

How to Use Crystal Reports

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This instruction is for using Crystal reports to: 1. View Existing Reports 2. Run Reports with or without Prompts

1. Open **Crystal Reports on the Edge Server** from the aits.uark.edu Sharepoint page.

The screenshot shows the University of Arkansas website. The header includes the university logo, the name 'University Advancement', a search bar, and a 'GIVE TODAY!' button. The main content area is titled 'Information and Technology Services' and contains a breadcrumb trail: 'U of A / University Advancement / Offices / Information and Technology Services'. Below this, there is a paragraph describing the services and a list of 'Quick Links'. The link 'Crystal Reports on the EDGE Server' is highlighted with a green box. To the right, there is a 'Training Documents' section with links to 'Advanced', 'BlackBaud', 'Crystal', 'How to files', 'Notice of Student Support', and 'Training Overview'. At the bottom, there is a 'STAFF' section listing six individuals with their titles, email addresses, and phone numbers.

University Advancement Search this site

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Information and Technology Services

U of A / University Advancement / Offices / Information and Technology Services

Information and Technology Services is responsible for University Advancement information data systems and user computing hardware and software.

The information or data side includes all on-line system maintenance, security, training, and data retrieval. Its main duties include ID setup, security, and training for on-line systems including Advance, Crystal Reports Server, NOS and Blackbaud; database and on-line system upgrades and enhancements for Advance, CRS, and the NOS; data imports and exports to and from other systems; and data retrieval and distribution from all data systems involved. We are here to help.

Quick Links

- [Advance for General Users](#)
- [Advance for Central Development Users](#)
- [Advance for Alumni Association Users](#)
- [Advance TRAIN \(For Training Purposes\)](#)
- **[Crystal Reports on the EDGE Server](#)**
- [Blackbaud](#)

Request Forms

- [Report Request Form](#)
- [Advance/Crystal Reports ID Request Form](#)
- [NOSS- Notice of Student Support ID Request Form](#)
- [Blackbaud ID Request Form](#)

Training Documents

- [Advanced](#)
- [BlackBaud](#)
- [Crystal](#)
- [How to files](#)
- [Notice of Student Support](#)
- [Training Overview](#)

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2. Enter your User Name and Password.
 - a. User Name = Your email prefix (e.g. cmfarris)
 - b. Password = Whatever you have set it to

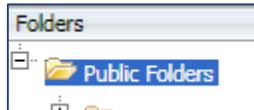


The screenshot shows the SAP BusinessObjects BI launch pad login interface. At the top, there is an orange horizontal bar. Below it, the text reads "SAP BusinessObjects" in a large, bold font, followed by "BI launch pad" in a smaller font. A bold instruction says "Enter your user information, and click 'Log On'." Below this, a smaller line of text states "If you are unsure of your account information, contact your system administrator." The login form consists of three input fields: "System:" with the value "UARFDNPRPT1:6400", "User Name:", and "Password:". A blue "Log On" button is positioned to the right of the password field. In the bottom left corner, the SAP logo is visible, and in the bottom right corner, there is a "Help" link.

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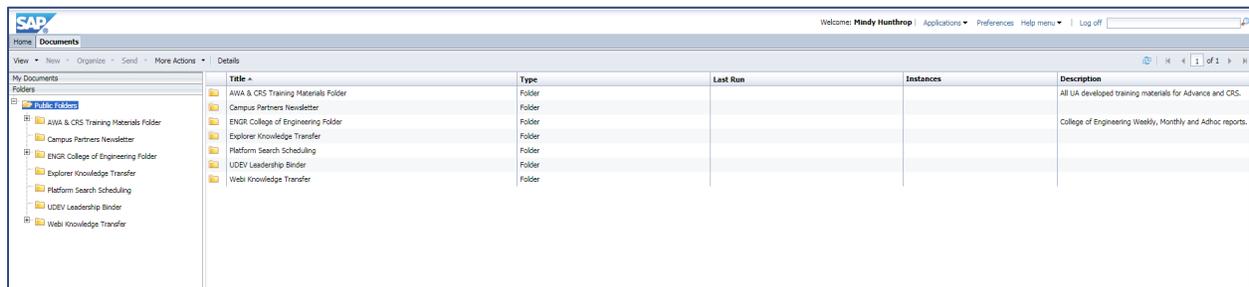
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3. Double-click on Public Folders.
4. Your screen should now look “something” like this.

