

Crystal Report 9.0

Set Report Options (Lesson 1)

Lesson 1

Prior to creating a Crystal Report, configure the setting options.

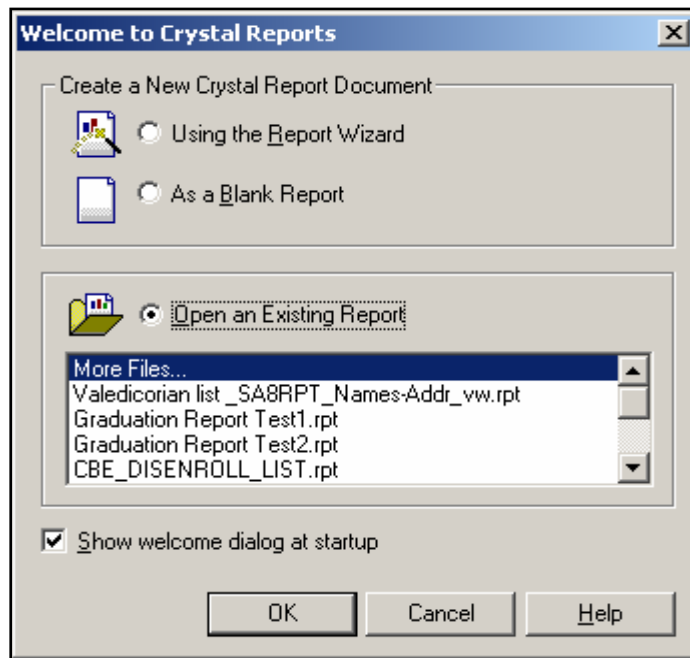
Summary

Lesson 1
Setting Report Options

Set Report Options

When you first open Crystal Reports 9, you will be presented with the following dialog box (Figure 1):

Figure 1



From here, you can create a Crystal Report either by using the Report Wizard or by starting with a blank report. You may also select one of the last several recent files you have developed, or search for a different file (“More Files....”).

We will start with an existing report:

1. **Make Your Selection** and click “**OK**”.



The **Welcome to Crystal Reports** dialog box may be hidden at startup. In that case, you would use the standard Windows-type program menu selections (**File > New** or **File > Open**).

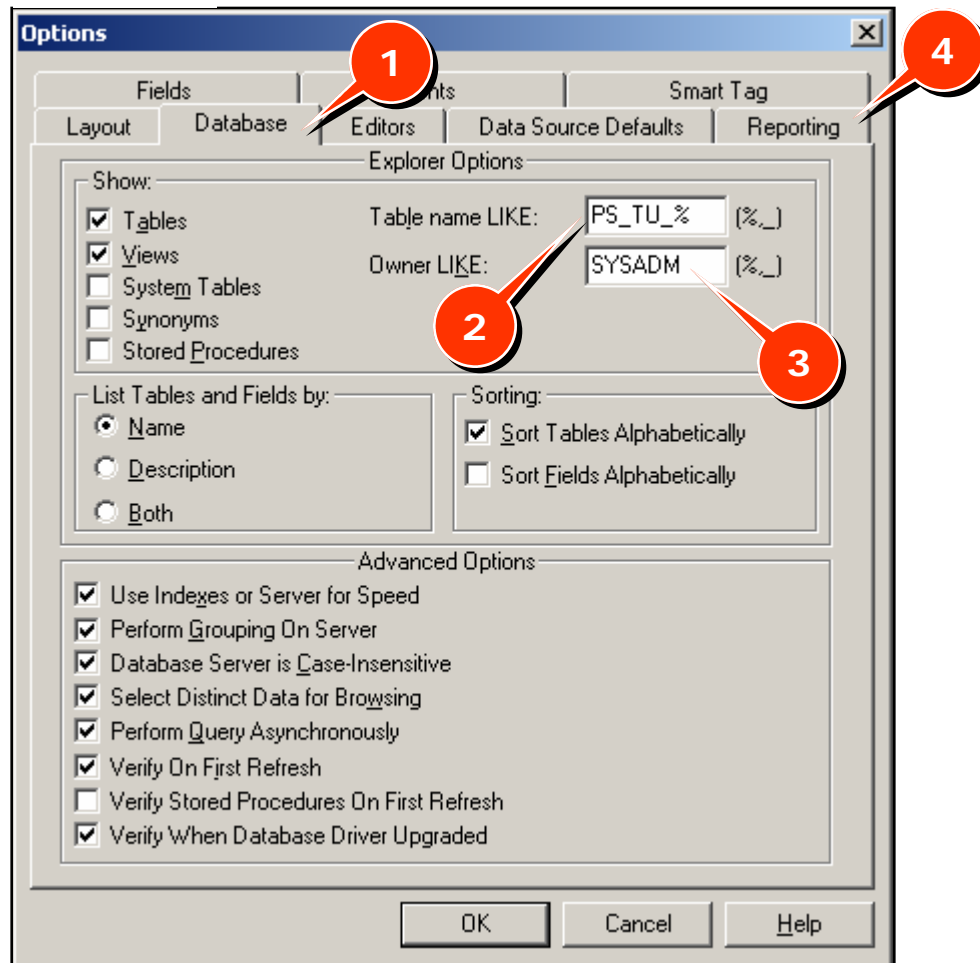
2. For starters, hit **Cancel**, allowing you to set your options for Crystal Reports first. After that’s done, you can come back to this.

Setting Options

Once the options are set, it will remain that way for all reports you create, unless the settings are changed again.

1. Click on **File > Options**, click on the **Database** tab (Figure 2, 1).
2. Place check marks in the boxes as indicated in Figure 2.

Figure 2



Crystal Reports have a default value for the number of tables returned (8,000) for a particular data source. PeopleSoft has over 14,000 tables, therefore, depending on the your Oracle role, you may not see the tables you need.

The names of tables can be limited by typing in the table name or partial name, followed by "%", in the text box next to "Table name LIKE" (Fig 2, 2). In addition to, or instead of, the "Table name LIKE", the schema name (Owner LIKE) can be used (Fig 2, 3).

3. We will select the tables by owner and table name. Set "Owner LIKE:" to "SYSADM" (Fig 2, 3). This is the owner of all the PeopleSoft tables. Set the "Table name LIKE" to PS_TU_% (Fig 2, 2).



The "%" is a wild card that will bring back all tables beginning with PS_TU_.

- ! If you create a report against any other owner or data source not under the SYSADM schema, you will have to delete or change this option, as well as delete the “Table name LIKE” option.
- 4. Click on the **Reporting** tab (Fig 2, 4).
- 5. Uncheck **Save Data With Report**. If you save the data with the report, the next time you open the report, the old data will show.
- ! Saving data with the report can also create a fairly large file, which may eventually cause a problem with disk space. In addition, if this report is to be uploaded and scheduled to run in Crystal Enterprise, you do not want the saved data. You will want the user to run a fresh report.
- 6. Click **OK** to save your changes.
- ★ When you have a file open, under **File** there is another selection called **Report Options**. This will only change the options for the current report. **Options** sets the default options for all reports and will remain that way until you change them again.

Take time to familiarize yourself with the other toolbar options.