How to Use Crystal Reports

Ver. 1

14February2018

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.

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

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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.

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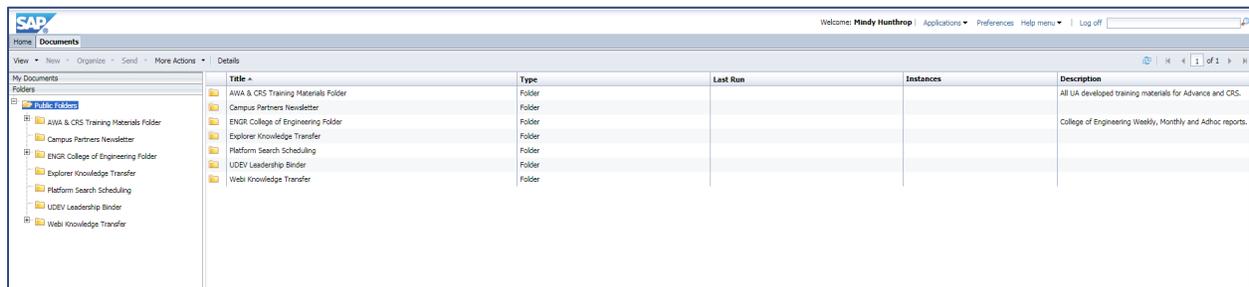
These are the folders that are available to you as a user. Inside of these folders you will find reports custom-designed for your department.

- 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.

5. Select your unit folder. In this example ENGR College of Engineering.
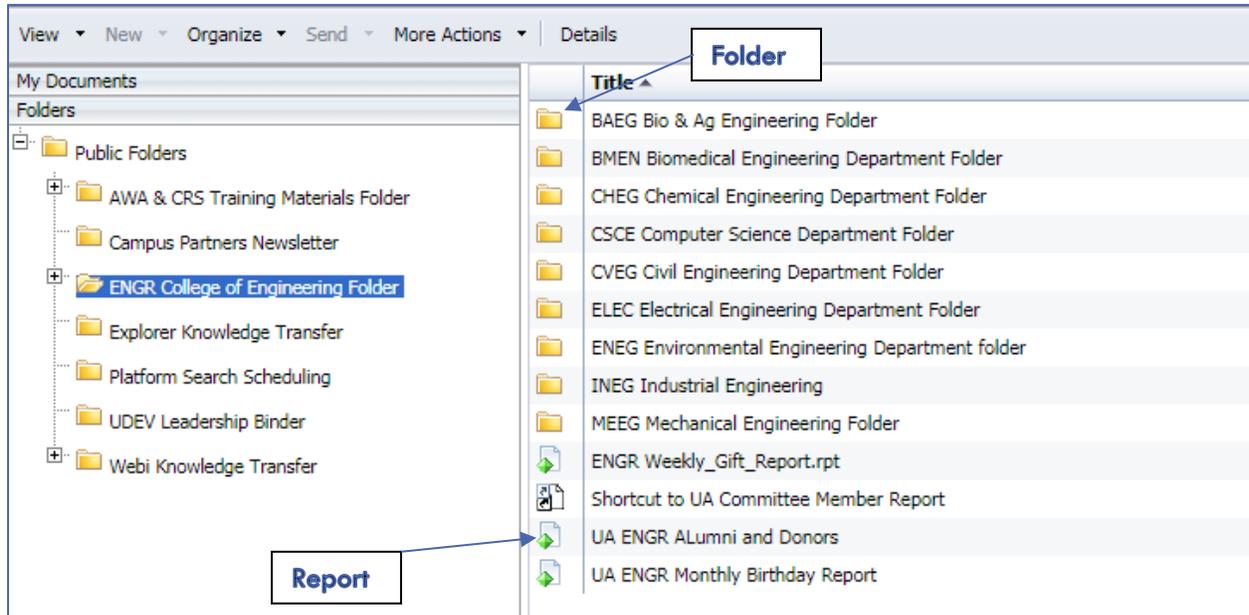
The folder icons mean that there are more folders or reports inside. 🗀

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.

