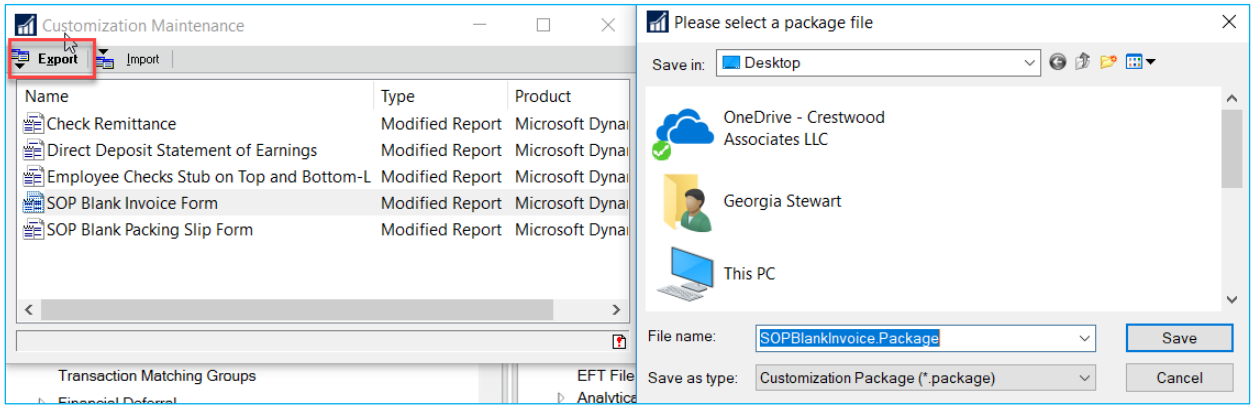
Copying Reports and Word Templates to Create History Versions in Dynamics GP

Here's a time saving way to duplicate format changes to your other reports, historical versions of reports, and documents in Dynamics GP. There are a couple variations on how to do this, depending if you are using the Dynamics Report Writer or Word Templates

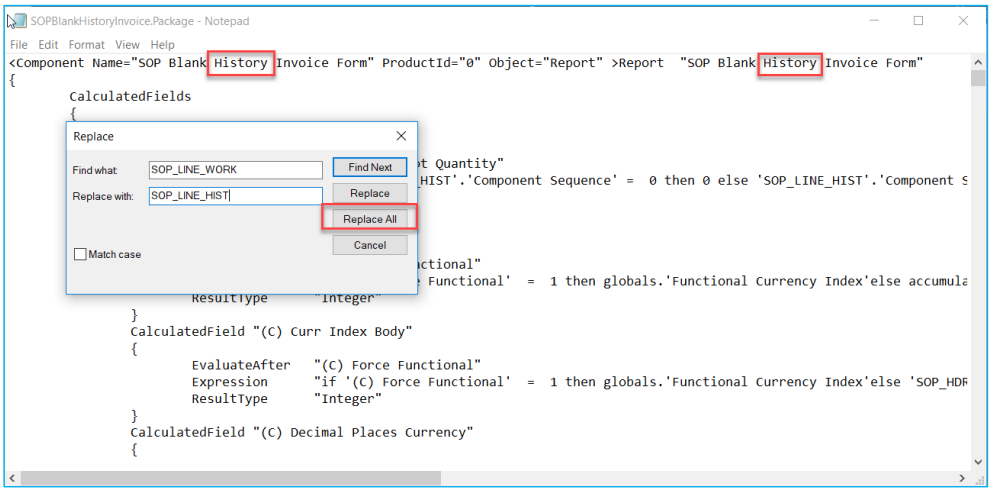
Here are the steps for the Report Writer versions of the reports.