IMPORTANT! EACH USER HAS A DIFFERENT VIEW. NOT ALL USERS CAN VIEW ALL FILES OR FOLDERS. YOUR FOLDER AND THE REPORTS IN IT MAY DIFFER FROM WHAT IS SHOWN IN THIS HOW-TO. THE PROCEDURES, HOWEVER, ARE THE SAME FOR EVERY REPORT.



These are the folders that are available to you as a user. Inside of these folders you will find reports custom-designed for your department.

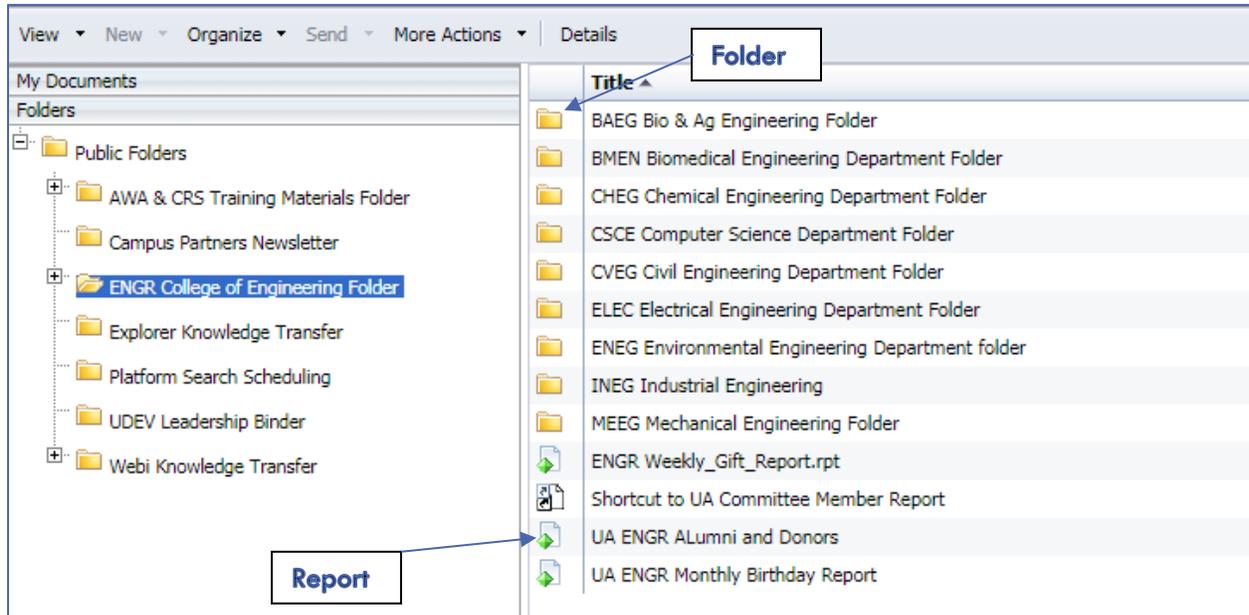
- Reports are placed in these folders by the AITS team.
- You can request custom reports at aits.uark.edu.
- **Always** request a report if you are going to be contacting entities in Advance! Never create your own reports out of Advance, it's DANGEROUS.
- Reports that are used repeatedly are candidates for permanent residency in Crystal.

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5. Select your unit folder. In this example ENGR College of Engineering.



The folder icons mean that there are more folders or reports inside. 

The small paper icon with a green diamond is a report. 

FOR THIS HOW-TO WE WILL USE THE ENGR Weekly_Gift_Report.rpt as an example.

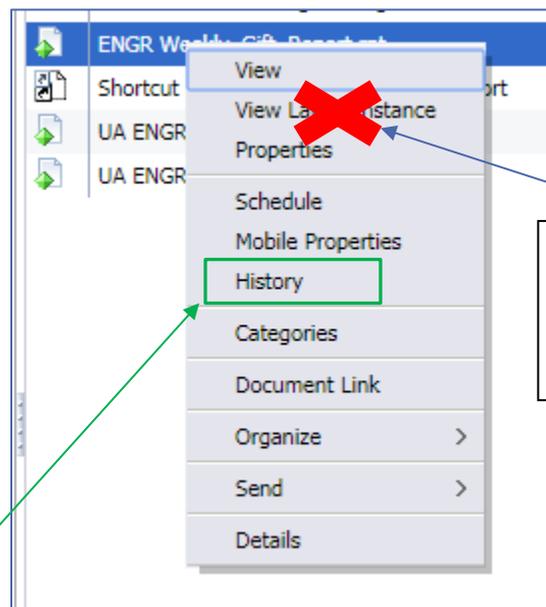
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TO VIEW AN EXISTING REPORT

1. Right-click on the report name. A list of options will appear.



View Latest Instance is NOT a good idea. If your last report failed to run you will just get a copy of an older inaccurate report.

