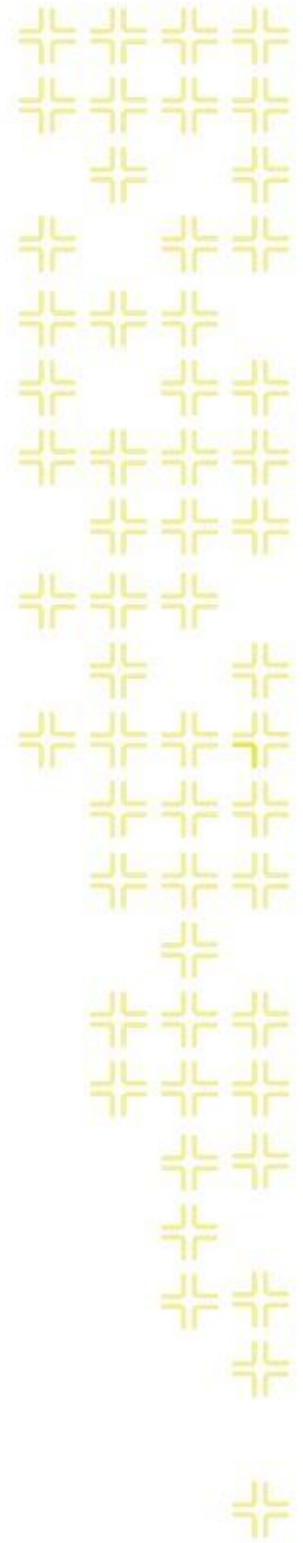




TRAINING GUIDE

Crystal Reports Web

Converting Custom Reports to Lucity Web



Web Reports

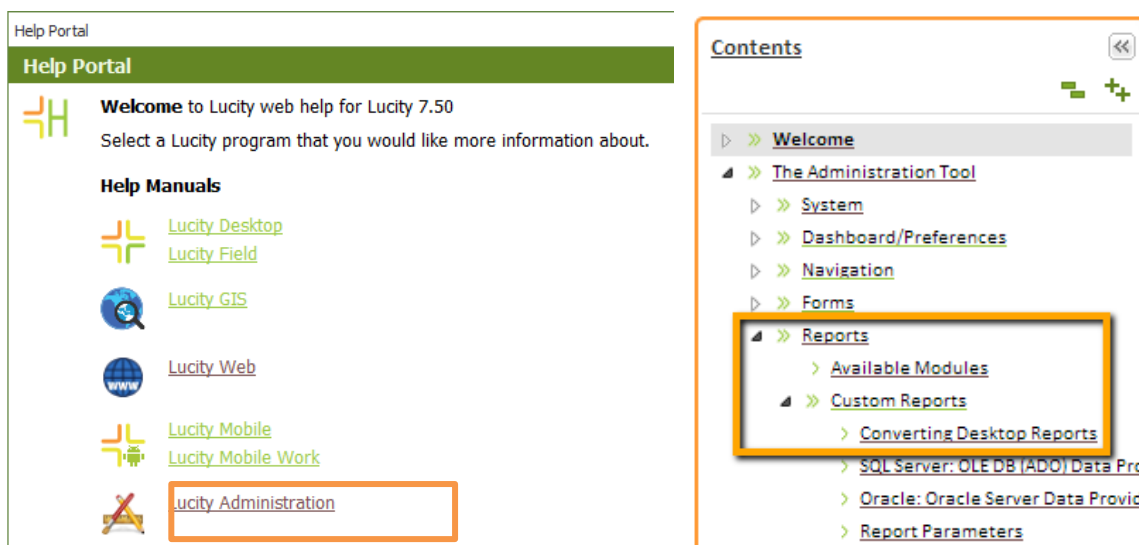
Custom Reports that have been created for the desktop version of Lucy will **NOT** work in the Web application as is. To convert a report from a standard Lucy report to a Web report, complete the following steps:

This manual explains how to convert a custom report you use in Lucy Desktop to work in Lucy Web.

Instructions for converting reports to the web are also found in the online help guide.

Go to help.lucity.com and select Lucy Administration Tool.

In the Table of Contents go to [The Administration Tool > Reports > Custom Reports > Converting Desktop Reports](#).



