

Setting Up Crystal Reports XI for Use with SACWIS Ad-Hoc Data



Knowledge Base Article

Setting Up Crystal Reports XI for Use with SACWIS Ad-Hoc Data

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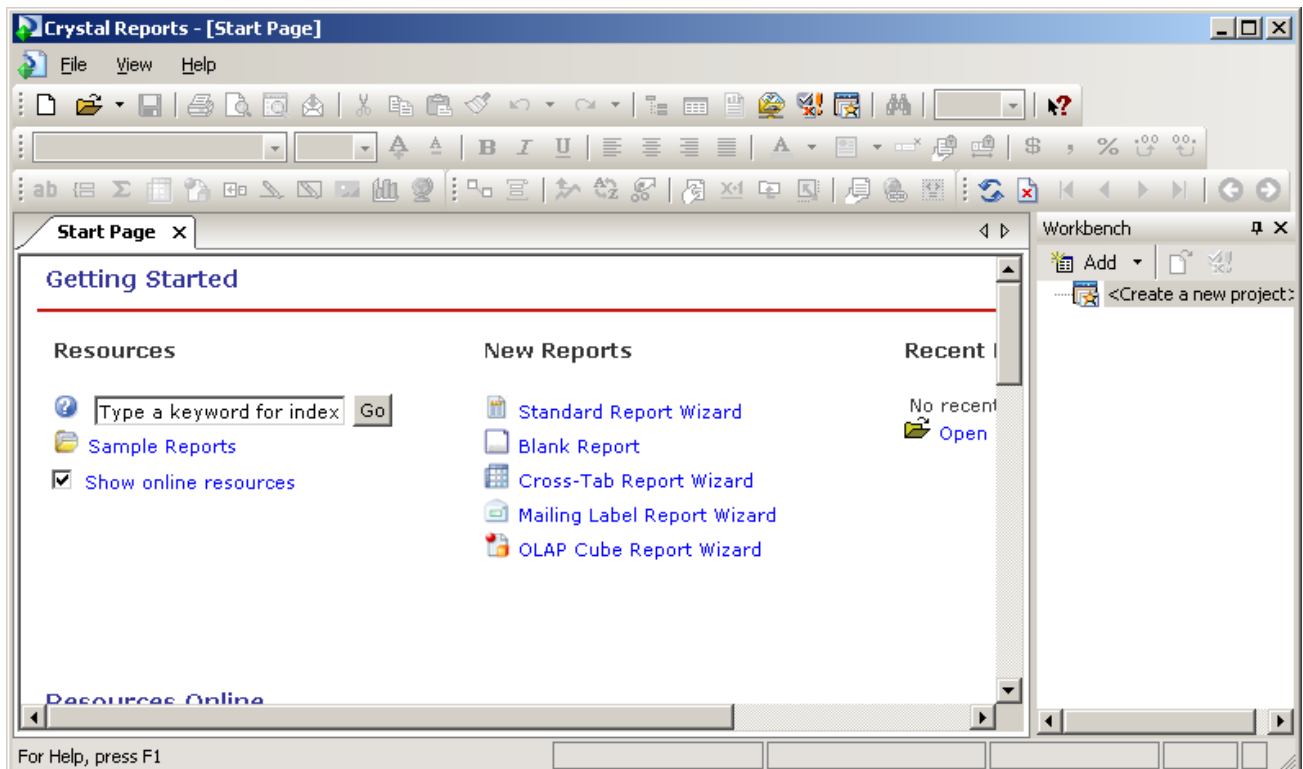
Setting Up Crystal Reports XI for Use with SACWIS Ad-Hoc Data

Overview

This article describes how to set up **Crystal Reports XI** to generate reports using **SACWIS Ad-Hoc data**, and how to use the connection you create to view data.

Setting Up Crystal Reports XI

1. Open **Crystal Reports (XI)**.



There are two different ADHOC environments available:

- **ADHOC_SACRPT** – This environment is refreshed nightly at 8PM, and
- **ADHOC2_SACRPT** – This environment is refreshed at Midnight each night.

You may access whichever environment serves your needs best, or both if you wish.

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Note: The examples below assume that you have the Oracle client software installed, and the following entry in your TNSNAMES.ora file (if you are not on the State network, the IP address will be different):

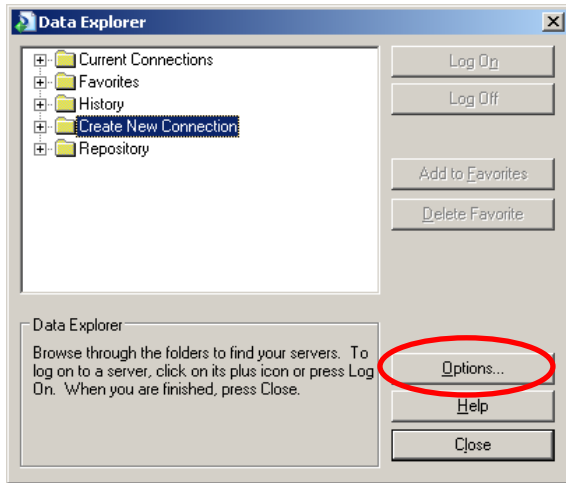
```
ADHOC_SACRPT=
  (DESCRIPTION=
    (ADDRESS=
      (PROTOCOL=TCP)
      (HOST=ax-svc-02501)
      (PORT=1521)
    )
    (CONNECT_DATA=
      (SERVER=dedicated)
      (SERVICE_NAME=ADHOC_SACRPT)
    )
  )
```

```
ADHOC2_SACRPT=
  (DESCRIPTION=
    (ADDRESS=
      (PROTOCOL=TCP)
      (HOST=ax-svc-02498)
      (PORT=1521)
    )
    (CONNECT_DATA=
      (SERVER=dedicated)
      (SERVICE_NAME=ADHOC_SACRPT)
    )
  )
```