2. Select History as you see in the above illustration.

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3. This will show you a list of the previous times that this report has been run.
4. History contains (see graphics below):
 - a. **Instance Time** - Date that the report was last run.
 - b. **Title** – Name of the report.
 - c. **Status** – Look for Success or Failure. If you see **Recurring** this is a report that is set to run on a pre-set schedule. Always look at **Success** reports for valid information.
 - d. **Created by** – The person that ran the report.
 - e. **Type** – Type of report (i.e. Microsoft Excel or PDF)
 - f. **Parameters** – These are the settings that can be changed to make a report show different information. This field shows you which settings were in place when the report was run.

All reports are stack-ranked by date. Newest to oldest.

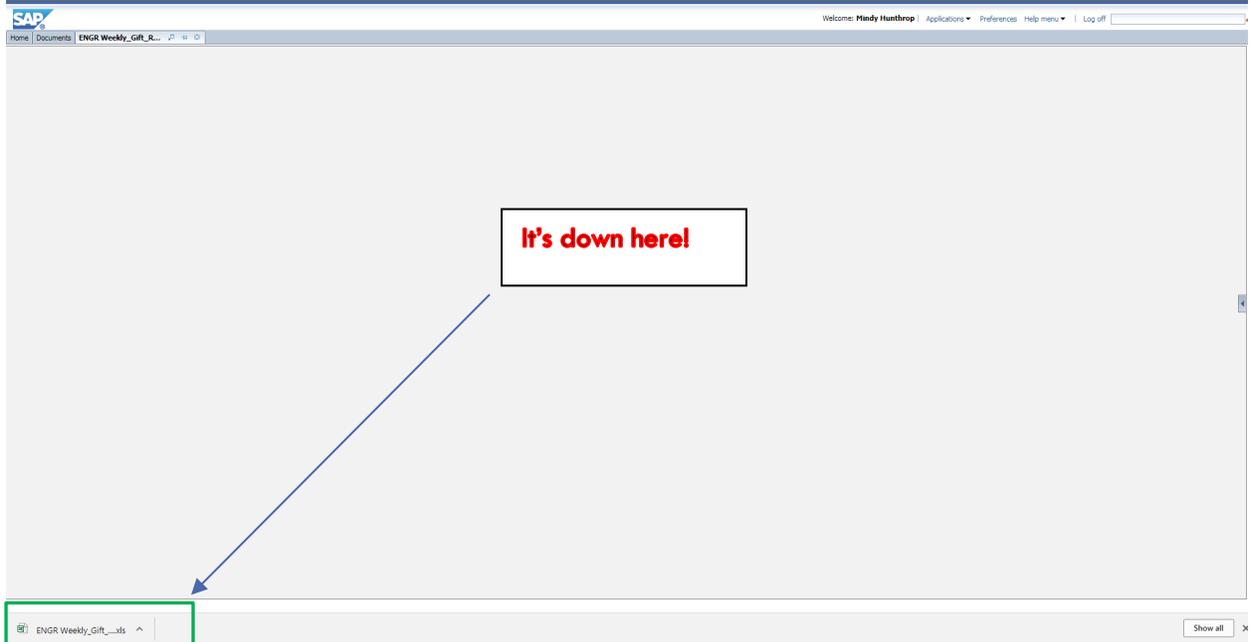
	Instance Time	Title	Status
	Feb 10, 2018 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
	Feb 3, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
	Jan 27, 2018 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
	Jan 20, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
	Jan 13, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
	Jan 6, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
	Dec 30, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
	Dec 23, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
	Dec 16, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
	Dec 9, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
	Dec 2, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
	Nov 25, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
	Nov 18, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
	Nov 11, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
	Nov 4, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
	Oct 28, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
	Oct 21, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
	Oct 14, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
	Oct 7, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success
	Sep 30, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success
	Jan 29, 2016 1:38 PM	ENGR Weekly_Gift_Report.rpt	Recurring

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6. Your file has now been opened on the bottom-left corner of your screen. You may open it by clicking on it. (See below)



