CRYSTAL REPORTS
For SAP Business One

Crystal Reports for SAP Business One

Version 8.8 family, 9.0 family, and beyond

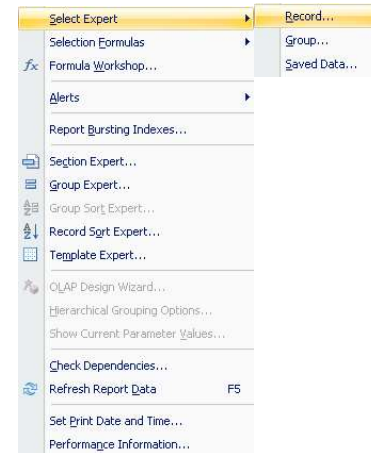**Carl Britton Lewis – Chief SAP Business One Ambassador**

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TOTAL CARE

Section 8

CRYSTAL REPORTS
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**Filtering Report Data**

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Select Expert

- Rarely will you want a listing of every record in your database on your report
- Most often you are interested in only a select set of records, as in sales for a particular BP or inventory for a group of products.
- The Select Expert allows you to filter your report by:
  - Record
  - Group
  - Saved Data
- Your record selection criterion does not have to be based on a field in your report. You can choose any field from the database as a basis for record selection.

Select Expert ▶ | Record...
Selection Formulas ▶ | Group...
ƒx Formula Workshop... | Saved Data...
Alerts ▶
Report Bursting Indexes...
Section Expert...
Group Expert...
Group Sort Expert...
Record Sort Expert...
Template Expert...
OLAP Design Wizard...
Hierarchical Grouping Options...
Show Current Parameter Values...
Check Dependencies...
Refresh Report Data   F5
Set Print Date and Time...
Performance Information...

Select Expert

- The Select Expert opens automatically for the field you select. If you have not selected a field by clicking it to make it active before using one of these methods, a dialog box opens, displaying the fields.
- Using the drop-down list, you can build selection criteria that meet your needs.
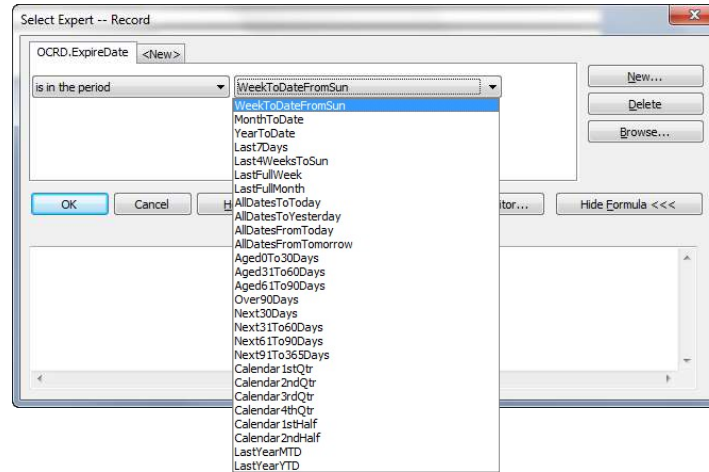- Depending on the field you select, the available options in the second drop-down list are:

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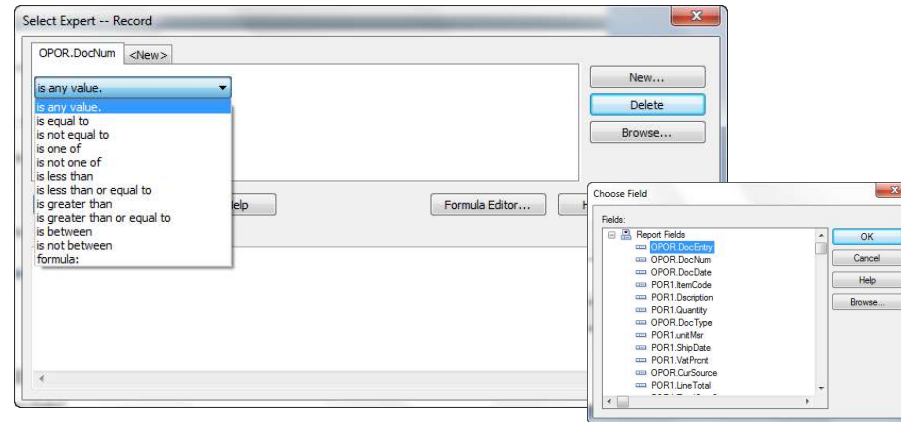
■ **You may have multiple selection criteria**
  ■ Ex: Only Business Partners that are "Customers" or "Leads" (OCRD.CardType) and who are not assigned to salesperson (OSPL.SlpName) "Bill Levine" or "Sophie Klogg"