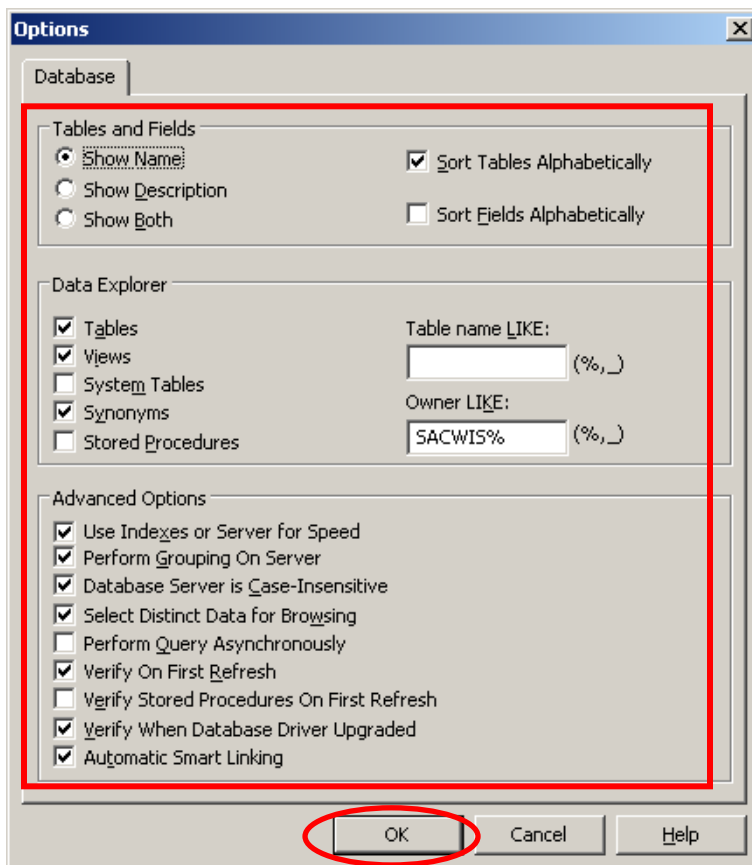
Note: The examples in this document show how to set up connections to the **ADHOC_SACRPT** environment, which refreshes at 8PM. To set your system up to access **ADHOC2_SACRPT**, which refreshes at midnight, simply replace ADHOC_SACRPT with ADHOC2_SACRPT in the setup steps.

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2. Select **File / Log On or Off Server**.
3. In the **Data Explorer** window, click the **Options...** button.



4. Set the **Options** as shown below.

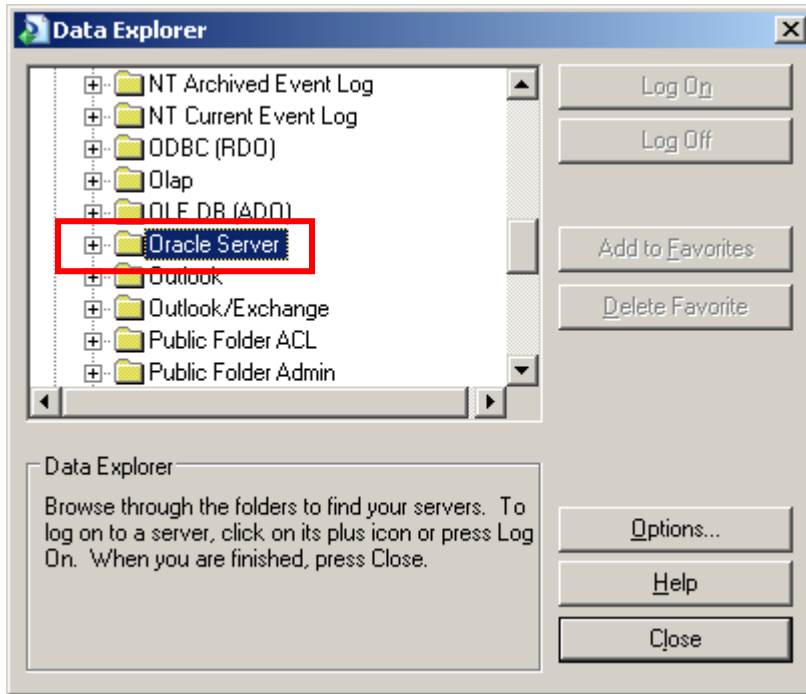


5. Click the **OK** button to return to the **Data Explorer** window.

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6. Select **Create New Connection**.
7. Select **Oracle Server**.

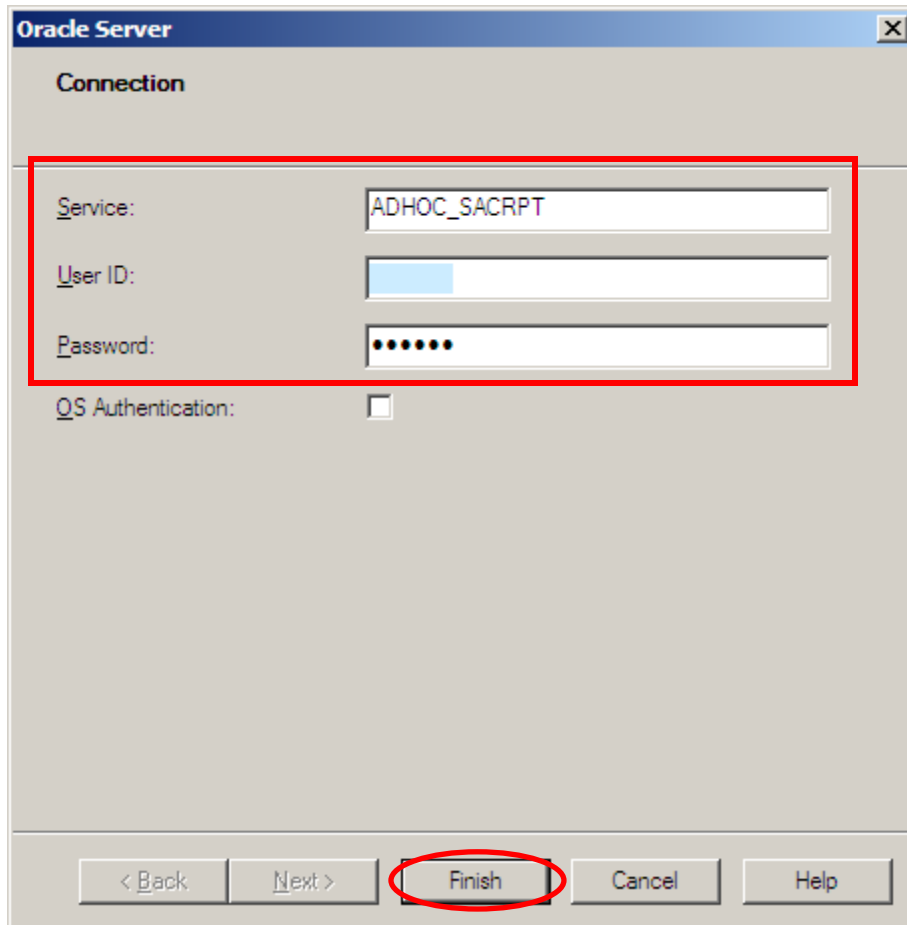
Note: You may need to select **More Data Sources**, then select **Oracle Server**.



The **Oracle Server** window appears as shown on the next page.

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8. In the **Service** field, enter **ADHOC_SACRPT**.
9. Enter your **User ID** and **Password**.
10. Click the **Finish** button.



The screenshot shows the "Oracle Server" dialog box with the "Connection" tab selected. The "Service" field contains the text "ADHOC_SACRPT". The "User ID" and "Password" fields are empty. The "QS Authentication" checkbox is unchecked. The "Finish" button at the bottom is circled in red.