TO VIEW AN EXISTING REPORT

1. Right-click on the report name. A list of options will appear.
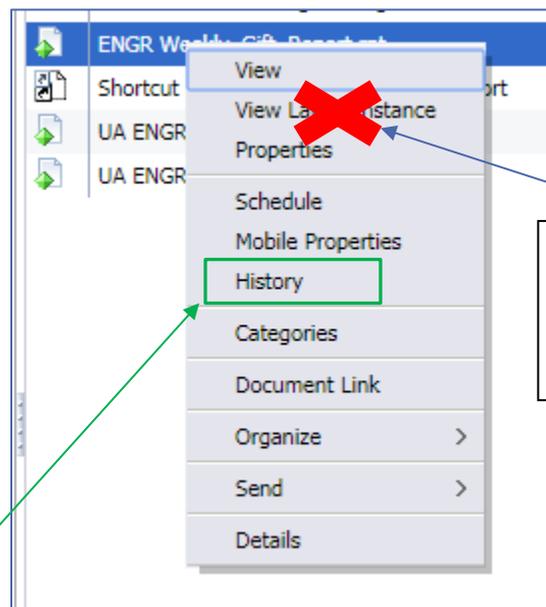
View Latest Instance is NOT a good idea. If your last report failed to run you will just get a copy of an older inaccurate report.

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

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.

History – ENGR Weekly_Gift_Report.rpt

View | Organize | Send | More Actions

Instance Time ▼		Title		Status	
Feb 10, 2018 1:36 PM		ENGR Weekly_Gift_Report.rpt		Success	
Feb 3, 2018 1:35 PM	A	ENGR Weekly_Gift_Report.rpt	B	Success	C
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	

Created By	Type	Locale	Parameters
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;
Administrator	Microsoft Excel		null; null; 2103; null; null; null;

D   **E**   **F**

5. Choose the report you wish to view and left-click on its title.

Title
ENGR Weekly_Gift_Report.rpt
ENGR Weekly_Gift_Report.rpt
ENGR Weekly_Gift_Report.rpt
ENGR Weekly_Gift_Report.rpt
ENGR Weekly_Gift_Report.rpt

Click Here!

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)

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)
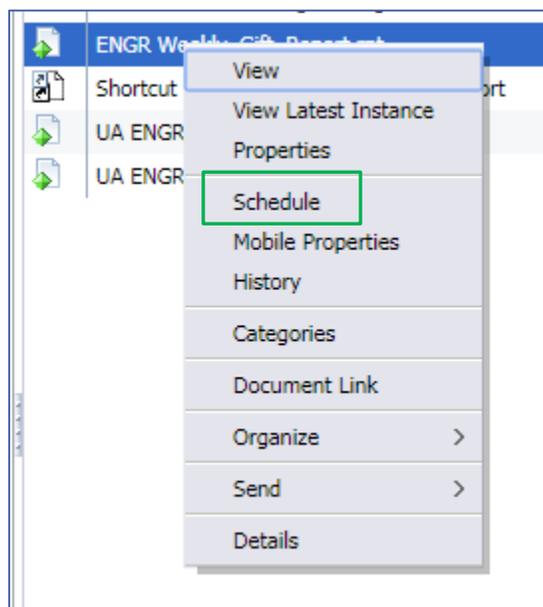
2. Left-click on Schedule.

