

User Manual

Aptean Food and Beverage ERP

Report Data Designer

Product Documentation



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Release notes

Article • 7/8/2026 • 1 min read

To view what's new or changed in each release of the Aptean Report Data Designer extension, select the specific release version.

Date	Release version	Description
July 2026	2602.1.330587	Stability release
June 2026	2602.1.0.0	Minor release
April 2026	2602.0.0.0	Major release
March 2026	2601.1.0.0	Stability release
January 2026	2601.0.0.0	Feature release
October 2025	2501.0.0.0	Initial release



2602.1.330587

Release Note • 7/8/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
382043	An error occurs when deploying a report from Report Data Designer, because the generated app package contains a duplicate XML declaration that Business Central rejects, preventing report deployment.



2602.1.0.0

Release Note • 6/24/2026 • 2 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
371510	The system fails to validate the Filter Value field value against unsafe content before including it in generated AL code, which could allow invalid values to affect the output of the generated report extension.
367209	The system does not check whether the applications containing the tables used in the report data design are listed as app dependencies when executing the Validate Report Design action, causing deployment to fail with missing dependency errors even after validation passes.
370788	An error occurs when filtering on multiple option values using a pipe separator in the Filter Value field for option and enum type fields, because the system treats the entire pipe-separated string as a single value instead of recognizing individual options.
370575	An error occurs when running a deployed report that includes Media , MediaSet , or Blob type fields, because the system generates incorrect variable declarations for image-type fields, causing the report to fail at runtime.
375341	An error occurs when deploying any report from Report Data Designer after a version upgrade. The generated package files contain an invalid XML declaration that Business Central rejects, preventing report deployment.



2602.0.0.0

Release Note • 4/22/2026 • 3 min read

Features

With the features added in this release of the Aptean Report Data Designer extension,

- You can copy a complete report data design set including its hierarchical tables, field configurations, filters, and relational logic to create a new independent dataset, with the option to also duplicate associated report profiles. For more information, see [Copy a report data design set](#).
- You can receive intelligent join suggestions when adding table relationships in the report data designer, with a tiered suggestion engine that analyzes Business Central table relations metadata, primary key and naming convention patterns, and heuristic field similarity to recommend appropriate join fields ranked by confidence level. For more information, see [Configure table relationships with suggested joins](#).
- You can publish RDD-generated reports directly to specific page actions and menu paths within Business Central, configuring target pages, menu groups, action captions, and parameter bindings through a dedicated publishing page on the report profile. For more information, see [Publish a report to a menu path](#).
- You can configure report layout assignments at the item, item category, and item variant levels for batch worksheet and production output item label usages through the new **Document Layouts** action on item cards, item category cards, and item variant pages. For more information, see [Configure item report layouts](#).
- You can assign report layouts at the production scenario level through the new **Document Layouts** action on the **Item Production Scenarios** page, controlling which batch worksheet and production output item label reports and layouts are used for released production orders that reference a specific scenario. For more information, see [Configure production scenario report layouts](#).
- The system automatically resolves the correct report layout when printing batch worksheets and production output item labels by traversing a five-level priority hierarchy — production scenario, item + variant, item, item category (with parent category walk up to 10 levels), and BC report selection — so that the most specific layout configuration is always used without manual intervention. For more information, see [Configure item report layouts](#).

UI/UX changes

The following UI/UX changes have been made in this release.

- The **APT Item Document Layouts** page has been added.
- The **APT Production Scenario Document Layouts** page has been added.
- The **Copy** action has been added to the **Report Data Design List** and **Report Data Design Card** pages.



- The **Publish to Menu Path** action has been added to the **Report Profile Card** page.
- The **Document Layouts** action has been added to the **Item Card**, **Items** list, **Item Category Card**, and **Item Categories** list pages.
- The **Document Layouts** action has been added to the **Item Production Scenarios** page.
- The join suggestion panel has been added to the table relationships area of the **Report Data Design Card** page.



2601.1.0.0

Release Note • 3/25/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
363242	The system incorrectly displays the caption for the Calculated Fields field on the Report Data Designer card page.



2601.0.0.0

Release Note • 1/28/2026 • 4 min read

Features

With the features added in this release of the Aptean Report Data Designer extension, you can:

- Configure report profiles setup including number series for automatic profile and version numbering and set default rounding methods for calculations through the **Report Profiles Setup** page. For more information, see [Configure report profiles setup](#).
- Organize report profiles into meaningful groups using profile categories based on their intended use, such as Regulatory, Internal, or R&D reporting. For more information, see [Manage profile categories](#).
- Create and manage report profiles with versioning and status workflow using the **Report Profiles** and **Report Profile Card** pages to customize report presentation for different audiences, customers, or regulatory requirements without modifying the underlying report design. For more information, see [Manage report profiles](#).
- Configure field-level override rules with multiple transformation modes including text replacement, range display, threshold comparison, and field omission. For more information, see [Configure profile rules value override modes](#).
- Configure field-level override rules through the profile rules tree-grid interface. For more information, see [Configure profile rules](#).
- Configure report request pages to dynamically display profile selection fields enabling real-time profile application at report runtime. For more information, see [Configure report request](#).
- Implement proof-of-concept profile application workflows by demonstrating end-to-end functionality from profile setup through report generation. For more information, see [Implement profile POC workflows](#).
- Configure field properties including custom captions, formatting options, and field usage specifications to control how fields are displayed and used in your reports. For more information, see [Manage report data designer](#).
- Validate field selections to ensure all selected fields are compatible with the report structure and AL code generation requirements. For more information, see [Validate field selections](#).
- Select fields from multiple tables for report inclusion, controlling which data appears in your report output and ensuring only relevant fields are included. For more information, see [Manage report data designer](#).
- Create custom formulas for calculated fields using AL expression syntax, with validation to ensure formula correctness and prevent invalid operations. For more information, see [Manage report data designer](#).