1. Go to Microsoft Dynamics GP button > Tools > Customize > Customization Maintenance
2. Export the SOP Blank Invoice

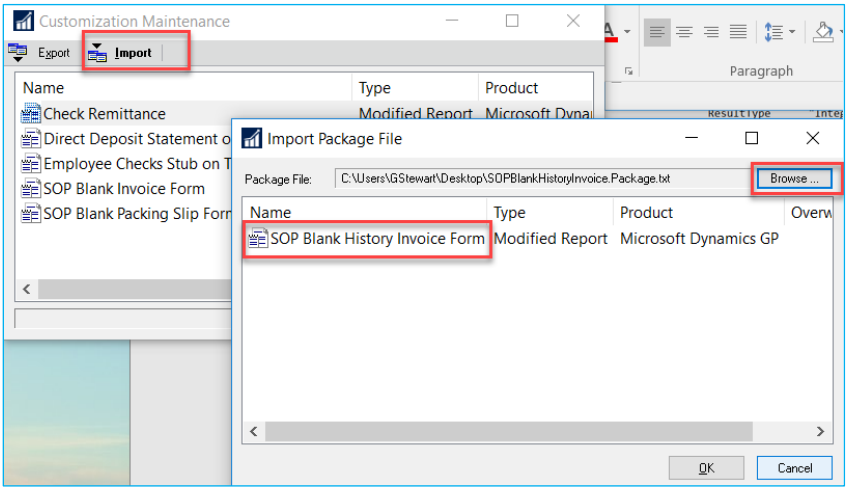


3. Open the exported report in Notepad
    A. Change the top line where you see the Report Name as "SOP Blank Invoice Form" so that it has History between Blank and Invoice. Here is what it should look like:
    <Component Name="SOP Blank History Invoice Form" ProductId="0" Object="Report" > Report "SOP Blank History Invoice Form"
    B. Then click Edit > Replace
        a. Find SOP_HDR_WORK and replace with SOP_HDR_HIST
        b. Click Replace All
    C. Then click Edit > Replace
        a. Find SOP_LINE_WORK and replace with SOP_LINE_HIST
        b. Click Replace All

D. Click File > Save As and save the updated package file with a new name



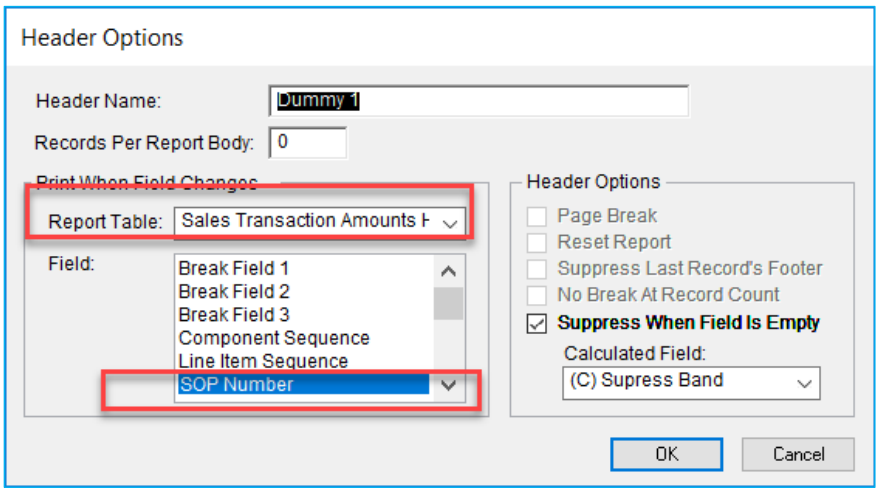
4. Go into GP to Microsoft Dynamics GP button > Tools > Customize > Customization Maintenance and import the newly saved package file. It should import in as the SOP Blank History Invoice Form and replace what is already there.



5. Go into Report Writer and update the Segment options so the report can be emailed (Microsoft Dynamics GP button > Tools > Customize > Report Writer)
   A. Select Microsoft Dynamics GP as the product
   B. Click the Reports Button
   C. Highlight SOP Blank History Invoice Form and click Open
   D. Click the Layout button
   E. In the Report Layout, click Tools and select Section Options

F. In the Report Header area, highlight Dummy 1 and click the Open button.

G. The Report Table is not correct after copying the SOP Blank Invoice to create the SOP Blank History Invoice. Change the Report Table to Sales Transaction Amounts History and highlight SOP Number as the Field.



