TRAINING GUIDE

# Crystal Reports Web

Converting Custom Reports to Lucity Web

# Web Reports

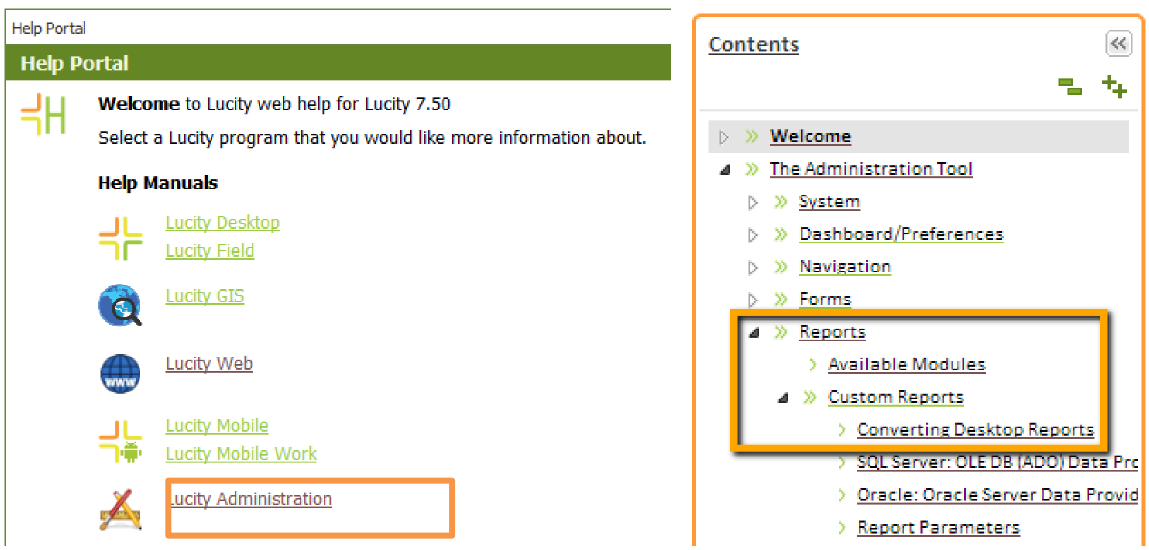
Custom Reports that have been created for the desktop version of Lucity will **NOT** work in the Web application as is. To convert a report from a standard Lucity report to a Web report, complete the following steps:

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

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

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

In the Table of Contents go to The Administration Tool > Reports > Custom Reports > Converting Desktop Reports.



