Formpipe.

How do I Use Dialog Setup?

Alex Clemons - 2023-12-15 - Comments (0) - Lasernet FO Connector FAQs

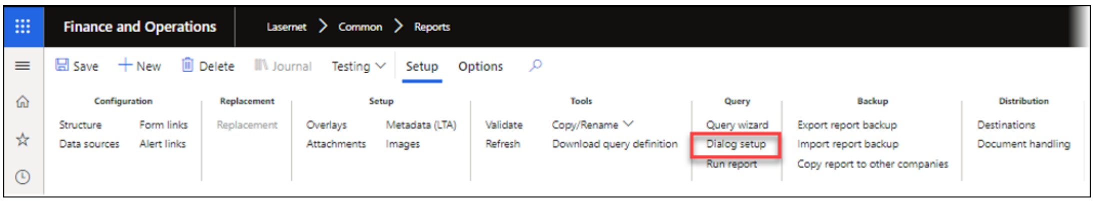
Lasernet for Dynamics 365

When you run a query report in Dynamics 365 Finance and Operations, a dialog will appear allowing you to make selections such as the Destination, Records to Include, and the Run Report in Background options. Dialog Setup is a Lasernet Connector function that allows you to customise this dialog to fit your needs. This article provides an introduction on how to use Dialog Setup. For a more in-depth explanation of all the different settings and capabilities of Dialog setup, please reference our Form links – [Dialog setup] and [Query – Dialog setup] sections of our guide.

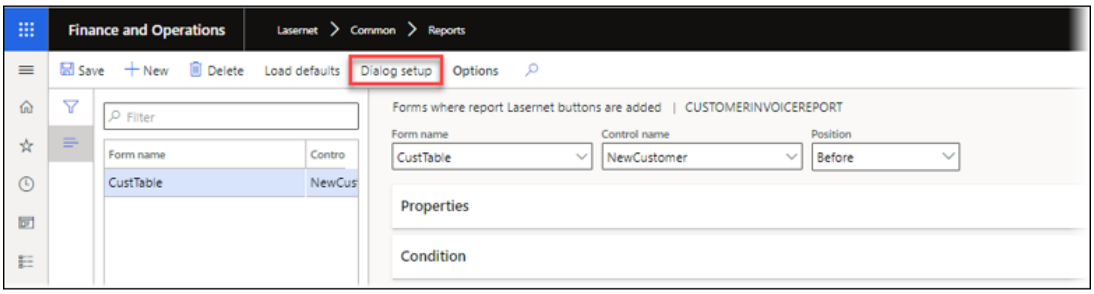
Dialog setup locations

Dialogue Setup can be found in two places:

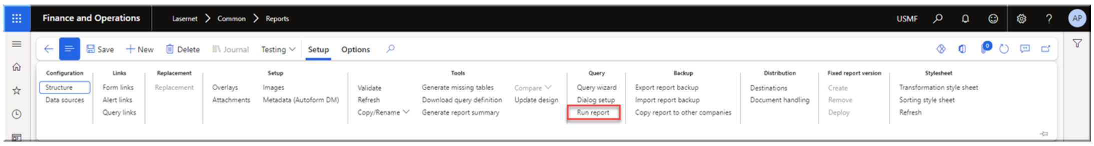
Lasernet > Common > Reports, on the action pane of the Lasernet query report and on the **Form link** of a Lasernet query report.



Lasernet > Common > Reports, on the **Form link** of a Lasernet query report.



We will review the **Dialog Setup** on the action pane of the Lasernet query report. This Dialog Setup controls the dialog the user sees when they run the query report from **Lasernet > Common > Reports > Run Report** on the action pane.



Example Dialog setup configuration

Prerequisite: We have created a custom query report called 'CustomerInvoiceReport'.

1. Navigate to **Lasernet** > **Common** > **Reports**, select **CustomerInvoiceReport** and on the action pane, select **Dialog setup**.