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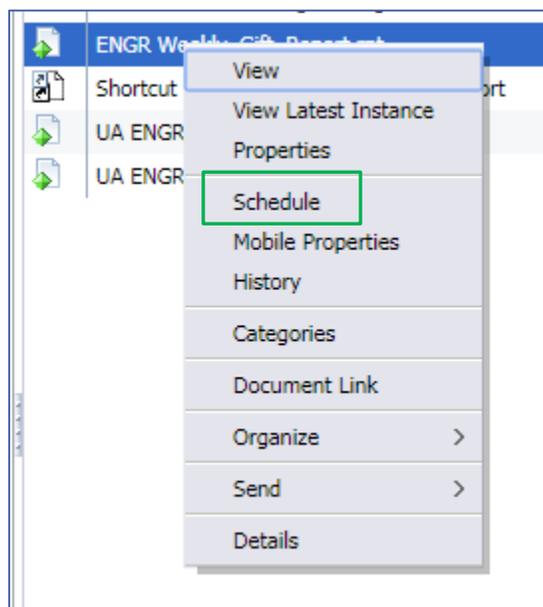
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How to Run an Existing Report with (or without) Changed Parameters

1. Right-click on the report name. A list of options will appear.

ONLY RUN A NEW REPORT IF YOU NEED CURRENT DATA OR YOU NEED TO CHANGE HOW A REPORT IS RUN (ITS PARAMETERS)



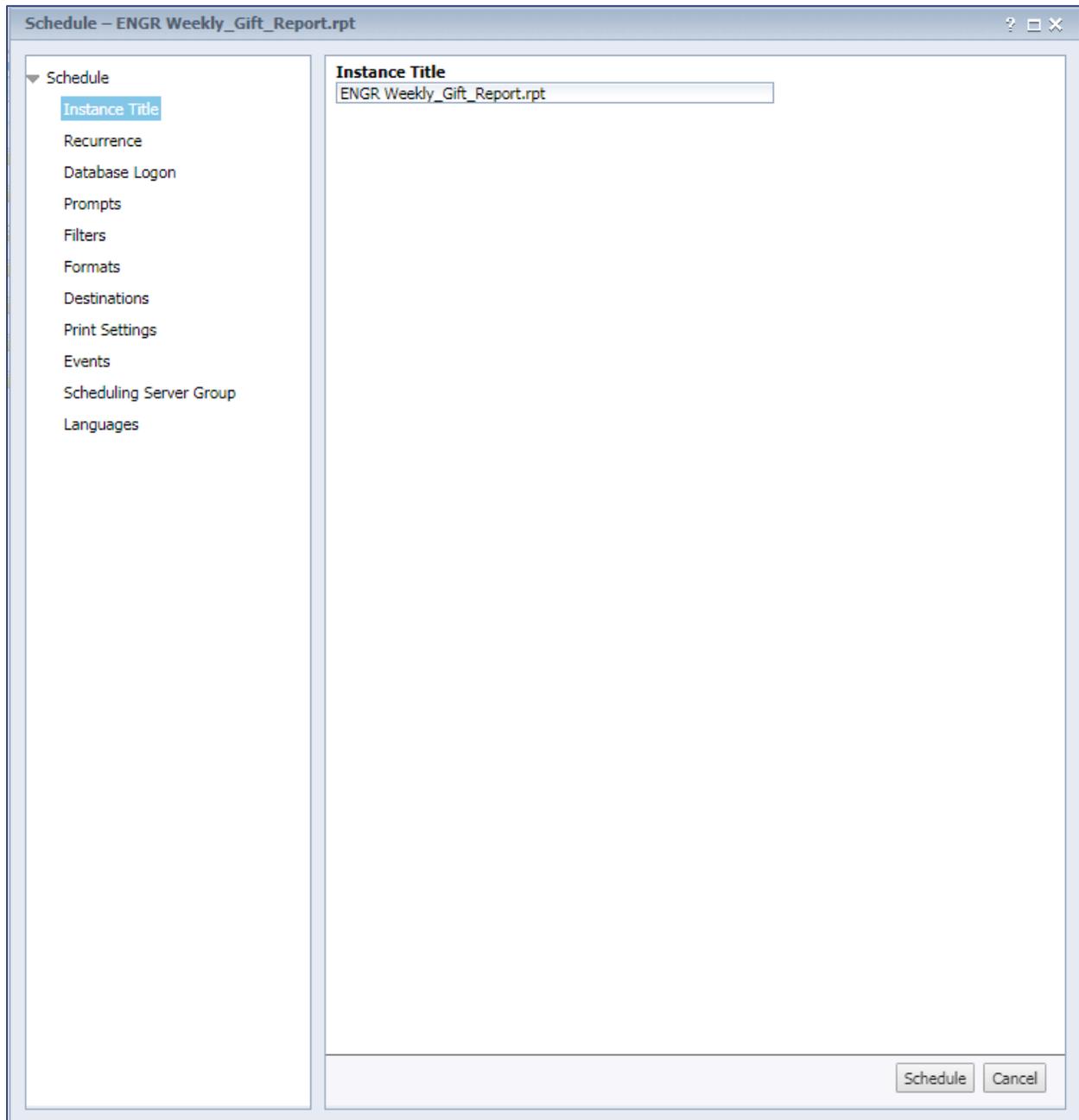
2. Left-click on Schedule.