H. Click OK or Save on all windows, and return to Dynamics GP.

6. Set up the Alternate/Modified Forms and Reports to use the modified report

A. Click Microsoft Dynamics GP button > Tools > Setup > System > Alternate/Modified Forms and Reports

B. Select the ID (usually DEFAULTUSER)

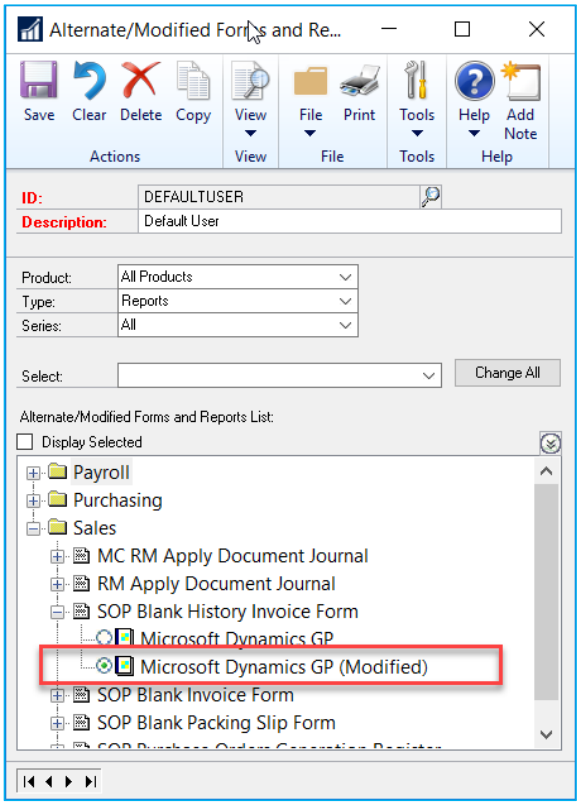
C. Select the following

i. Product = All Products

ii. Type = Reports

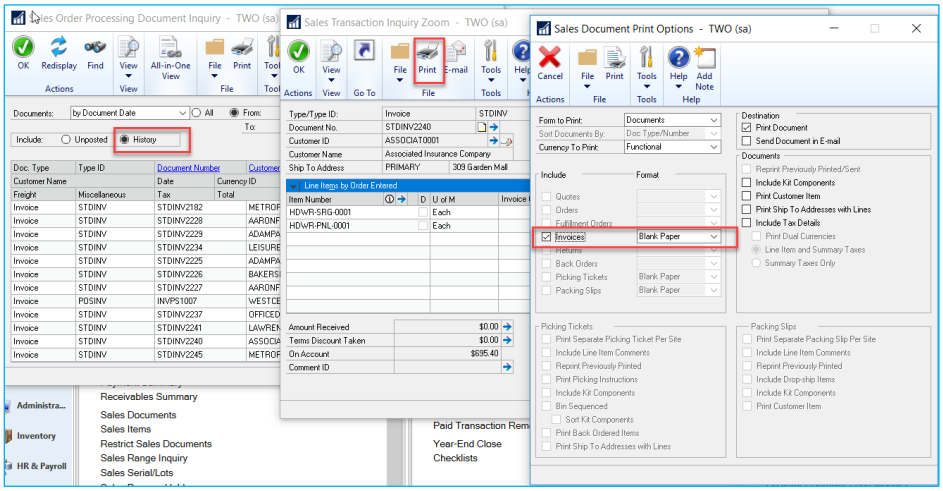
iii. Series = All

D. Open the Sales folder and the SOP Blank History Invoice Form and mark the radio button for Microsoft Dynamics GP (Modified) to use the modified version of the report.