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

Schedule – ENGR Weekly_Gift_Report.rpt	? □ ✕

▼ Schedule

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

Instance Title
ENGR Weekly_Gift_Report.rpt

[Schedule] [Cancel]
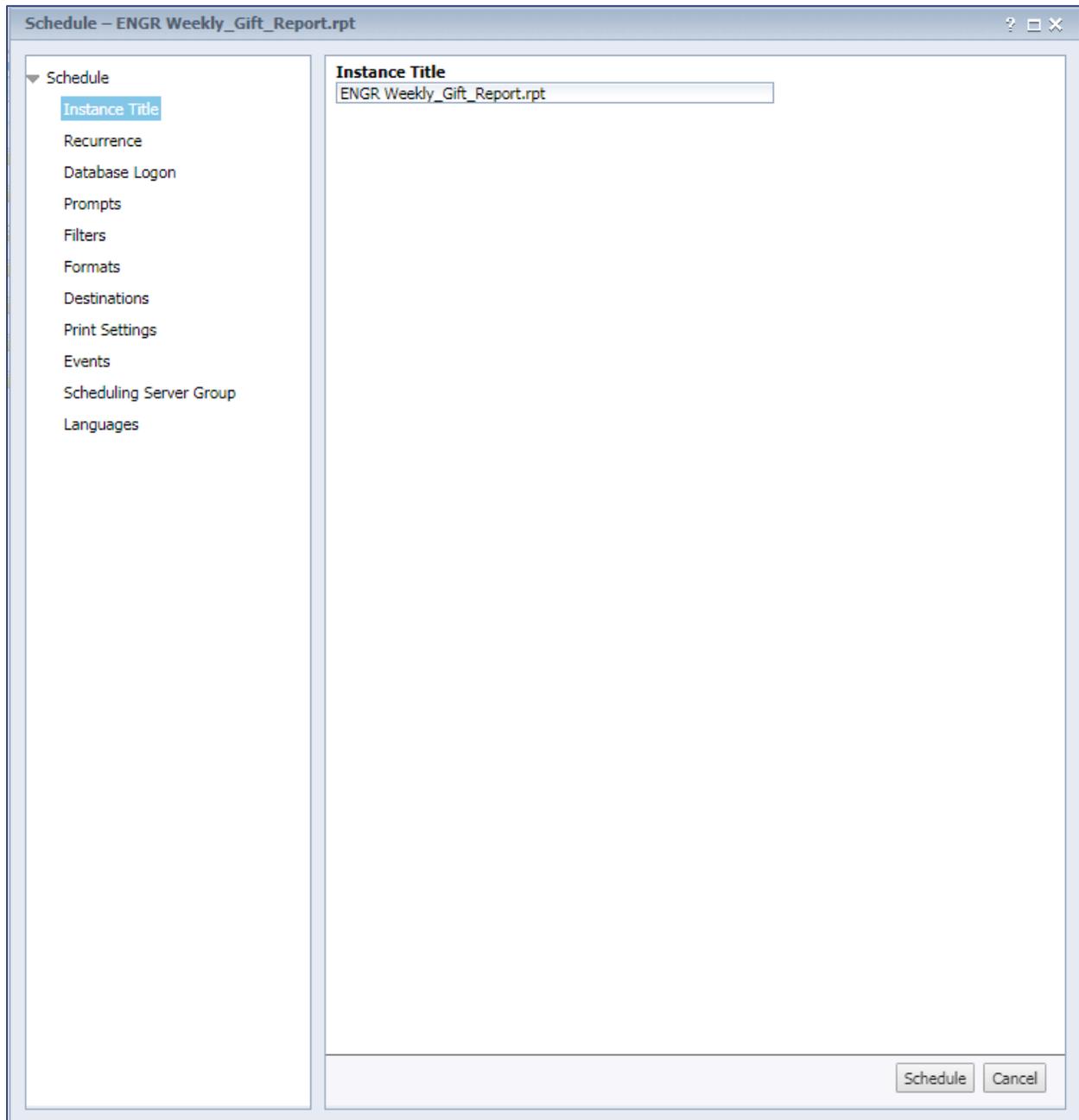
4. Instance Title – You may change the Title of the Report for this run only.

