

# NiUG Discovery Conference 2009

## Crystal Reports for Beginners (Workshop)

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## Introduction

The Crystal Reports for Beginners workshop will provide you with an overview and hands on experience into developing Crystal Reports for your iMIS data. The workshop will use the iMIS 10.6 demo database and Crystal Reports version 9.0.

In order to provide you with as much learning time we have split the workshop into two sessions (1) Crystal Reports presentation and overview and (2) hands-on exercises. We hope that this will allow you to learn the basics and then you can work through this handbook's exercise at your pace.

What we give you here, we hope, is enough information to either enhance any skills you may have or give you enough knowledge to massage existing reports or a better understanding if you want to consider partaking of the entire course with ASI or others.

The **Beginner's workshop** will cover;

- Overview of Crystal Reports and the report design window
- Creating a basic report
- Record selection
- Linking tables
- Using Parameter fields
- iMIS Standard Reports an overview

The **Advanced workshop** will cover:

- Review of basic workshop/ CR knowledge
- Formula Basics
- Conditional Formatting
- Report Sections
- Sub reports
- Exporting report data.
- Moving a report to Production from Test.
- Troubleshooting

We hope you enjoy the workshop!

Greg Norris, REIQ

&

Michelle Lelempsis, Asthma Foundation NSW

## Application Details

### Crystal Report version 9.0

Start >> All Programs >> Crystal Reports 9 Tools >> Crystal Reports 9

#### iMIS Login

Database login for Crystal Reports

Username: sa

Password: sa

iMIS client login

Username: MANAGER

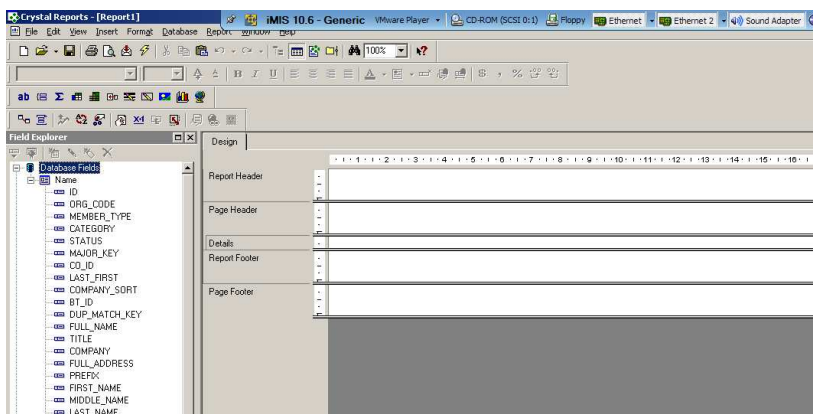
Password: manager

## Creating a Basic Report

### Workshop 1. Creating a report

In this exercise you will create a membership expiration date report.

1. Create a new custom report by selecting File > New > Crystal Reports Gallery, select As a Blank Report, and click OK.
2. On the Database Expert window, select Create New Connection and then select ODBC.
3. Select the iMIS10 Data Source and then click Next.
4. Enter the User ID (sa) and Password (sa) and click Finish.
5. Expand the Database and then expand the Tables.
6. Double-click Name in the table list and then click OK.
7. Select View > Field Explorer to open the Field Explorer window.
8. Expand Database Fields



9. Expand the Name table and select the following fields to display on your reports ID, FULL\_NAME, COMPANY and PAID\_THRU by dragging each field into the Details section.
10. Select Report > Refresh Report Data – The report preview should appear similar to the following example:

ID	FULL NAME	COMPANY	PAID_THRU
10000	Chris Mew Baker	Sims Free Centre	30/06/2008 12:00:00AM
10001	Mr. John Tan	Opus, Inc.	28/02/2008 12:00:00AM
10002		The Working Company	
10003	Clara Chen	The Working Company	28/02/2008 12:00:00AM
10004	Tawanda Phillips	Opus, Inc.	
10005	Shabir Singh	The Working Company	31/08/2008 12:00:00AM
10006	Robert A. O'Leah, Sr, AM	H. O'Leah & Sons	31/01/2008 12:00:00AM
10007	Susan Eise	CEO International	
10008	Mr. Terence Manley	Caravan Travel	
10009		L.J. Hooker - Head Office	
10010	Franklin Beard		31/12/2005 12:00:00AM
10011		International/Book Publishers	
10012		Systemakers Ltd.	28/02/2008 12:00:00AM
10013		International/medco	28/02/2008 12:00:00AM
10014		Foundation Support Systems	28/02/2008 12:00:00AM
10015		Sailing Systems, Inc.	28/02/2008 12:00:00AM
10016		Private Eyes, Inc.	28/02/2008 12:00:00AM
10017		PublicBots Edr.	28/02/2008 12:00:00AM
10018		Peach Street, Inc.	28/02/2008 12:00:00AM
10019		Opus Europe	31/12/2005 12:00:00AM
10020	Jean Garçon	Opus Europe	31/12/2005 12:00:00AM
10021	Suzie Stephens	CEO International	
10022		National Headquarters	
10023	Mr. Tom Kennedy	U.S. Service	
10025	Chuck Miller	Warren Oil Company	
10026	Mr. Takao Ogata	Japan All Trade, Inc.	31/08/2008 12:00:00AM
10027	Jose Jaramillo	Sociedad de Aguas de Occid	
10028		Environment, Inc.	
10029	Ir Miep Van O Iken	Waterstop Valve	30/09/2008 12:00:00AM
10030	Ethelwyn Williams		31/08/2008 12:00:00AM
10031	John Adamson	Nikram Ltd.	31/08/2008 12:00:00AM
10032	Stephen Verbeven		31/08/2008 12:00:00AM
10033	Margaret Nelson		30/09/2008 12:00:00AM
10035	Pete Bachman	American Business Services	
10036	Victor Mzkata	Zulu Enterprises	31/08/2008 12:00:00AM
10037	Ms. Carla Stevens	Black&Gold Computer Technology	31/08/2008 12:00:00AM
10038	Mr. Juan Rodriguez	Blackwood Electric	31/08/2008 12:00:00AM
10039		Fountain Design, Inc.	31/12/2004 12:00:00AM
10040	Stan Fajuel	Fountain Design, Inc.	31/12/2004 12:00:00AM
10041	Quen Kieftman	Fountain Design, Inc.	31/12/2004 12:00:00AM
10042	Henry Hopewell	Fountain Design, Inc.	31/12/2004 12:00:00AM
10043	Dorena Arceve	Fountain Design, Inc.	31/12/2004 12:00:00AM
10044	Rhona Alexander	Fountain Design, Inc.	31/12/2004 12:00:00AM

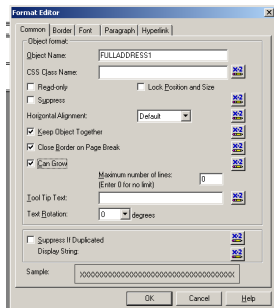
11. Save the report as Workshop1.rpt to a folder 'Workshop' on the desktop.

***Congratulations you have made your first Crystal Report!***

### Workshop 2. Add another field and use the Format Editor

Using the report that you created in the previous exercise we will add the FULL\_ADDRESS field and enable Can Grow on this field.

1. Add the FULL\_ADDRESS field onto the report – drag the FULL\_ADDRESS field from the Field Explorer window into the reports detail.
2. Preview the report – notice how only part of the FULL\_ADDRESS data is displaying?
3. Right-click on the FULL\_ADDRESS field and select Format Field.
4. From the Common tab select the Can Grow option and click ok.



5. Preview the report.
6. Save the report as Workshop2.rpt

### Workshop 3. Suppress the ID field

Using the report that you created in the previous exercise suppress the ID field from the report.

1. Open the Workshop1.rpt report
2. Right-click on the ID field and select Format Field.
3. Form the Common Tab enable the Suppress option and click ok.
4. Preview the report.

ID	FULL_NAME	COMPANY	FULL_ADDRESS	PAID_THRU
	Ctnis Mark Baker	Elm Tree Centre	18 English St Cronulla, NSW 2230	30/08/2008 12:00:00Ah
	Mr. John Tan	Opus, Inc.	333 N Michigan Ave Chicago, IL 60601-3901	
		The Working Company	8 Rawson St SUBIA CO, WA 6008	28/02/2008 12:00:00Ah
	Clara Chen	The Working Company	8 Rawson St SUBIA CO, WA 6008	
	Tawanda Philips	Opus, Inc.	333 N Michigan Ave Chicago, IL 60601-3901	
	Sivatha Singh	The Working Company	8 Rawson St SUBIA CO, WA 6008	31/08/2008 12:00:00Ah
	Robert A. Green, Sr, AM	R Green & Sons	80 Chute St MORDIALLOC, VIC 3195	31/01/2008 12:00:00Ah

5. Save the report as Workshop3.rpt

## Reviewing the Report Design Window

### Workshop 4. Position and resize objects

In this exercise we will move and resize objects on the report that we made in the previous exercise.