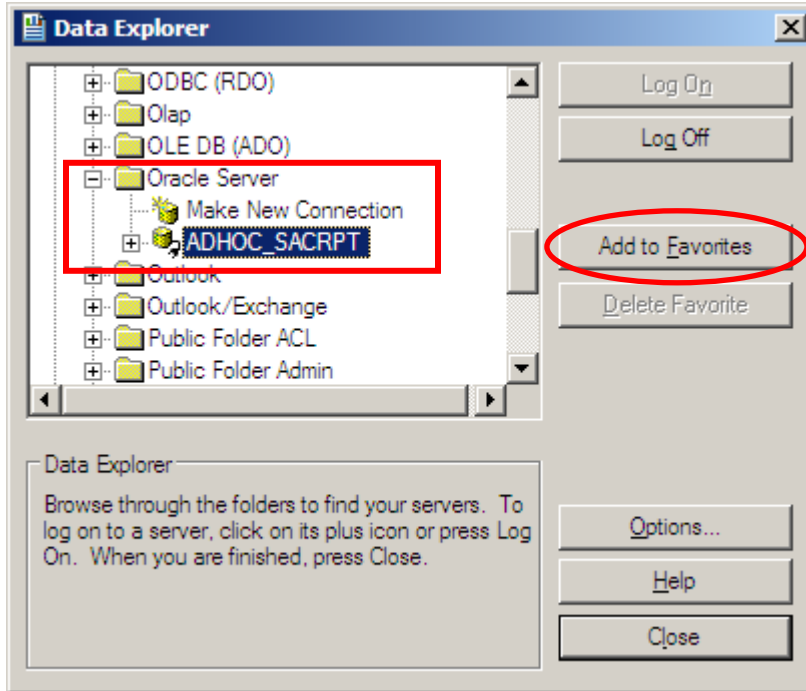
| | |
|--------------------|--------------------------|
| Service: | ADHOC_SACRPT |
| User ID: | |
| Password: | •••••• |
| QS Authentication: | <input type="checkbox"/> |

< Back Next > **Finish** Cancel Help

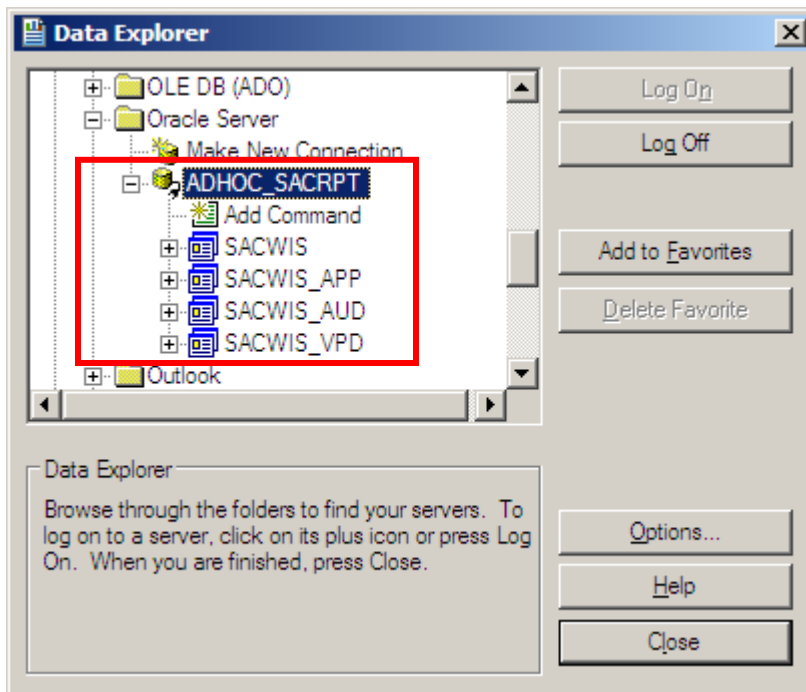
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A successful connection with options set as above should appear as shown below.

11. Select **ADHOC_SACRPT** and click the **Add to Favorites** button

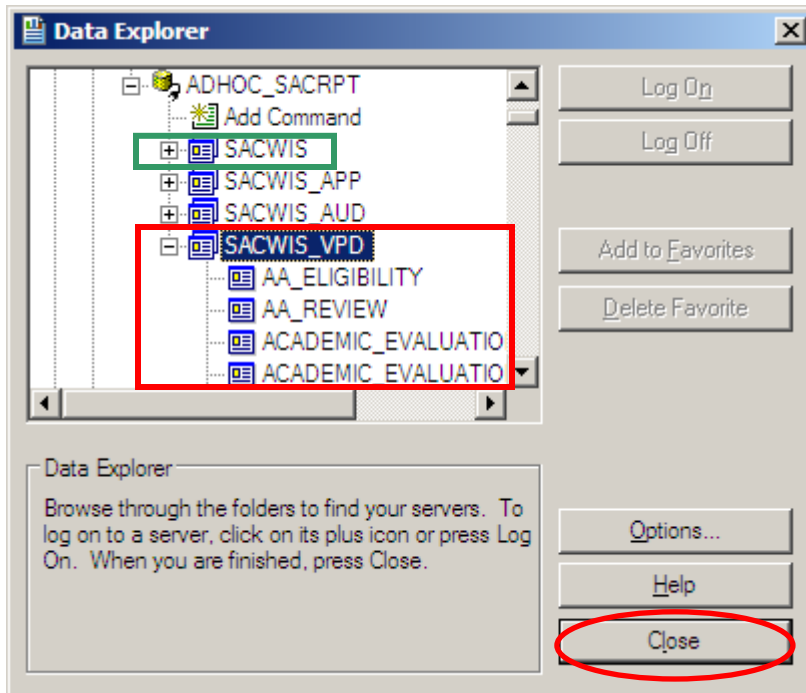


12. Click the plus sign (+) next to **ADHOC_SACRPT** to expand it.



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13. Click the plus sign (+) beside **SACWIS_VPD** to expand it.



SACWIS_VPD / VIEWS will be your agency-limited view of the data.

SACWIS (shown in green above) is the complete set of state-wide data.