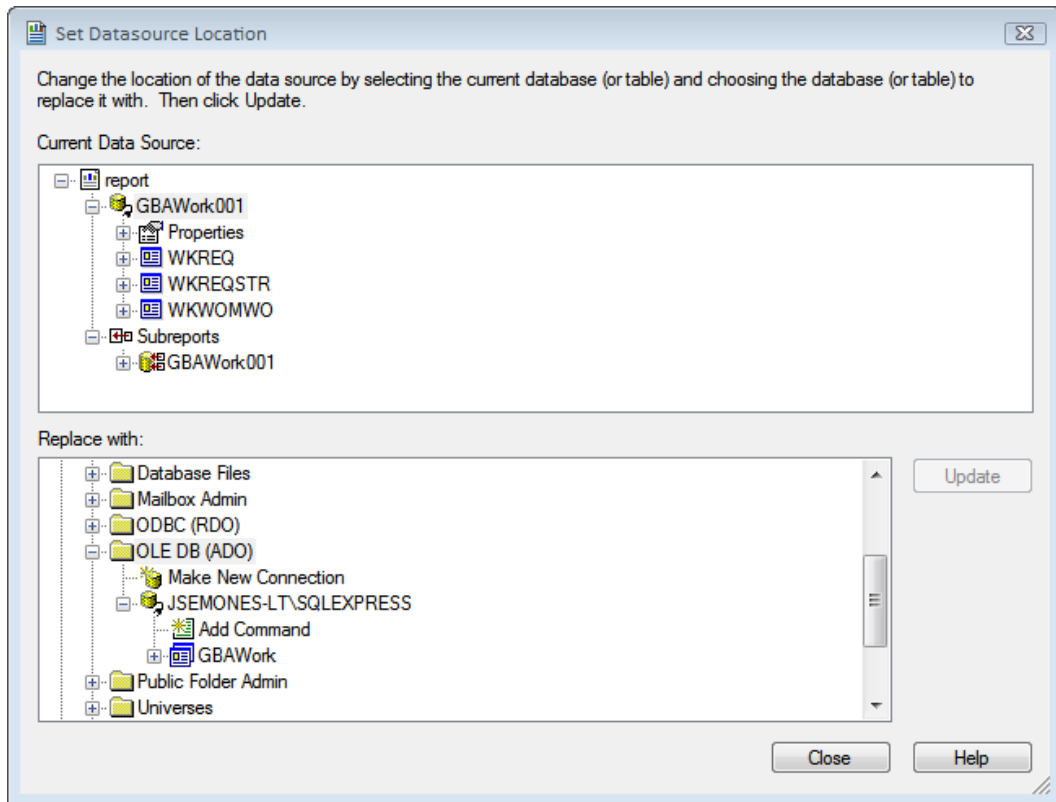
Converting Desktop Reports for use in Lucy Web

1. Make a copy of the report and add Web to the end of the report name.

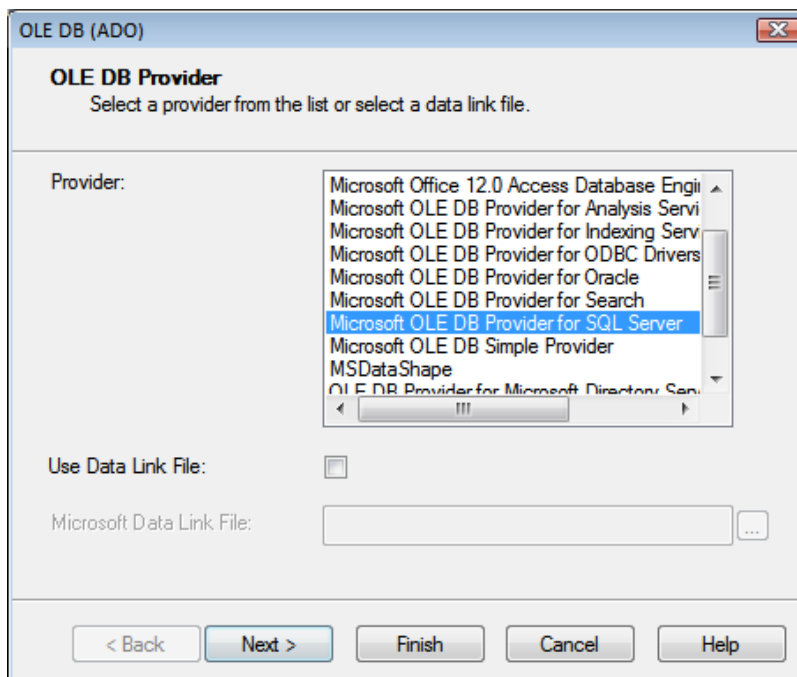
Example: Desktop report WOSumGrProb.rpt would be copied and renamed for the Web WOSumGrProbWeb.rpt.

