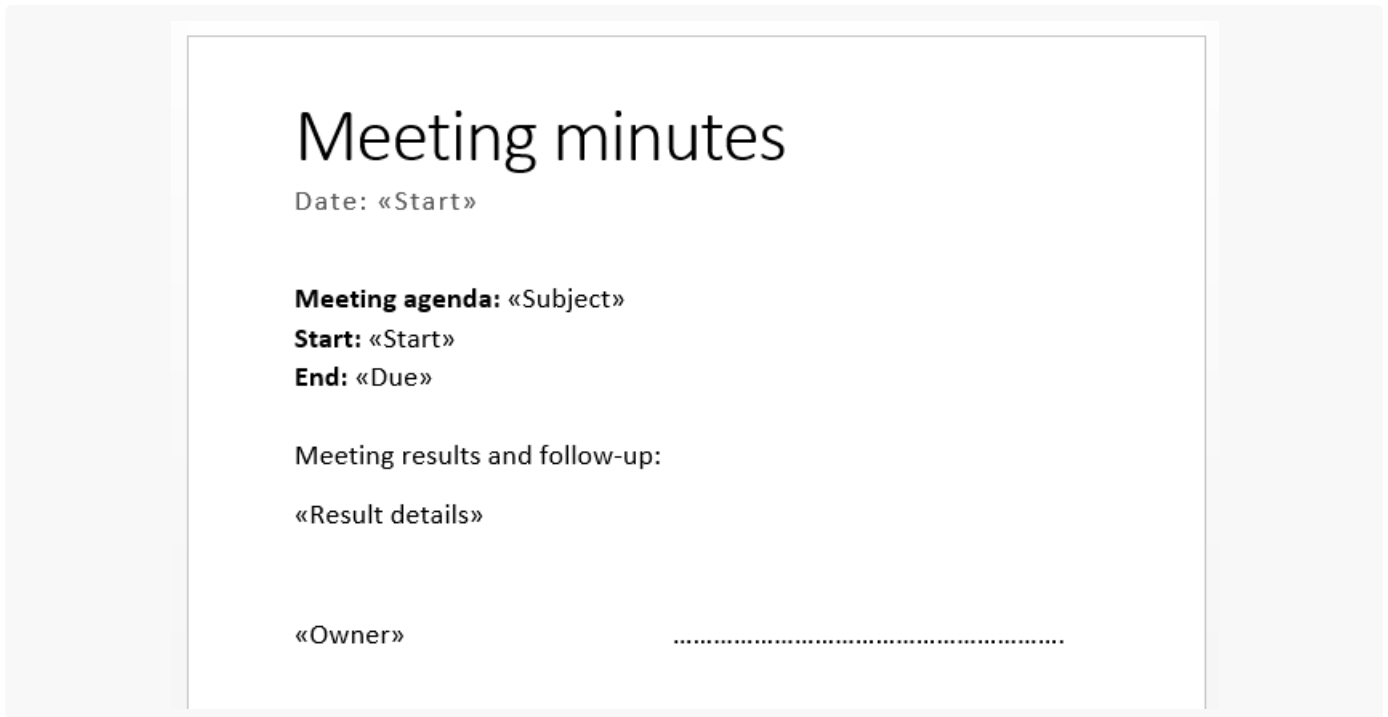
1. To add data to the template, drag the corresponding field on the page ([Fig. 1](#)).

Fig. 1 Adding a field to the report template



2. As a result, a field will be added on the page. When the report is generated, the field will contain data from the corresponding system record in Creatio.
3. Add all other necessary fields as well as the text in the report ([Fig. 2](#)).