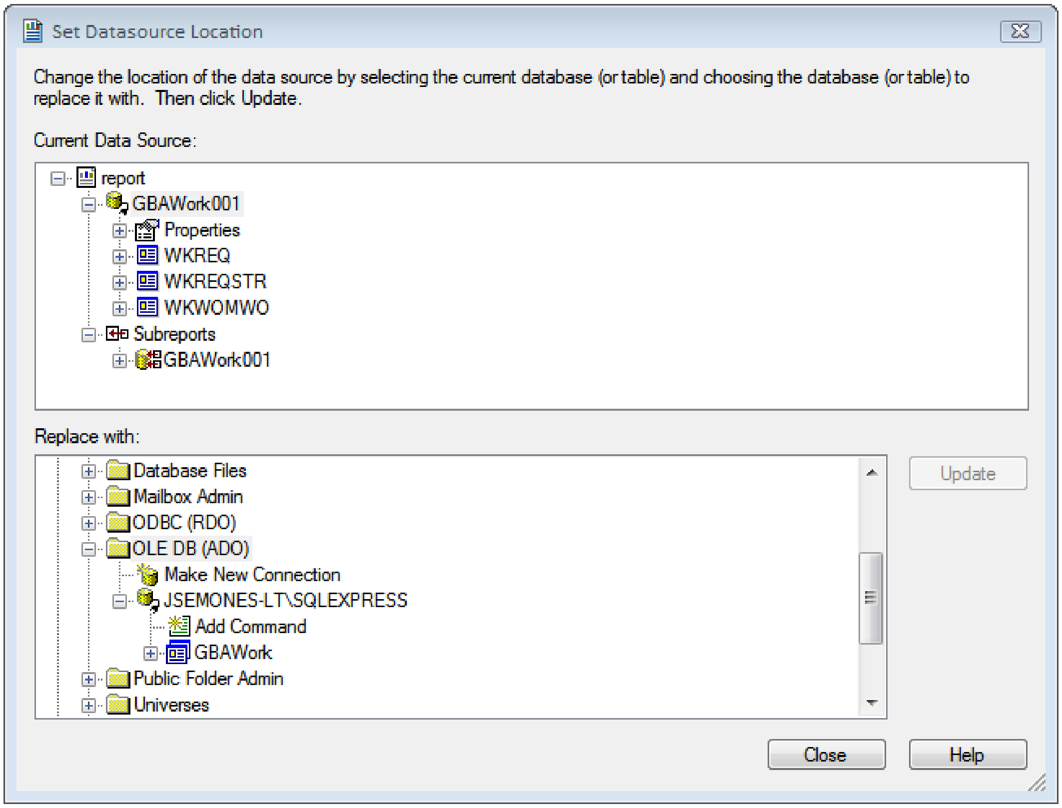

## Converting Desktop Reports for use in Lucity Web

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

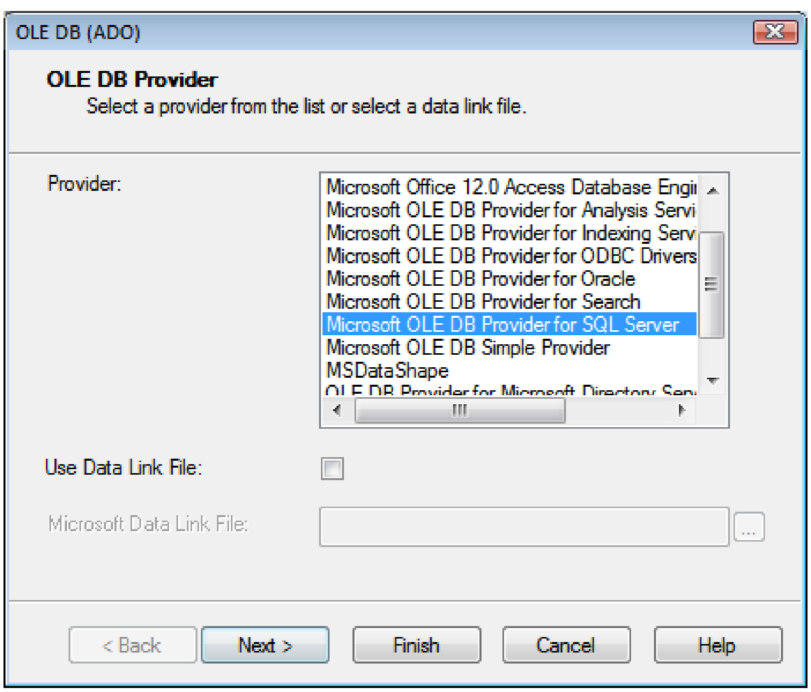
   Example: Desktop report WOSumGrProb.rpt would be copied and renamed for the Web WOSumGrProbWeb.rpt.