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3. This will open your Schedule screen. It will look like this:



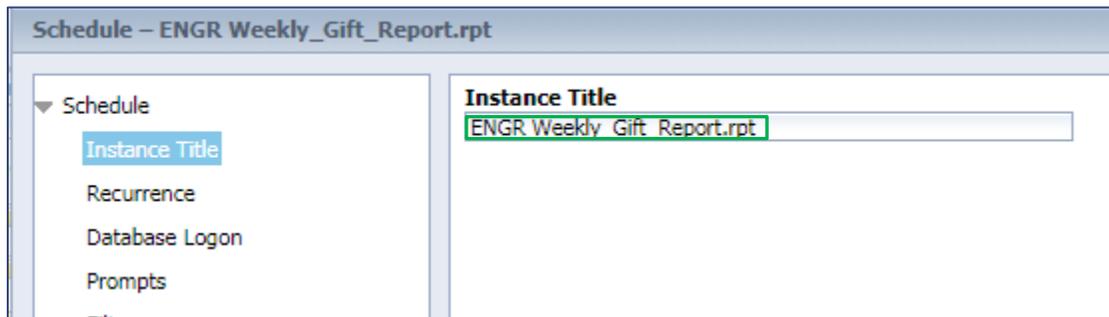
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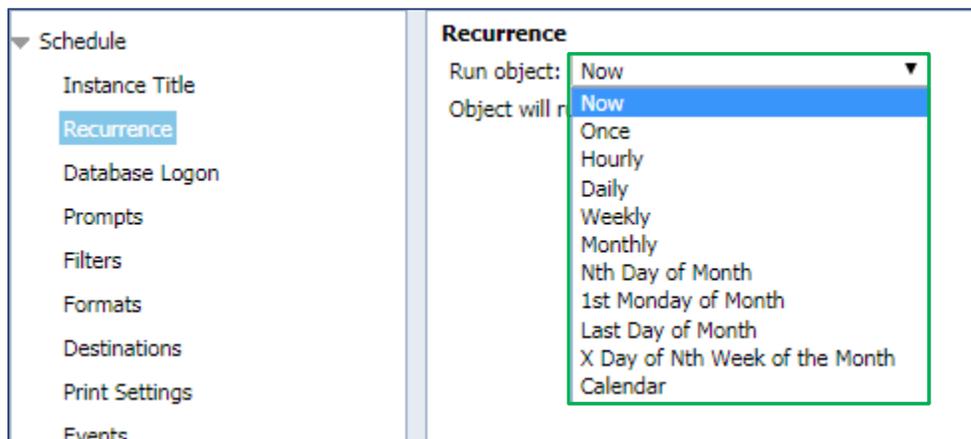
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4. **Instance Title** – You may change the Title of the Report for this run only.

THIS IS NOT A REQUIRED STEP. IT IS OPTIONAL.



5. **Recurrence** – This will let you set up the report to run multiple times. You have multiple options as you can see below:



*IF YOU ONLY NEED THE REPORT TO RUN ONCE AND RIGHT NOW SELECT **NOW!***

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6. **Prompts** – Allows you to change the parameters of the report. This is how you change what information the report will display.

THIS IS NOT A REQUIRED STEP. IT IS OPTIONAL.

Schedule – ENGR Weekly_Gift_Report.rpt

▼ Schedule

- Instance Title
- Recurrence
- Database Logon
- Prompts**
- Filters
- Formats
- Destinations
- Print Settings
- Events
- Scheduling Server Group

Prompts

Edit Values...

