

Getting Started Crystal Reports

Getting Started

Chapter 2

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Objectives

You will learn:

- Report Creation Wizards.
- Report Designer.
- Previewing reports.
- How to create the first report.
- Table selection.
- Table linking.
- Field selection.
- How to use templates.
- Saving the report.

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Report Creation Wizards

- There are four Report Creation Wizards:
 - Standard
 - Cross-Tab
 - Mailing Label
 - OLAP

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Standard

- The Standard Report Creation Wizard is the most generic of the wizards.
- It provides guidance through choosing a data source and linking database tables. It also helps in adding fields and specifying the grouping, summarization (totals), and sorting criteria to be used.
- It provides instructions for chart creation and record selection.
- The Templates screen contains predefined layouts which can be applied a report in order to give it more impact.

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Cross-Tab

- The Cross-Tab Report Creation Wizard provides for the creation of a report in which data is displayed as a cross-tab object.
- Two special screens (Cross-Tab and Grid Style) help create and format the cross-tab itself.

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Mailing Labels

- The Mailing Labels Report Creation Wizard creates a report that is formatted to print on any size mailing label.
- The Label screen can be used for selecting a commercial label type, or for defining layouts of rows and columns for any multi-column style report.

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OLAP

- The OLAP Report Creation Wizard provides the capability for creating a report in which the OLAP data is displayed as a grid object.
- Although similar to the Cross-Tab Report Creation Wizard in several ways, there are differences in the OLAP Report Creation due to the requirements of working with OLAP data sources.
- First the location of the OLAP data has to be specified and then the dimensions be included in the grid have to be chosen.
- Report data is filtered and the style of the grid object is chosen. Grid object can also be customized.
- Labels can be defined for the grid and a chart can be inserted.

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Start Page

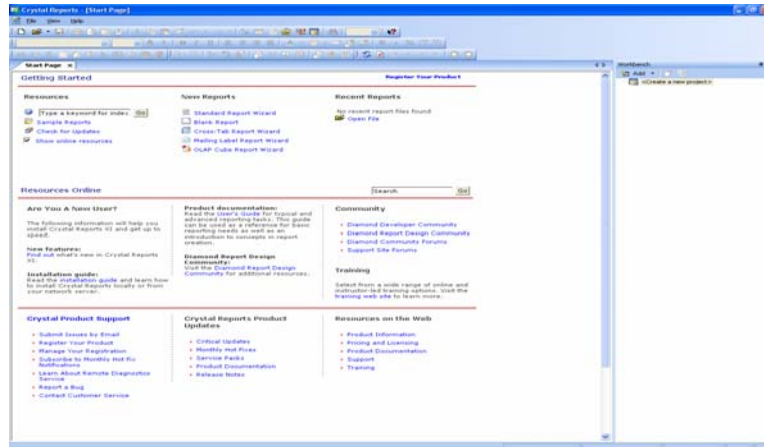
- After opening Crystal Reports, the Start Page will be presented. The Start Page.
- The goal is to make it easy to either to open the most recent projects that are being worked on or find out the latest news and updates about Crystal Reports.
- The majority of the page consists of links to online sample reports, important help topics, and the support page.
- In the middle of the page are links to create a new report with each type listed individually.
- The right column shows a list of the most recently used reports.

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Start Page



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Workbench

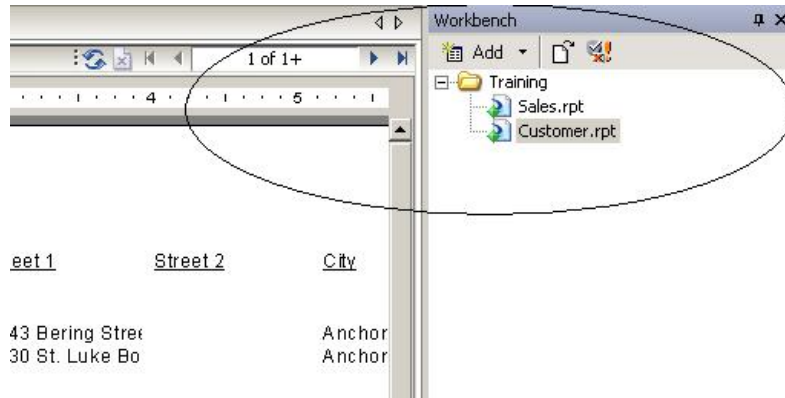
- The Workbench is an important addition to the Start Page. It is useful for managing a large number of reports.
- Within the Workbench, projects can be created and each project has multiple reports in it. By grouping reports into different projects, it becomes easier to manage where the reports are and how they are related to each other.
- If Business Objects Enterprise is used, an entire project can be published to the enterprise software. This serves to allow a report to be viewed anywhere with a web browser.

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Workbench



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Report Designer

- The Report Designer provides the capability for designing reports by adding report objects, formatting the report layout, modifying database connections, etc.
- The Report Designer is where a majority of the user's time will be spent when using Crystal Reports.
- Along the top of the screen are the different toolbars:
 - Standard
 - Insert
 - Navigation
 - Formatting
 - Wizards
- By default, all are displayed when the designer is opened the first time.