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

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

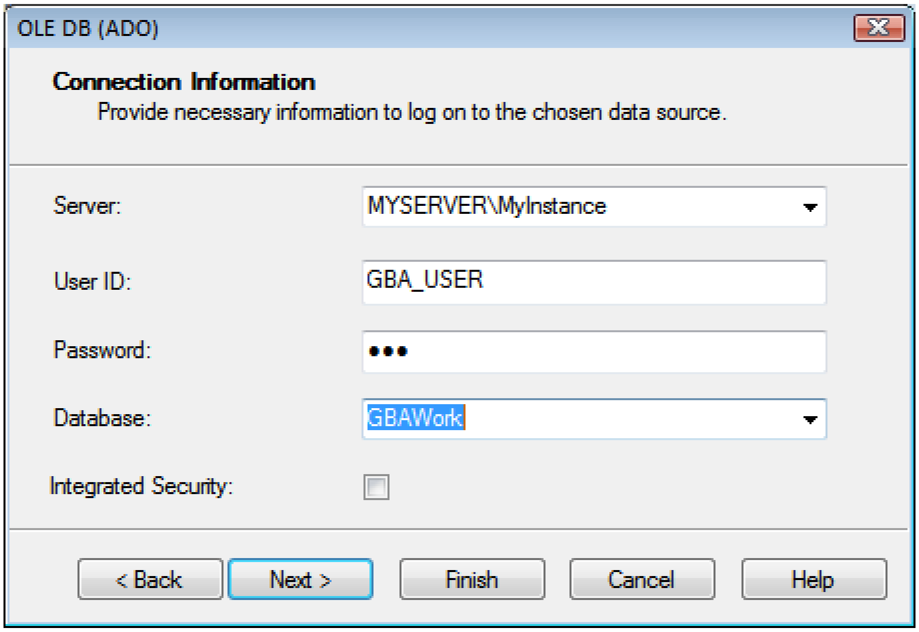



5. If you are using **SQL Server** you will then be prompted to select a provider. Use the Microsoft OLE DB Provider for SQL Server as shown below.