    THIS IS NOT A REQUIRED STEP. IT IS OPTIONAL.
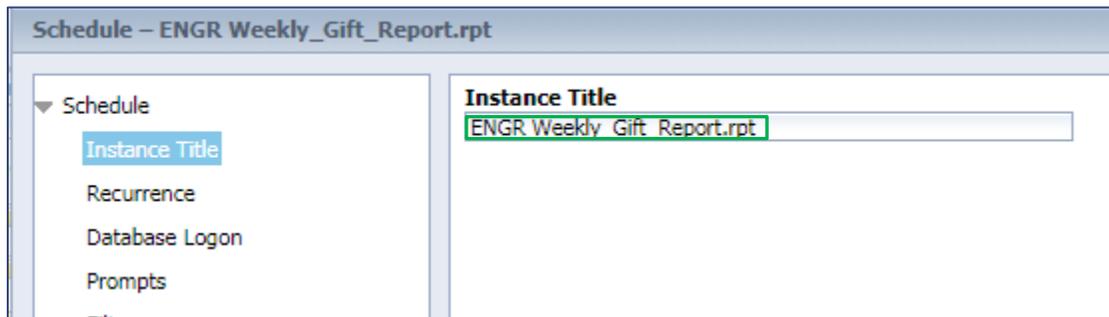
5. Recurrence – This will let you set up the report to run multiple times. You have multiple options as you can see below:
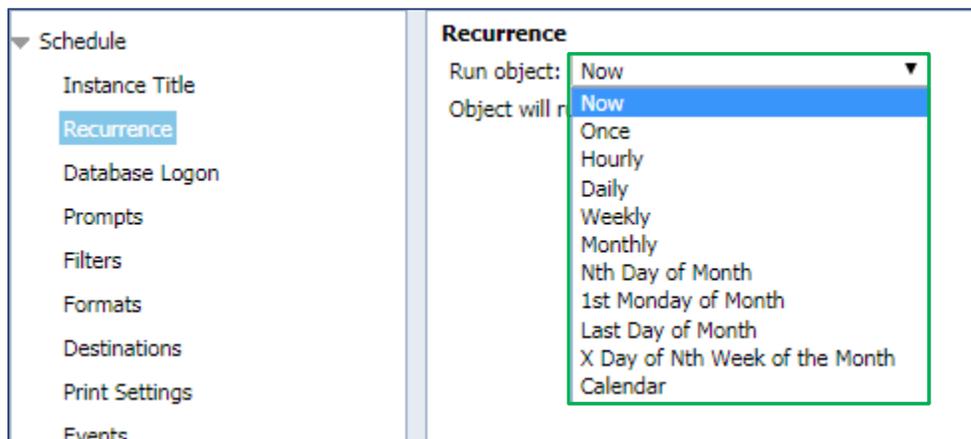
*IF YOU ONLY NEED THE REPORT TO RUN ONCE AND RIGHT NOW SELECT **NOW**!*

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.

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.

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.)

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**

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

IGNORE ALL OTHER OPTIONS!

Schedule – ENGR Weekly_Gift_Report.rpt	? □ ×

▼ Schedule

Instance Title

Recurrence

Database Logon

Prompts

Filters

Formats

Destinations

Print Settings

Events

Scheduling Server Group

Languages

Prompts

[Edit Values...]

Parameter	Scheduling Value
* I_START_DATE	Feb 5, 2018 4:07:41 PM
* 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