2. Select **Default** for **Execution**, leave **Set focus** blank, and set **Submit when modified** to **No**.

Create a new Parameter:

To add a new parameter, follow these steps:

1. Select **New** and provide a **Control Name**.

2. Select the checkbox for **Show**, choose a **Default value** and select **From las value** for the **Load instruction** field.

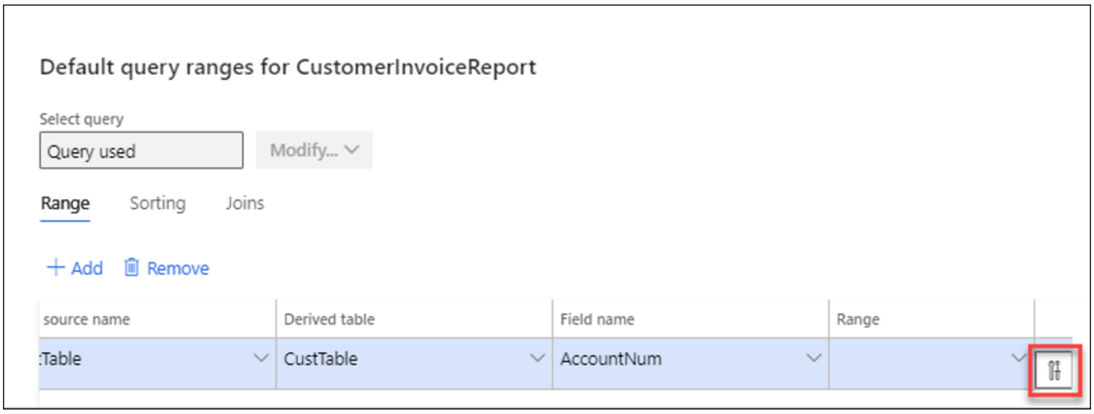
Set up a Default Range using a Parameter

To set up a Default Range using a Parameter, follow these steps:

1. Click **Default ranges**.

2. Add a line for table CustTable and field AccountNum.

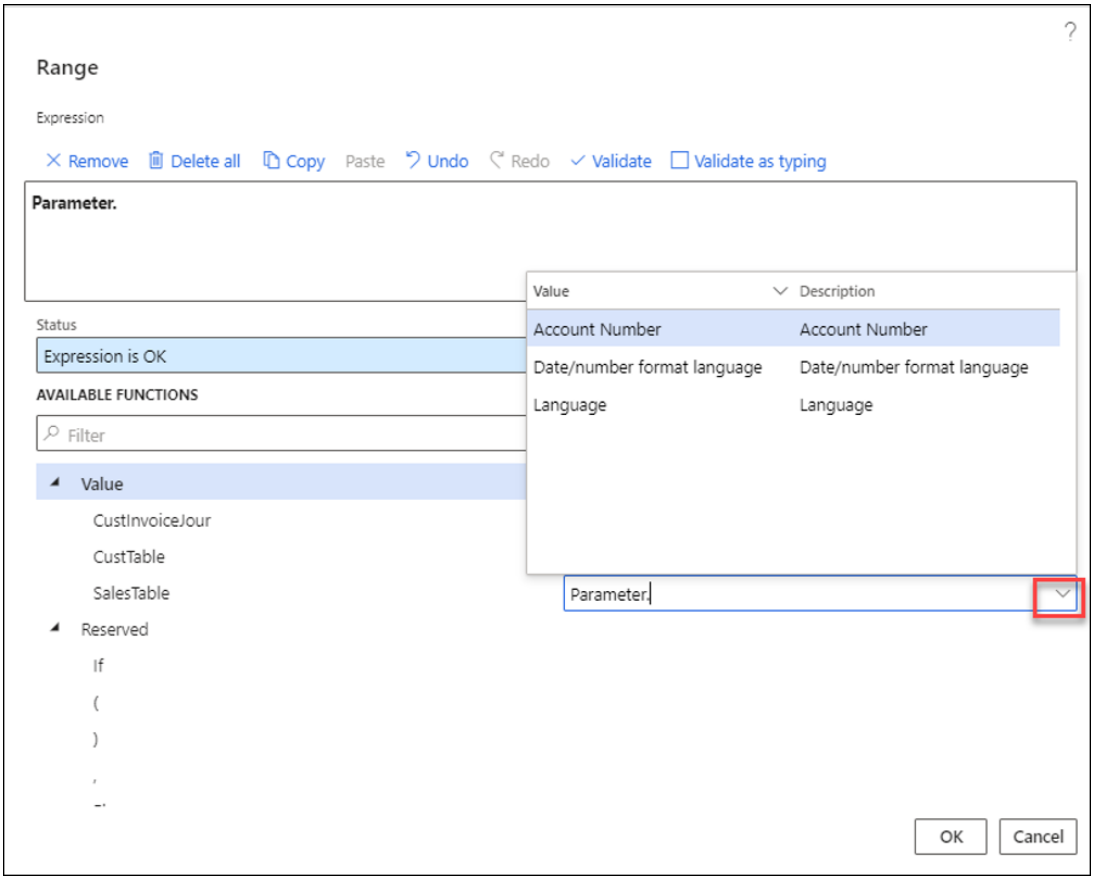
3. Scroll to the right and select the **Expression Editor** button.