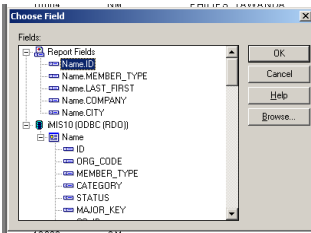
1. Open the report Workshop1.rpt
2. Resize the ID field in the Page Header and Details sections.
3. Drag the guidelines for the LAST\_FIRST, COMPANY and PAID\_THRU fields to the left
4. Resize the LAST\_FIRST field in the Page Header and Details section.
5. Resize the COMPANY field in the Page Header and Details section.
6. Save the report as Workshop4.rpt

## Record Selection

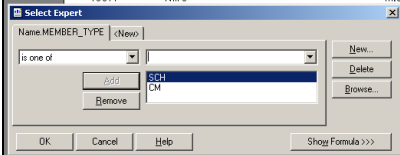
### Workshop 5. Create a membership index report

In this report we will create a new membership index report that displays the members ID, member type, name and company name based on selected criteria.

1. Select File >New to open the Crystal Reports Gallery window.
2. Select the Using the Report Wizard option and select the standard report wizard
3. Click OK to open the Standard Report Creation Wizard window.
4. Navigate to and select the Name table by double-clicking on it.
5. Click NEXT to display the Fields tab.
6. Select and add the following database fields from the Name table:-
  - 6.1. ID
  - 6.2. MEMBER\_TYPE
  - 6.3. LAST\_FIRST
  - 6.4. COMPANY
  - 6.5. CITY
7. Click Finish
8. Select the Design tab
9. Right-click on the COMPANY field and select Format Field to display the Format Editor window.
10. Enable the Can Grow option on the Common table and click OK.
11. Click the Select Export icon on the Standard tool to display the Choose Field window



12. Select the MEMBER\_TYPE field
13. Click OK to display the Select Expert window.
14. Click the drop-down list, and select is one of.
15. Click the second drop-down list and select CM.
16. Click the second drop-down list again, and select SCH



17. Click ok and you report should be similar to the following example.

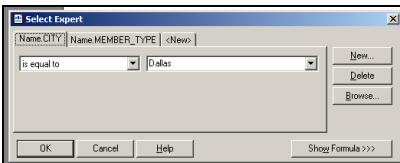
ID	MEMBER_TYPE	LAST_FIRST	COMPANY	CITY
10002	CM		The Working Company	SUBIACO
10009	CM		L.J. Hooker - Head Office	OYMPIE
10012	CM		Spybreakers Ltd.	Killien
10013	CM		International M edico	New York
10014	CM		Foundation Support Systems	Somerville
10015	CM		Sailing Dreams, Inc.	Dallas
10016	CM		Private Eyes, Inc.	San Diego
10017	CM		Publications Etc.	Austin
10018	CM		Pecan Street, Inc.	Austin
10019	CM		Opus Europe	Paris
10022	CM		GED International	Eden Prairie
10029	CM		Fountain Design, Inc.	Fort Wayne
10184	CM		Blackwood Electric	Fort Worth
10185	CM		American Business Services	Houston
10186	CM		Omaha Medical Services	Columbia
10187	CM		Academy of Child Professors	Austin
10188	CM		Critical Care Systems	Hopkins
10189	CM		Reynolds Pharmaceutical Company	Fresh Meadows
10190	CM		Quality Products	Columbus
10191	CM		Software Trainer's Inc	Newark
10192	CM		Publications Etc.	Austin
10193	CM		U.S. Medical	Phoenix
10194	CM		Lamba Industries	Newark

18. Save the report as Workshop5.rpt

### Workshop 6. Adding additional selection criteria to the membership index report

In this report we will add additional selection criteria to the membership index report that was created in Workshop 5.

