Section 6

CRYSTAL REPORTS
For SAP Business One

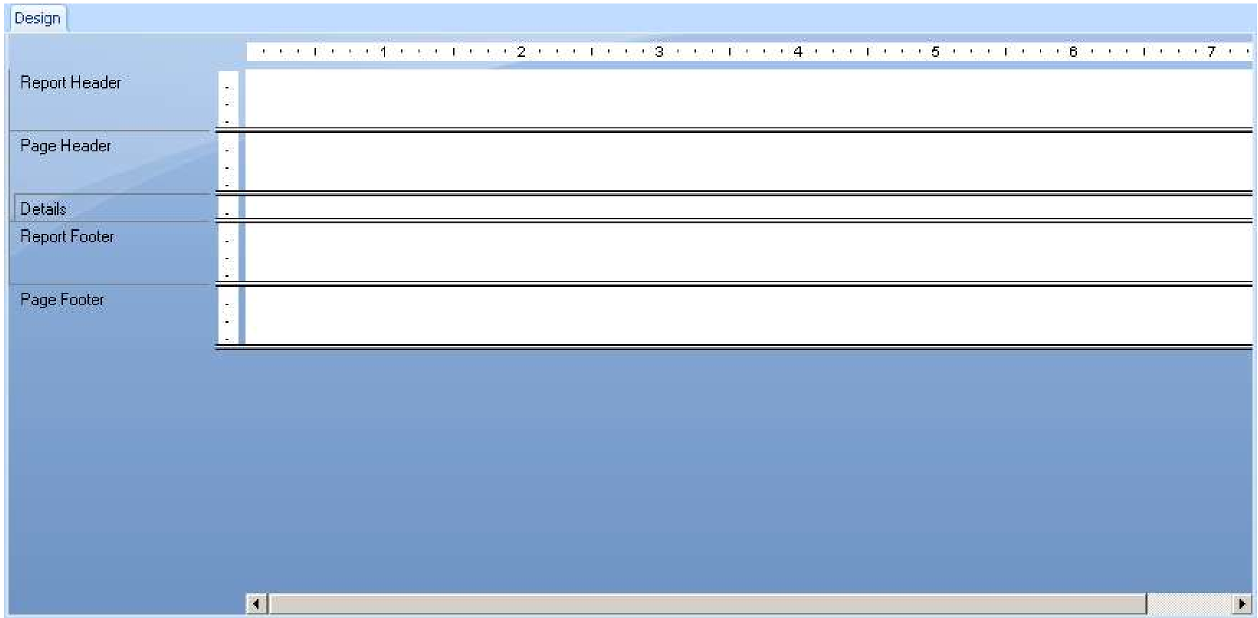
Overview of the Reports Designer

Vision33 TOTAL CARE+

Vision33

SAP Gold Partner

Report Areas



- Each section is indicated by a section boundary. These lines indicate the separation of the areas and do not print to paper. You can move these bars to change the amount of space reserved for each section. You click and drag the section divider to the desired position.
- The names of the five areas can also be shortened to their abbreviated forms (RH, PH, D, RF, and PF). You set the Short Section Name option in the Design View area of the Layout tab in the Options dialog box from the File menu.