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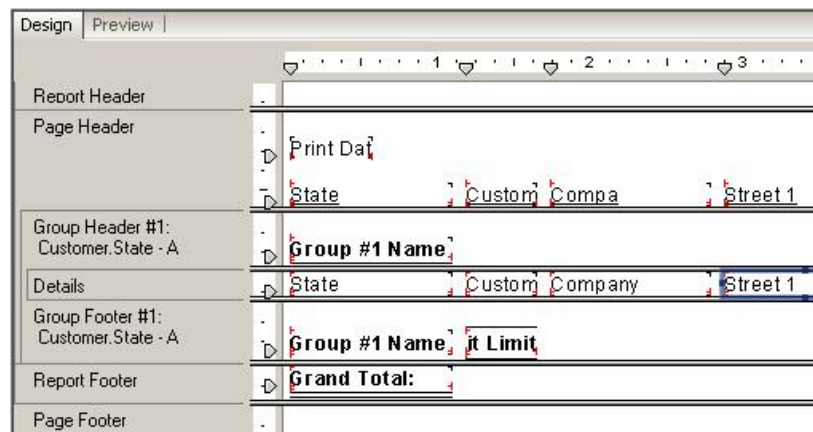
Report Designer

- The toolbars can be rearranged or disabled.
- The majority of the screen consists of the report being worked on.
- Along the top is the tab showing the report title as well as the tabs of any other reports open. Below the tab is the report in design mode. It shows each report section: Report Header, Page Header, Details, etc. and the report objects in the section.
- Along the right side of the screen are windows displaying different characteristics of the report and design environment.

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Report Designer



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Report Designer

- The top-most window is the Workbench. Below the Workbench is the Field Explorer and the Report Explorer.
- The Field Explorer shows the different fields that can be displayed on a report. These can be database fields, formula fields, parameters, etc.
- The Report Explorer displays each part of the report and lists every report object in each section.
- For complex reports displaying many objects, this makes it easy to get an understanding of what is displayed on a report without allowing the placement of the objects to make things confusing.
- The Report Designer also provides the option for previewing a report while work is being performed.

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Report Designer

Report Section	Description
RH: Report Header	Used for the report title and other information that needs to appear at the beginning of the report. It can also be used for charts and cross-tabs that include data for the entire report.
PH: Page Header	Used for information that will appear at the top of each page. This can include such things as chapter names, the name of the document, and other similar information. It can also be used to display field titles above the fields on a report.
D: Details	Used for the body of the report, and is printed once per record. The bulk of the report data generally appears in this section.
PF: Page Footer	This section usually contains the page number and any other information that needs to appear on the bottom of each page.
RF: Report Footer	This section is used for information that will appear only once at the end of the report - such as grand totals - and for charts and cross-tabs that include data for the entire report.

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Previewing Reports

- **Standard View**
 - In standard view, the report is displayed a page at a time. The navigation buttons in the Preview tab can be used by the user for moving to the beginning or end of the report or moving backward and forward through the report one page at a time.
- **Group Tree View**
 - The Group Tree view can be shown or hidden using Toggle Group Tree on the Standard toolbar.
 - The Group Tree view presents a split screen:
 - The right pane displays the report.
 - The left pane displays a high level outline of the report, displaying the hierarchy of groups and subgroups in a tree format.

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Previewing Reports

- Right below the tab that displays the report name are the Design and Preview tabs.
- Clicking on the Preview tab presents what the report will look like when it is printed.
- If the Preview tab isn't shown, clicking on the Print Preview button will display it.
- In preview mode the left side of the screen becomes a group selection tree that provides the capability for jumping directly to a specific group on the report.
- In the middle of the screen is the report as it will look when it is printed out.

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Create First Report

- The Report Creation Wizard can be used for facilitating the creation of the initial report.
- When finished, a simple report will be created which creates and prints out a simple report that shows employee names.
- Open Crystal Reports and ensure that the Start Page is active.
- Click on the Standard Report Wizard link.
- This is the first option under the New Reports column in the middle of the page. After clicking on this link, the Standard Report Creation Wizard opens. This wizard provides the steps/instructions for creating a new report.

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Create First Report

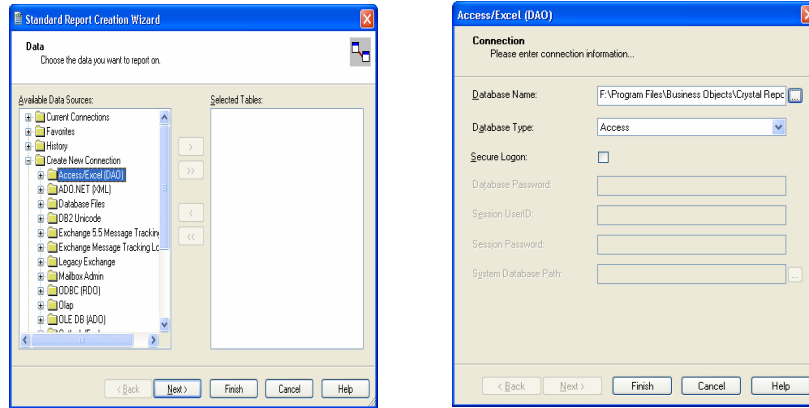
- The first step is to select the data source.
- Double-click on the Create New Connection folder to expand it.
- Double-click on the Access/Excel (DAO) selection. This opens the Access/Excel (DAO) dialog box which is used as the data source is selected.
- Click on the button to the right of the Database Name textbox and navigate to the Xtreme.mdb database.
- It is located at: x:\Program Files\Business Objects\Crystal Reports 11\Samples\en\Databases\xtreme.mdb.
- Click the Ok button to select this database.