The expression editor will open.

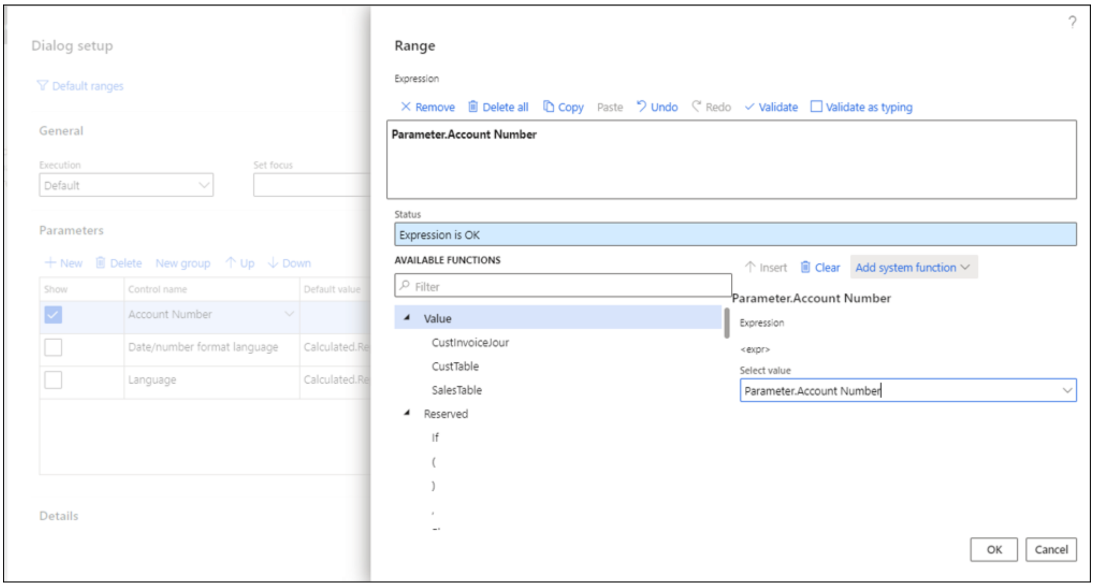
4. In the **Selected value** field, click the dropdown and select **Parameter**.