2. The Web report would then be converted as follows.
3. Open the report in Crystal Reports.

4. Go to Database>>Set Datasource Location.
 - o SQL Server Clients select OLE DB (ADO)>>Make New Connection.
 - o Oracle Clients select Oracle Server.

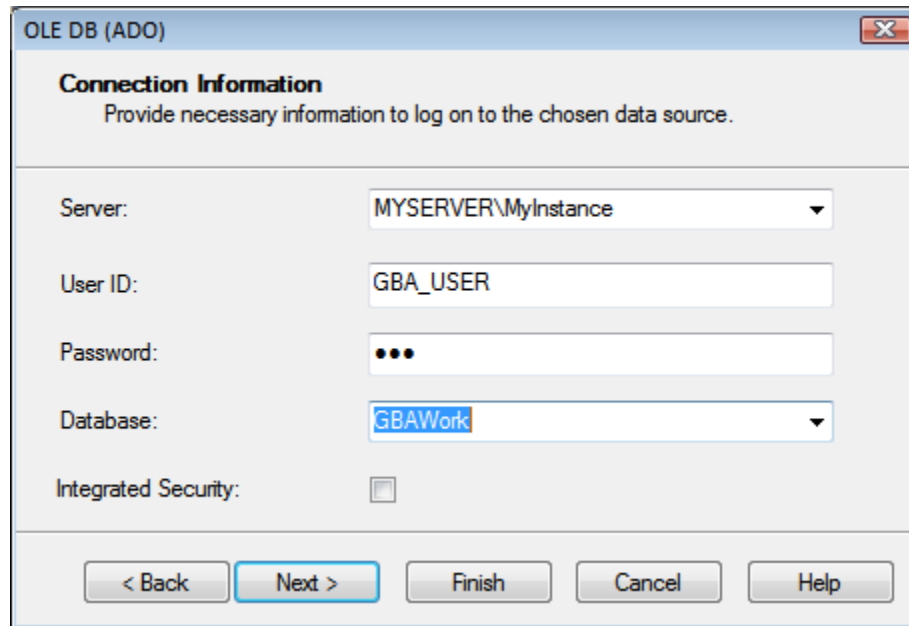


5. If you are using SQL Server you will then be prompted to select a provider. Use the Microsoft OLE DB Provider for SQL Server as shown below.



6. Next, enter the Connection information.

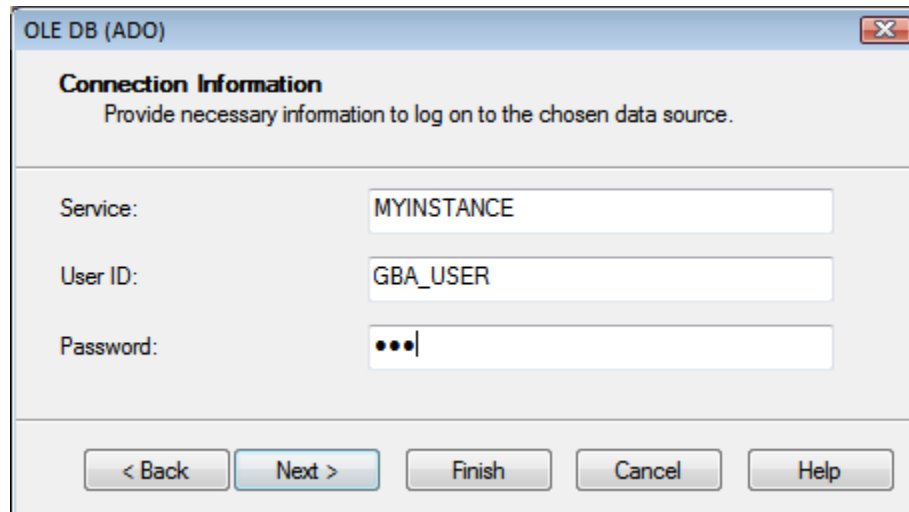
- For SQL Server, include the SQL Server Name, User ID, Password, and Database. Your Lucy Administrator should be able to provide this information. The Database is specific to the report database that it was created with such as GBAWork or GBAEquip.