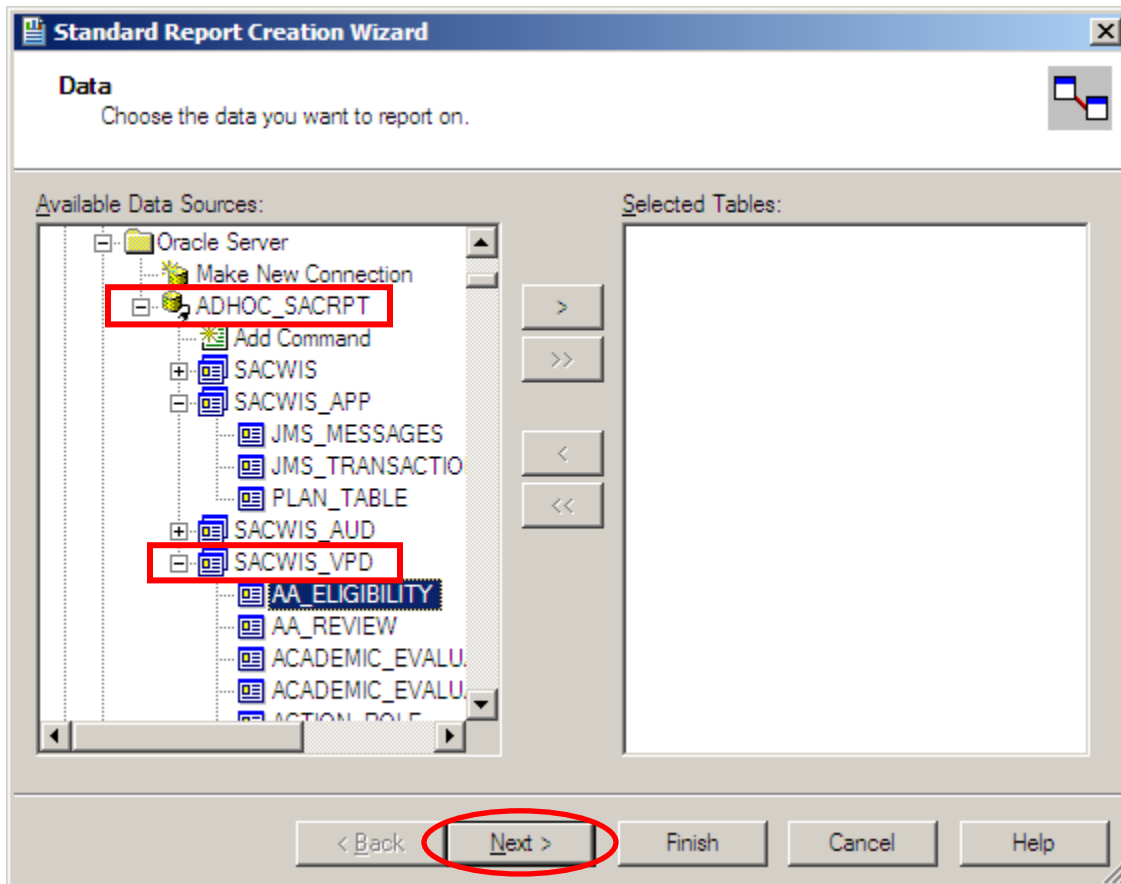
14. Click the **Close** button.

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Using the Connection to View Data

Complete the following steps to view data using the connection you created above.

1. Select **File / New / Standard Report**.
2. Select the Data Sources under the **Favorites** folder.
3. Select **ADHOC_SACRPT**.

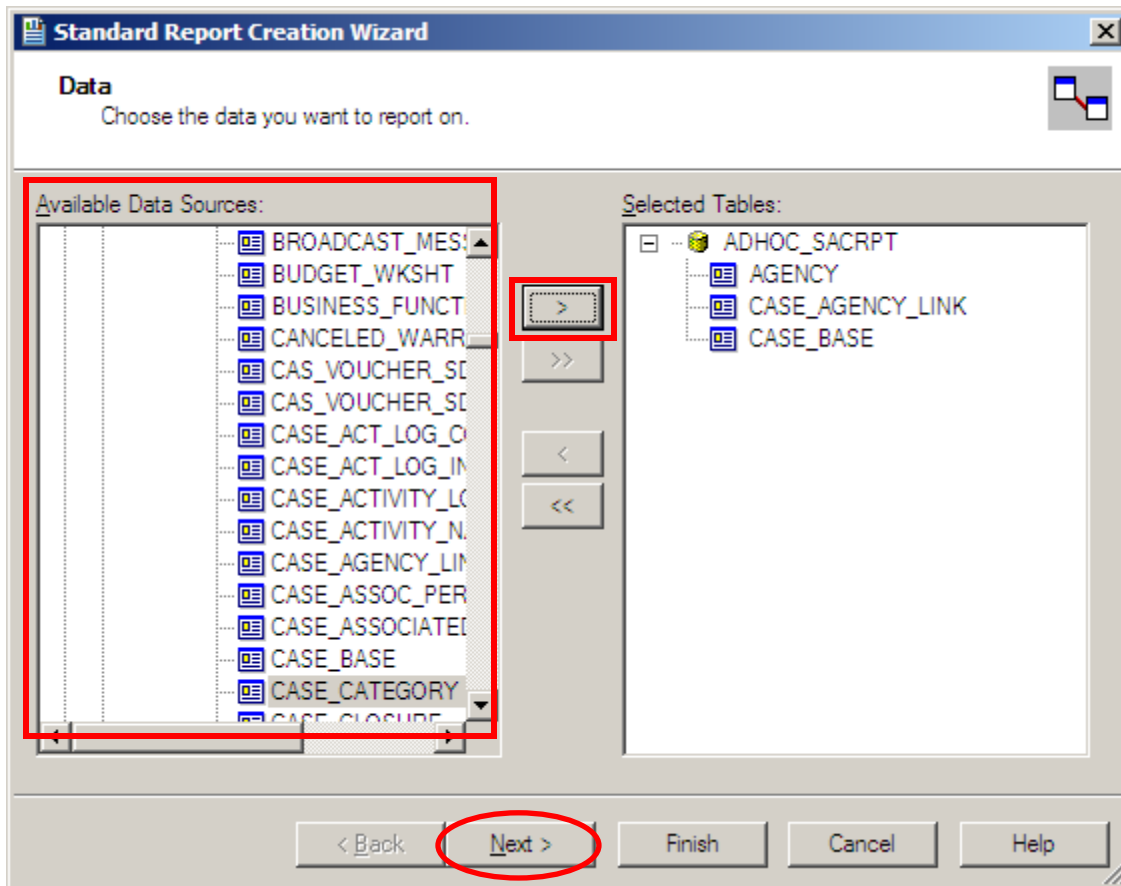


Note: If you log off after creating the connection above and return later, you will be prompted for your database ID and password.

4. Select **SACWIS_VPD**.
5. Select **VIEWS**.
6. Click the **Next** button.

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7. Select the synonym(s) for the table(s) to add to the report.