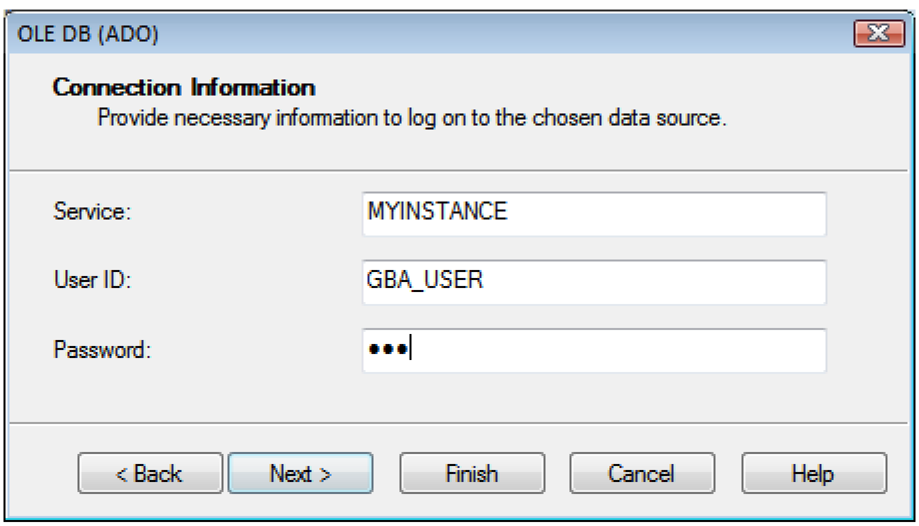


6. Next, enter the Connection information.

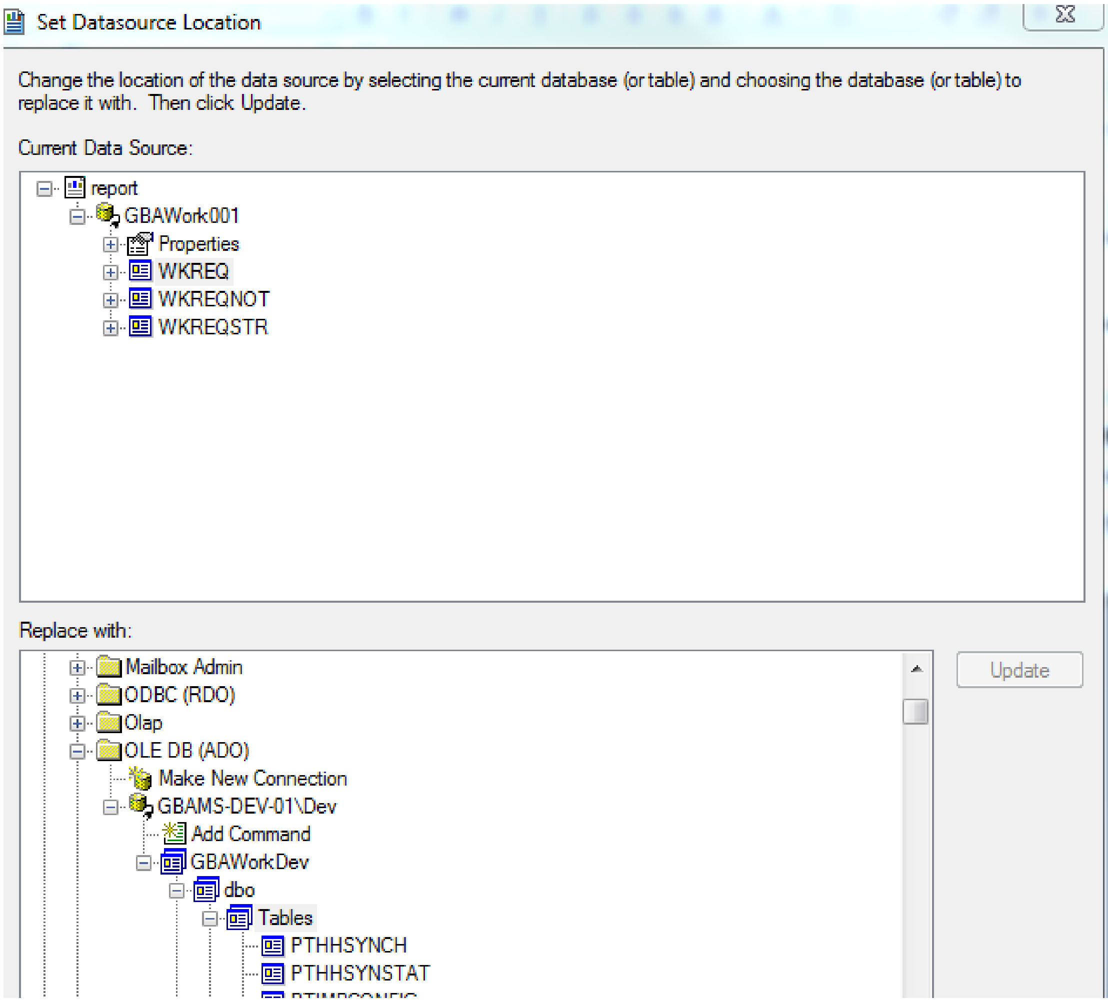
- For **SQL Server**, include the SQL Server Name, User ID, Password, and Database. Your Lucity Administrator should be able to provide this information. The Database is specific to the report database that it was created with such as GBAWork or GBAEquip.