1. Open Workshop5.rpt report
2. Select the CITY field
3. Click the Select Expert icon on the Expert Tools toolbar.
4. Click the drop-down list and select is equal to.
5. Click the second field and enter Dallas.



6. Click OK
7. Click the Refresh icon on the Standard toolbar to update the data on the Preview tab. Your Report should appear similar to the following:

ID	MEMBER_TYPE	LAST_FIRST	COMPANY	CITY
10015	CM		Sailing Dreams, Inc.	Dallas
10202	CM		Zigg-Naylor Pharmaceuticals	Dallas

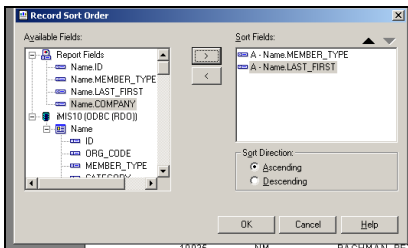
8. Save the report as Workshop6.rpt

## Sorting and Grouping

### Workshop 7. Sorting, Grouping and Summarising Records

In this workshop you will create a new report to show all members sorted by member type and last name.

1. Select File > New to open the Crystal Reports Gallery
2. Select the Using the Report Wizard option, and select the Standard Report wizard
3. Click OK to open the Standard Report Creation window.
4. On the Data tab, navigate to and select the Name table by double-clicking on it.
5. Click Next
6. Insert the ID, MEMBER\_TYPE, LAST\_FIRST, and COMPANY database fields.
7. Click Finish.
8. Click the Record Sort Export icon on the Export Tools tool bar to open the Record Sort Order window.
9. Select the Name.MEMBER\_TYPE field and click the Add icon to move the field to the Sort Fields area of the window.
10. Select the Name.LAST\_FIRST and click the Add icon to move the field to the Sort Fields area of the window.



11. Click OK
12. Click the Refresh icon on the Standard toolbar. Your report should be similar to the following example:

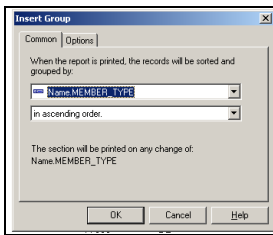
ID	MEMBER_TYPE	LAST_FIRST	COMPANY
10196	A		R Green & Sons
17966	A		Telstra
17987	A		Sunbeam
11554	AA		L.J Hooker - Bowen
152	AA		L.J Hooker - Broadbeach
158	AI	BACHMAN, PETER	American Business Services
17992	AI	BROGO, PETER	De la Salle College
17988	AI	HALPENNY, AMANDA	Sunbeam
19009	AI	HANSON, JOHN	Balmain Bowling
17704	AI	HEARN, TIM	
17984	AI	MCCORMACK, JENNIFER	
17935	AI	MURDOCH, RUPERT	L.J Hooker - Head Office
17937	AI	PACKER, JAMES	L.J Hooker - Head Office
17936	AI	PACKER, JOHN	L.J Hooker - Head Office
17981	AI	ROSENLOOM	
198	AI	SPRYN, MICHAEL	Recovery Services Inc.
17992	AI	TSA	
17993	AI	TRAMPET, ANDREW	De la Salle College
17979	AI	WALKER, DAVID	
17990	AI	WILSON, JOHN	Avery Centre
17989	AI	WILSON, MARY	Avery Centre
17965	AI	ZAP, WAYNE	Telstra Foundation
17939	AL	YOUNG, ROBERT	L.J Hooker - Head Office
11393	B	BEIDLER, DIANA	ABC Pty Ltd
11699	BE		Silverwater Pty Ltd
17941	BE		Alfred Hospital
17954	BE		Alfred Hospital - Cardiac Car
17956	BE		Victoria Health
17963	BE		One Now Funeral Parlour
17964	BE		Telstra Foundation
17783	BE	KEANE, ASHLEIGH	
10986	BE	SAENZ, CHRISTOPHER	
17957	BE	WALKER, D	D Walker and Sons
17959	C		Macquarie Bank
17998	C	BROWN, LINDA	Luna Park
10002	CM		The Working Company
10009	CM		L.J Hooker - Head Office
10012	CM		Spybreakers Ltd.
10013	CM		International Medico
10014	CM		Foundation Support Systems
10015	CM		Online Process Inc.

13. Save the report as Workshop7.rpt

### Workshop 8. Grouping Records

In this workshop you will group the report results from the Workshop 7 exercise by member type.