- Define calculated fields with standard aggregation functions (sum, average, count, min, max) to display aggregated values in your reports. For more information, see [Manage report data designer](#).
- Configure static filters for report data items to limit the data retrieved based on predefined criteria, including filter operators and values. For more information, see [Configure static filters](#).
- Specify request filter fields that allow end users to filter report data at runtime, providing flexibility in what data appears in each report execution. For more information, see [Configure request filter fields](#).
- Define sorting fields and direction to control the order in which records appear in your report, supporting multi-level sorting for complex data organization. For more information, see [Manage report data designer](#).
- Validate report designs and generate AL code from configured report data designs, transforming user configurations into executable AL report objects. For more information, see [Validate and generate report code](#).
- Package and deploy report extensions directly to your Business Central environment or download extension packages for manual deployment to other environments. For more information, see [Deploy report extensions](#).

UI/UX changes

The following UI/UX changes have been made in this release.

- The following pages have been added.
 - Profile Categories
 - Report Profiles
 - Report Profile Card
- The following actions are added to the **Report Data Design Card** page.
 - Build and Deploy App Package
 - Build and Download App Package
 - Run Report
 - Extension Deployment Status
 - Request Filter Fields
 - Validate Report Design
 - Generate Report Code
- The following fields have been added to the **Report Data Designer Fields** page.
 - Custom Caption
 - Field Format
 - Filter Value



- Operator
- Sorting Direction



2501.0.0.0

Release Note • 10/22/2025 • 3 min read

Features

With the features added in this release of the Aptean Report Data Designer extension,

- You can assign custom aliases to tables included in a report, and these are displayed in the report structure view, alongside the table names.
- You can define parent-child relationships between tables when building report structures. Additionally, the system validates defined relationships to ensure data consistency and logical correctness.
- You can select multiple tables when defining a report structure. This feature provides greater flexibility in report creation by enabling you to combine data from related sources into a single comprehensive report.
- You can create custom formulas for calculated fields within your reports. This feature allows you to perform advanced calculations beyond standard functions, enabling tailored data analysis and in your reports.
- You can define calculated fields using standard aggregation functions. This feature simplifies data analysis by automatically computing totals and averages within reports, allowing you to derive insights without manual calculations.
- You can configure field properties such as captions and formats to make reports more readable and user-friendly. This feature allows you to rename fields with meaningful captions and apply appropriate formats.
- You can select specific fields from tables to include in your reports, ensuring that only relevant data is displayed. This feature allows you to choose multiple fields, customize your report content, and focus on key business insights.
- The system automatically validates selected fields to ensure compatibility with report requirements. This feature helps prevent configuration errors by identifying incompatible data types and confirming valid selections before report generation.
- You can define sorting fields for your report data, allowing you to organize information in a clear and meaningful order. This feature lets you choose one or more fields and specify ascending or descending order to control how data appears in the final report.
- You can define static filters for each data item in your report, ensuring that only relevant data is displayed based on predefined criteria. This feature allows you to set and save filters, which the system applies automatically whenever the report is generated. If an invalid filter is used, the system provides a clear error message to guide you in correcting it.



- You can specify request filter fields at runtime, allowing you to dynamically adjust the data displayed in your report. This feature enables you to select filter fields, define filter criteria, and modify them before generating the report, ensuring that the output is tailored to your immediate needs. If no data matches the selected filters, the system displays a error message to indicate this.
- You can deploy and manage Business Central report projects via a Web API, streamlining app packaging and deployment. The system generates all necessary files including app.json, launch.json, and report files and organizes them into a structured project folder, which can then be zipped and sent through the Web API.
- You can set up report data design through the **Report Data Designer Setup** page to define parameters required for accessing the Web API and other report data design functionality. For more information, see [Set up report data designer](#).

For more information, see [Manage report data designer](#).



Introduction

Article • 11/24/2025 • 2 min read

The Apteian Report Data Designer (RDD) extension is an advanced, user-centric solution that helps you to create, configure, and deploy custom reports without requiring AL development expertise. It supports in building tailored business reports efficiently and cost-effectively while maintaining adherence to AL coding standards and best practices.

With this extension, you can visually design reports by defining data structures, selecting fields, and configuring relationships, filters, and sorting options through an intuitive interface. The system then automatically generates the required AL code and packages the report as a Business Central extension for direct deployment.

The Apteian Report Data Designer extension is designed for various roles across the organization:

- Sales Managers: To create detailed customer and sales analysis reports.
- Financial Controllers: To produce financial and budget variance reports.

Additionally, this extension can be used by business analysts, operational managers, and other functional users who require customized reporting.