[Schedule] [Cancel]
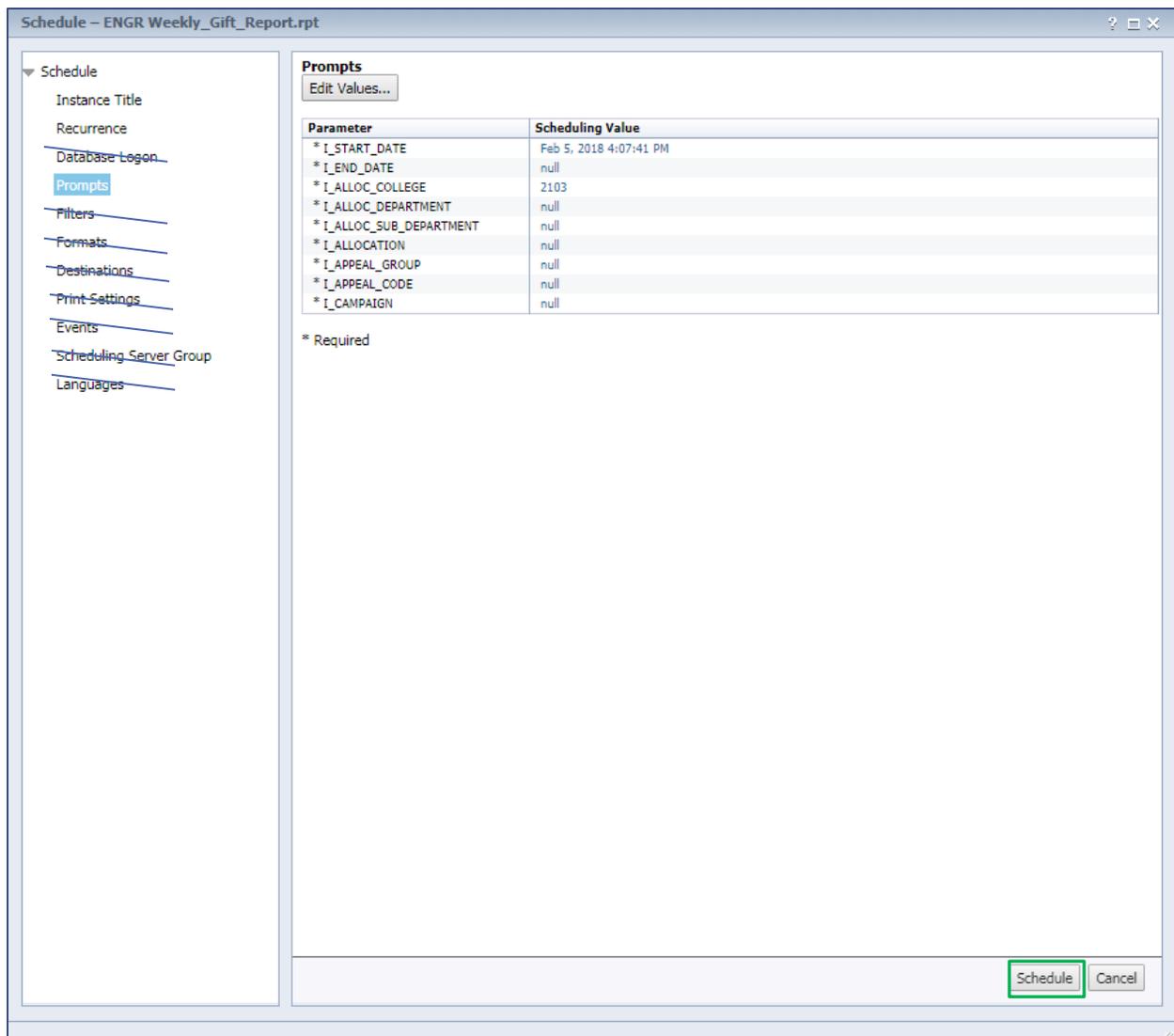
12. This will cause your History page to open again.
13. You will see your report running at the top of the screen.
14. This is what it will look like when it is finished:
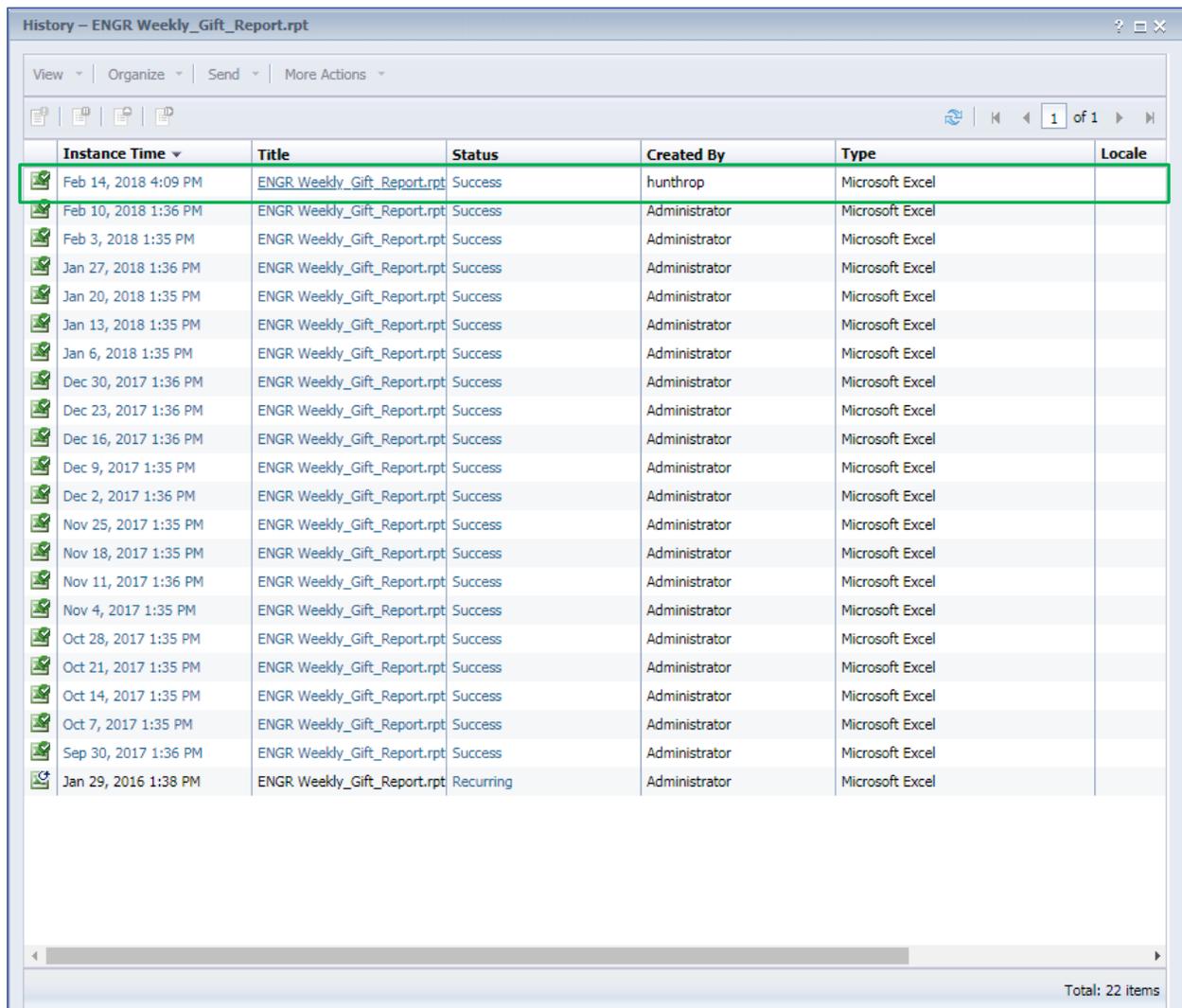
15. Choose the report you JUST RAN and left-click on its title.