1. Open the Workshop7.rpt
2. Click the Insert Group icon on the Insert Tools toolbar
3. Click the first drop-down list, and select Name.MEMBER\_TYPE.



4. Click OK
5. Click the Refresh icon on the Standard toolbar. Your report should be similar to the following example:

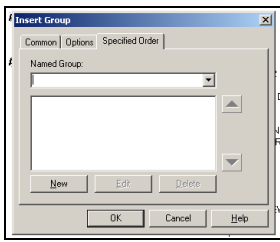
23/10/2008				
	ID	MEMBER_TYPE	LAST_FIRST	COMPANY
A	10196	A		R Green & Sons
	17866	A		Telstra
	17987	A		Sunbeam
AA	11584	AA		L J Hooker - Bowen
	152	AA		L J Hooker - Broadbeach
AI	156	AI	BACHMAN, PETER	American Business Services
	17992	AI	BROKO, PETER	De la Salle College
	17998	AI	HALPENNY, AMANDA	Sunbeam
	18009	AI	HANSON, JOHN	Balmain Bowling
	17704	AI	HEARN, TIM	
	17994	AI	MCCORMACK, JENNIFER	
	17935	AI	MURDOCH, RUPERT	L J Hooker - Head Office
	17937	AI	PACKER, JAMES	L J Hooker - Head Office
	17936	AI	PACKER, JOHN	L J Hooker - Head Office
	17981	AI	ROSENBLOOM	
	186	AI	SPRYN, MICHAEL	Recovery Services Inc.
	17982	AI	TBA	
	17993	AI	TRAMPET, ANDREW	De la Salle College
	17979	AI	WALKER, DAVID	
	17990	AI	WILSON, JOHN	Avery Centre
	17989	AI	WILSON, MARY	Avery Centre
17965	AI	ZAP, WAYNE	Telstra Foundation	
AL	17939	AL	YOUNG, ROBERT	
B	11393	B	BEIDLER, DIANA	L J Hooker - Head Office
BE	11699	BE		ABC Pty Ltd
	17941	BE		Silverwater Pty Ltd
	17954	BE		Alfred Hospital
	17955	BE		Alfred Hospital - Cardiac Car
	17956	BE		Victoria Health
	17963	BE		Gone Now Funeral Parlour
17964	BE		Telstra Foundation	

6. Save the report as Workshop8.rpt

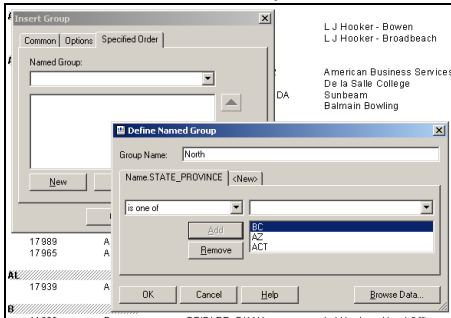
## Workshop 9. Grouping Records in specified order

In this workshop you will group the report results from the Workshop 7 exercise by member type.

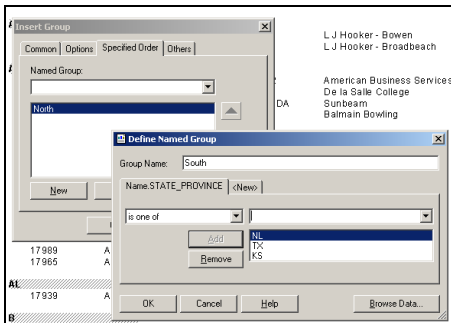
1. Select File > New to open the Crystal Reports Gallery
2. Select the Using the Report Wizard option, and select the Standard Report wizard
3. Click OK to open the Standard Report Creation window.
4. On the Data tab, navigate to and select the Name table by double-clicking on it.
5. Click Next
6. Insert the ID, MEMBER\_TYPE, LAST\_FIRST, COMPANY and STATE\_PROVINCE database fields.
7. Click Finish.
8. Click the Record Sort Expert icon on the Export Tools toolbar to open the Record Sort Order window.
9. Select the Name.MEMBER\_TYPE field and click the Add icon to move the field to the Sort Fields area of the window.
10. Select the Name.LAST\_FIRST field and click the Add icon to move the field to the Sort Fields area of the window.
11. Click OK
12. Click the Insert Group icon on the Insert Tools toolbar
13. Click the first drop-down list and select Name.MEMBER\_TYPE
14. Click OK
15. Click the Insert Group icon on the Insert Tools Toolbar
16. Click the first drop-down list and select Name.STATE\_PROVINCE
17. Click the second drop-down list and select in specified order. The Specified Order tab will display :



