**Lesson # 3 - Exercise Objectives**

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

1. Use the New Report Wizard to build a basic Crystal report against SAP Business One Business Partner data
2. Format that report using toolbar options and object guidelines
3. Save the report to an .rpt file and to Business One database Menu folder.
4. Sort your report data
5. FYI – These exercises are not intended to be step-by-step style. It is suggested that students view the “video solution” prior to making a personal attempt to solve this exercise on their own. You will find any needed samples in the CRT folder supplied in the course deliverables.

**Exercise Introductions**

Create a basic Business Partner list report that uses data from two SAP Business One tables (OCRD and OSLP). Before we start designing reports we will set few designer options that will change the default behavior of our report creation. Using the New Report Wizard we will join our tables and add fields to our simple report. After we view the report we will use the designer to make formatting and field changes to the listing. We will end by saving our report to our desktop and to the SAP Business One database.

**Exercise Steps**

1. Before you begin your new report, use the File > Options menu to set the following to designer defaults for future reports that you build.
	1. From the Database Tab choose to show both Table Names and Table Descriptions
	2. You hate your “Field Titles” underlined like your instructor so you want to turn that default Off
	3. Turn On “Autosave Reports After” 5 minutes. (Hint Reporting tab)
	4. Turn off the “Insert Group Name with Group” option
2. Select New Report from the File menu or the New Report Icon on the toolbar
3. Create a New Connection in the Available data source window
4. Select SAP Business One folder
5. Enter Your database and Business One credentials if they are not already filled in:
	1. SAP Business One Server:
	2. License Server:
	3. Server Type:
	4. Company Database:
	5. Company User ID:
	6. Company User Password:
	7. Click Finish
6. Expand the database file tree
7. Expand B1 Tables
8. Find the OCRD [Business Partner] and OSLP [Sales Employee] tables and select them for you report. Hint: Remember the Business One menu structure to help you locate each table in the list of 01 to 15 trees.
9. Click Next What field name are these two tables Joined together by? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
10. Click Next and select the Following fields to display in your report from the two tables you previously selected
	1. CardCode
	2. CardName
	3. Phone1
	4. SlpName
	5. Balance
11. Click Next
12. Skip the Grouping Step by clicking the Next button
13. Skip the Record Selection as well by clicking the Next button
14. On the Template window keep the default “No Template” selection.
15. Click the Finish button
16. When it refreshes what screen are you on? The Design or Preview tab? Does your report have data? Do your column names have Underlines? Do your column headings have a field name and description? Why do you think they do?
17. Update the BP Code column header to show the text “BP Code” only. Use the Format Painter icon to “paint” all the other Header columns the same as BP Code. Update the column headers as follows: (you can format them manually as well)

18. Use the Field Explorer to add the OCRD.CardType field before the BP Code column. You may have to move some things around. Set the header of this column to “BP Type” and format as other headers.

19. Expand the Page Header Section to include the new SAP B1 Logo from the class Graphics folder
20. Preview your Report
21. Sort the Report by CardCode - Hint: Report > Record Sort Expert. Did it change? Why not? Now sort By CardName
22. Save your new report to a new Folder on your Desktop named “My Class Exercises” name the report “Simple Customer Listing”
23. Save this same REPORT back to the SAP Business One database with the same name “Exercise 3 - Simple Customer Listing”.
24. Go to Business One and Run this report from Business One. Did it work? Where did you find the Report? What Folder? Now move this report to the Business Partner >Business Partner Reports menu.
25. Go Back to the Crystal designer and make sure you “data is NOT saved with your report”

****