The key benefits of using this extension are:

- No-Code Report Development: Design and generate complete AL report objects directly within Business Central, without any coding.
- Flexible Field Management: Select and configure fields, captions, and formats; control visibility; and assign usage (display, filter, sorting, request filter).
- Advanced Data Operations:
 - Define static and dynamic filters for runtime data refinement.
 - Configure multi-level sorting options for structured report output.
 - Create calculated fields using aggregation functions or custom formulas.
- Seamless Deployment: Package the generated report as a Business Central extension (.app file) and deploy directly to the target environment or download for manual installation.

Understanding your responsibilities

The Report Data Designer supports powerful, custom multi-table datasets that have the potential to materially affect runtime performance. You should always design reports with performance in mind and validate them in a sandbox before production. Exported reports must be managed by you. After every Business Central or Apteian update, you are responsible for testing your reports and making any required adjustments to ensure they remain compatible with the system.



Setup

Article • 2/2/2026 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up report data designer](#)
- [Configure report profiles setup](#)



Manage permission sets

Article • 10/22/2025 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

Users with this permission set can perform specific actions directly without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *RDD202FDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets and typically involves additional conditions or approvals before an action can be completed.

The indirect permission set ID for this extension is *RddbASIC202FDW*.

User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see

[Assign permissions to users and groups](#).

Assign a permission set

1. Select the Search icon , enter **Users**, and then choose the related link.

The **Users** list page opens.

2. Navigate to the username for which you want to assign the permission set and select it.

The **User Card** page opens.

3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.

The associated fields are automatically updated based on the entered value. The user has the necessary



permissions to use the features of the the Aptean Report Data Designer extension, ensuring secure and role-based access.



Set up report data designer

Article • 10/22/2025 • 1 min read

The **Report Data Designer Setup** page allows you to define global configuration parameters required to manage report data designs.

To set up the report data designer, follow these steps:

- 1. Navigate to the **Report Data Designer Setup** page.
- 2. Enter the required information in the following fields to set up data for a report:

Field	Description
Default ID Range From	Enter the starting number for the report object ID range. The system uses this value as the lower limit when automatically assigning IDs to newly created report designs.
Default ID Range To	Enter the ending number for the report object ID range. The system uses this value as the upper limit when automatically assigning IDs to report designs.
Default Publisher	Enter the name of the publisher that should be automatically assigned to generated report extensions.

The report data designer setup is complete.

The system applies these configurations automatically to all new report designs created using the report data designer feature. You can update the ID range or publisher details later if necessary.



Configure report profiles setup

Article • 2/2/2026 • 2 min read

The **Report Profiles Setup** page lets you configure report profile settings, including number series for automatic profile and version numbering and default rounding methods for calculations.

To configure report profiles, follow these steps:

1. Select the Search icon  , enter **Report Data Designer Setup**, and then choose the related link.
The **Report Data Designer Setup** page opens.
2. Configure the number series fields:
- | Field | Description |
|----------------------------|---|
| Profile ID No. Series | Select the number series used for automatic profile ID assignments. When creating new profiles, the system uses this series to generate unique identifiers (e.g., PROF-000001). |
| Profile Version No. Series | Select the number series used for automatic version numbering. When creating new profile versions, the system uses this series to generate version identifiers (e.g., PROF-VER-000001). |
3. In the **Default Rounding Method** field, select the rounding method to apply by default to all profile calculations.
The available options are:
- *Nearest*: Rounds to the nearest value.
 - *Up*: Always rounds up.
 - *Down*: Always rounds down.

 **Note**

Individual profile rules can override the default rounding method. If left blank, no default rounding is applied.

7. Select **OK** to save the setup.

 **Important**

If no number series are configured, the system displays an error when you attempt to create a new profile.
Ensure both number series are properly configured before creating profiles.



Manage report data designer

Article • 2/2/2026 • 5 min read

The **Report Data Designer List** page displays all report data designs created. This list provides an overview of existing report definitions along with key identifying details such as code, description, and assigned report ID. From this page, you can create new report designs, edit existing ones, or open the card page to define detailed report structures, data items, and relationships.

To design reports, follow these steps:

1. Select the Search icon , enter **Report Data Designer List**, and then choose the related link.
The **Report Data Designer List** page opens.
2. On the action bar, select **New** to create a report data design. The **Report Data Design Card** page opens.
3. On the **General** FastTab, enter the required information to define the report in the following fields:

Field	Description
Code	Enter the unique identifier for the report data design.
Description	Enter the purpose or content of the report.
Report Name	Enter the name of the report to be displayed when it is executed.
Usage Category	Select the purpose or usage type of the report. The available options are: <i>None, ReportsAndAnalysis, Documents, Lists, Tasks, Administration.</i>
Application Area	Enter the application area where this report design can be used.
Modified At	Specifies the date and time when the report design was last modified.
Modified By	Specifies the user who last modified the report design.

4. Enter the required details of the extension and relevant version information in the following fields:

Field	Description
App ID	Specifies the unique system-generated identifier for the extension.
App Name	Enter the name of the app that contains the report design.
Publisher	Enter the name of the user who created the app.
Report ID	Select the unique numeric identifier assigned to the report.



ID Range From	Enter the ID range to begin with the report objects used in the app. This value should be equal or greater than the Report ID field value.
ID Range To	Enter the ID range to end the report objects used in the app. This value should be greater than the ID Range From field value.
Version Major	Enter the major version number of the report extension.
Version Minor	Enter the minor version number of the report extension.
Version Build	Enter the build number, generally incremented during each build iteration.
Version Revision	Specifies the revision number, used for minor fixes or revisions to the same build.