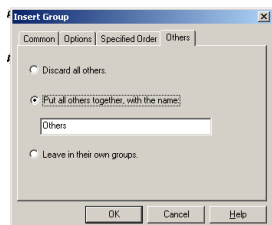
18. Enter North in the Named Group field on the Specified Order tab.
19. Click New on the Specified Order tab to display the Define Named Group window.



20. Select is one of from the drop-down list. A second drop-down list that pulls from the Name.STATE\_PROVINCE field and an empty text area will display.
21. Select each of the northern states from the second drop-down list to add them to the text area. The text area expands to a third drop-down list.
22. Click OK
23. Enter South in the Named Group field on the Specified Order tab.
24. Click New on the Specified Order tab to display the Define Named Group window.
25. Select is one of from the drop-down list.
26. Select each of the southern states from the second drop-down list to add them to the text area.



27. Click OK
28. Select the Others tab
29. Enable the Put all others together with the name option and enter others in the empty field.



30. Click OK
31. Click the Refresh icon on the Standard toolbar. Your report should be similar to the following example:

23/02/2005					
ID	MEMBER TYPE	LAST_FIRST	COMPANY	STATE	PROVINCE
<b>A</b>					
<b>Others</b>					
10186	A		R Green & Sons	VIC	
17966	A		Telstra	VIC	
17987	A		Sunbeam	VIC	
<b>AA</b>					
<b>Others</b>					
11584	AA		L.J Hooker - Bowen	QLD	
152	AA		L.J Hooker - Broadbeach	QLD	
<b>AI</b>					
<b>North</b>					
17990	AI	WILSON, JOHN	Avery Centre	ACT	
17989	AI	WILSON, MARY	Avery Centre	ACT	
<b>Others</b>					
156	AI	BACHMAN, PETER	American Business Services	QLD	
17992	AI	BROKO, PETER	De la Salle College	NSW	
17988	AI	HALPENNY, AMANDA	Sunbeam	NSW	
19009	AI	HANSON, JOHN	Balmain Bowling	NSW	
17704	AI	HEARN, TIM		WA	
17984	AI	MCCORMACK, JENNIFER			
17935	AI	MURDOCH, RUPERT	L.J Hooker - Head Office	QLD	
17937	AI	PACKER, JAMES	L.J Hooker - Head Office	QLD	
17936	AI	PACKER, JOHN	L.J Hooker - Head Office	QLD	
17981	AI	ROSENBLUM		SA	
188	AI	SPRYN, MICHAEL	Recovery Services Inc.	WA	
17982	AI	TBA			
17993	AI	TRAMPET, ANDREW	De la Salle College	NSW	
17979	AI	WALKER, DAVID			
17965	AI	ZAP, WAYNE	Telstra Foundation	VIC	
<b>AL</b>					
<b>Others</b>					
17939	AL	YOUNG, ROBERT		QLD	
<b>B</b>					
<b>Others</b>					
11393	B	BEIDLER, DIANA	L.J Hooker - Head Office	QLD	

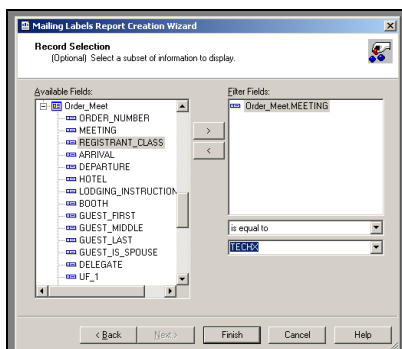
32. Save the report as Workshop9.rpt

## Linking Tables

### Workshop 10. Linking Tables - I

In this workshop you will create special badges for an upcoming event. The badges need to include the member's informal name, full name, title, company, city and state.