The image shows a screenshot of the 'OLE DB (ADO)' dialog box, titled 'Connection Information'. The subtitle reads 'Provide necessary information to log on to the chosen data source.' The dialog contains the following fields and controls:

- Server:** A dropdown menu with the text 'MYSERVER\MyInstance'.
- User ID:** A text input field containing 'GBA_USER'.
- Password:** A text input field with three black dots representing a masked password.
- Database:** A dropdown menu with 'GBAWork' selected.
- Integrated Security:** An unchecked checkbox.
- Buttons:** A row of five buttons at the bottom: '< Back', 'Next >', 'Finish', 'Cancel', and 'Help'.

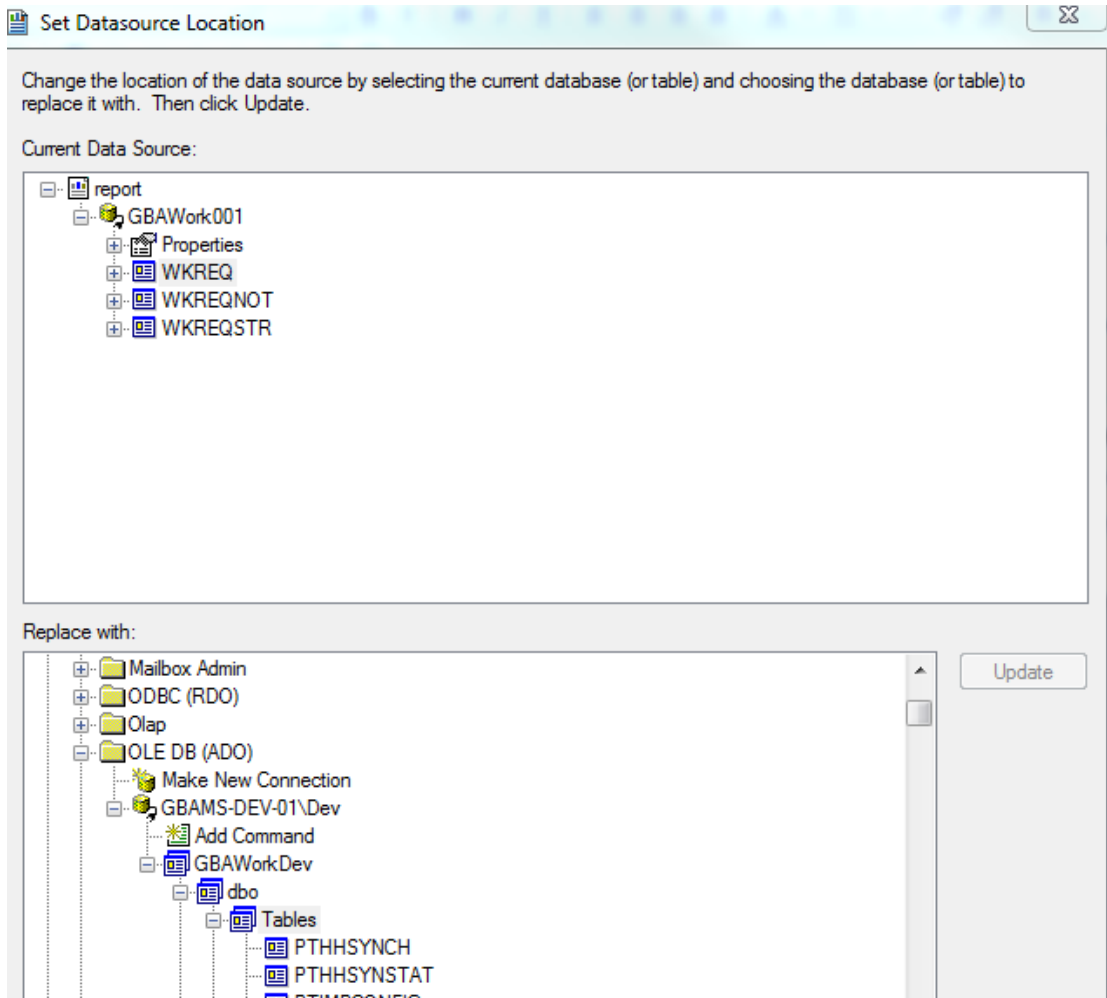
- For Oracle, include the Service, User ID, and Password.