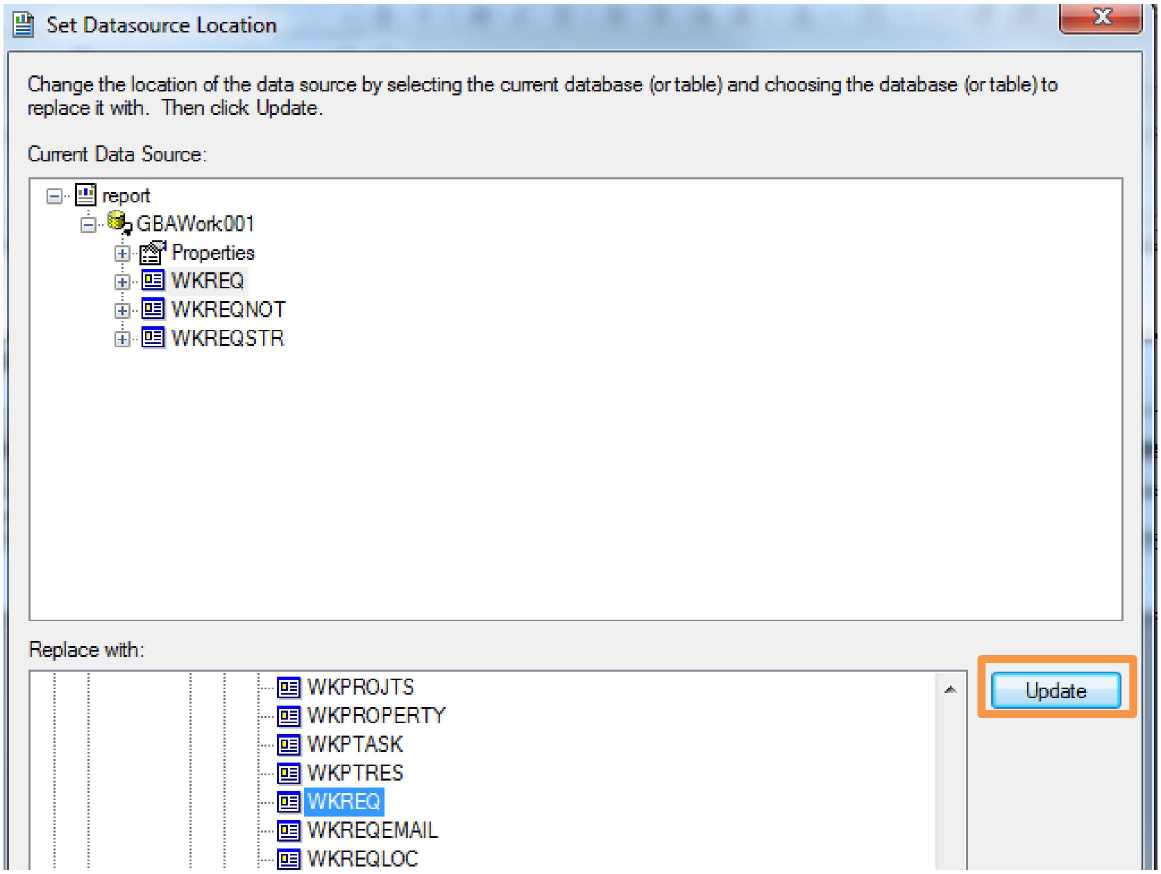

- For **Oracle**, include the Service, User ID, and Password.



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



8. 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.