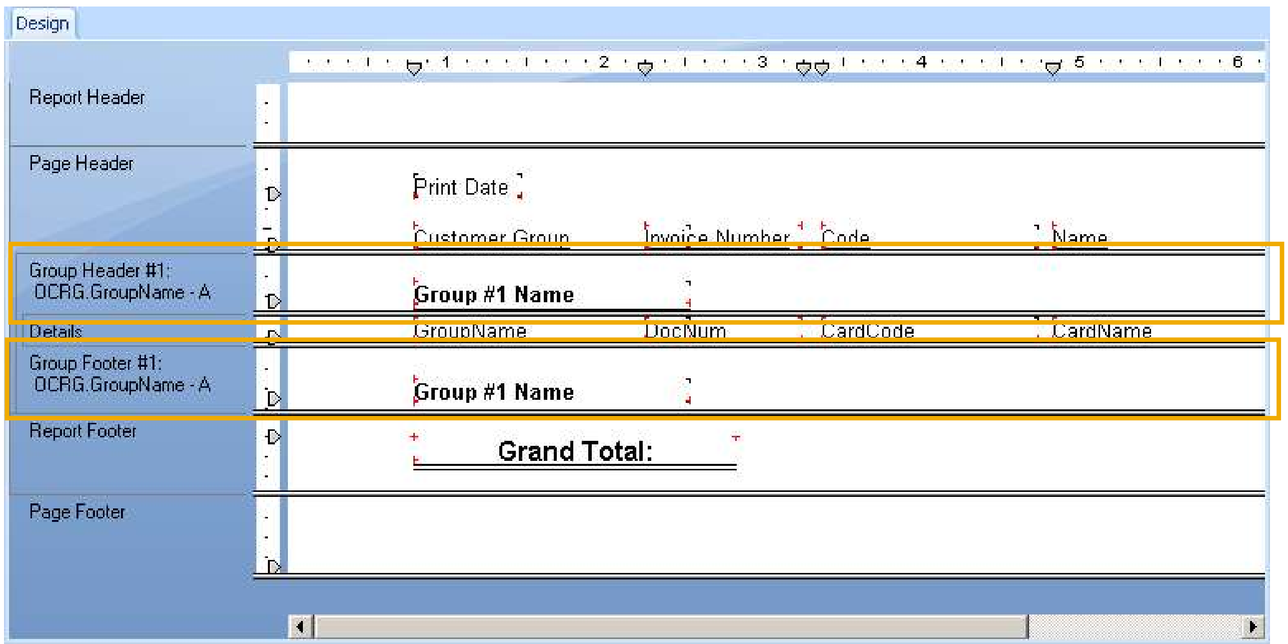
Report Areas

Vision33 TOTAL CARE

Report Header	Page Header	Details	Report Footer	Page Footer
▪ Printed only on first page ▪ Used for titles, name of the report, print date and logo ▪ Charts that read from the entire report	▪ Printed at the top of each page ▪ Used for column headings, print date, chapter name and page number	▪ Body of the report ▪ Printed once per record ▪ Used for the data fields	▪ Printed only once at the end of the report ▪ Used for grand totals, total number of pages ▪ Charts that read from the entire report	▪ Printed at the bottom of each page ▪ Used for page numbers and other info

Report Areas – With Groups

- When the report is grouped, for each grouping level, 2 additional areas are added:
  - Group Header
  - Group Footer



Preview & Design Modes

Design

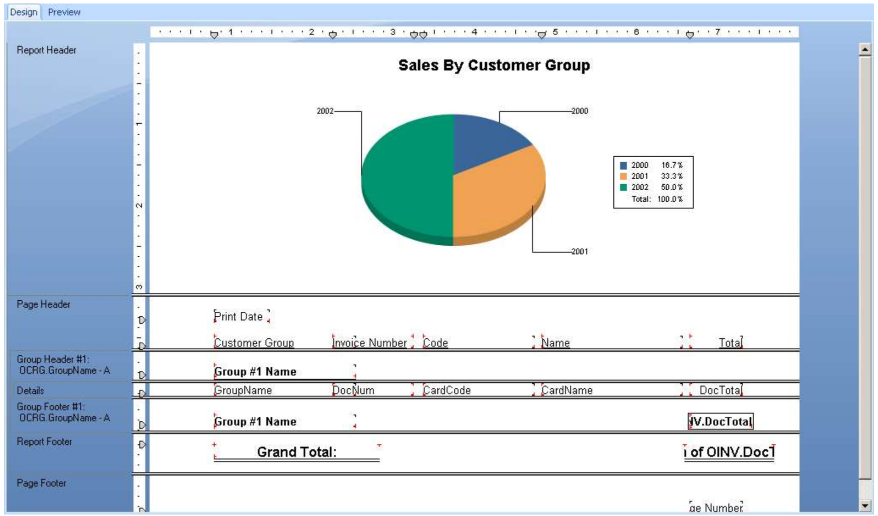
- Easy to distinguish between sections
- Use Guidelines
- Use to add new fields
- Where the majority of your report development is done