5. Click the dropdown again and you will now see all the **Dialog Parameters** available for selection.

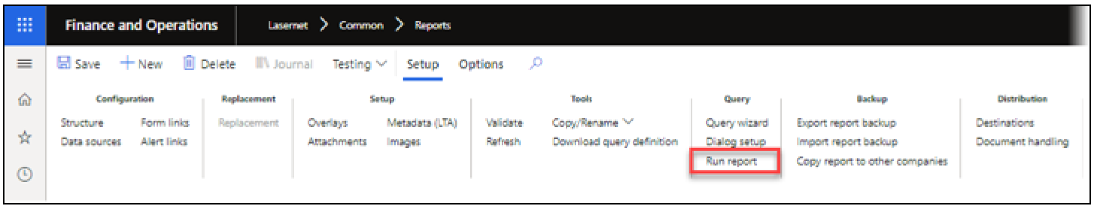


6. Select the new parameter and click **Ok** to close the expression editor.

7. Click **Ok** in the **Dialog setup** to close the **Dialog setup**.

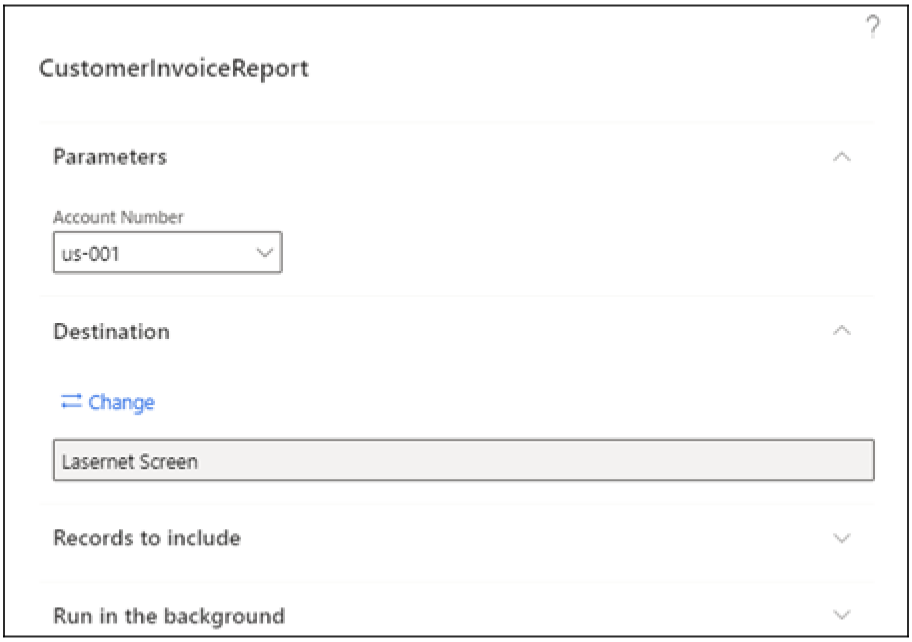


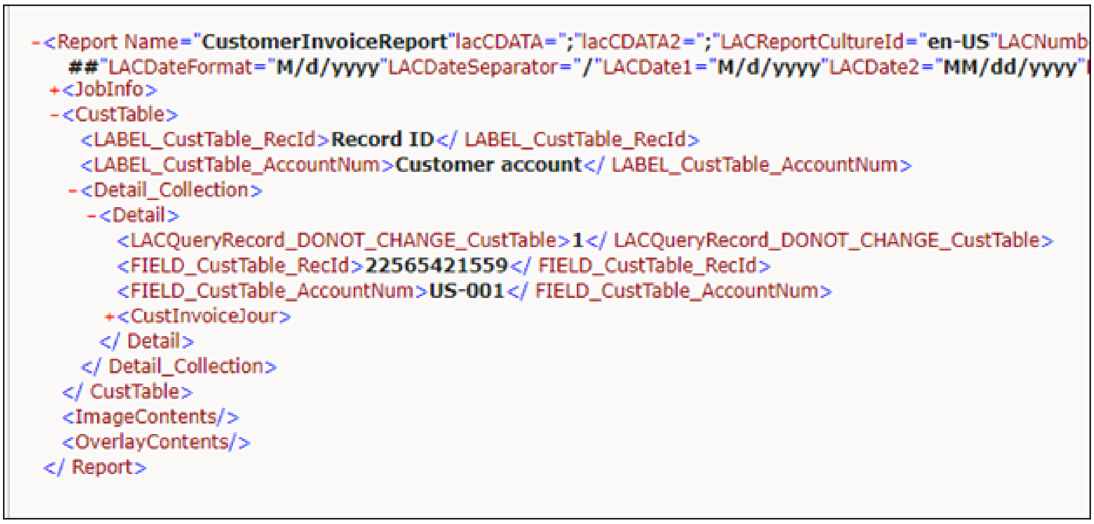
8. On the action pane click **Run report**.