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Choose the Data



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Select Table

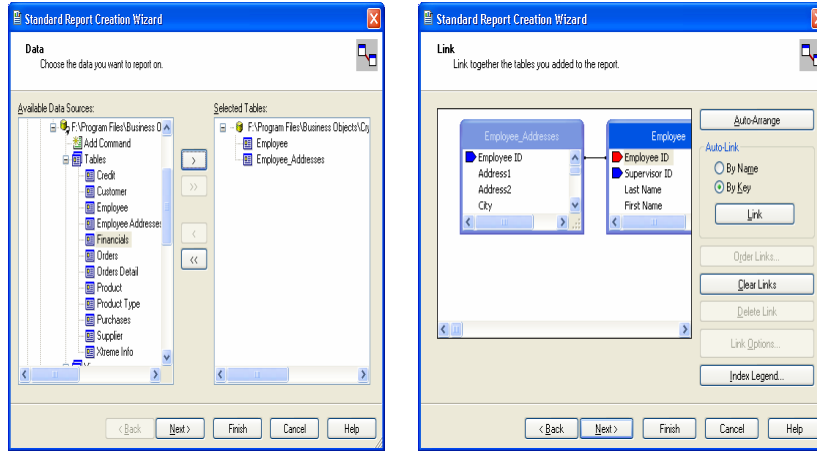
- Click the Finish button to close the dialog box.
- Expand the Tables selection to see the tables in the database.
- Click on the Employee table name to select it.
- Click on the Right arrow to move the Employee table to the Selected Tables list.
- Click on the Employee Addresses table name to select it.
- Click on the Right arrow to move the Employee Addresses table to the Selected Tables list.

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Link Tables



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Field Selection

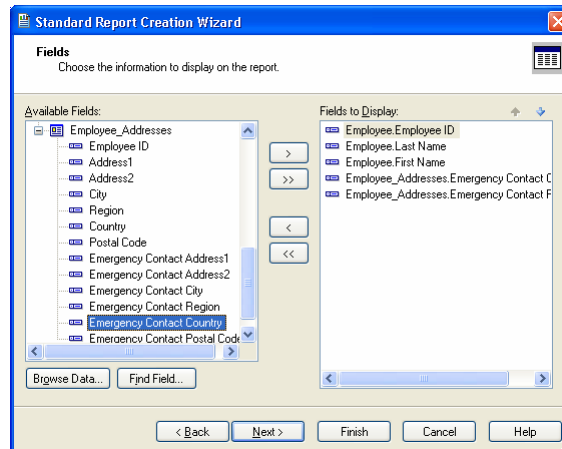
- The Fields dialog appears showing all the fields from each table. Moving fields from the Available Fields list to the Fields to Display list on the right adds the fields to the report.
- Click on the following fields and then click on the Right arrow button to move them to the Fields to Display list:
Employee Id, Last Name, First Name, City, and Region.

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Field Selection



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Templates

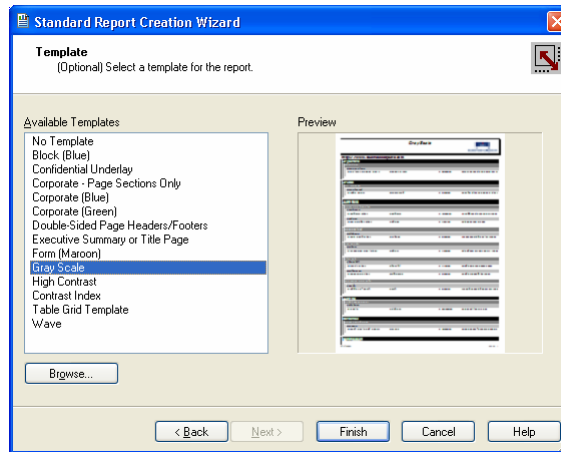
- Click the Next button to move to the Templates.
- From the Template dialog there is a list of pre-determined report formats which can be chosen.
- Crystal Reports comes with over a dozen different styles to choose from.
- When clicking on each template, the preview area to the right displays an example of what the report would look like.

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Templates



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Report Title

- The report title is simply called Report1.
- This isn't a very descriptive name and it should be changed.
- On the application menu, select File | Summary Info.
 - This opens the Document Properties dialog.
- Enter Employee List as the title.

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Save the Report

- Save report as Employee List.rpt.
- If more changes need to be made to the report's design, click on the Design tab above the report.