8. Click the **Next** button.

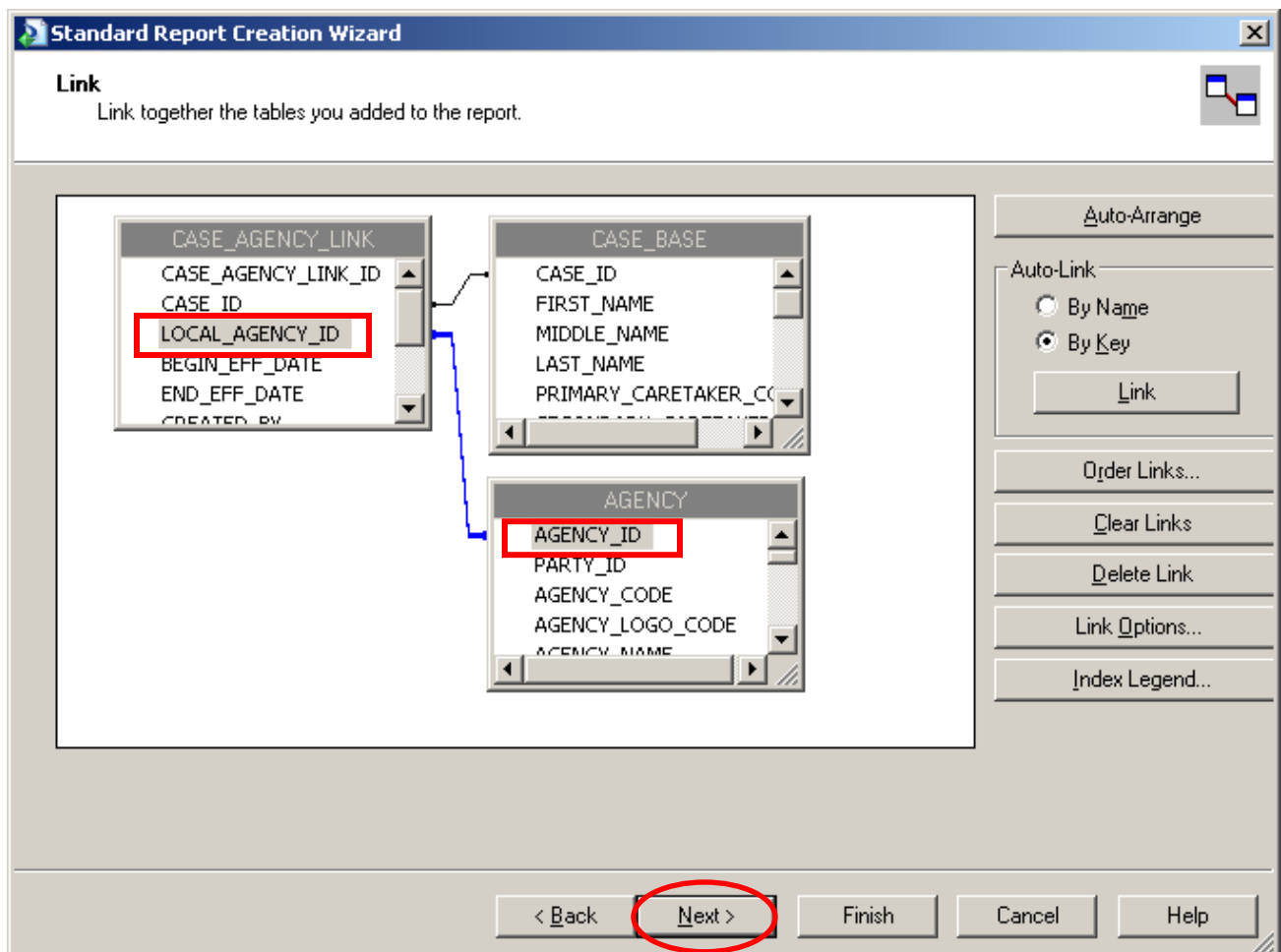
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9. Arrange tables and add relationships as needed.

Note: If relationships are formally defined in the database they will be reflected here. If they are not defined, Crystal Reports may make a guess based on matching column names, or may not suggest a join at all.

Example: CASE_AGENCY_LINK is a table you may become very familiar with. It is the only case where AGENCY_ID is named differently (LOCAL_AGENCY_ID).

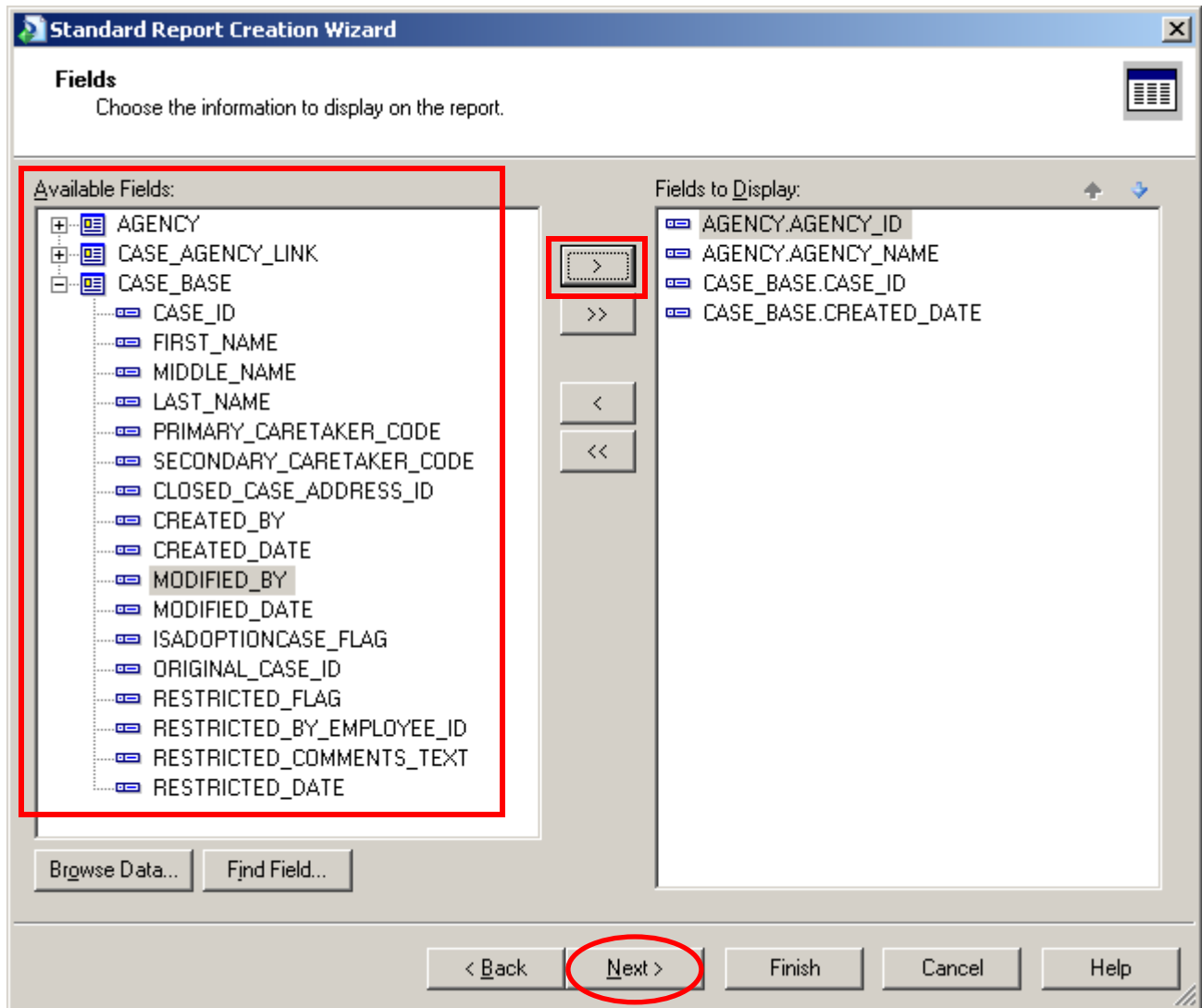
10. Drag **LOCAL_AGENCY_ID** to **AGENCY_ID** to fill in the missing link, as shown below.