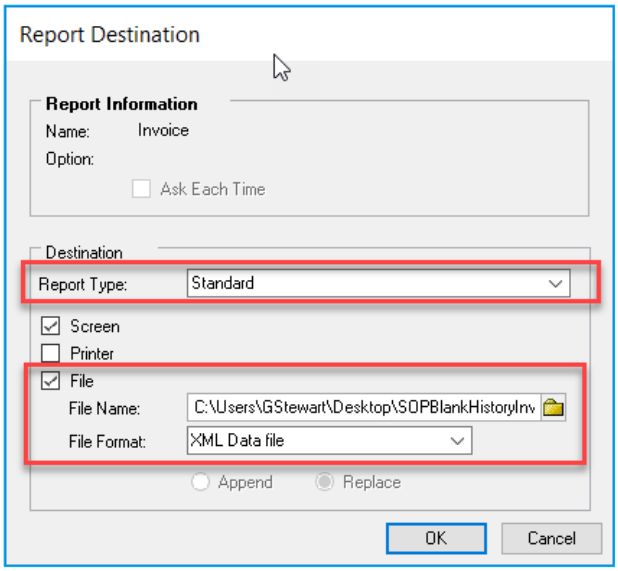
For the Word Template:

1. Print the standard version of the History invoice to an XML file
   A. Go to Inquiry > Sales > Sales Documents
   B. Select the History radio button
   C. Highlight an invoice and click the Document Number link to drill back to it
   D. Click the Print button in the Sales Transaction Inquiry Zoom window.
   E. Mark the box to Include Invoices and select Blank Paper, then click the Print button.

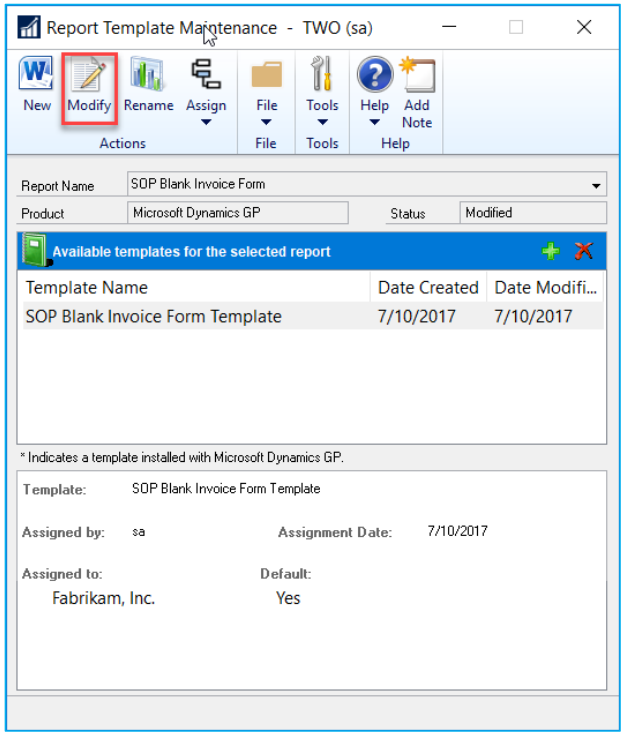


   F. Make sure you select the Report Type = Standard and mark the File box. Choose the XML Data file as the File Format and browse out and select the path where you want to save the file and enter the file name. Click

Save or OK to print the print the report.



E. Go to Reports > Template Maintenance and select the SOP Blank Invoice form that you were using and click the button Modify the template you are using