5. On the **Report Design Tables Used** FastTab, enter the required details to define the tables used to build the report data design and how they relate to one another in the following fields:

Field	Description
Table No.	Select the ID of the table used in the report.
Table Name	Specifies the name of the table and its fields used in the report to display.
Indentation Level	Enter the number in the hierarchical level of the fields to be displayed in the report. You can also execute the Indent action to update the indent number in an incremental order.
Parent Table Name	Specifies the name of the parent, relevant to the Table Name field value. The system updates this field value when you execute the Indent action.
Alias	Enter the alias used for the table in the report design.
Base Record	Select this checkbox to define the corresponding Table Name field value as the base record for the report data structure.
Filter String	Specifies the filters to apply. You can select this field value or execute the Filter Fields action to filter fields on the Report Data Designer Fields page.
Include in Report	Select this checkbox to define whether data from the table is included in the report output.
Sorting	Specifies the sorting order of records to apply. You can select this field value or execute the Sorting Fields action to sort fields on the Report Data Designer Fields page.
Request Filter Fields	Specifies the list of the fields available for user-defined filters when running the report. You can select the field value or execute the Request Filter Fields action to filter fields on the Report Data Designer Fields page.



Custom Caption	Enter a custom caption to override the default field caption on the Report Data Designer Fields page.
Field Format	Select the format to apply to the field value on the Report Data Designer Fields page. The available options are: • <i>None</i>: No special formatting. • <i>Date</i>: Format as date. • <i>Time</i>: Format as time. • <i>DateTime</i>: Format as date and time. • <i>Decimal</i>: Format as decimal number.
Sorting Direction	Select the sorting order on the Report Data Designer Fields page. The available options are: • - <i>Ascending</i>: Sort from lowest to highest (A to Z, 0 to 9). • - <i>Descending</i>: Sort from highest to lowest (Z to A, 9 to 0).
Select Fields	Select the checkboxes for the fields you want to include on the Report Data Designer Fields page.

6. On the action bar, execute the following actions as required:

Action	Description
Select Multiple Tables	Opens the Select Tables for Report page and follow the instructions to select the tables you want to include in your report.
Output Fields	Opens the Report Data Designer Fields page to manage the output fields for the report table.
Calculate Fields	Opens the Report Design Calculated Fields List page to define calculated fields (example, for total or subtotal), calculation type, source field, and custom formula for this report table.
Table Relations	Opens the Report Design Table Relations page and to define the table relationships between the table and the base record.
Outdent	Updates the Indentation Level field value in the decremental order.
Validate Relationships	Validates the table relationships and indentation levels defined in the table.
View Hierarchy	Opens the Report Design Tables page and view the table in the order of indentation.



- On the **App Dependencies** FastTab, on the action bar, select **Select Dependencies**. The **Select Dependencies for Report** page opens.
- Select the extensions on which the report depends and then select **Close**. The system updates the details of the dependent extensions in the following fields:

Field	Description
Dependency App ID	Specifies the ID of an extension on which the report depends.
Dependency Name	Specifies the name of the dependent extension.
Dependency Publisher	Specifies the publisher of the dependent extension.
Dependency Version	Specifies the version of the dependent extension used in the report design.

You have configured all the datasets required to generate the report.

Additionally, you can execute the following actions on the header:

Action	Description
Validate Report Design	Validates the structure of the report data design to ensure it is completely set up.
Generate Report Code	Generates AL code for the report design based on defined tables and fields.
Build and Deploy App Package	Builds an app package from the report design and deploys it.
Build and Download App Package	Builds an app package from the report design and downloads it. Note that the downloaded app package can be used by others (by executing the Extension Deployment Status action and uploading it to their environment) to have the same report design in their environment.
Run Report	Runs the generated report in the current environment. You can then preview and print the report.
Extension Deployment Status	Opens the Extension Installation Status page to view deployment information and also uploads the downloaded app related to report.

Create custom formulas

To create a custom formula for a calculated field, follow these steps:



1. On the **Report Data Design Card** page, on the **Report Design Tables Used** FastTab, select the table line for which you want to add calculated fields.
2. On the action bar, select **Calculate Fields**.
The **Report Design Calculated Fields List** page opens.
3. On the action bar, select **New** to create a calculated field.
4. In the **Field Name** field, enter a unique name for the calculated field.
5. In the **Field Caption** field, enter a descriptive label for the calculated field.
6. In the **Calculation Type** field, select *Custom Formula*.
7. In the **Formula** field, enter the custom formula using supported AL syntax.
8. Select the **Include in Report** checkbox to include the calculated field in the report output.
9. Select **OK** to save the calculated field.

Note

The system validates custom formulas and displays errors if:

- Invalid AL syntax is used.
- Referenced fields do not exist or are not accessible.
- Invalid operators are applied to field types (for example, multiplication on text fields).
- Filter expressions contain invalid comparisons.