You will now see the new parameter. You can type in a value before selecting **Ok** to run the report.

The report will run, using the value you have entered in the dialog as a filter on the corresponding table.



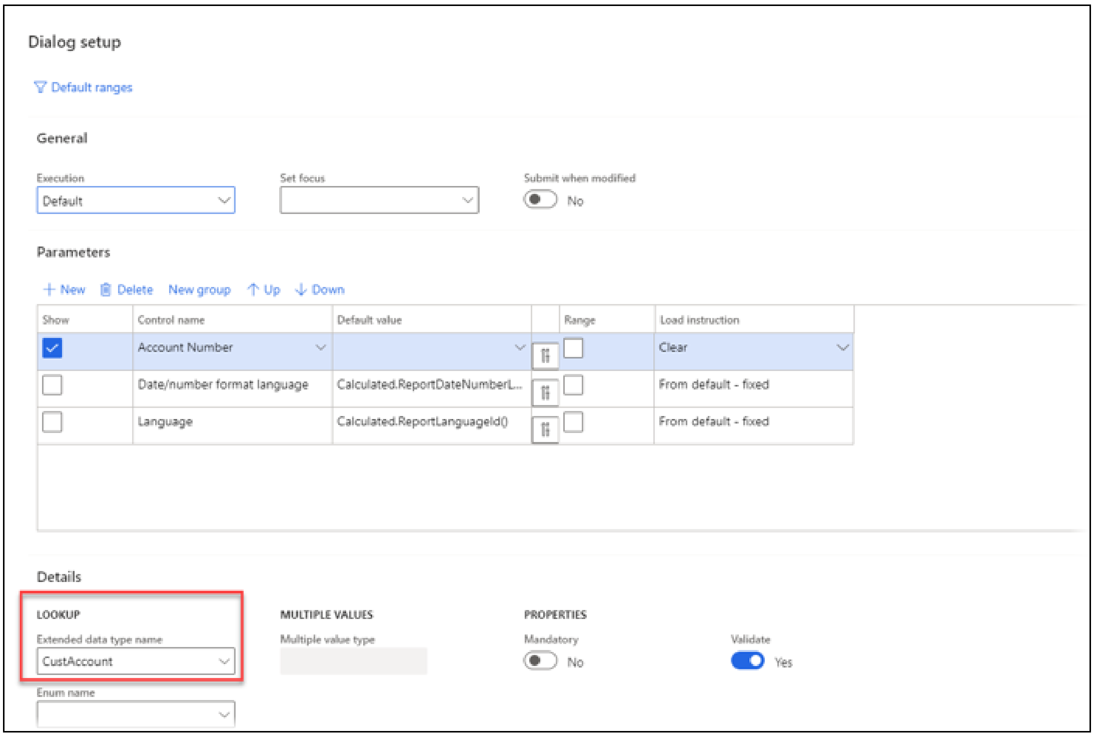


Use Extended data type

To use the Extended data type, follow these steps:

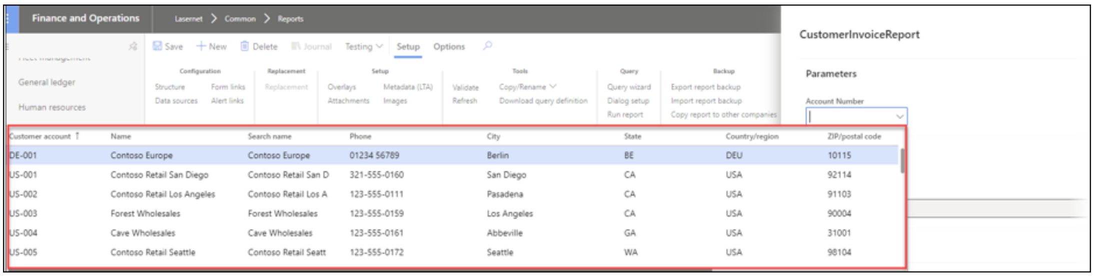
1. Open the **Dialog setup** again and select the new parameter.