Preview

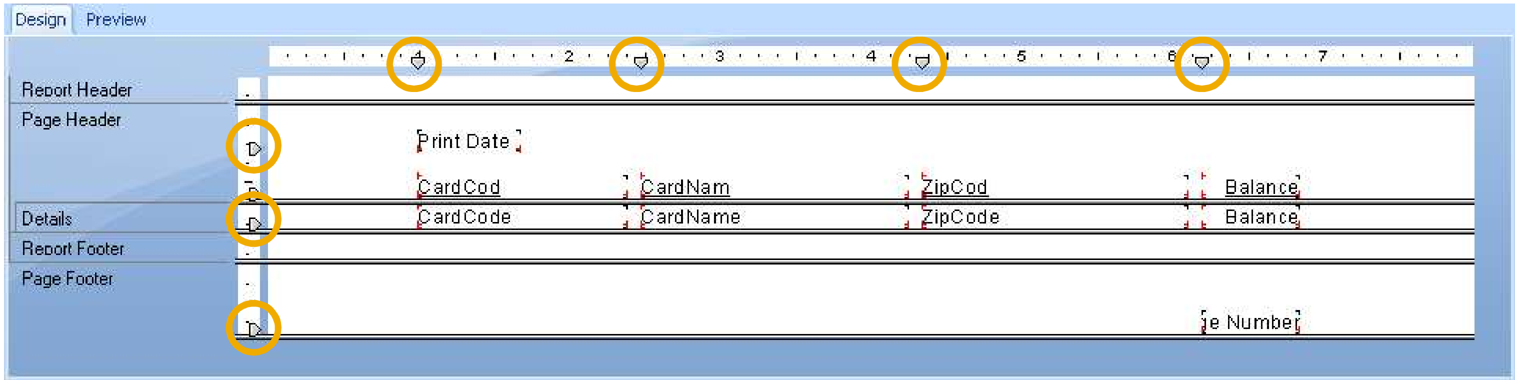
- WYSIWYG
- Toggle Preview Pane icon – easy navigation
- Certain changes require refreshing the data
- Zoom, skip pages and Drill Down

Design Tab

- The Design tab is where you do most of the initial work when creating a report. It designates and labels the various sections of the report. You can do the initial formatting, place objects in the sections where you want them to appear, specify sorting, grouping, and totaling needs, and so forth.
- The report created in the Design tab is a kind of virtual report; it has the structure and instructions for creating the final report, but it is not the report itself.
- While working in the Design tab you manipulate “representatives” or placeholders of objects, not the objects themselves.
- The Design window offers faster previewing of information and layout because you are not working with the actual data itself.
- You can add and delete fields and other objects, move them around, set up complex formulas, and more, without tying up the computer or network resources needed to gather the data.



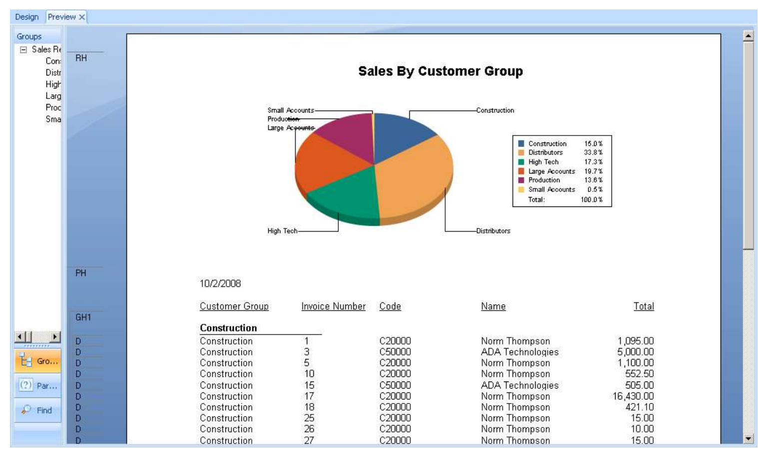
Positioning Objects Using Guidelines



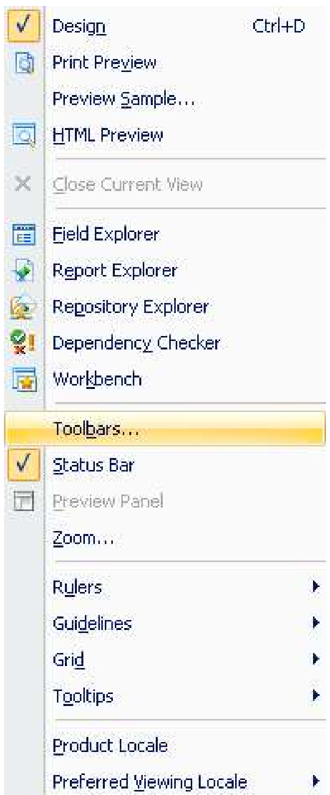
- If you want to line objects up with one another, you can insert a guideline and attach objects to it.
- Then, in one step, you can move the guideline to reposition all the objects attached to the guideline.
- When the Insert Detail Field Headings option is turned on Crystal automatically places a vertical marker in the ruler for each field you place in the Details area.
- These markers or “handles” let you move the fields and their column headings horizontally on your report at the same time by moving the guideline arrowhead.
- When you click a field to move or resize the object, “tracker guidelines” appear, aligning the object against the horizontal and vertical rulers to let you clearly see the placement.

