CRYSTAL REPORTS
SAP 4.2

USER DOCUMENT

Prepared by: Cindy Gonzales
October 2016
This document will guide users through the basic processes of viewing and running reports in Crystal SAP 4.1. This is intended for users who are familiar with Los Rios current version of Crystal Enterprise.

**Internet Explorer (IE)** is the recommended browser.

Login with the following URL: [https://reports.losrios.edu/BOE/BI](https://reports.losrios.edu/BOE/BI)

The login page will look like the below screenshot.

Enter your W+Emplid and Los Rios Password. ‘Authentication’ need to be set to ‘Windows AD’ as shown.
INITIAL SCREEN
Click on ‘Folders’ circled at the bottom left of the screen
ACCESS REPORTS
The below screenshot represents a similarity to what the user’s screen will look like. The folders represent the Security granted to the user.

There are two ways to access reports:
1. Drill down on the folders
2. Search for the folder by either a title name, a word in the title or by report name:. If the entire report name is not known, the beginning of the report name can be used followed by an asterisk. Ex: RCINS*

See next page for examples.
ACCESS REPORTS (Continued)
If the folder location of the report is known, drill down on the folders to the report.
Example: To find Attendance reports, click/open the ‘SA’ folder and click/open ‘Attendance’ (See Below)
If the folder location is unknown, search for the report. Searching can be accomplished by:

- searching for a word in the report name.
  For example: Enrollment
- search on the beginning of the Report Number.
  For example, attendance reports begin with RCATT. If the following number of the report is unknown, add an asterisk (RCATT*)

(Note: Adding asterisk to the beginning of the search does not work. Example: *ATT0053)

There are two locations to search:

1. There is a search box in the top right corner of the screen next to the Log off link. In this example, the search is on ‘Attendance’. See listed reports under ‘Search Results’.
In addition, search functionality can be initiated by clicking on ‘Search’ at the bottom left of the screen. This will open the search option on the left. This example is searching on reports beginning ‘RCATT’.
**VIEW or VIEW LATEST INSTANCE**

View or View Latest Instance:
At the top right, click on the ‘View’ tab
NOTE: Executing reports with the ‘View’ are NOT saved in History

**EXECUTE REPORT**

View: Click ‘View’ to run/execute the report.
   - Enter parameter(s).
   - Report will be displayed in same screen as a new tab.
   - To close, click X on tab:

**VIEW LAST REPORT EXECUTED**

View Latest Instance: Click on ‘View Latest Instance’ to view last report that was executed by the ‘Schedule’ option.
CRYSTAL REPORTS

VIEW HISTORY OF REPORTS

To view reports that were executed in the past:
Highlight Report
Click on ‘More Actions’
Click on ‘History’ in the drop down.

All past reports will be displayed. See example below.
To view a report, double click on the report.

Note: Reports that are ran via
The ‘View’ option, are NOT
Saved in ‘History’
CRYSTAL REPORTS

SCHEDULE
Some reports run for a long time and will not complete with the ‘View’ option. Or reports are run with the intent of viewing the report at later dates. Schedule these reports to run ‘Now’ as shown below by clicking ‘More Actions’ and then ‘Schedule’. See screenshot.

Once Schedule is clicked, see example page below

Begin by clicking on ‘Recurrence’. Schedule to ‘Now’
Click on ‘Prompts’ and enter prompts.

To populate Prompts, click on [EMPTY]. This will bring up prompts. See example below.

Once prompts are populated, page will look similar to example. Click on Schedule at bottom right of screen.
**CRYSTAL REPORTS**

**SCHEDULE** (Continued)

Other Options before scheduling:

Formats: Options to run in excel, PDF, word . . .
Default is Crystal Reports.

**NOTE**: ‘Crystal Reports’ will **NOT** send as an **Email** attachment.
Print Settings will send output to printer.

**Email Option**
Click on Destinations

Select ‘Email’ screen below

Please Note: the back arrow will at the top of the browser Will return to the login page.
Below is an example of populating the email information
Enter From and To email addresses.
Select on ‘Add Placeholder’ and select option for Subject. This is not required. Freeform text is an option.

%SI_VIEWER_URL% is a URL link to the report. In addition, check Add Attachment to send as an attachment.