Define calculated fields with aggregation functions

To define calculated fields with aggregation functions, follow these steps:

1. On the **Report Data Design Card** page, on the **Report Design Tables Used** FastTab, select the table line for which you want to add calculated fields.
2. On the action bar, select **Calculate Fields**.
The **Report Design Calculated Fields List** page opens.
3. On the action bar, select **New** to create a calculated field.
4. In the **Field Name** field, enter a unique name for the calculated field.
5. In the **Field Caption** field, enter a descriptive label for the calculated field.
6. In the **Calculation Type** field, select the aggregation function.

The available options are:

- *Sum*: Calculates the total of values in the specified source field.
- *Average*: Calculates the average of values in the specified source field.
- *Count*: Counts the number of records.
- *Min*: Finds the minimum value in the specified source field.
- *Max*: Finds the maximum value in the specified source field.



7. In the **Source Field** field, select the field to use for the calculation.

 Note

The **Source Field** field is not applicable for *Count* operations.

8. Select the **Include in Report** checkbox to include the calculated field in the report output.

9. Select **OK** to save the calculated field. > [!Note] > You can repeat these steps to add multiple calculated fields to your report tables.



Manage customer report layout

Article • 10/22/2025 • 3 min read

You can assign a layout on the **Customer Report Layout** page that defines how the report appears when printed or exported after you create a report data design and deploy it via the **Report Data Design Card** page. You can use either a Word or an RDLC layout, depending on your organization reporting requirements.

To assign a layout for the reports, follow these steps:

- 1. Select the Search icon , enter **Customer Report Layout**, and then choose the related link. The **Customer Report Layout** page opens with all available report layouts in the environment.

Field	Description
Report ID	Specifies the ID assigned during the layout creation.
Report Name	Specifies the name of the report.
Description	Specifies the text describing the layout or its purpose. You can edit this text according to your requirements.
Built-In	Specifies whether the layout is built-in or not.
Type	Specifies the layout format, either <i>Word</i> or <i>RDLC</i> .

- 2. On the action bar, select **New > Copy** to make a copy of the selected report.
- 3. On the action bar, select **New** to create a report layout. The **Insert Built-in Layout for a Report** page opens.
- 4. On the **Insert Built-in Layout for a Report** page, enter the required information for the following fields:

Field	Description
Report ID	Select the ID of the report you want to associate a layout with.
Report Name	Specifies the name of the report linked to the selected Report ID field value.
Insert Word Layout	Turn on this toggle if you want to insert a word layout for the report.
Insert RDLC Layout	Turn on this toggle if you prefer an RDLC (Report Definition Language Client-side) layout for advanced visual structuring.



 Note

You can use both Word and RDLC layout types for the same report if you want to offer multiple rendering options.

5. Select **OK** to create the layout.

The system displays the layout on the **Custom Report Layouts** page.

The customer report layout is set up.

Additionally, you can execute:

- The **Run Report** action to test the report.
- The **Update Layout** action to update specific report layouts.
- The **Import Layout** and **Export Layout** actions to import and export the world files, respectively.
- The **Migrate to System Layouts** action to migrate the selected custom report layouts to system layouts.



Manage profile categories

Article • 2/2/2026 • 2 min read

Profile categories allow report profiles to be organized into meaningful groups based on their intended use, such as Regulatory, Internal, or R&D reporting. To manage profile categories, follow these steps:

- 1. Select the Search icon , enter **Profile Categories**, and then choose the related link.
The **Profile Categories** list page opens.
- 2. On the action bar, select **New** to create a new profile category.
- 3. Enter the required information to define the category in the following fields:

Field	Description
Code	Enter a unique category code (up to 10 characters). For example, enter <i>QC</i> for Quality Control or <i>REG</i> for Regulatory submissions.
Description	Enter a descriptive name for the category (up to 100 characters). Use clear terminology that describes the category's purpose.

- 4. Select **OK** to save the categories.



Manage report profiles

Article • 2/2/2026 • 2 min read

The **Report Profiles** page lists all report profiles defined in the system and provides actions to create and manage them. From this page, profiles can be created, copied, published, versioned, and archived to control their lifecycle and availability.

To manage report profiles, follow these steps:

1. Select the Search icon , enter **Report Profiles**, and then choose the related link.
The **Report Profiles** page opens.
2. Select **New** on the action bar to create a new profile.
The **Report Profile Card** page opens.
3. Enter the required information to define the profile in the following fields:

Field	Description
Profile ID	Specifies the unique identifier automatically assigned using the configured number series. If no number series is configured in the Report Data Designer Setup page, an error displays prompting you to configure the required number series before continuing.
Profile Name	Enter a descriptive name for the profile (up to 100 characters).
Report Data Design Code	Select the RDD report design this profile applies to. Once selected, the Report Data Design Description field automatically fills in with the report name.
Report Data Design Description	Specifies the description of the selected report design. This field value automatically populates when you select a report design code.
Profile Category	Select a category to organize the profile.
Version	Enter the version number for this profile.
Effective Date	Enter the date when this profile version becomes active. Profiles with effective dates in the future will not be applied until that date passes.
Status	Select the profile status. The available options are: • <i>Draft</i>: Profile is being developed. • <i>Published</i>: Profile is active and can be used. • <i>Inactive</i>: Temporarily disabled.



- *Archived*: Retained for historical purposes.

Only published profiles can be selected when running reports.

4. On the **Report Profile** card page, expand the **Profile Rules** section to configure field overrides and consolidations.