Preview Tab

- When you preview a report, the program gathers the data, makes the necessary calculations, and displays the report in the Preview tab.
- With the data in place, you can review the spacing and formatting of your report and see the actual results of all your summaries, formula calculations, and record and group selections.
- The first time the Preview tab is used, it retrieves data from your underlying data source(s) and saves it with the report (unless you have set up the program not to save data).
- From that point on, the program uses the saved data whenever you preview the report unless you specifically refresh **(F5)** it or add a field that requires the program to retrieve new data.

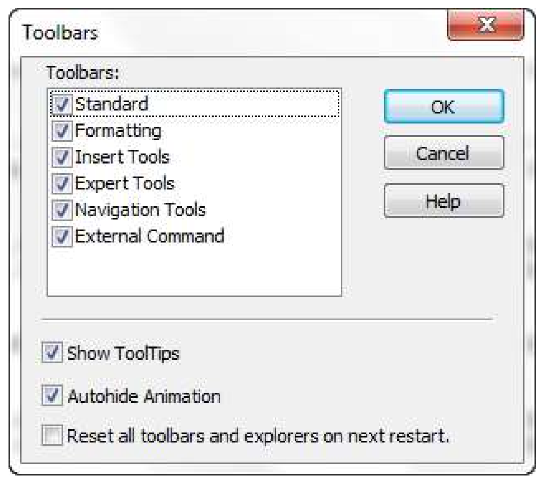


Crystal Reports Toolbars

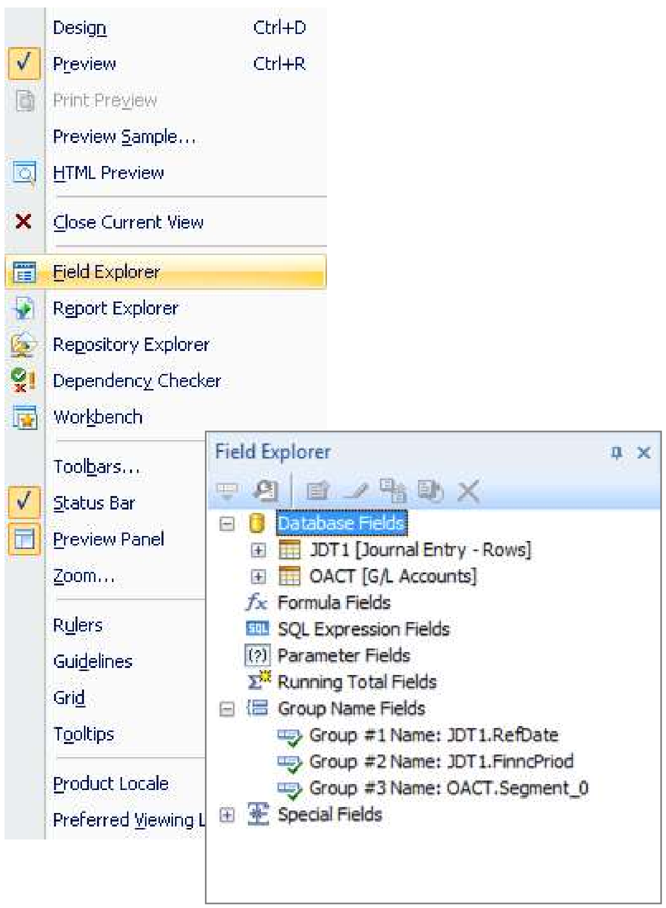


■Working with toolbars

- The Report Designer window includes several toolbars.
- To move a toolbar, click and hold in an unused part of the toolbar, between groups of buttons, or on the unused area at the beginning or end of the toolbar. Drag the entire toolbar to the desired location.
- The toolbars are “floating” toolbars. You can position them on any of the four sides of the screen, or float them on your design area.

