

Creating a basic Report

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Learning Outcomes

- Starting a Report from Scratch
- Choosing a Data Source
- Placing field on the Report
- Selecting, sizing, moving and aligning Objects
- Using guides and Guidelines
- Creating Text Objects
- Previewing a report
- Saving a Report.

Creating a Basic Report

- Most often when reports need to be highly customized according to specific needs, it is preferable to start with a Blank Report.
- Starting with a Blank Report allows you to create intermediate templates which you can save and re-use afterwards.

Creating a Basic Report

- The first step as usual is to identify your data source(s). Previously, we've seen that we can access data sources by two main methods.
- Direct database access is fine if you dealing with only one type of data source at a time. e.g. a single Microsoft Access database.
- When dealing with multiple type(s) and/or data source(s) at the same time, indirect database access is recommended via either ODBC or OLEDB.

Creating a Basic Report

- Click on Start a Blank Report.
- Connect natively to a new sample Microsoft Access database called Northwind2008.mbd
- Select the entire Customers table.
- You should have a screenshot similar to the one on the next slide.

Creating a Basic Report

- Two side panels are enable by defaults:
 - Report Explorer
 - Field Explorer
- Auto-hide and Dock options can be toggled.
- If you expand (click on the \oplus) the Database Fields in the Field Explorer tab, you will see all the available Tables and Fields, in our case, the Customers table.
- Expanding the Customers Table will reveal all the available fields.

Creating a Basic Report

- Fields can be placed on the report either:
 - By dragging field(s) and dropping them in the D-Section.
 - By Right-Clicking on highlighted field(s) and Choosing Insert to Report or clicking the far left icon and clicking in the D-Section.
- Note: You can select multiple items by using the CTRL-clicking or SHIFT-clicking just like in a normal window.
- When selecting multiple fields, drop the fields as close to the top-left edge of the D-Section.
- Field Text headers are added automatically in the PH-Section.

Creating a Basic Report

- While hovering on a field, a tooltip indicates the table the field originates. This is useful for fields having similar names from different tables.
- You can select individual objects by clicking on them. Objects can be moved by dragging. Resizing handles also appear and allow the user to control the height and width.
- Hint: Adjusting the width of a field automatically adjusts the width of the respective Field Text Header.

Creating a Basic Report

- Field data can be browsed anytime by right-clicking and selecting Browse Field data...
- Multiple fields can be selected by marquee-selecting the fields concerned.
- Fields can be moved by using the arrow keys or by right-clicking
- Fields can be aligned horizontally or vertically by right-clicking.
- Fields can also sized to have same heights or widths by right clicking.

Creating a Basic Report

- Grid and Guidelines can be enabled by selecting View → Guidelines or Grid in either Design or Preview mode.
- Guides are also very useful in aligning fields and can be added by clicking in the Guide Area and removed by removing them off the Guide Area.
- Text Objects can be added by right-clicking anywhere in the work area and selecting Insert Text Object, clicking the cross-hair cursor where needed. It can also be inserted by clicking on the left-most icon in the Insert Toolbar.

Creating a Basic Report

Task 2.1

- Select CustomerID, CompanyName, City, Region and LastYearSales and place them on the report.
- Create a Text Object and place it in the RH-Section called Customer Sales. Adjust the size and font-weight and alignment.
- Preview your report in the preview pane.
- Save your report as basic2008.rpt

Crystal Reports - [basic2008.rpt]

File Edit View Insert Format Database Report Window Help

Start Page basic2008.rpt

Design Preview X

Groups basic2008.rpt

RH

PH

Customer Sales

CustomerID	CompanyName	City	Region	LastYearsSales
1,001	Alfreds Futterkiste	Berlin		\$2,294.00
1,002	Ana Trujillo Emparedados y helados	México D.F.		\$799.75
1,003	Antonio Moreno Taquería	México D.F.		\$6,452.15
1,004	Around the Horn	London		\$6,589.00
1,005	Berglunds snabbköp	Luleå		\$14,533.20
1,006	Blauer See Delikatessen	Mannheim		\$1,079.80
1,007	Blondesdås! père et fils	Strasbourg		\$8,371.80
1,008	Bólido Comidas preparadas	Madrid		\$4,035.80
1,009	Bon app'	Marseille		\$12,462.55
1,010	Bottom-Dollar Markets	Tsawassen	BC	\$8,547.50
1,011	B's Beverages	London		\$3,179.50
1,012	Cactus Comidas para llevar	Buenos Aires		\$238.00
1,014	Chop-suey Chinese	Bern		\$6,657.70
1,015	Comércio Mineiro	Sao Paulo	SP	\$1,128.00
1,016	Consolidated Holdings	London		\$787.60
1,017	Drachenblut Delikatessen	Aachen		\$420.00

Field Explorer

- Database Fields
 - Customers
 - CustomerID
 - CompanyName
 - ContactName
 - ContactTitle
 - Address1
 - Address2
 - City
 - Region
 - PostalCode
 - Country
 - Phone
 - Fax
 - LastYearsSales
- Formula Fields
- SQL Expression Fields
- Parameter Fields
- Running Total Fields
- Group Name Fields
- Special Fields

- Your preview should look like the one above.