Exercise 1 – Report & Layout Manager Import & Export

**Exercise Objectives**

At the conclusion of this exercise, you will be able to:

1. Import reports and Business One Report Packages into the SAP Business One main menu.
2. Assign imported report layouts or reports to correct document ID or folder.
3. Create new Report folders on Business One Main Menu
4. Export Crystal Layouts and Reports from Business One to files system.
5. Run Crystal reports from SAP Business One
6. “Copy” a System Crystal reports layout

**Exercise Introductions**

Perquisites: SAP Business One version 9.0 and Crystal Reports for SAP Business One is already installed.

**Exercise Steps**

1. Open the Report and Layout Manager. Administration>Setup>General>Report and Layout Manager.
2. Import these three reports (.rpt files) from your Sample Report directory into the Business Partner Reports folder as “Reports” (not Layouts) in SAP Business One. You may want to create a new folder to store these newly imported reports – call this Folder “Drafts.” Or, import the report in the menu folder that make the most sense to you.
   1. Sales Analysis.rpt
   2. Simple Item Report.rpt
   3. Purchase Analysis.rpt
3. Run the report “Simple Item Report” from the Report and Layout Manager window. Drill down using the golden arrows next to each line. Where were you taken when you click on these arrows?
4. Create a new report folder named “SAP B1 Crystal Class Exercises” under the existing “Service>Service Report” Menu. Find the new report folder. Any reports live there?
5. From the Report and Layout Manager, select the Report Package “US.b1p” for Import
6. Select the following report Layouts from the list (ignore the Overwrite and Master List checkboxes)
   1. A/R Sales Quotation (Item) -CR (US)
   2. Packing List –CR (US)
   3. Business Partner Aging (Summary) –CR (US)
7. They should not be there, but if they already exist, Rename them in the dialog window as follows
   1. A/R Sales Quotation (Item) -CR (CLASS)
   2. Packaging List –CR (CLASS)
   3. Business Partner Aging (Summary) –CR (CLASS)
8. Select a sales quote in the system and use the Preview (File Menu) the current default Sales Quotation form. Note what it looks like.
9. Now Make the “A/R Sales Quotation (Item) -CR (US)” layout you just imported the Default print layout for all users that print Sales Quotes. (Hint this cannot be done from Report and Layout Manager.
10. Now Preview the Sales Quotation with the new layout.
11. Use the File>Preview Layouts to preview a third version of the sales quotation “Quotation Preprinted USA (System)” Looks different again.
12. Create a ‘Copy’ of the “A/R Sales Quotation (Item) -CR (US)” layout and call it “A/R Sales Quotation (Item) -CR (*your initials MM/YY*)” where MM/YY are today’s month and date. Make this the Default Sales Quotation layout. Hint: There is no copy function but an Edit and Save …….(Save As in SAP Business One)
13. Use the Report and Layout Manager to Export the following Layouts to the Report Package “MyReportLayouts\_From\_SBODemoUS.b1p” to a folder on your Desktop.
    1. “A/R Sales Quotation (Item) -CR (your initials MM/YY)” you just “copied”
    2. “Business Partner Aging (Summary) –CR (US)”
14. Use the Report and Layout Manager to Export the following Reports from the Business Partner Reports folder to the Report Package “MyReports\_From\_SBODemoUS.b1p” to a folder on your Desktop.
    1. Sales Analysis.rpt
    2. Purchase Analysis.rpt