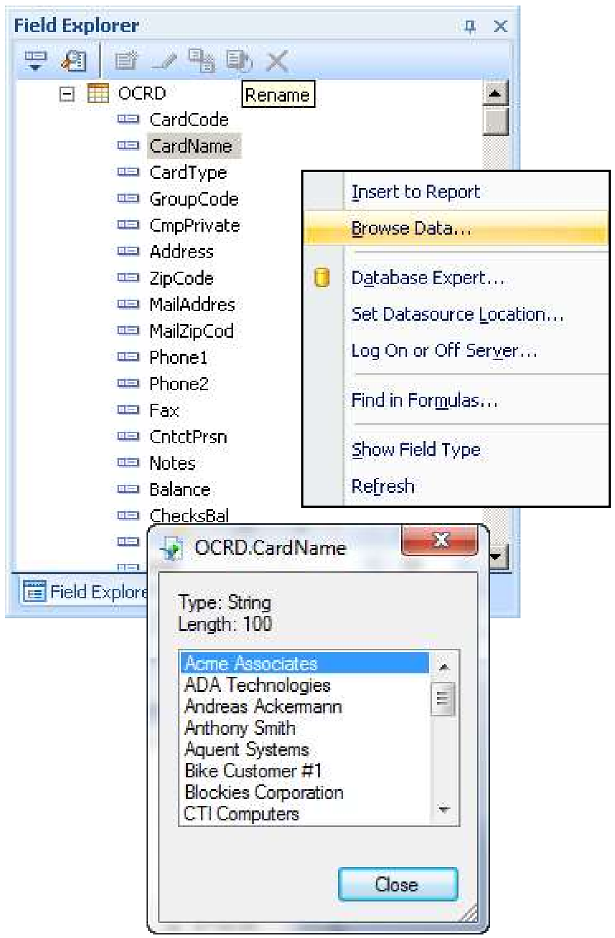


Field Explorer Tool



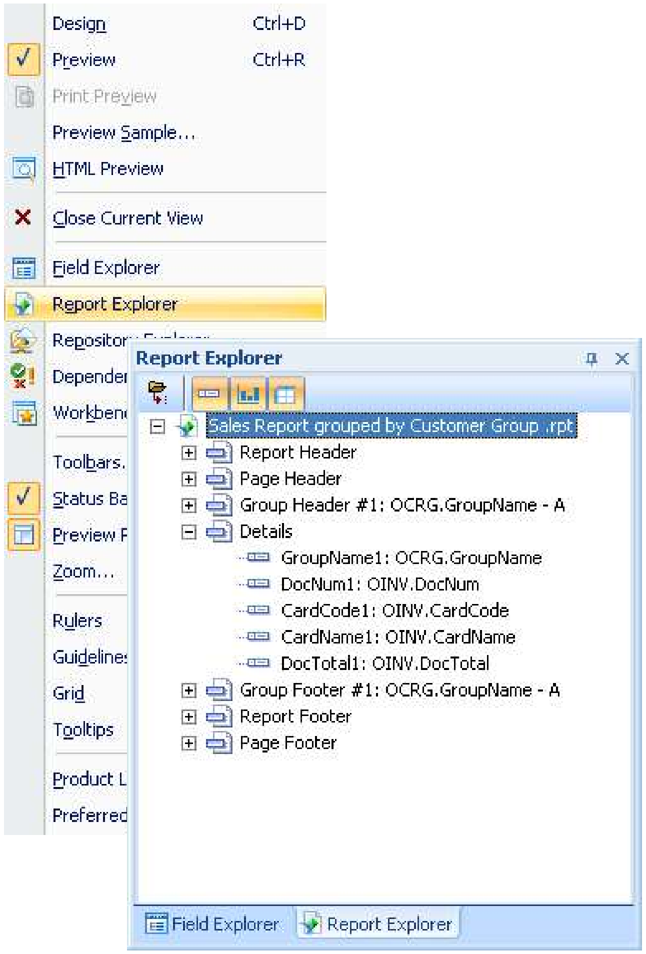
- The Field Explorer displays a tree view of database fields, special fields formula fields, SQL expression fields, parameter fields, group name fields, and running total fields that you have defined for use in your report
- Use the Field Explorer to insert, modify, or delete these objects on the Design and Preview tabs. You'll see the Field Explorer after you have:
  - Clicked the Field Explorer button on the Standard toolbar.
  - Selected the Field Explorer from the View menu.