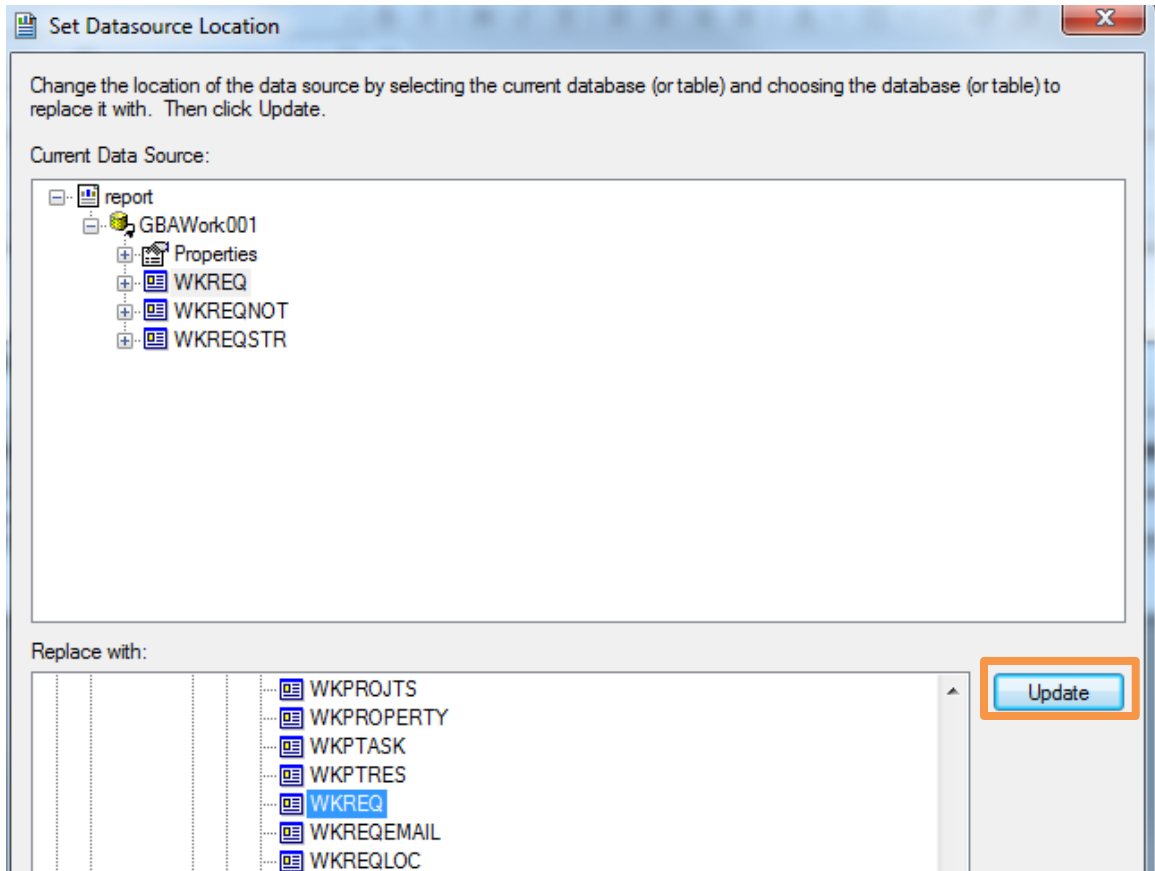
The image shows a screenshot of the 'OLE DB (ADO)' dialog box, titled 'Connection Information'. The subtitle reads 'Provide necessary information to log on to the chosen data source.' The dialog contains the following fields and controls:

- Service:** A text input field containing 'MYINSTANCE'.
- User ID:** A text input field containing 'GBA_USER'.
- Password:** A text input field with three black dots representing a masked password.
- Buttons:** A row of five buttons at the bottom: '< Back', 'Next >', 'Finish', 'Cancel', and 'Help'.

7. Once you create a connection you will need to individually (manually) map **EVERY TABLE** from the report one at a time.