11. When complete, click the **Next** button to proceed.

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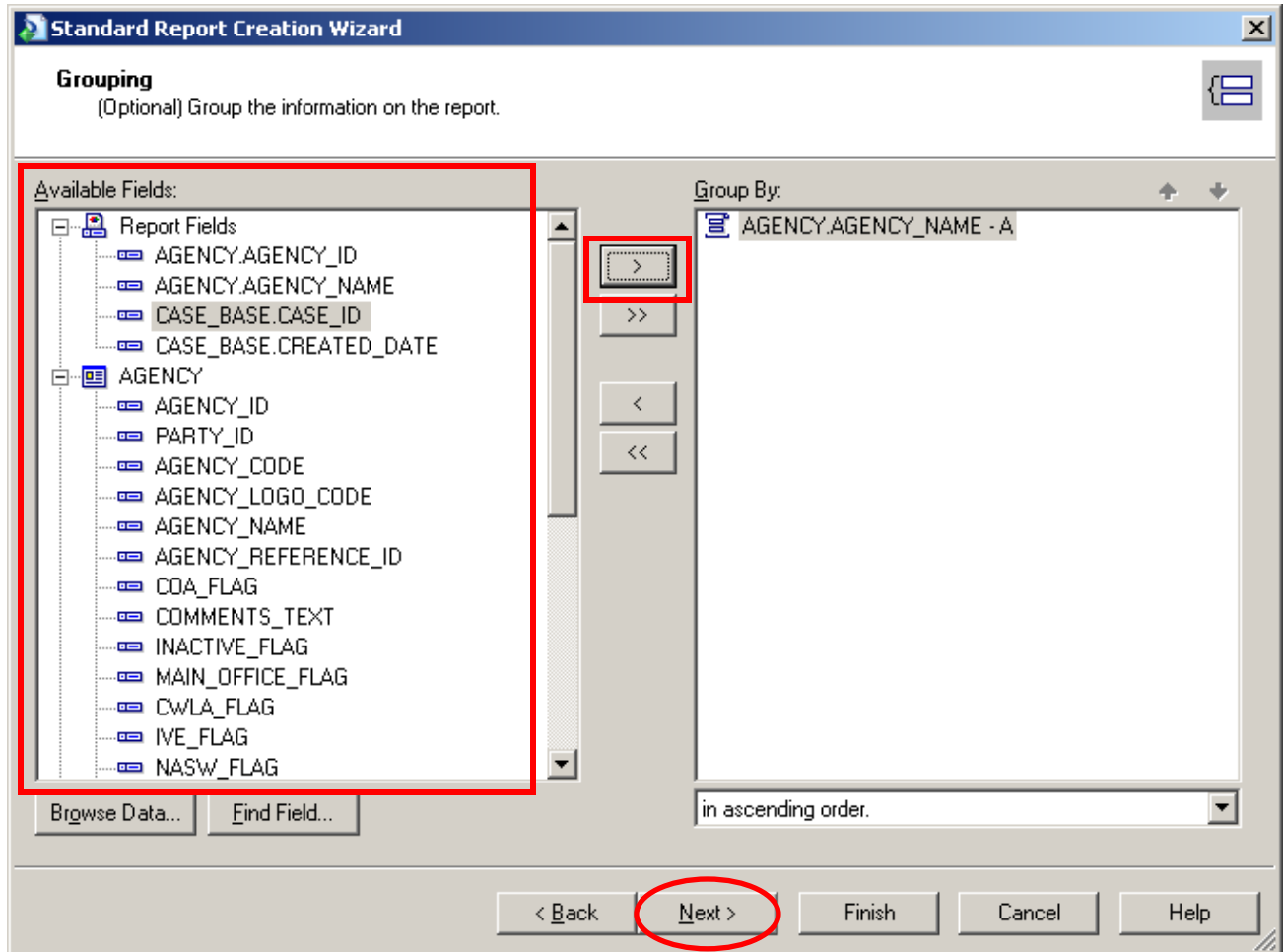
12. Select the columns to include in the report.



13. Click the **Next** button.

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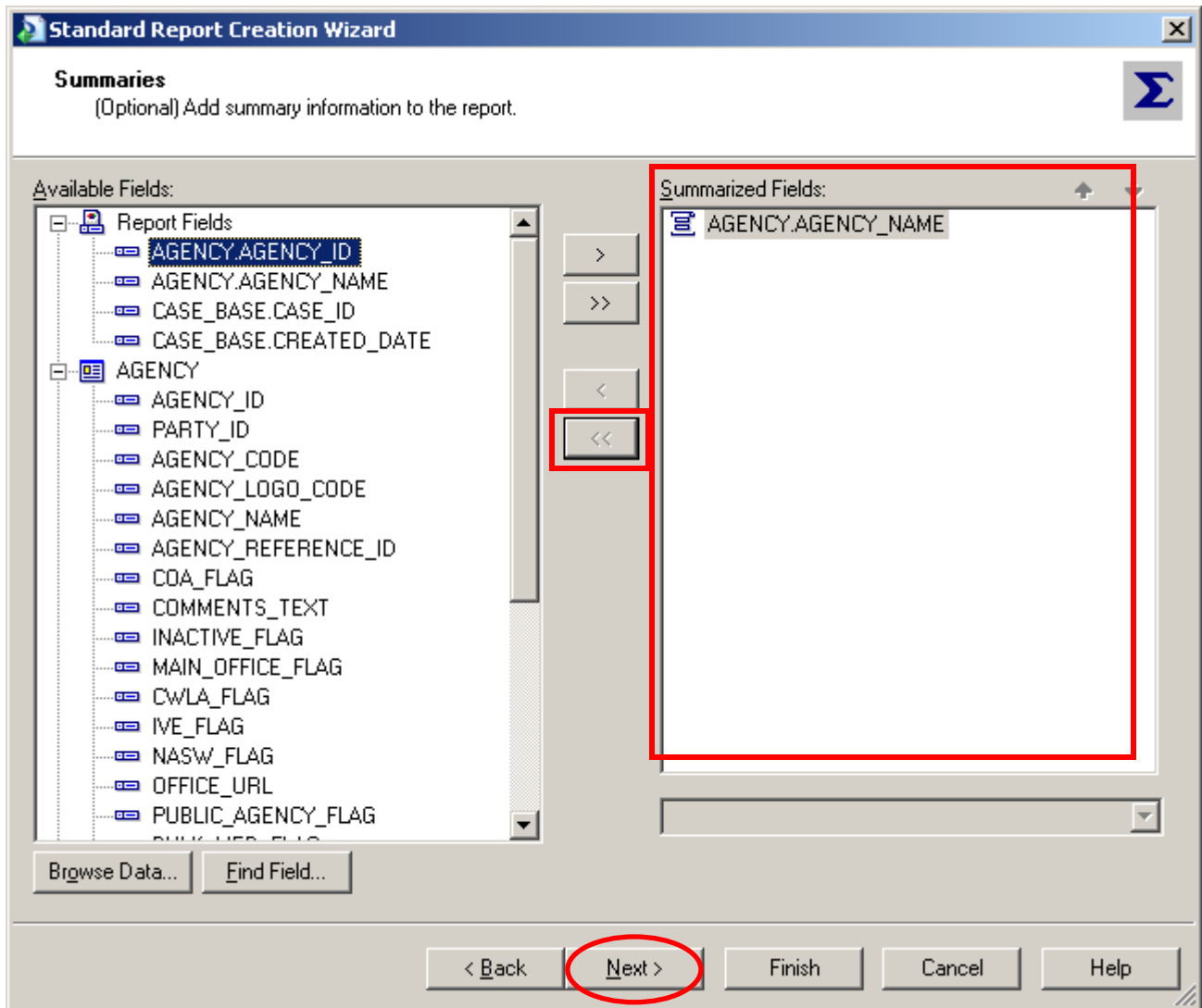
14. Select the **Group (sort)** columns.