1. Select File > New to open the Crystal Reports Gallery
2. Select the Using the Report Wizard option, and select the Mail Label report type.
3. Click OK to open the Mailing Labels Report Creation Wizard window.
4. Navigate to and select the following tables by double-clicking the table name: Order\_Badge and Order\_Meet
5. In the links window, delete the Delegate link if it exists.
6. Click Next
7. Add the following fields by double-clicking the field name: FULL\_NAME, TITLE, COMPANY, INFORMAL, CITY and STATE\_PROVINCE
8. Click Next
9. Select the Name Badge (Avery 5395)
10. Click Next
11. Select Order\_Meet.MEETING in the Record Selection area and click the Add icon
12. Click the drop-down list, and select is equal to.
13. Click the second drop-down list and select TECHX.



14. Click Finish to update the data and preview the report.

15. Save the report as Workshop10.rpt. Your report should be similar to the following example.

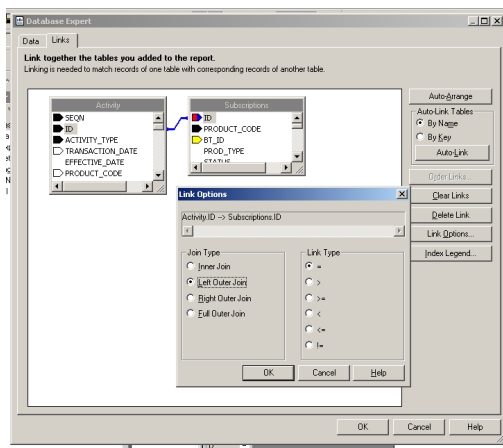
## Workshop 11. Linking Tables - II

In this workshop you will create a report using a left outer join to join to include all records in the Activity table and the Subscriptions table.

1. Select File > New to open the Crystal Reports Gallery
2. Select the Using the Report Wizard option, and select the Standard report type.
3. Click OK to open the Standard Report Creation Wizard window.
4. Navigate to and select the Activity and Subscriptions tables.
5. In the Link area, remove all links except the Activity.ID and Subscriptions.ID link and click Next.
6. In the fields area, insert the following fields Activity.ID, Activity.MEMBER\_TYPE, Subscriptions.PRODUCT\_CODE
7. Click Next
8. In the Group area, select the Activity.ID, Activity.MEMBER\_TYPE, and Activity.ACTIVITY\_TYPE fields
9. Click finish.
10. Click the Select Export icon
11. Select Activity.MEMBER\_TYPE
12. Select is equal to from the drop-down list.
13. Select A from the second drop-down list.
14. Click OK.
15. Right-click on the ID field, and select Format Field .
16. Enable the Suppress If Duplicated option on the Common tab, and click OK.
17. Right-click on the Activity Type field and select Format Field.
18. Enable the Suppress If Duplicated option on the Common tab and click OK.
19. Click the Refresh icon on the Standard toolbar. Your report should look similar to:

ID	MEMBER_TYPE	ACTIVITY_TYPE	PRODUCT_CODE
23/10/2006			
10009	A	DUES	BASIC
	A	DUES	CHAPT/GOLD COAST
10010	A	ORDER	ACT
	A	ORDER	BASIC
	A	ORDER	BASIC_GST
	A	ORDER	JOUR
	A	ORDER	PAC
151	A	DUES	ACT
	A	DUES	BASIC
	A	DUES	BASIC_GST
	A	DUES	CHAPT/HARRIS
	A	DUES	CHAPT/TRAVIS
	A	DUES	JOUR
	A	DUES	PAC
	A	DUES	ACT
	A	DUES	BASIC
	A	DUES	BASIC_GST
	A	DUES	CHAPT/HARRIS
	A	DUES	CHAPT/TRAVIS
	A	DUES	JOUR
	A	DUES	PAC
10010	A	ORDER	ACT
	A	ORDER	BASIC
	A	ORDER	BASIC_GST
	A	ORDER	JOUR
	A	ORDER	PAC
	A	ORDER	ACT
	A	ORDER	BASIC
	A	ORDER	BASIC_GST
	A	ORDER	JOUR
	A	ORDER	PAC

20. Click on the database expert icon
21. Select the Links tab
22. Select the link between Activity.ID and Subscriptions.ID and click Link Options
23. Under Join Type select the Left Outer Join option and click OK. Click prompts you to then refresh the report data.
24. Click OK



As the left outer join was selected the report now includes all records regardless if data existed in the Subscriptions table.