Field Explorer – Browse Data



- You can take a look at a sample of the actual data in the table before you place the field on your report in the Browse Field Data dialog box.
  - To browse field data
    1. Select the field.
    2. From the Field Explorer, click Browse.
    3. Scroll through the list.
    4. Click Close when finished.
- Default settings are the first 500 records or it times out at five seconds, depending on what has been set up in the registry setting.

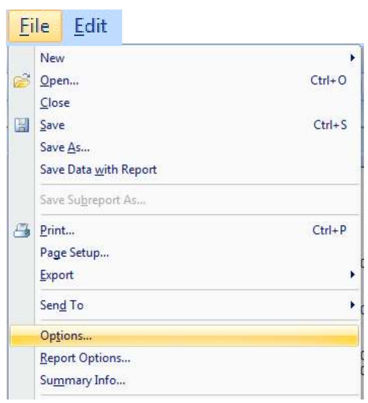
Report Explorer Tool

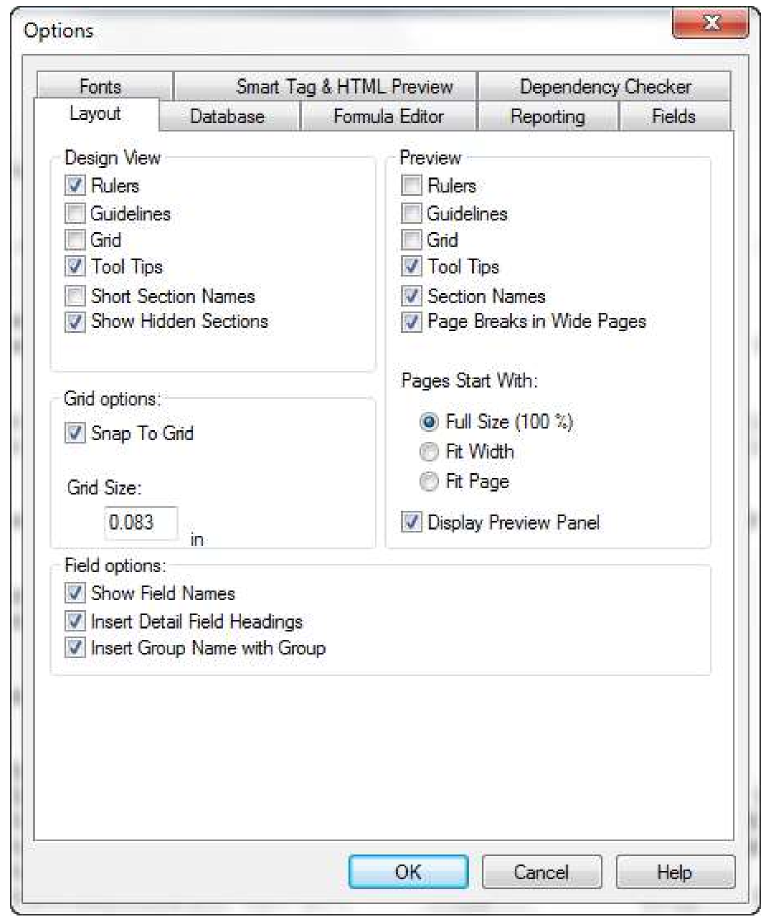


- The Report Explorer displays a tree view of the sections in your report and lists the report objects contained in each section and works like a “report navigator.” You can work with report objects directly from the explorer.
- The content of the Report Explorer represents the content of the report in a tree view. The root node is the report itself, while the first-level nodes represent the report's sections.
- The Report Explorer appears when you select the Report Explorer command from the View menu, or when you click the Report Explorer button on the Standard toolbar.
- Within each section, the report's fields and objects are listed. Any item you select in the tree view will be selected in the report (in either Design or Preview modes).