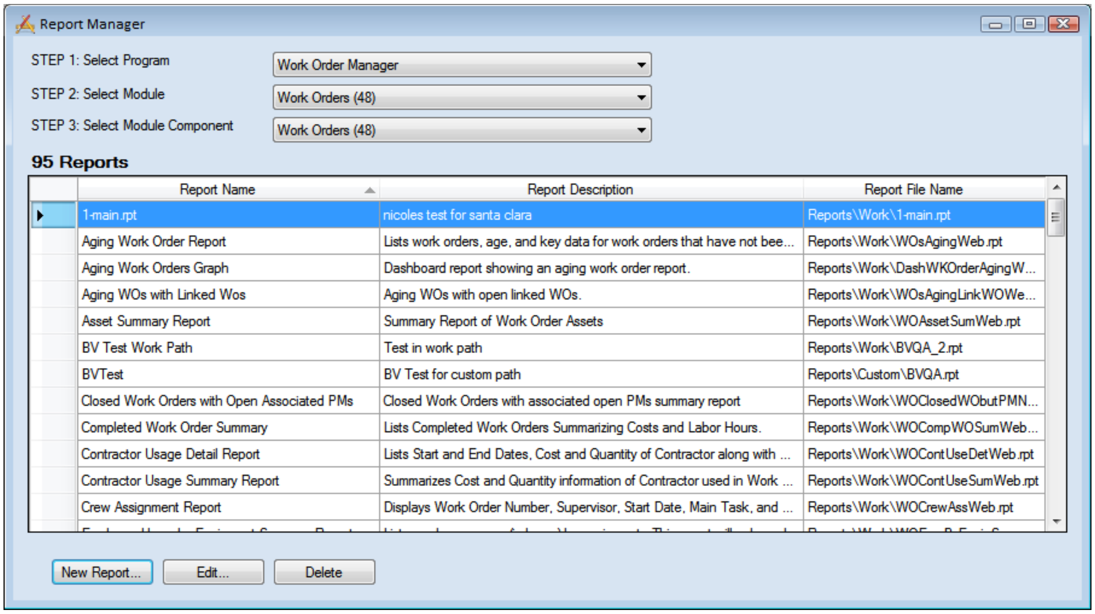

9. After the report is converted for Web use it will need to be added to the appropriate report folder.  Typically found at intpub\wwwroot\LucityWeb\Reports.  Drop the report in the correct folder such as Work or Equip.

# Adding the Report

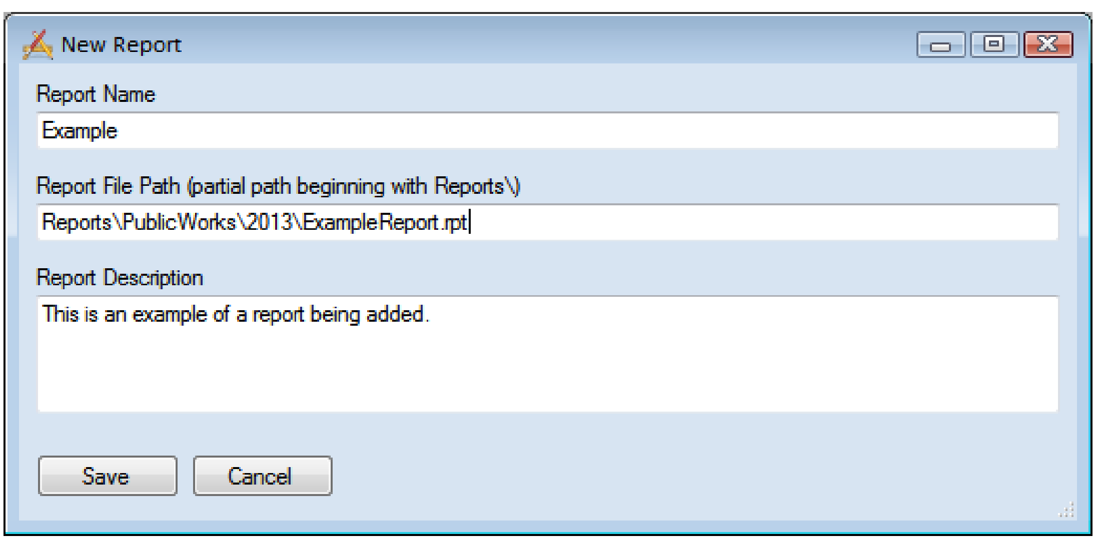
Now the report will need to be added to the list of available reports in the module the report is to be run from.  There are two different methods for adding reports in the web.

## Method 1 - Through the Lucity Administration Tool

1. Launch the Lucity 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:



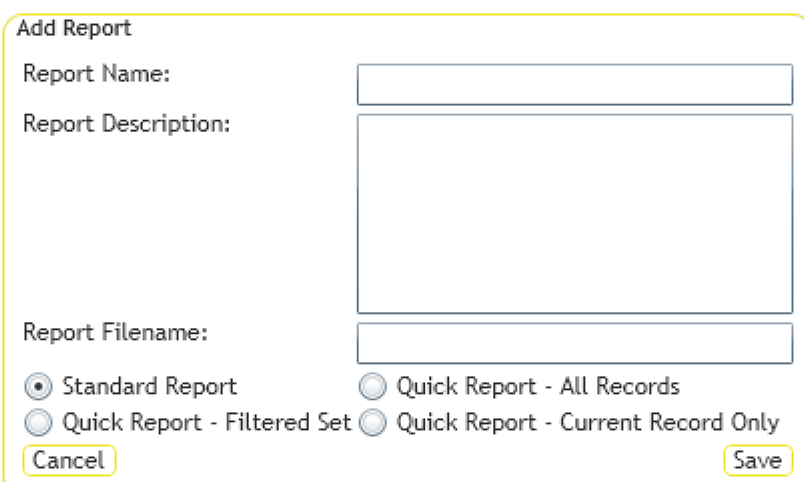

4. Enter the **Report Name**.

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.