- To do this, click on a table in the top box (Current Data Source) and the same table in the bottom box (Replace with) and then click on Update. Do this for each table, even the ones listed under Subreports. Note: *Properties* is not a table to be updated.



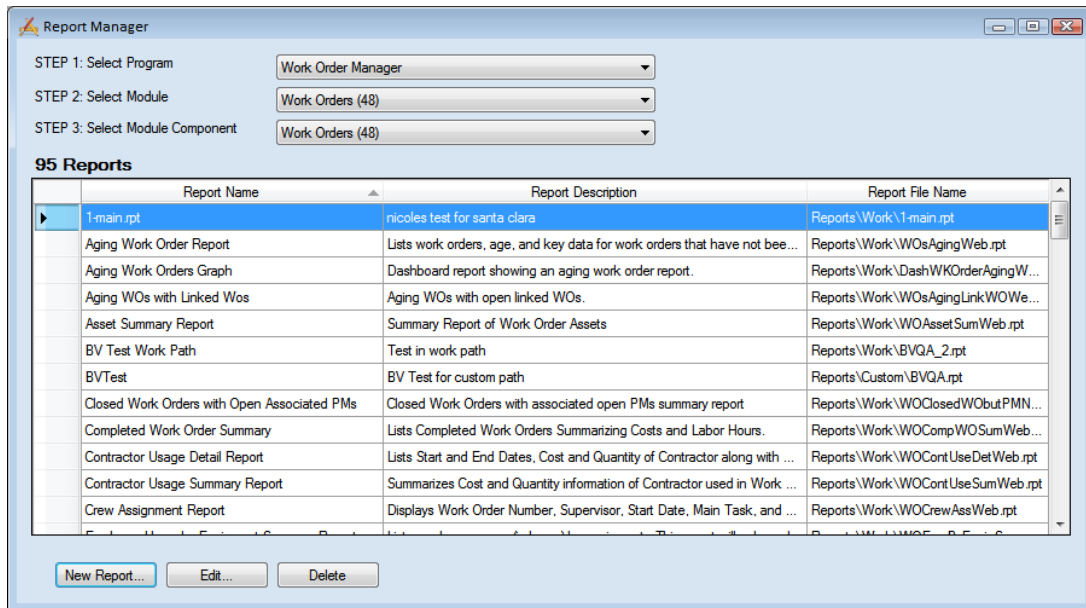
- After the report is converted for Web use it will need to be added to the appropriate report folder. Typically found at `intpub\wwwroot\LucityWeb\Reports`. Drop the report in the correct folder such as Work or Equip.

Adding the Report

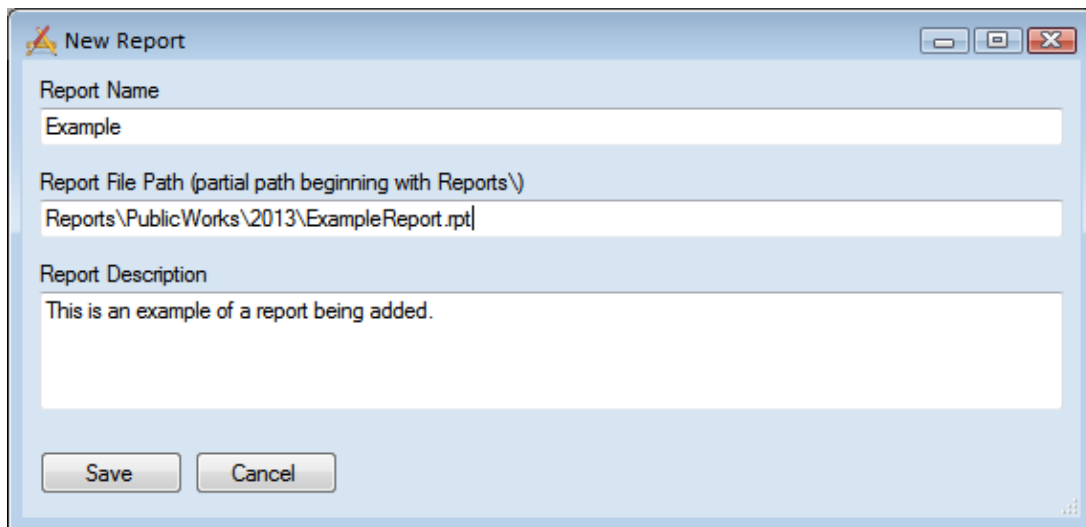
Now the report will need to be added to the list of available reports in the module the report is to be run from. There are two different methods for adding reports in the web.