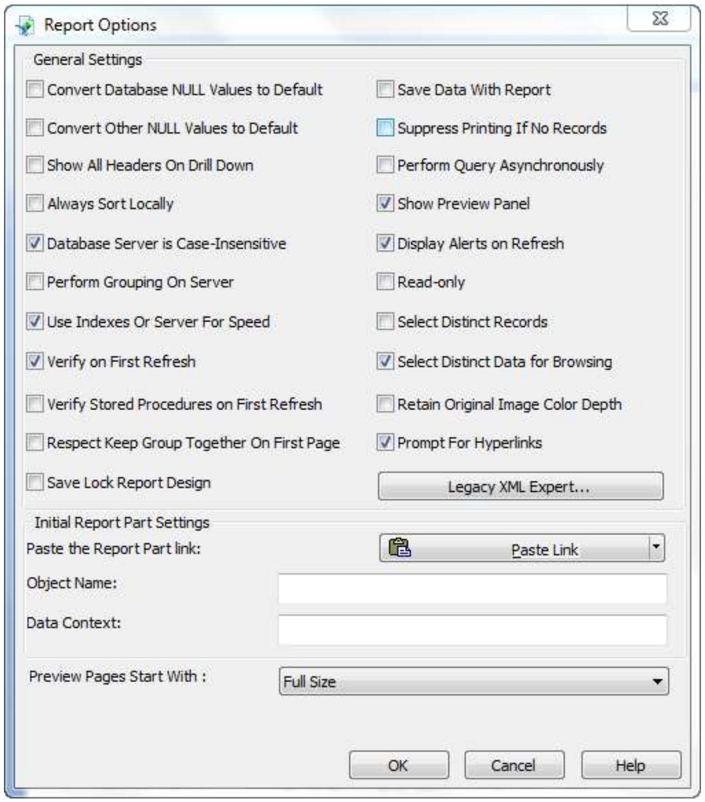
Program Options

- Use the Options choice on the File menu to configure the Designer defaults
- Use the Options dialog box to change the default values for the entire program.
  - Layout (Design, Preview, Grid & Fields)
  - Database (Tables & Fields, Data Explorer)
  - Formula Editor (Font, Color and Syntax)
  - Reporting (Save & NULL Options)
  - Fields (Default Field Formatting Options)
  - Fonts (Fonts Defaults by Field Types)
  - Smart Tag & HTML Preview
  - Dependency Checker (Report Checking)