F. In word, delete the xml data source:

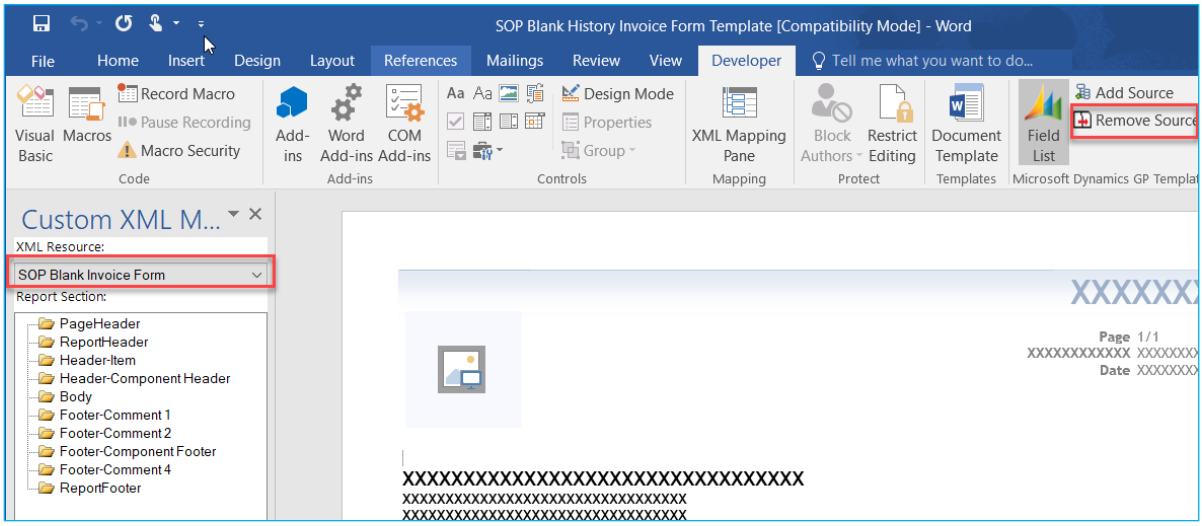
A. Go to the Developer tab

B. Click the Field List button (you must have previously installed the GP Word Add-In from the GP installation media)

C. On the right side of the Word document, select the SOP Blank Invoice Form from the XML Resource drop-down.

D. Click the Remove Source button at the top of the window.

E. Click OK on the message asking if you are sure you want to remove the source.

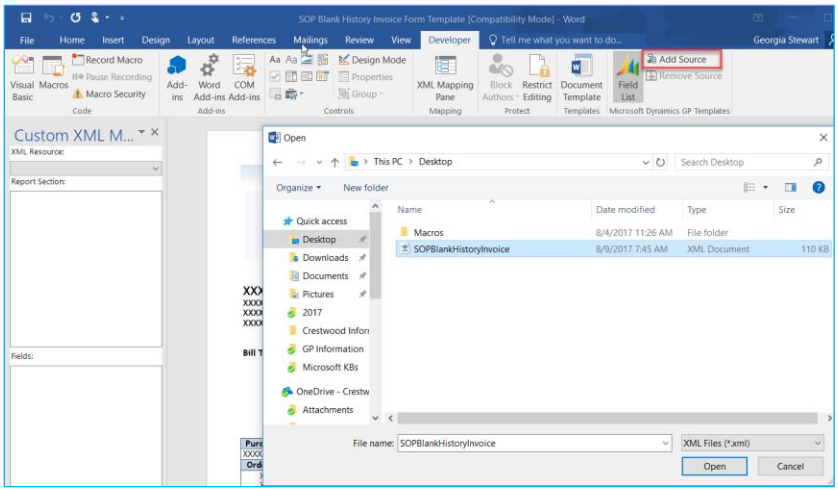


G. Add the XML Source you created in Step 1:

A. Click the Add Source button

B. Find and select the XML file you generated and click the Open button

