Getting Started with Crystal Reports

Session Description:

If you would like to create customized reports—look no further. This session will introduce you to the tools needed to write basic reports using the Report Wizard and Blank Report functions, helping you to understand views, tables, data and formulas. When you need customized reports what do you do? Turn to Crystal Reports. This basic session will introduce you to the steps needed to create your own custom reports. This is a non-module specific session meant to show the user Crystal navigation, formulas and views with the understanding that attendees have had some exposure to Crystal. For more module-specific reporting, please consider attending one or more of the advanced sessions.
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BLANK REPORT VS. REPORT WIZARD
MUNIS Crystal Reports offers two ways of creating reports. Creating a report using the Report Wizard, which walks you through the steps of selecting the data you want to report on, grouping the data, filtering the data, and summarizing the data. It is helpful to understand how to create a report from the blank report option before using the report wizard. Creating a report through the Blank report option allows you to start with a blank design view and do all of the filtering, grouping, and summarizing yourself.

TABLES VS. VIEWS
MUNIS Crystal Reports offers “Views” which combine tables and keep table linking and MUNIS security intact. Without views, tables must be linked manually and MUNIS security doesn’t exist. In order to use views when creating reports in Crystal, go into the File – Options menu then click on the Database tab.
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**CRYSTAL REPORTS DESIGN PAGE**
Once you have selected the appropriate view(s) or table(s), you will then be in the design page of your report. This is where you create and format your report. The sections of the design page are as follows:

**Report Header** – Information appears only on the first page of the report.

**Page Header** – Information appears at the top of each page in the report.

**Group Header** – Appears for each group defined in the report. When there is more than one group defined, the Group Headers are displayed in ascending order. (*When a group is created)*

**Detail** – The detail section is in the middle of the report and is where you place your fields when you drag them into the report.

**Group Footer** – Appears for each group defined in the report. Group Footers are displayed in descending order when more than one group is defined. (*When a group is created)*

**Report Footer** – Appears at the bottom of the last page in the report.

**Page Footer** – Appears at the bottom of every page in the report. It will appear below the report footer on the last page of the report.

![Crystal Reports Design Page](image-url)
CRYSTAL REPORTS FIELD EXPLORER
The field explorer is where you can select fields that are from the database. The MUNIS data fields reside under the database field’s label. The data fields that you can select depend on the views or tables you have selected. In order to place them in your report, you have to select the individual field and drag the field and drop the field into the correct section.

SELECT EXPERT
The select expert allows you to filter your report. To use this function go to the Report menu and choose Select Expert or use the toolbar icon (shown above). Select <New> and scroll down to find the field you want to filter on and either double click on the field or highlight the field and click OK. Use the pull down menu to select a filter option, and then fill out the field to the right with the criteria.

For example: Select the ap_vendor_city field and then select is equal to “FALMOUTH” (note this field is case sensitive.)

*Your report would now only have those vendors that have an address that is equal to the city of “FALMOUTH”.

GROUP EXPERT
Group expert allows you to group your report by a field. When you create a group it will create two new sections in your design screen, a group header and group footer. Group header is where the actual group name will display. The group footer is where you can put summaries. To create a group select on the group expert icon (shown above), then select the field you want to group on.

For example: Select the ap_vendor_city field.
*Your report would now have your vendors grouped in order by the city in their address.*

**PARAMETER FIELD**

Use the parameter option to setup parameters so that your report will prompt you with some defining questions prior to running the report. This way you can create one report yet report on different departments, time periods, warrant numbers, vendors, etc. To do this, go to the Field Explorer and right click on Parameter Fields and select New. Fill out the field name for the parameter and the actual prompting text, and then select the options on how you want the parameter to work.

*Be sure to select the correct Value type or you will not be able to use the field in the select expert.*

Once the parameter field has been completed, go back to the Select Expert to link this to your report by selecting the field that the prompt filters on and inputting the field in the pull down on the right (see below). If you would like the prompt data to display on the report drag the field into the report.
FORMULA FIELDS

Formula fields allow the user to create a field to display data. This is a good way to display data that is not an actual field in MUNIS. These fields can be as simple as taking a four digit field and only displaying 2 digits, a mathematical equation, or as hard as taking a numeric field and converting it to a text field. In order to create a formula field you must go to the field explorer and right click on formula fields, then select new. This will then prompt you to create a name for your field.

Then click on the editor button which will allow you to create the actual syntax formula. Once you have created a formula you can check to see if there are any errors in it by clicking on the X2 button. This will highlight any errors in your formula. Once you have saved your formula and are back in your design view, you would drag the new formula field you created into your report.

USING THE REPORT WIZARD

The report wizard walks you through the steps of creating a report automatically. It will ask you what views or tables you want to use. It will then ask you to select ALL of the fields you want to use in your report; you do not have to place them in sections. The wizard will then prompt you to create groups in your report, filter your report by using the select expert, and create summary fields. After walking through the steps, the wizard will then bring you to the design view and from here it works just like any other report you have created.
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