 Note

Profile rules define how individual report fields are transformed during report execution. See [Configure profile rules[(Configure-Profile-Rules.md)]] for detailed steps on setting up field-level overrides, consolidation logic, and rounding methods.

5. When the profile configuration is complete and ready for use, select **Publish Profile** on the action bar to change the profile status to *Published*. Profile is available for selection when you run the associated report. Additionally, you can execute the following actions on the header:

Action	Description
Copy Profile	To create a duplicate of the selected profile.
Publish Profile	To change the profile status to <i>Published</i> .
Archive Profile	To change the profile status to <i>Archived</i> .
Create Profile Version	To create a new version of the profile.

 Note

You can view all profiles for a specific report design by selecting the **Profiles** action on the **Report Data Design Card** page.



Configure profile rules value override modes

Article • 2/2/2026 • 2 min read

Field-level override rules can be configured with multiple transformation modes, including text replacement, range display, threshold comparison, and field omission. To configure profile rules value override modes, follow these steps:

1. Select the Search icon , enter **Report Profiles**, and then choose the related link.

The **Report Profiles** page opens.

2. Open the report profile you want to configure.
3. On the **Report Profile Card** page, expand the **Profile Rules** section.
4. Select the field rule you want to configure.
5. In the **Override Mode** field, select the transformation type.

The available options are:

- *Text*: Replace field value with custom text.
- *Range*: Display range of values (from-to format).
- *Threshold*: Apply conditional logic based on numeric thresholds.
- *Omit*: Exclude field from report output.

Note

Configure the mode-specific parameters based on your selected override mode.



Configure profile rules

Article • 2/2/2026 • 2 min read

You can configure field-level override rules using the tree-grid interface to customize the data appearance on the reports. To configure profile rules, follow these steps:

1. Select the Search icon , enter **Report Profiles**, and then choose the related link.
The **Report Profiles** page opens.
2. Select the report profile you want to configure.
3. On the **Report Profile** card page, expand the **Profile Rules** section.
4. To add a new rule, on the action bar, select **New**.
5. In the **Field Name** field, select the field you want to apply a rule to.
6. Configure the rule parameters based on your requirements.
7. Select the **Active** checkbox to enable the rule.



Configure report request

Article • 2/2/2026 • 4 min read

The **Report Request** page can be configured to dynamically display profile selection fields, enabling real-time profile application at report runtime. To configure report request pages, follow these steps:

1. Select the Search icon  , enter the name of the report you want to configure, and then choose the related link.
2. On the action bar, select **Print** or **Preview** to open the report request page.
3. In the **Profile Selection** field, select the report profile you want to apply.
The profile dropdown displays only profiles compatible with the current report.
Configure any additional report parameters as needed.
4. On the action bar, select **Print** or **Preview** to generate the report with the selected profile.

Print report with profiles

You can print reports using selected profiles from the report request pages, enabling different data to be printed based on the chosen profile by applying field-level transformations, omitting fields not included in the profile, and printing default values when no profile is selected. To print a report with a profile, follow these steps:

1. Open the RDD report you want to print (e.g., Certificate of Analysis).
2. On the **Report Request** page, in the **Report Profile** field, select the profile you want to apply.

Note

The lookup displays only Published profiles that are linked to the current report design. If no profiles exist or none are published, the field is not available.

3. Configure any additional report parameters (filters, options) as needed.
4. Select **Print** or **Preview**.
The system loads the selected profile, applies all active field override rules, executes consolidation logic, and applies rounding methods before generating the output.

Note

If you run the report without selecting a profile, the report displays normal field values with no overrides applied.



Profile application process

You can apply a selected report profile during report generation to transform and print report data based on the configured profile rules. When a profile is selected, the system applies the profile rules in a defined sequence during report generation to transform and print the report data.

When printing a report with a selected profile, choose one of the following options to control field value transformation in the printed output:

- *Profile loading*: The system loads the selected profile and caches all active rules in memory.
- *Field processing*: For each field in the report dataset, the system:
 - Checks for an active profile rule.
 - Applies the configured override mode (Omit, Text, Range, or Threshold).
 - Executes consolidation filters and calculations, if defined.
 - Applies rounding methods based on the profile or setup defaults.
- *Output generation*: The report prints transformed values according to the applied profile rules.

Note

Applying a profile typically adds less than 100 ms of processing time for profiles with 20–50 rules.



Copy a report data design set

Article • 4/22/2026 • 3 min read

You can copy an existing report data design set to create a new independent dataset with all configuration preserved, including hierarchical tables, field configurations, filters, relational logic, and optionally associated report profiles. The new set is reset to *Draft* status with a new version while maintaining a "Copied From" reference for audit traceability.

To copy a report data design set, follow these steps:

1. Select the Search icon , enter **Report Data Design List**, and then choose the related link.

The **Report Data Design List** page opens.

2. Select the report data design set you want to copy.

3. Select **Copy**.

The copy dialog opens.

4. In the **New RDD Code** field, enter a unique identifier for the new design set.

Note

The field is auto-populated with "COPY-[OriginalCode]" but can be edited. The code must be alphanumeric and a maximum of 20 characters.

5. In the **New RDD Description** field, enter a description for the new design set.

6. Select the **Copy Report Profiles** checkbox to also duplicate the associated report profiles.

7. Select **OK** to create the copy.

The new report data design set is created with *Draft* status, version 1.0, and a "Copied From" reference to the source design. All tables, fields, filters, and relationships are fully independent from the source.