The following operators are available when applying selection on a date field

Section 9

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Grouping & Totaling Data

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Text Object
Σ Summary...
Field Heading
Sort Control...
Group...
OLAP Gri...
Cross-Tal...
Subrepor...
Line
Box
Picture...
Chart...
Map...
Flash...
OLE Obje...
Template

Select Expert ▶
Selection Formulas ▶
fx Formula Workshop...
Alerts ▶
Report Bursting Indexes...
Section Expert...
Group Expert...
Group Sort Expert...
Record Sort Expert...
Template Expert...
OLAP Design Wizard...
Hierarchical Grouping Options...
Show Current Parameter Values...
Check Dependencies...
Refresh Report Data   F5
Set Print Date and Time...
Performance Information...

- Use the Group Expert or the Insert Group icon to define & maintain groups in your report
- Groups can be based on report fields or any field from the database tables you have in your report
- Group Name is inserted automatically on the Group Header area.
- Grouping overrides the record sort.

Group Expert

Available Fields:
- Report Fields
  - OCRD.CardType [BP Type]
  - OSLP.SlpName [Sales Employee Name]
  - OCRD [Business Partner]
  - OSLP [Sales Employee]
    - SlpCode [Sales Employee Code]
    - SlpName [Sales Employee Name]
    - Memo [Remarks]
    - Commission [% Commission for Sales Employee]
    - GroupCode [Commission Group]
    - Locked [Locked]
    - DataSource [Data Source]
    - UserSign [User Signature]
    - EmpID [Employee ID]

Group By:
- OSLP.SlpName [Sales Employee Name] - A

Browse Data...   Find Field...   Options...

OK   Cancel   Help

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- To add groups to the report, open the Group Expert or the Insert Group icon.

- Select the fields you would like to group the report by. You can use fields from the report, or any other field from the selected tables.

- Group Name is inserted automatically on the Group Header area. (defined on the File>Options>Layout)

- Grouping override record sort. See the group sorting option

**The following options are available for setting up groups:**

- Customize Group Name fields
- Keep Group Together
- New Page After # of Visible Groups
- Repeat Group Header on Each Page
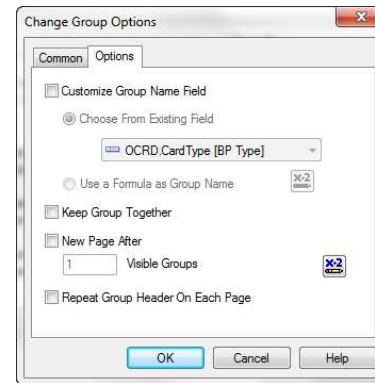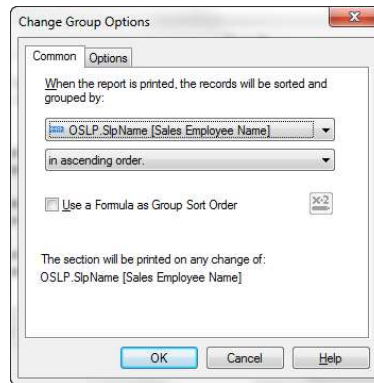
- The following options are available for setting up groups:

  - ◆ Customize Group Name fields – can choose one of the fields in the report, or use a formula

  - ◆ Keep Group Together – prevent groups from splitting across pages

  - ◆ New Page After # of Visible Groups – start a new page after a defined number of groups

  - ◆ Repeat Group Header on Each Page – in case the group overflow more then one page, the Group Header repeats in each page

Multiple Groups

- You are not limited to one level of grouping within Crystal. You can have groups within groups.

- To create nested groups, follow the same steps that you did when you created the first group on your report.