15. Click the **Next** button.

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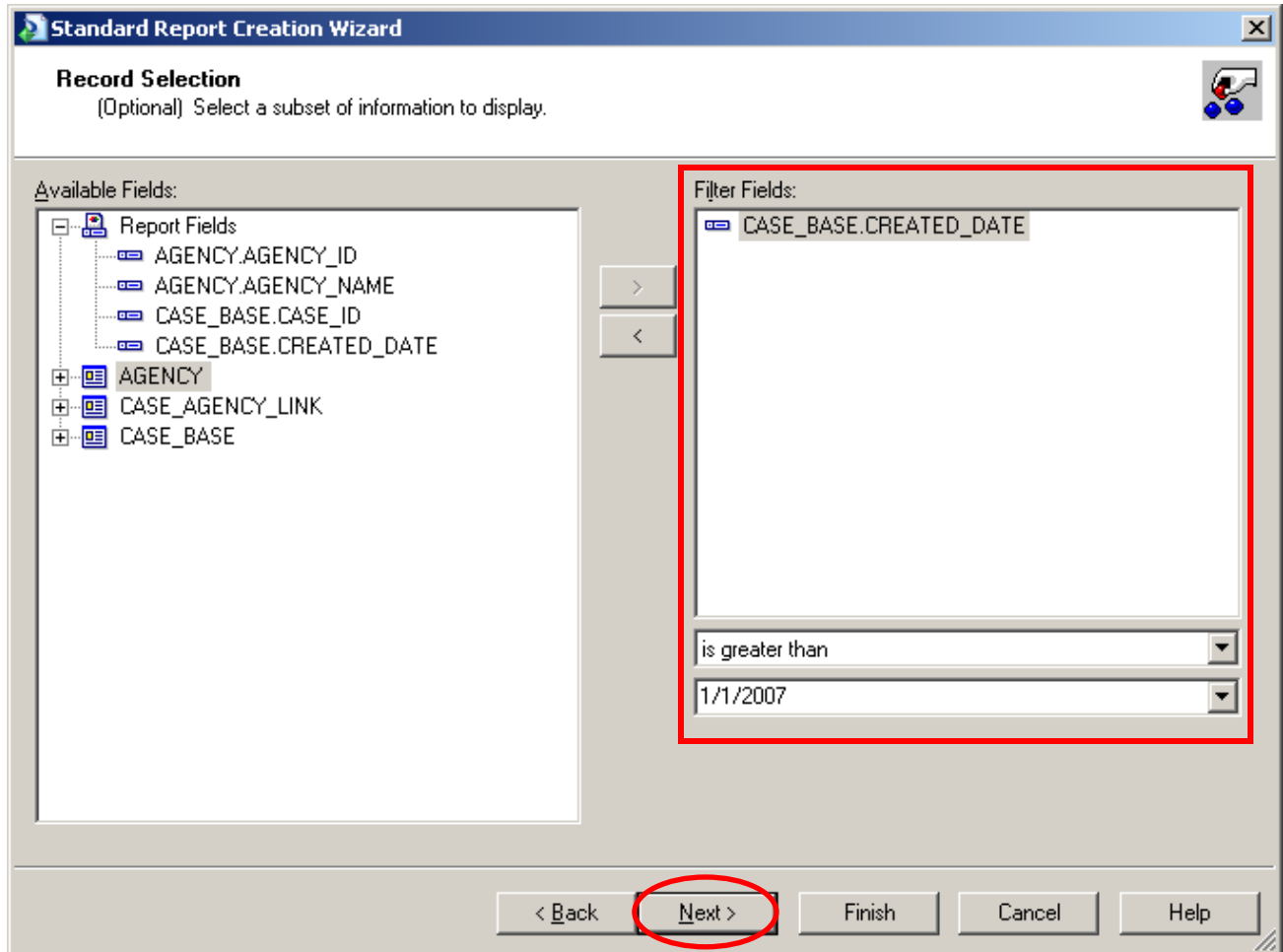
16. Clear any unneeded **Summary** columns.