Fig. 2 A report with the added fields and static text



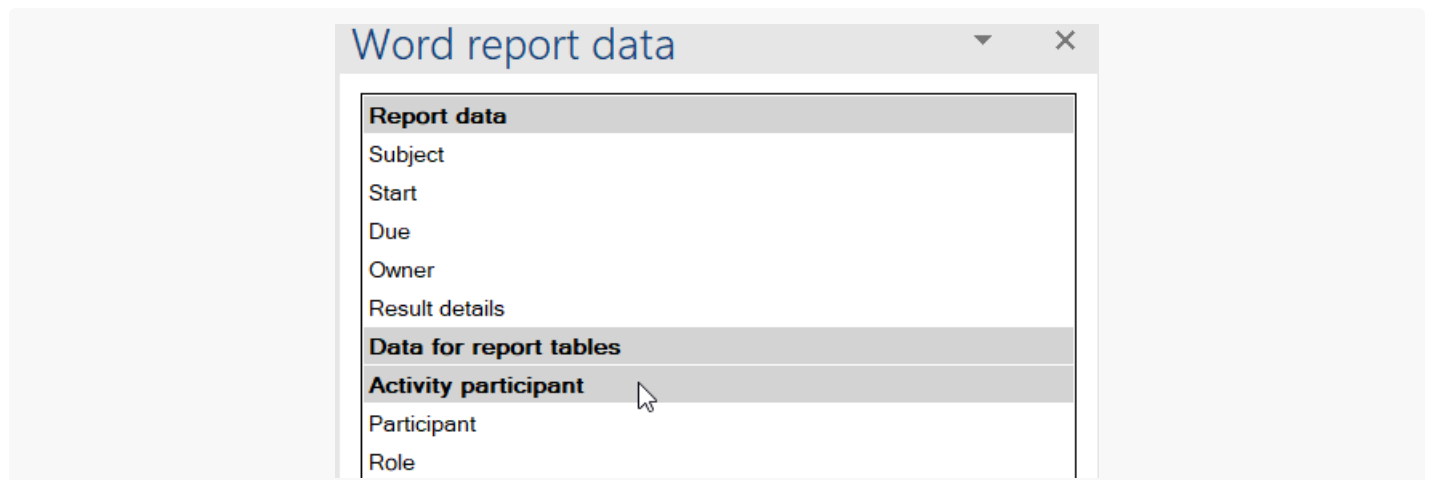
4. Save the report template.

Add table data to a template

Add all table columns to the template

To add all the table columns [configured in the report designer](#) to a template, drag a group of fields to the template page ([Fig. 1](#)).

Fig. 1 Adding all table columns to the template



As a result, the template will contain the table with all columns from the selected group. Titles of table columns will correspond to the titles of columns in Creatio.

You can use standard MS Word tools to customize the added table. The text in titles of the table columns can be edited. Fields placed in table cells determine the data that will be displayed in the column.

Add separate columns

1. Add a simple table with the required number of columns on the template page. Each column must comprise a title and one row ([Fig. 1](#)).

Fig. 1 Adding a table to the template manually

2. Enter the text of the column titles ([Fig. 2](#)).

Fig. 2 A table with static titles of columns

Participant	Role

3. Drag a column title to an empty cell of the table which should display the data from this column ([Fig. 3](#)).

Fig. 3 A table with fields added

Participant	Role
«Activity participant.Participant»	«Activity participant.Role»

4. Set up the template visual appearance by placing the table in the right part of the file ([Fig. 4](#)).

Fig. 4 Setting up a template visual appearance

Meeting minutes

Date: «Start»

Meeting agenda: «Subject»
Start: «Start»
End: «Due»

Participants:

Participant	Role
«Activity participant.Participant»	«Activity participant.Role»

Meeting results and follow-up:

«Result details»

«Owner»

5. Save the report template.

In the generated report, the fields of the table will contain data from Creatio. The number of rows in the table will correspond to the number of records.

Edit the existing template in the Creatio MS Word plug-in

You can modify the layout of any MS Word report in Creatio at any time.

1. Open an empty MS Word document on your computer.
2. Click [*Connect*] on the Creatio plug-in toolbar.
3. Log in to the system with your Creatio credentials.
4. On the [*Creatio*] tab of the MS Word ribbon, click [*Select report*].
As a result, a list of available MS Word reports will open.
5. Select a report to configure and click [*OK*]. As a result, the current report template will open.
6. Click [*OK*] in the pop-up window. As a result, the previously configured template file will open.
7. Make the necessary changes to the template layout.
8. Click [*Save to Creatio*] on the [*Creatio*] tab of the MS Word ribbon.
As a result, the plug-in will upload your report template to Creatio.

Upload the updated template to Creatio

To add the edited template in Creatio:

1. Open an empty MS Word document on your computer.
2. Click [*Connect*] on the Creatio plug-in toolbar.
3. Log in to the system with your Creatio credentials.
4. Click [*Save in Creatio*].
5. Click [*Save*].

As a result, a new template will be used the next time this report is generated.

You can also upload the report in the report designer directly by clicking [*Upload template*].