Method 1 - Through the Lucy Administration Tool

1. Launch the Lucy Administration Tool and go to **Reports > Report Manager**.



2. Use the drop downs at the top of the tool to navigate to the module that the report is meant for.
3. Click the **New Report** button at the bottom of the Report Manager dialog. The following window will appear:




4. Enter the **Report Name**.

5. Enter the **Report File Path**. This should always start with **Reports** and then the rest of the path to the report including the .rpt file extension.
6. Enter the **Report Description**.
7. Click **Save**. The new report will be added to the Report Manager.

Method 2 - Through Lucity Web

1. Open the Web module that the report will be run from. Open the Reports Tool.

To launch the Reports tool click the  on the toolbar. The following window will appear:

Report Name	Report Description
Aging Work Order Report	Lists work orders, age, and key data for work orders that have not been closed. Based on date created.
Aging Work Orders Graph	Dashboard report showing an aging work order report.
Asset Summary Report	Summary Report of Work Order Assets
Closed Work Orders with Open Associated PMs	Closed Work Orders with associated open PMs summary report
Completed Work Order Summary	Lists Completed Work Orders Summarizing Costs and Labor Hours.
Contractor Usage Detail Report	Lists Start and End Dates, Cost and Quantity of Contractor along with Task and Work Order Information
Contractor Usage Summary Report	Summarizes Cost and Quantity information of Contractor used in Work Orders.
Crew Assignment Report	Displays Work Order Number, Supervisor, Start Date, Main Task, and Location grouped by Crew.
Employee Hours by Equipment Summary Report	Lists employee usage (in hours) by equipment. This report will only evaluate employees and equipment
Employee Usage Detail	Details all Work Order Information each employee has been associated with
Employee Usage Summary Report	Summarizes Total Cost, Units, and Average Rate per Employee.
Equipment Hours by Employee Summary Report	Lists equipment usage (in hours) by employee. This report will only evaluate employees and equipment
Equipment Usage Detail Report	Lists Start and End Dates, Cost and Quantity of Equipment along with Task and Work Order Information.
Equipment Usage Summary Report	Summarizes Cost and Quantity information of Equipment used in Work Orders.
Fluid Usage Detail Report	Lists Start and End Dates, Cost and Quantity of Fluid along with Task and Work Order Information.
Fluid Usage Summary Report	Summarizes Cost and Quantity information of Fluid used in Work Orders.
Main Task Detail Report	Detail of Work Orders and Costs by Main Task
Main Task Summary Report	Count and Total Cost of Work Orders by Main Task
Material Usage Detail Report	Lists Start and End Dates, Cost and Quantity of Materials along with Task and Work Order Information.
Material Usage Summary Report	Summarizes Cost and Quantity information of Materials used in Work Orders.
Monthly Open Work Orders Chart by Status/Cat	Dashboard report showing all open work orders for the current month by category
Monthly Open Work Orders Chart by Status/Cat/Prob	Dashboard report showing all open work orders for the current month by category then problem

All Records
 Filtered Set
 Current Record Only

2. To add a new report, click the Add button . The following dialog will appear:

Add Report

Report Name:

Report Description:

Report Filename:

Standard Report
 Quick Report - All Records
 Quick Report - Filtered Set
 Quick Report - Current Record Only

3. Enter a **Report Name**, **Report Description**, and the **Report Filename** (the name of the actual .rpt file) remember to add the .rpt portion on at the end of the report filename.
4. Choose the type of report this will be
 - Standard Report - The report will be run by clicking the report tool, selecting the report and how to run it, and running it.
 - Quick Report - All Records - Adds the report to the quick report dropdown list next to the report tool. The report will always be run against all records.
 - Quick Report - Filtered Set - Adds the report to the quick report dropdown list next to the report tool. The report will always be run against the current filter set.
 - Quick Report - Current Record Only - Adds the report to the quick report dropdown list next to the report tool. The report will always be run against the current record.
5. Click Save.