Parameter	Scheduling Value
* I_START_DATE	null
* I_END_DATE	null
* I_ALLOC_COLLEGE	2103
* I_ALLOC_DEPARTMENT	null
* I_ALLOC_SUB_DEPARTMENT	null
* I_ALLOCATION	null
* I_APPEAL_GROUP	null
* I_APPEAL_CODE	null
* I_CAMPAIGN	null

* Required

*THIS REPORT HAS MULTIPLE PARAMETERS THAT CAN BE CHANGED. NOT ALL REPORTS HAVE THIS MANY PARAMETERS. SOME HAVE **NO** PARAMETERS AT ALL!*

7. Click Edit Value... button to make changes to the report parameters.
- 

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8. If you want to change a parameter remove the check mark by Set to Null Set to Null and change the information in the text box. Sometimes these have drop down boxes or calendar tools, sometimes they require the user to enter text directly into the box. (In the below example I have set a start date of February 5 and 4:02:31 PM.)

The screenshot shows a 'Prompts' dialog box with a title bar and a close button. The main area is titled 'Enter prompt values.' and contains six parameter rows. Each row has a label on the left and a parameter name on the right. The first row, 'I_START_DATE', is highlighted with a green border. It includes a text box with the value '2/5/2018 16:02:31' and a 'Set to Null' checkbox that is unchecked. The other rows have 'Set to Null' checkboxes that are checked. The rows are: 'I_END_DATE', 'I_ALLOC_COLLEGE' (with value '2103'), 'I_ALLOC_DEPARTMENT', 'I_ALLOC_SUB_DEPARTMENT', and 'I_ALLOCATION'.

Parameter Name	Value	Set to Null
I_START_DATE	2/5/2018 16:02:31	<input type="checkbox"/>
I_END_DATE		<input checked="" type="checkbox"/>
I_ALLOC_COLLEGE	2103	<input type="checkbox"/>
I_ALLOC_DEPARTMENT		<input checked="" type="checkbox"/>
I_ALLOC_SUB_DEPARTMENT		<input checked="" type="checkbox"/>
I_ALLOCATION		<input checked="" type="checkbox"/>

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9. When your parameters are all set the way you like (YOU CAN SET MORE THAN ONE ON THE SAME PAGE!)

10. Scroll to the bottom of the box and choose the OK button.

OK

The screenshot shows a 'Prompts' dialog box with a scrollable list of parameters. Each parameter has a text input field and a 'Set to Null' checkbox. The parameters listed are:

- I_ALLOC_DEPARTMENT
- I_ALLOC_SUB_DEPARTMENT
- I_ALLOCATION
- I_APPEAL_GROUP
- I_APPEAL_CODE
- I_CAMPAIN

All 'Set to Null' checkboxes are checked. At the bottom right, there are 'OK' and 'Cancel' buttons.