ID	MEMBER_TYPE	ACTIVITY	PRODUCT_CODE
23/10/2006			
10009	A	DUES	BASIC
	A	DUES	CHAPT/GOLD COAST
10010	A	ORDER	ACT
	A	ORDER	BASIC
	A	ORDER	BASIC_GST
	A	ORDER	JOUR
	A	ORDER	PAC
151	A	DUES	ACT
	A	DUES	BASIC
	A	DUES	BASIC_GST
	A	DUES	CHAPT/HARRIS
	A	DUES	CHAPT/TRAVIS
	A	DUES	JOUR
	A	DUES	PAC
	A	DUES	ACT
	A	DUES	BASIC
	A	DUES	BASIC_GST
	A	DUES	CHAPT/HARRIS
	A	DUES	CHAPT/TRAVIS
	A	DUES	JOUR
	A	DUES	PAC
17987	A	GIFT	
10010	A	ORDER	ACT
	A	ORDER	BASIC
	A	ORDER	BASIC_GST
	A	ORDER	JOUR
	A	ORDER	PAC
	A	ORDER	ACT
	A	ORDER	BASIC
	A	ORDER	BASIC_GST

25. Save the report as Workshop11.rpt

## Using Parameter Fields

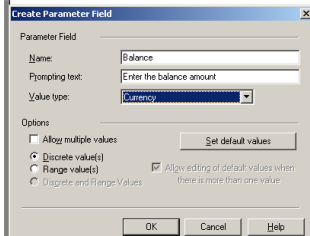
### Workshop 12. Create a parameter report to locate an outstanding invoice

In this workshop we will create a report with the customer's details and any outstanding invoices for a particular amount.

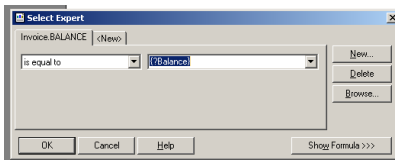
1. Select File > New to open the Crystal Reports Gallery
2. Select the Using the Report Wizard option, and select the Standard report type.
3. Click OK to open the Standard Report Creation Wizard window.
4. In the Data window, navigate to and select the Name and Invoice tables
5. Click next twice
6. In the Fields window, select the following fields: Name.ID, Name.FULL\_NAME, Name.CITY, Invoice.DESCRPTION, Invoice.BALANCE
7. Click Next
8. In the Grouping Window, select Name.ID
9. Click Next
10. In the Summaries window, verify the Invoice.BALANCE are in the summarized area.
11. Click finish
12. Click on the Design tab.
13. Right-click on individual column headings and select Edit Text Object. Rename the column headings as follows using initial caps: Id, Name, Suburb, Invoice Description and Outstanding Balance.

23/10/2009	Id	Name	Suburb	Invoice Description	Outstanding Balance
11584					
11584		BOWEN		Professional Development Si	-\$200.00
11584		BOWEN		Professional Development Si	-\$200.00
11584		BOWEN		Professional Development Si	-\$200.00
11584		BOWEN		Professional Development Si	-\$200.00

14. Suppress the ID field in the detail section
15. Select Can Grow on the Invoice Description
16. Click the Field Explorer icon on the Standard toolbar to open the Field Explorer window.
17. Select Parameter Fields.
18. Click the New icon on the Field Explorer window to open the Create Parameter Field window.
19. Enter Balance in the Name field
20. Add “Enter the outstanding balance” in the Prompting Text Field
21. Select Currency from the Value Type



22. Select OK
23. In the Record Selection window, double-click Invoice.BALANCE to add it to the Filter Fields area.
  - 23.1. Click the drop-down list and select is equal to
  - 23.2. Click the second drop-down list and select {?Balance}



24. Select OK
25. The new parameter field ‘Balance’ will prompt you for a balance amount – enter 10.
26. Only the records with a balance of 10 are displayed

23/10/2009				
<u>Id</u>	<u>Name</u>	<u>Suburb</u>	<u>Invoice Description</u>	<u>Outstanding Balance</u>
11584		BOWEN	Annual Conference 2006	\$10.00
11584				<u>\$10.00</u>
<u>Grand Total:</u>				<u>\$10.00</u>

27. Save your report as Workshop13.rpt

*This completes the workshops for the Crystal Reports for Beginners – we hope you got a few tips and tricks!  
Please remember to complete the Evaluation Form.*

*Thank you,*

*Greg Norris & Michelle Lelempsis*