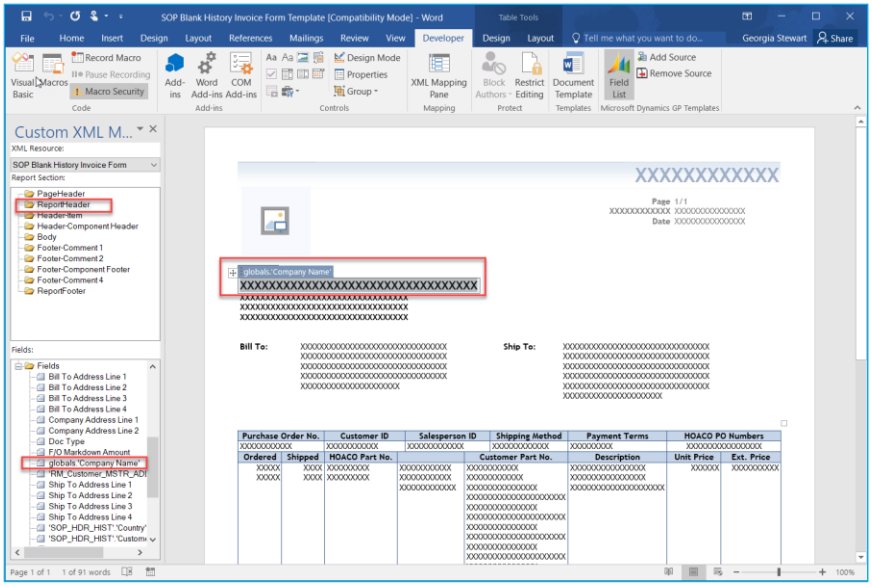
C. This will add the SOP Blank History Invoice xml file as the XML source



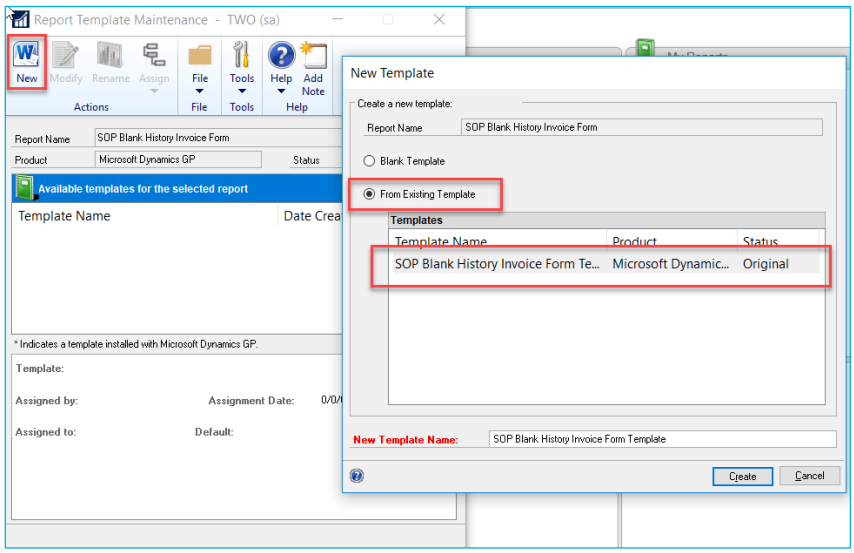
5. Now you have to change EVERY report field so all of the fields come from the new XML file because the new XML file uses the History tables as opposed to the Work tables that were used in the SOP Blank History Form.

A. Best way to do this is to highlight a field on the document so that you can see the field name, delete the entire field, then find the same field in the XML Source in the left side of the window and drag it onto the report to replace what was there.