2. In the **Details** fast tab, open the dropdown for **Extended data type** name, select **CustAccount** and click **Ok**.



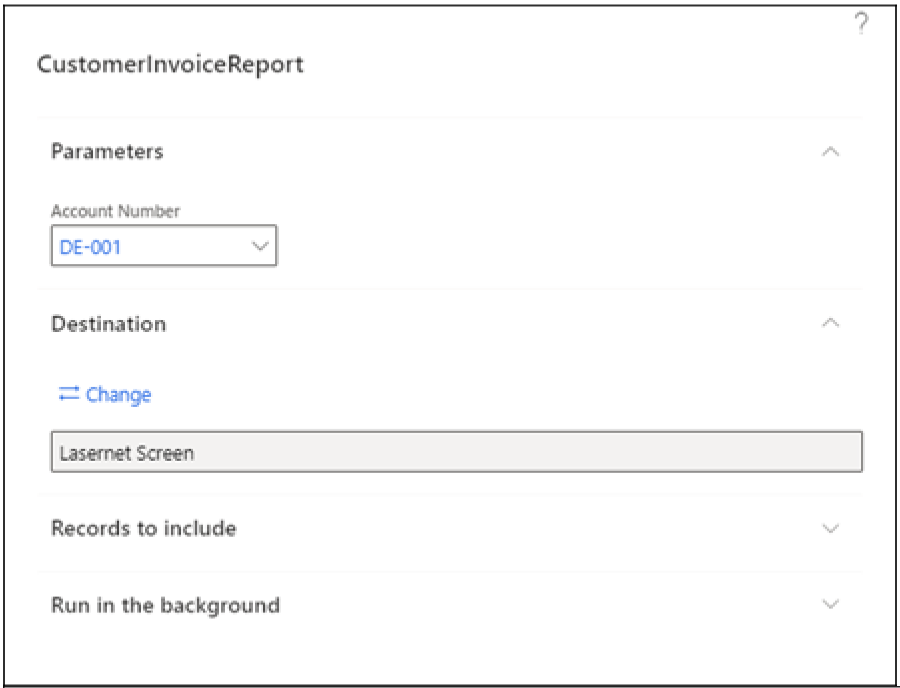
3. On the action pane click **Run report**. The dialog will appear.

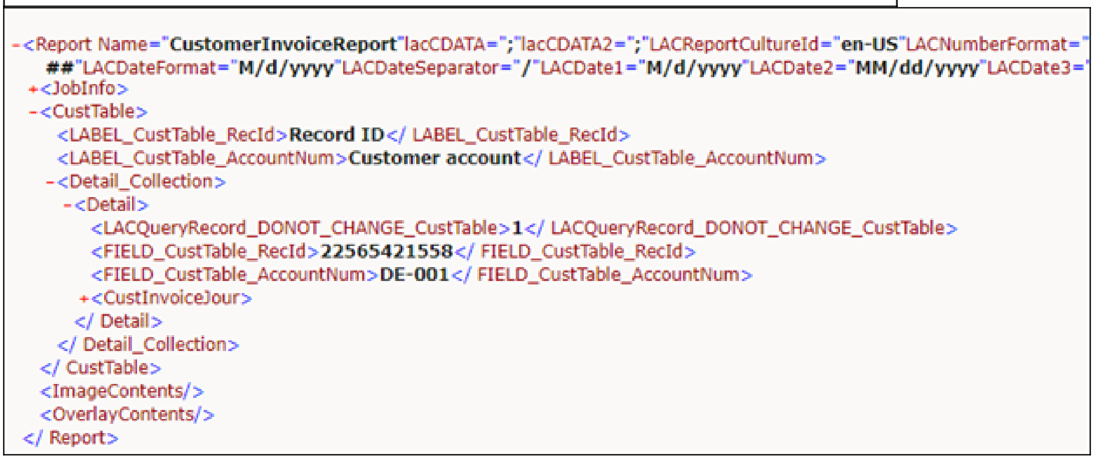
4. Select the dropdown arrow for the **Parameter** and you will now see a selection of Account numbers in the system.