Note

The copy action is available only for users with the RDD Designer role and is disabled for *Archived* status design sets.



Configure table relationships with suggested joins

Article • 2/2/2026 • 2 min read

When adding table relationships in the report data designer, the system provides intelligent join suggestions based on Business Central table relations metadata, primary key matching, and field naming patterns. Suggestions are ranked by confidence level to help you select the most appropriate join configuration.

To configure table relationships with suggested joins, follow these steps:

1. Select the Search icon , enter **Report Data Design List**, and then choose the related link.

The **Report Data Design List** page opens.

2. Select the report data design to configure.

The **Report Data Design Card** page opens.

3. In the table relationships area, add a new table relationship.

The system automatically generates join suggestions for the parent and child table combination.

4. Review the suggested joins, which display up to 3 suggestions ranked by confidence level:

- *High*: Based on explicit BC table relations metadata
- *Medium*: Based on primary key matching or field name patterns
- *Low*: Based on heuristic field similarity

5. Select a suggestion to apply it, or dismiss the suggestions to configure the join manually.

6. The system validates the applied join to ensure field data types are compatible, join fields exist in both tables, no circular references are created, and no duplicate relationships exist.



Publish a report to a menu path

Article • 4/22/2026 • 3 min read

You can publish RDD-generated reports to specific page actions and menu paths within Business Central, so that users can access reports directly from relevant pages such as production order cards or item lists. Published reports run pre-filtered with the appropriate record context from the hosting page.

To publish a report to a menu path, follow these steps:

1. Select the Search icon , enter **Report Profiles**, and then choose the related link.

The **Report Profiles** list page opens.

2. Select the report profile to publish.

The **Report Profile Card** page opens.

Note

The report profile must be in *Certified* or *Released* status to publish.

3. Select **Publish to Menu Path**.

The publishing configuration page opens.

4. Select the target page by searching by page ID, name, or caption.

5. In the **Menu Location** field, select where the report should appear. The available options are:

- *Page Reports Menu*: Appears in the page's Reports menu
- *Page Actions Menu*: Appears in the page's Actions menu
- *Navigation Menu*: Appears in the navigation menu
- *Role Center*: Appears on the Role Center

6. In the **Menu Caption** field, enter the caption for the menu action.

Note

The caption defaults to the report profile name and must be unique within the target menu group.

7. Optionally, configure parameter bindings to bind report parameters to page source fields (e.g., bind "Production Order No." to the page's **No.** field).



 Note

Unbound parameters will prompt the user at runtime. Data type compatibility is validated automatically.

8. Select **Publish** to make the report available on the target page.

The report appears immediately on the configured page without requiring a restart. When users select the report action, it opens with bound parameters pre-populated from the page context.



Configure item report layouts

Article • 4/22/2026 • 4 min read

The **APT Item Document Layouts** page allows you to assign specific report layouts at the item, item category, and item variant levels. These assignments control which layouts to use for the **Batch Worksheet** and **Production Output Item Label** reports when printing production documents for specific items.

To configure item report layouts for an item, follow these steps:

1. Select the Search icon , enter **Items**, and then choose the related link.
The **Items** list page opens.
2. Select the item will have report layouts for.
The **Item Card** page opens.
3. Select the **Document Layouts** action.
The **APT Item Document Layouts** page opens, filtered to the selected item.
4. Select **New** to create a new layout assignment.
5. In the **Usage** field, select the report usage. The available options are:
 - *Batch Worksheet*: For batch worksheet reports
 - *Prod. Output Item Label*: For production output item label reports
6. In the **Report ID** field, select the report to assign.
7. In the **Report Layout Name** field, select the specific layout for the report.
8. Optionally, in the **Variant Code** field, select the item variant for variant-specific layout assignments.

Note

Leave the **Variant Code** field blank to apply the layout to all variants of the item. When a variant code is specified, it takes priority over the item-level assignment.

9. Optionally, select **Copy from Report Selection** to import the default BC report selection settings as a starting point.

To configure item report layouts for an item category, follow these steps:

12. Select the Search icon , enter **Item Categories**, and then choose the related link.
The **Item Categories** list page opens.
13. Select the item category to configure report layouts for.
The **Item Category Card** page opens.
14. Select the **Document Layouts** action.



The **APT Item Document Layouts** page opens, filtered to the selected item category.

15. Select **New** to create a new layout assignment.

16. In the **Usage** field, select the report usage. The available options are:

- *Batch Worksheet*: For batch worksheet reports
- *Prod. Output Item Label*: For production output item label reports

17. In the **Report ID** field, select the report to assign.

18. In the **Report Layout Name** field, select the specific layout for the report.

19. Optionally, select **Copy from Report Selection** action to import the default BC report selection settings as a starting point.

Note

Item category layouts apply to all items within the category. The system walks up parent categories (up to 10 levels) when resolving layouts. Item-level assignments take priority over category-level assignments.



Configure production scenario report layouts

Article • 4/22/2026 • 3 min read

The **APT Production Scenario Document Layouts** page allows you to assign specific report layouts at the production scenario level. When a released production order references a specific scenario, the system uses the scenario's layout assignment for the **Batch Worksheet** and **Production Output Item Label** reports. Production scenario layouts have the highest priority in the resolution hierarchy, overriding item-level, variant-level, and category-level assignments.