B. NOTE: Word templates only use the Report Header section, not the Page Header.

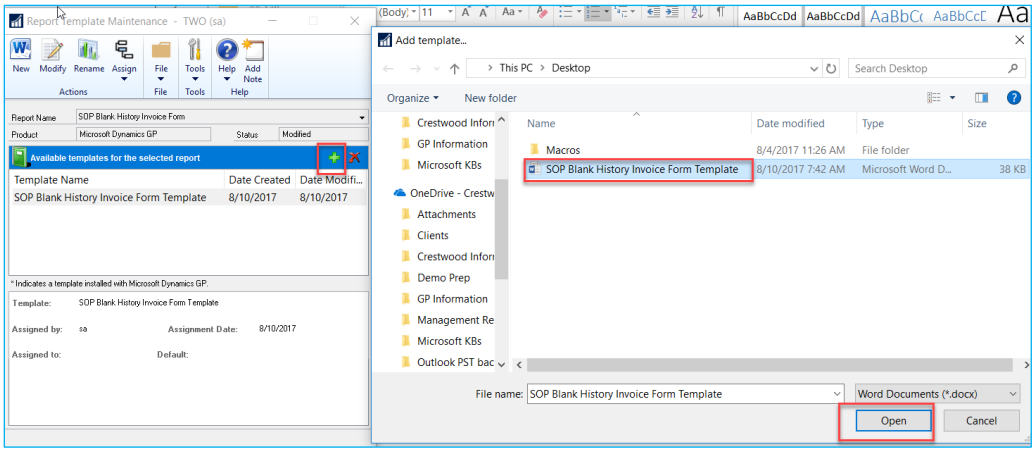


6. Click File > Save As and save as a new name by adding the word History between Blank and Invoice in the template name
7. Go back to GP to Reports > Template Maintenance and select the SOP Blank History Invoice form (modified version).
   A. If you already have a template configured for the SOP Blank History Invoice Form, you can simply select that Report Name and then click the Green Arrow and select your new template and assign it as the default for the company (see steps h through o below)
   B. If you do not have a template configured for the SOP Blank History Invoice Form (modified version), click More Reports in the Report Name field
   C. Select the following on the Reports window:
      i. Product = Microsoft Dynamics GP
      ii. Series = Sales
      iii. Status = Modified
   D. Highlight the SOP Blank History Invoice Form and click Select.
   E. Click the New button at the top of the Report Template Maintenance window.
   F. Click the radio button 'From Existing Template'
   G. Highlight the Template Name that has the Status of Original
   H. Click Create



   I. Click the Green Plus Sign at the top of the Report Template Maintenance

J. Browse out to find your saved template from the above steps (4 to 6) and click the Open button.



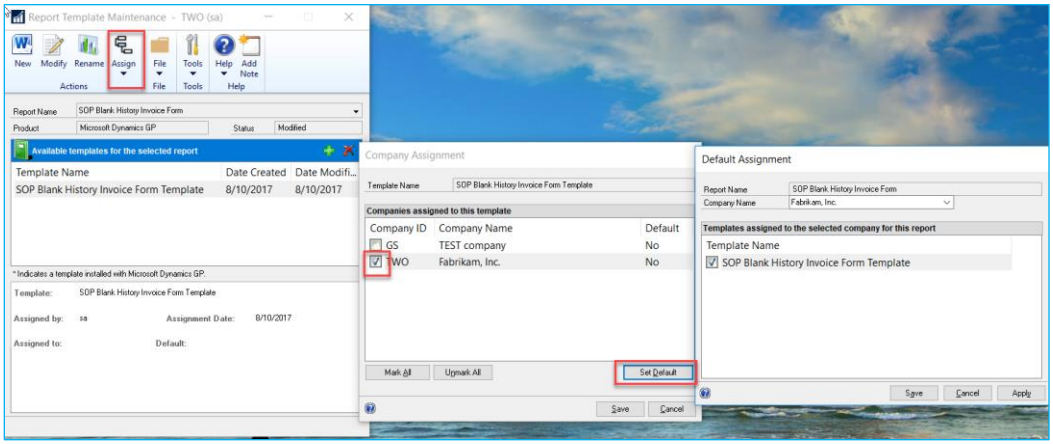
K. Click Yes on the message asking if you want to replace the existing template.

L. Click the Assign button and choose Company

M. Mark the box of the company where you want to assign the template

N. Click the Set Default button and mark the box of the template name for each company where you want the template to be the default

O. Click Save on each window



NOTE: There have been times where we have seen that templates are assigned to specific customers or customer classes. If you want a template to be used for the company regardless of the customer and customer class, be sure to clear all of the customer and customer class assignments from any other template that exists. These do not need to be assigned if one template is to be used for all.

Sources:
Blog: Developing for Dynamics GP
James Gomes response on June 14, 2013 to Copy Template for SOP Invoice into SOP History Invoice