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



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

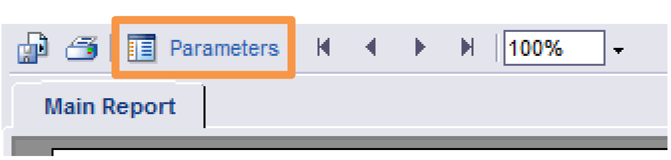
Parameter fields are very helpful in Crystal reports for use with record selection. The Web reports allow use of parameters but in a limited way.

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.

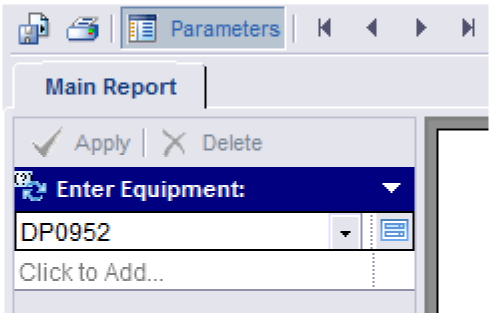
Value Options:

| 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 |

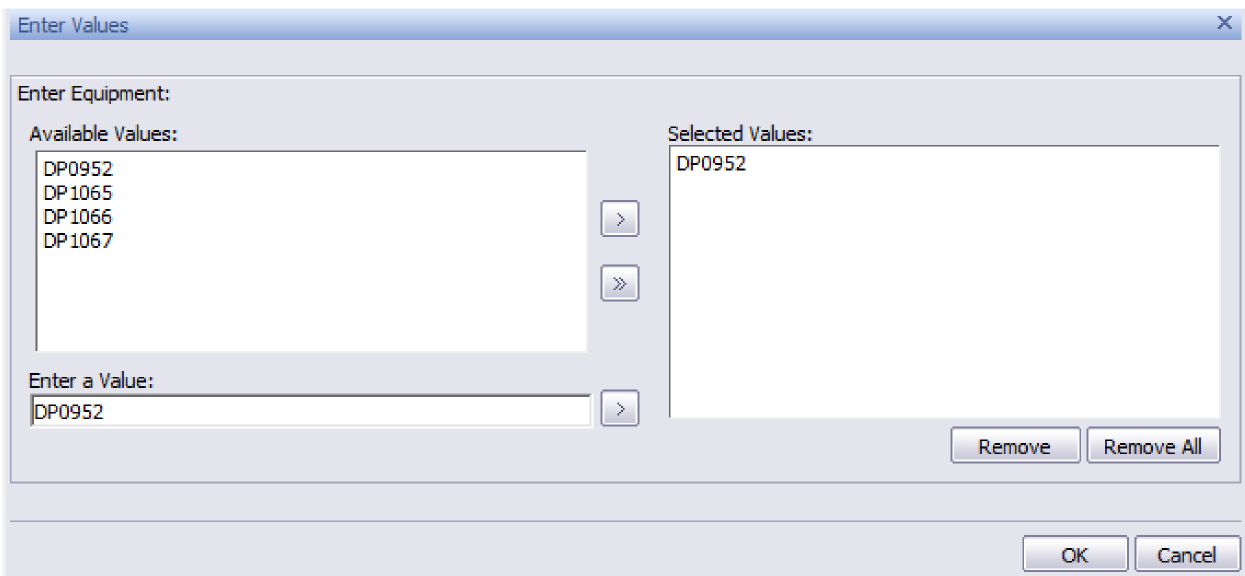
When this setting is Editable, then the report is opened in the Web with the HTML view, the Parameters button can be clicked on.



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.