To configure production scenario report layouts, follow these steps:

1. Select the Search icon , enter **Items**, and then choose the related link.

The **Items** list page opens.

2. Select the item to configure production scenario layouts for.

The **Item Card** page opens.

3. Navigate to **Related > Production > Production Scenarios**.

The **Item Production Scenarios** page opens.

4. Select the production scenario line to configure.

5. Select **Document Layouts**.

The **APT Production Scenario Document Layouts** page opens, filtered to the selected production scenario.

6. Select **New** to create a new layout assignment.

7. In the **Usage** field, select the report usage. The available options are:

- *Batch Worksheet*: For batch worksheet reports
- *Prod. Output Item Label*: For production output item label reports

8. In the **Report ID** field, select the report to assign.

9. In the **Report Layout Name** field, select the specific layout for the report.

10. Optionally, select **Copy from Report Selection** to import the default BC report selection settings.

Note

Production scenario layouts have the highest priority in the resolution hierarchy. When a production order references a scenario with a configured layout, that layout is used regardless of item-level or category-level assignments.



Implement profile POC workflows

Article • 2/2/2026 • 2 min read

You can select a profile on the **Report Request** page to apply field overrides, consolidation logic, and rounding methods to the report output without modifying the underlying report design. Proof-of-concept profile application workflows can be implemented to demonstrate end-to-end functionality from profile setup through report generation. To implement profile POC workflows, follow these steps:

1. Select the Search icon , enter **Report Profiles Setup**, and then choose the related link.
The **Report Profiles Setup** page opens.
2. Create a new report profile following the setup procedures.
3. Configure profile categories, rules, and field transformations.
4. On the action bar, select **Publish Profile** to activate the profile.
5. Navigate to a supported report and open the request page.
6. In the **Profile Selection** field, select your POC profile.
7. Generate the report and verify that transformations are applied correctly.
8. Review the output to validate field overrides, data filtering, and formatting rules.



Validate field selections

Article • 2/2/2026 • 1 min read

The system automatically validates field selections when you configure report fields to ensure compatibility and prevent code generation errors. Field validation checks include:

- *Field compatibility*: Verifies that selected fields exist in the specified tables and are accessible.
- *Data type validation*: Ensures field data types are compatible with the specified field format.
- *Usage validation*: Confirms that field usage assignments (output, filter, sorting, request filter) are appropriate for the field type.
- *Relationship validation*: Checks that fields used in table relationships are properly configured.

[!NOTE!] If validation errors are detected, the system displays error messages indicating which fields have issues and what corrections are needed.



Configure static filters

Article • 2/2/2026 • 2 min read

To configure static filters for a report table, follow these steps:

1. On the **Report Data Design Card** page, on the **Report Design Tables Used** FastTab, select the table line for which you want to configure filters.
2. On the action bar, select **Output Fields**.
The **Report Data Designer Fields** page opens.
3. On the action bar, select **Filter Fields** and select the field you want to add the filter.
4. In the **Operator** field, select the comparison operator.
The available options are:
 - =: Equal to
 - < >: Not equal to
 - >: Greater than
 - <: Less than
 - >=: Greater than or equal to
 - <=: Less than or equal to
5. In the **Filter Value** field, enter the value to filter by.
6. Select **OK** to save the filter configuration. The system updates the **Filter String** field on the **Report Design Tables Used** FastTab with the filter expression.

Edit or delete existing filter

To edit or delete existing filters, follow these steps:

1. On the **Report Data Designer Fields** page, select the filter line you want to modify.
2. To edit the filter, change the **Operator** or **Filter Value** field values.
3. To delete the filter, select **Delete**, on the action bar.
4. Select **OK** to save your changes.



Configure request filter fields

Article • 2/2/2026 • 1 min read

You can define which fields can be used as filters when running the report. To configure request filter fields for a report table, follow these steps:

1. On the **Report Data Design Card** page, on the **Report Design Tables Used** FastTab, select the table line for which you want to configure request filters.
2. On the action bar, select **Request Filter Fields**.
The **Report Data Designer Fields** page opens.
3. Select the fields that should be available for filtering when you run the report.
4. Select **OK** to save the request filter configuration.

The system updates the **Request Filter Fields** field value on the **Report Design Tables Used** FastTab with the list of available filter fields.

Note

When the report is run, the selected fields appear on the report request page where you can enter filter criteria to customize the report output.



Validate and generate report code

Article • 2/2/2026 • 1 min read

Validate the report design and generate the required AL code as part of the preparation process prior to deployment to ensure the report functions as expected. To validate and generate report code, follow these steps:

1. On the **Report Data Design Card** page, on the action bar, select **Validate Report Design**.

The system validates the structure of your report design to ensure all required configurations are complete.

Validation checks include:

- All required fields are populated.
- Table relationships are properly configured.
- Field selections are compatible with table structures.
- Calculated field formulas are syntactically correct.
- Extension dependencies are properly defined.

2. Review any validation errors or warnings displayed.

If validation errors exist, correct the issues and validate again.

3. After successful validation, select **Generate Report Code** on the action bar. The system generates the AL code for your report based on the configured tables, fields, calculated fields, filters, and sorting. The generated code is stored internally and ready for packaging and deployment.