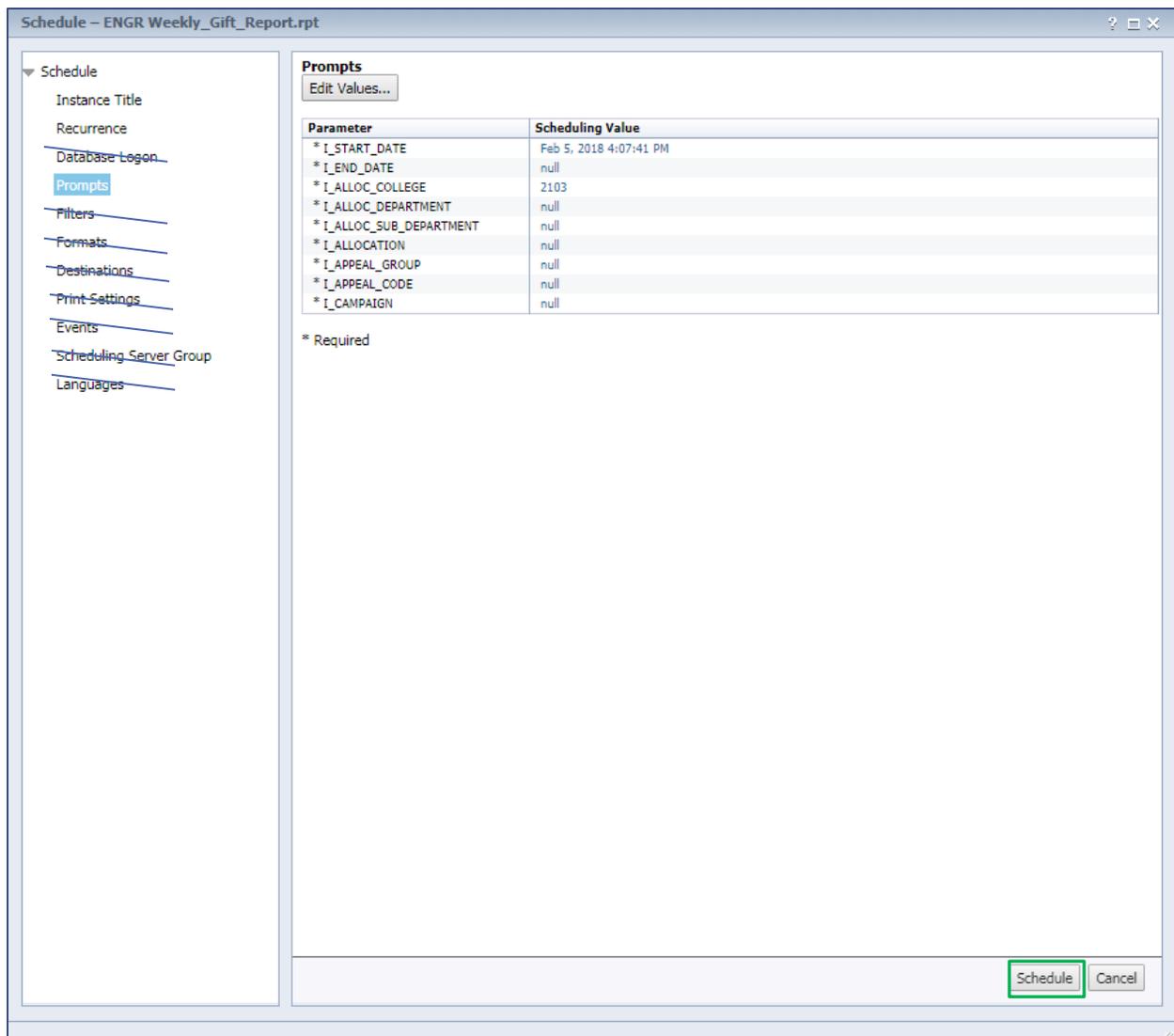
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11. Start the report by left-clicking the Schedule button in the bottom right hand corner of the screen.

IGNORE ALL OTHER OPTIONS!