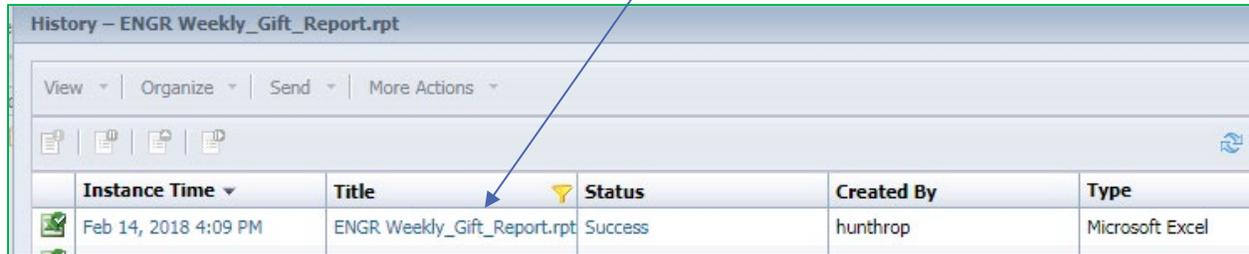
Instance Time ▾	Title	Status	Created By	Type
Feb 14, 2018 4:09 PM	ENGR Weekly_Gift_Report.rpt	Success	hunthrop	Microsoft Excel

History – ENGR Weekly_Gift_Report.rpt

View ▾ | Organize ▾ | Send ▾ | More Actions ▾

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)

It's down here!