- You can create groups in any particular order. Groups can be reordered at any time, unlike the sort order of records.
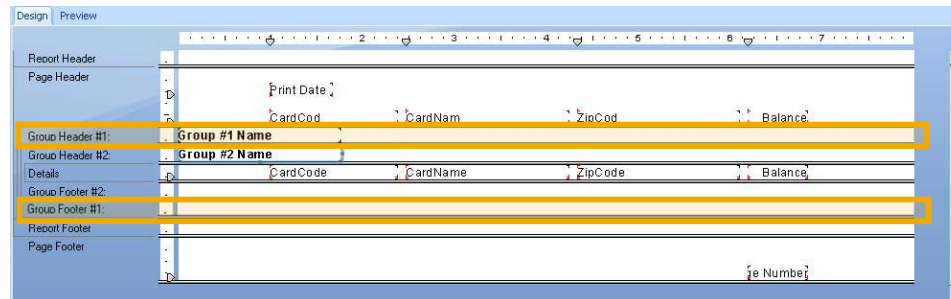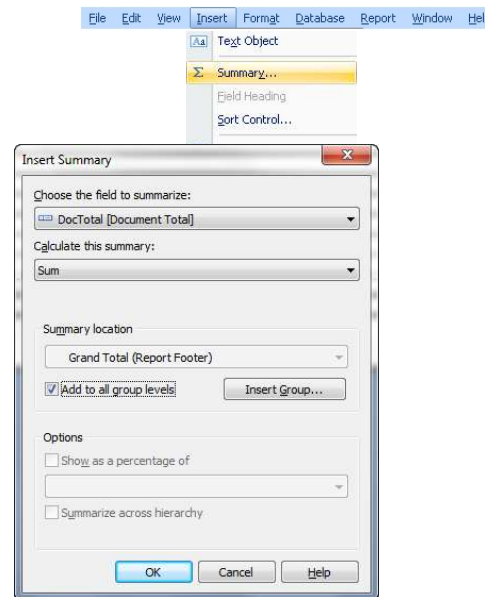
For Company database that does not use calendar month periods

- Add the OFPR (Posting Period) table to your report
- Group by the Period Code (OFPRCode)

- One of the primary purposes for breaking data into groups is to run calculations on each group of records instead of all records in the report.
- When the program summarizes data, it sorts the data, breaks it into groups, and then summarizes the values in each group automatically.
- You can insert summary information in either the Design or Preview tabs.

Summaries and Subtotals

- **Use the Insert Summary to add subtotals and grand totals**

  - Select column to summarize
  - Select operation: Sum, Min, Max…
  - Select location: Group level, grand total
  - Show as percentage of: Grand total

  Insert Summary

  Choose the field to summarize:
  DocTotal [Document Total]

  Calculate this summary:
  Sum

  Summary location
  Grand Total (Report Footer)

  ☑ Add to all group levels   Insert Group...

  Options
  ☐ Show as a percentage of

  ☐ Summarize across hierarchy

  OK   Cancel   Help

  Sum
  Average
  Sample variance
  Sample standard deviation
  Maximum
  Minimum
  Count
  Distinct count
  Correlation with
  Covariance with
  Median
  Mode
  Nth largest, N is:
  Nth smallest, N is:
  Nth most frequent, N is:
  Pth percentile, P is:
  Population variance
  Population standard deviation
  Weighted average with

  Grand Total (Report Footer)
  Group #1: OFPR.Code - A
  Group #2: OINV.DocDate - A
  Group #3: OINV.CardName - A

- You can easily define summaries and subtotals in any report.
- Use the Insert Summary to define it.
  - ◆ Select one of the columns located in the report details area to summarize
  - ◆ Select the desired operation – choose one of the options such as sum, max, min, average and more
  - ◆ Select the location of the summary – once of the groups, report level for grand total, or all groups.
  - ◆ You can show the subtotal as a percentage from the grand total of the report instead of an amount.

- **It is possible to suppress certain groups from the report based on just the group name, or based on the summary data.**

- **For example, show only sales employees that sold over 10,000 in a sales report, grouped by sales employee:**
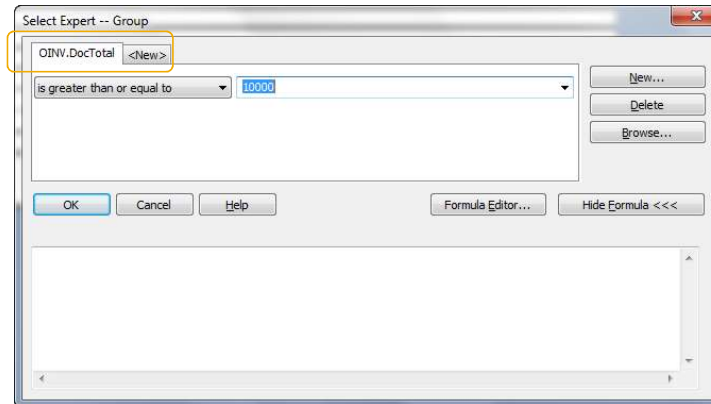
- It is possible to suppress certain groups from the report based on just the group name, or based on the summary data.
- For example, show only sales employees that sold over 10,000 in a sales report, grouped by sales employee:
- Note that all groups are still in the report. Only the ones that answer the condition, are printed

Exercise 5

Business Partners By Group

XL Reporter Workshop