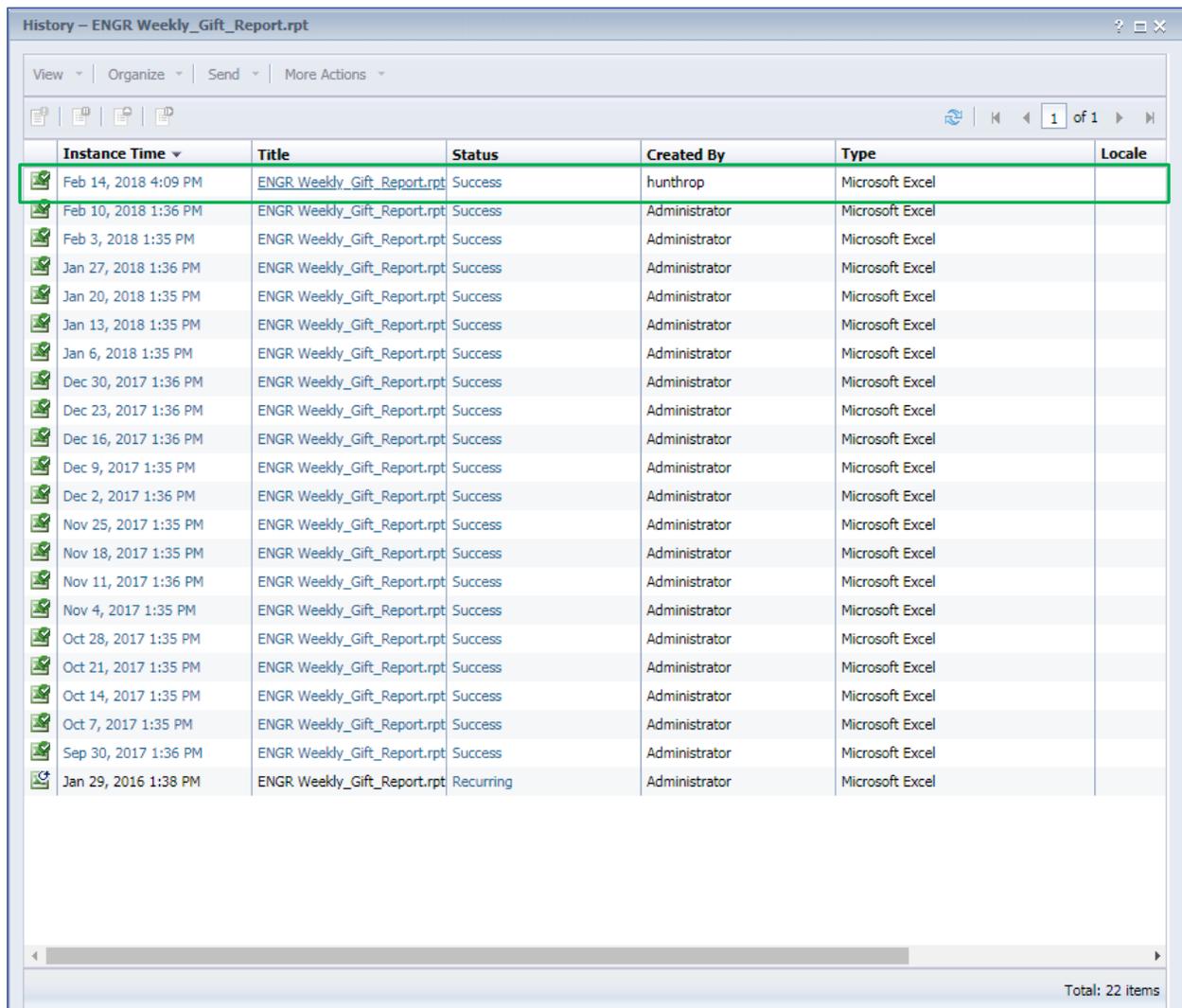


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12. This will cause your History page to open again.
13. You will see your report running at the top of the screen.
14. This is what it will look like when it is finished:



The screenshot shows a window titled "History - ENGR Weekly_Gift_Report.rpt". The window contains a table with the following columns: Instance Time, Title, Status, Created By, Type, and Locale. The table lists 22 instances of the report, with the most recent instance on Feb 14, 2018, highlighted in green. The status of all instances is "Success" except for the one on Jan 29, 2016, which is "Recurring".

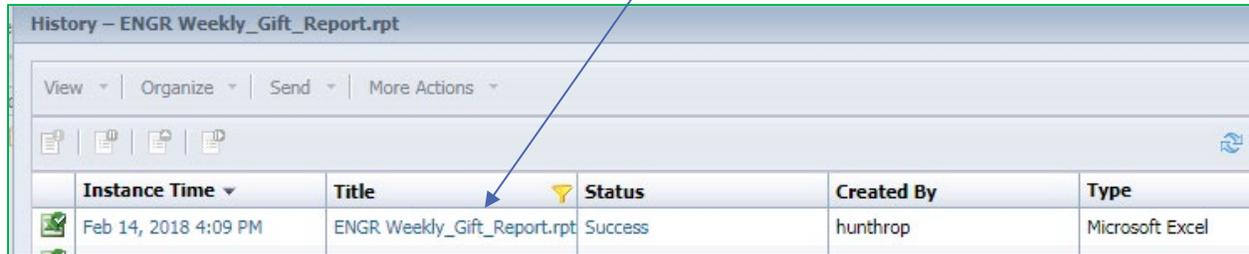
Instance Time	Title	Status	Created By	Type	Locale
Feb 14, 2018 4:09 PM	ENGR Weekly_Gift_Report.rpt	Success	hunthrop	Microsoft Excel	
Feb 10, 2018 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Feb 3, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Jan 27, 2018 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Jan 20, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Jan 13, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Jan 6, 2018 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
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Dec 23, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Dec 16, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Dec 9, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Dec 2, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Nov 25, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Nov 18, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Nov 11, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Nov 4, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Oct 28, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Oct 21, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Oct 14, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Oct 7, 2017 1:35 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Sep 30, 2017 1:36 PM	ENGR Weekly_Gift_Report.rpt	Success	Administrator	Microsoft Excel	
Jan 29, 2016 1:38 PM	ENGR Weekly_Gift_Report.rpt	Recurring	Administrator	Microsoft Excel	

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15. Choose the report you JUST RAN and left-click on its title.



The screenshot shows a table titled "History – ENGR Weekly_Gift_Report.rpt". The table has columns for Instance Time, Title, Status, Created By, and Type. A blue arrow points to the "Title" column header.

Instance Time	Title	Status	Created By	Type
Feb 14, 2018 4:09 PM	ENGR Weekly_Gift_Report.rpt	Success	hunthrop	Microsoft Excel

1. Your file has now been opened on the bottom-left corner of your screen. You may open it by clicking on it. (See below)