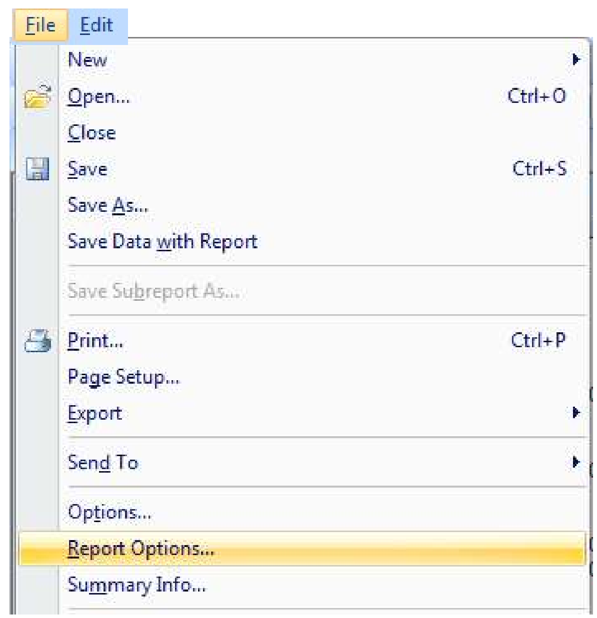




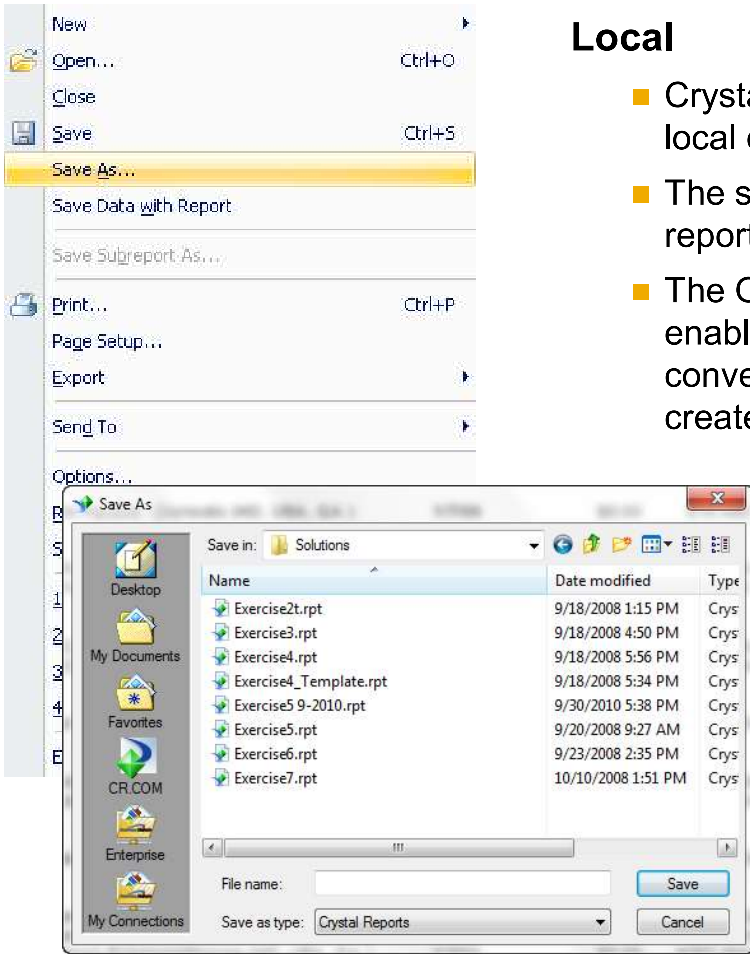
Report Options



- This dialog box appears when you choose the Report Options command from the File menu.
- Use the Report Options dialog box to change the options for only the current report.
- Most of the defaults should be left as is
  - Save Data with Report - Is typically the only option non technical folks change



Saving Your Report (Option 1)



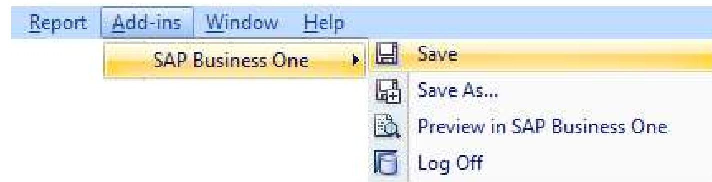
Local

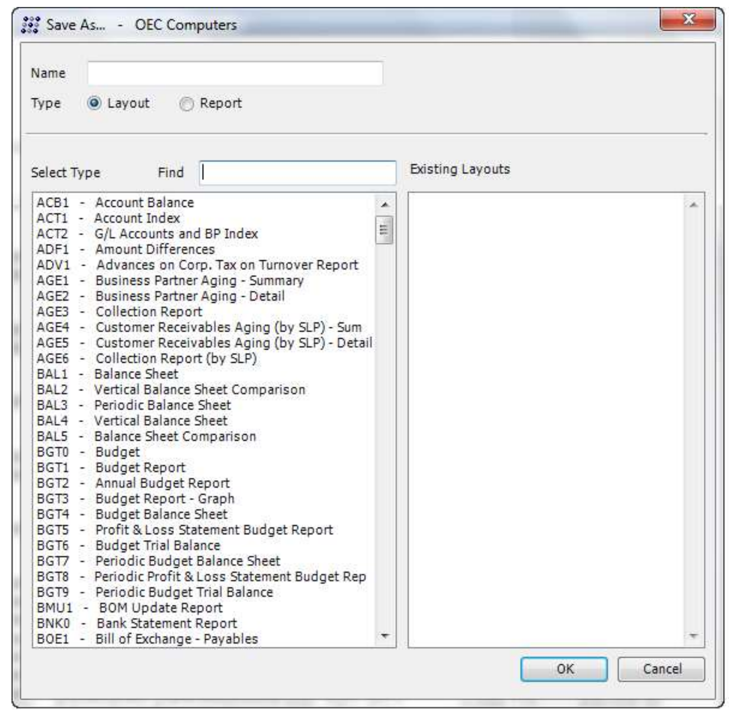
- Crystal reports can be saved as **.rpt** files to a local or network drive
- The saving function is the same in Crystal reports as in many other applications.
- The Open, Save, and Save As dialog boxes enable you to open or save a report conveniently to personalized folders that are created by your operating system.

Saving Your Report (Option 2)

Business One Database

- Crystal reports can be saved as Layouts or Reports within a Business One database.
- Use the Add-ins>SAP Business One menu to Save or Save As to save the report definition to Business One
- You will be asked to logon using your Business One credentials
- You have superuser permissions in Business One
- Any "Report" type is saved to the "Lost Reports" folder





Exercise 3

Simple Customer Listing