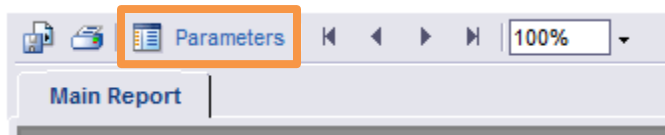
Parameters

Parameter fields are very helpful in Crystal reports for use with record selection. The Web reports allow use of parameters but in a limited way.

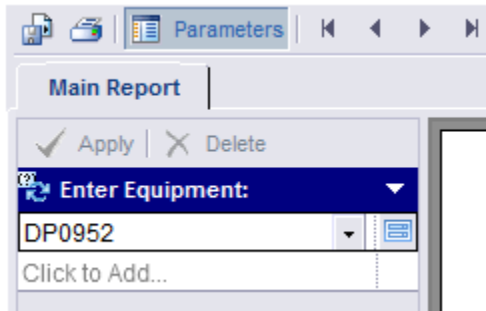
A parameter that is set up to allow multiple values will only accept a single value when the report is run. If the report is developed in Crystal XI or earlier, the report will not allow multiple values to be selected. If the report is created in the 2008 or later version of Crystal it is possible to query again once the report has been run in the HTML view to allow multiple values. This is set-up within the Parameter field. The Value Option is “Show on (Viewer) Panel”. The setting options are Editable, Do not show and Read Only.


Value Options:	
Option	Setting
Show on (Viewer) Panel	Editable
Prompt Text	Enter Equipment:
Prompt With Description Only	False
Optional Prompt	False
Default Value	
Allow custom values	True
Allow multiple values	True
Allow discrete values	True

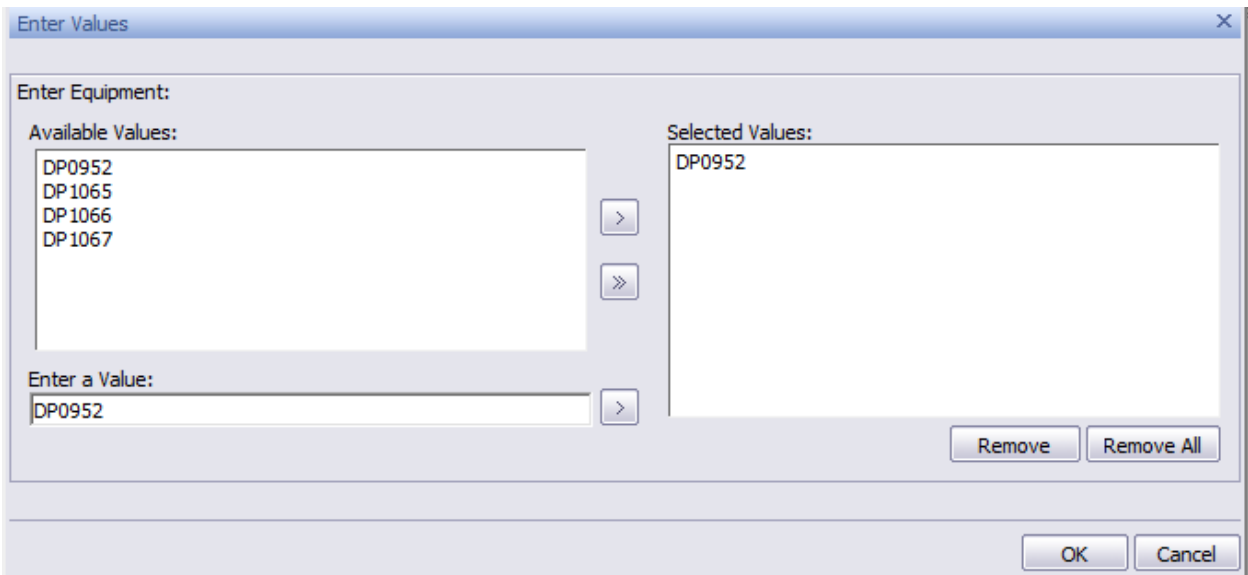
When this setting is Editable, then the report is opened in the Web with the HTML view, the Parameters button can be clicked on.



This opens a panel to the left of the report.



The actual parameter screen can be opened so multiple records can be selected by clicking on the Edit Parameter value button .



If parameters are set up in a subreport, they should not have the same name as parameters in the main report.