5. Select a value from the dropdown and click **Ok** to run the report.

The report will run using the value you have selected in the dialog as a filter on the corresponding table.





Use custom Enum fields and Single Select

You can customize the dropdown list the user sees on a dialog setup by using custom enum fields. To use the custom Enum fields, follow these steps:

1. Open the **Dialog setup** again and select the parameter.

2. In the **Details** fast tab, ensure the **Extended data type** and **Enum name** are blank as we will create custom Enum fields.

3. On the **Default Value,** define your custom enum fields by typing in each field in the following format: [Name]#[Value] Where the name is the field option the user will see and select. And the value is the value the name represents.

In the image below we have the customer account name as the Name and the account number as the value. Each option is separated by a comma.

4. Define the **Multiple value type**. Select **Single select** to limit the user to selecting one value and click **Ok**.

5. On the action pane click **Run report**. The dialog will appear.

6. Select the dropdown arrow for the **Parameter** and you will now see a selection of the Account number values you defined in the Dialog setup.

7. Select a value from the dropdown and click **Ok** to run the report.

The report will run using the value you have selected in the dialog as a filter on the corresponding table.

Use 'Multiple values' field

In the previous section, we used custom Enum fields with **Multiple value type Single select**. **Multi-select** allows the user to select more than one option.

To use the custom Multi-select, follow these steps:

1. Open the **Dialog setup** again and select the parameter.

2. In the **Details** fast tab, set the **Multiple value type** to **Multi-select** and click **Ok**.

3. On the action pane click **Run report**. The dialog will appear.

4. Select the dropdown arrow for the **Parameter** and you will now see a selection of the Account number values you defined in the Dialog setup with the option to select multiple values.

Select multiple values and **Ok** to run the report.

5. The report will run using the value you have selected in the dialog as a filter on the corresponding table.

Use a Range and System functions

You can use user input to filter on a range of values for your report. For example, when running a report on a date range. It is also possible to filter on a **UtcDateTime** field value using System methods.

To achieve this by using system methods and the expression editor, follow these steps:

1. Open the **Dialog setup** and add two new parameters. One for the From

date and one for the To date.

2. Add an extended data type name for each of the newly added parameters. Use FromDate for the From parameter and ToDate for the To parameter.

3. Select **Default Ranges** and add the table and relevant date field that will be filtered. Open the expression editor.

4. Add the following system functions unless they already exist. Select **Add system function** and find the Class name and Method Name and click **Ok** to add these to the list of available functions:

- Global:: datetobeginUtcDateTime(..)

- Global:: datetoendUtcDateTime(..)

- DateTimeUtil:: getUserPreferredTimeZone(..)

5. Create the following expression: datetobeginUtcDateTime (Parameter.From , getUserPreferredTimeZone( ))+ ".." + datetoendUtcDateTime (Parameter.To ,getUserPreferredTimeZone ( ))

Warning

Results may vary depending on whether a user time zone is specified or not.

6. Click **Ok** to save changes and close out of the Dialog setup. On the action pane click **Run report**. The dialog will appear.

7. Select the calendar icon and you will now see the option to select a date. Populate the From and To parameters and run the report.

8. The report will run using the values you have selected in the dialog as a filter on the corresponding tables.

Warning

When running the report an error is thrown back: “Error in Query wizard - Lasernet can't display SQL call that has expression in it and throws an error.”

This is just a display error, not a functional error.