17. Click the **Next** button.

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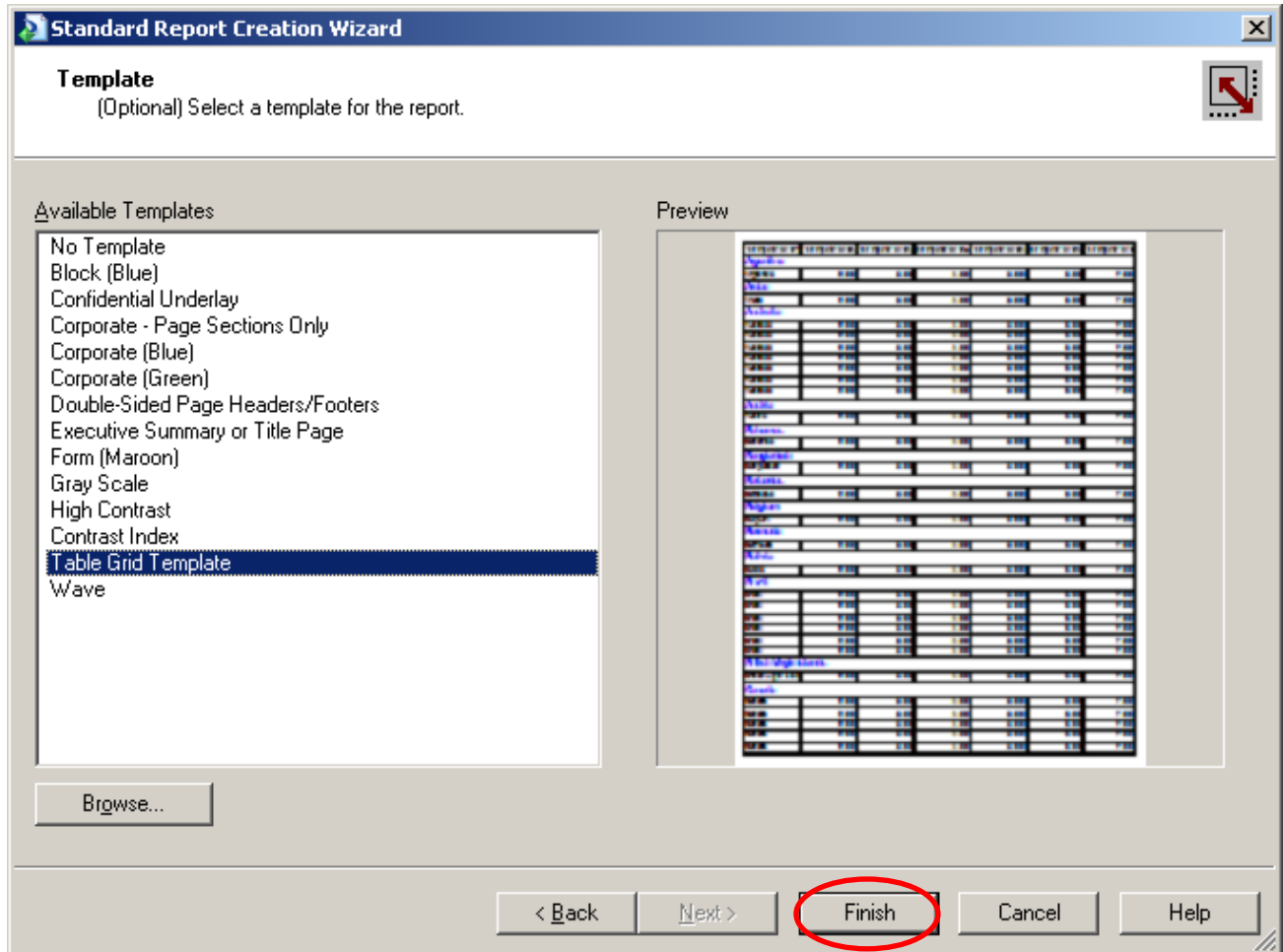
18. Add other filtering options.



19. Click the **Next** button.

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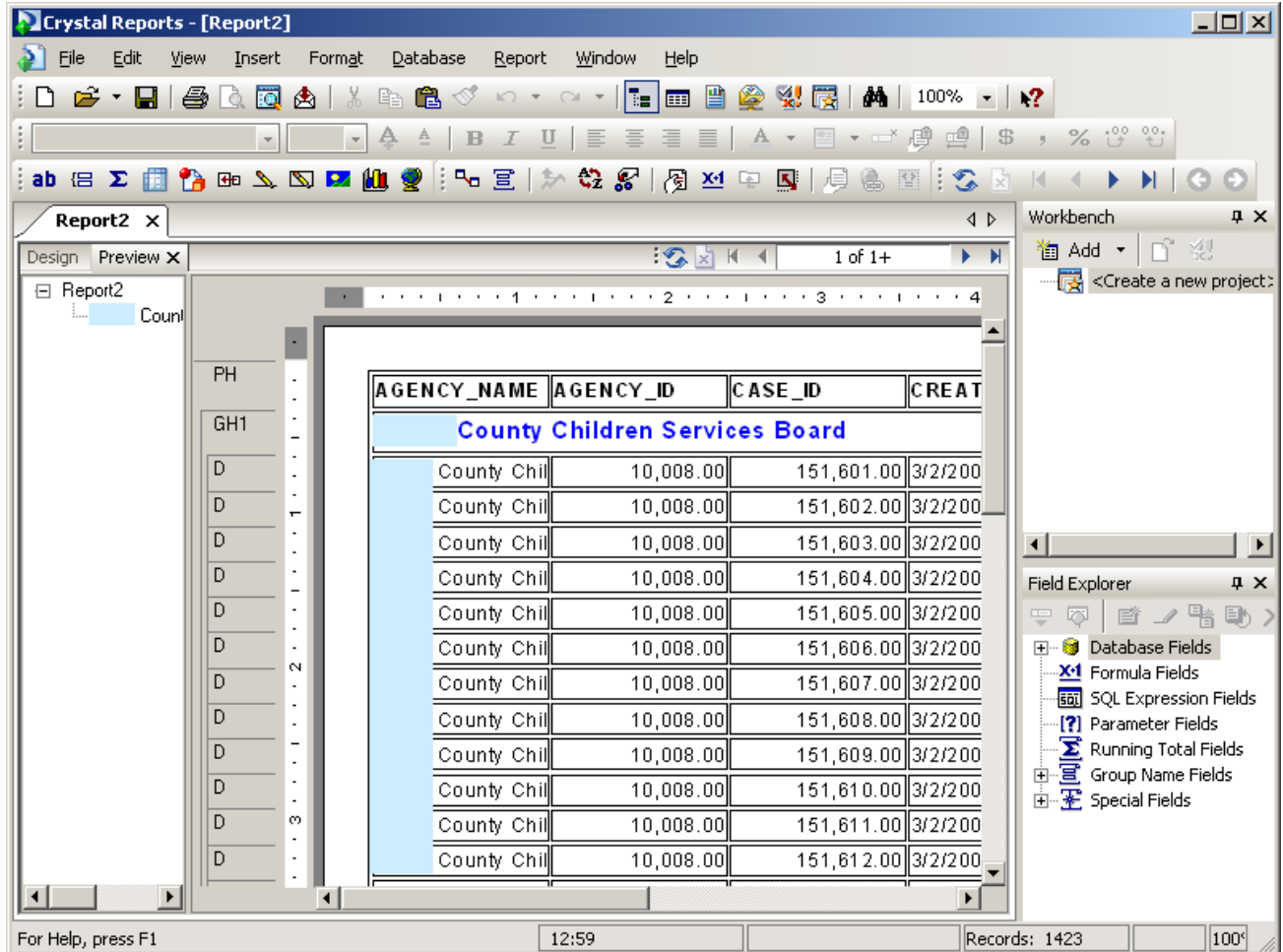
20. Select a template.



21. Click the **Finish** button to run the report.

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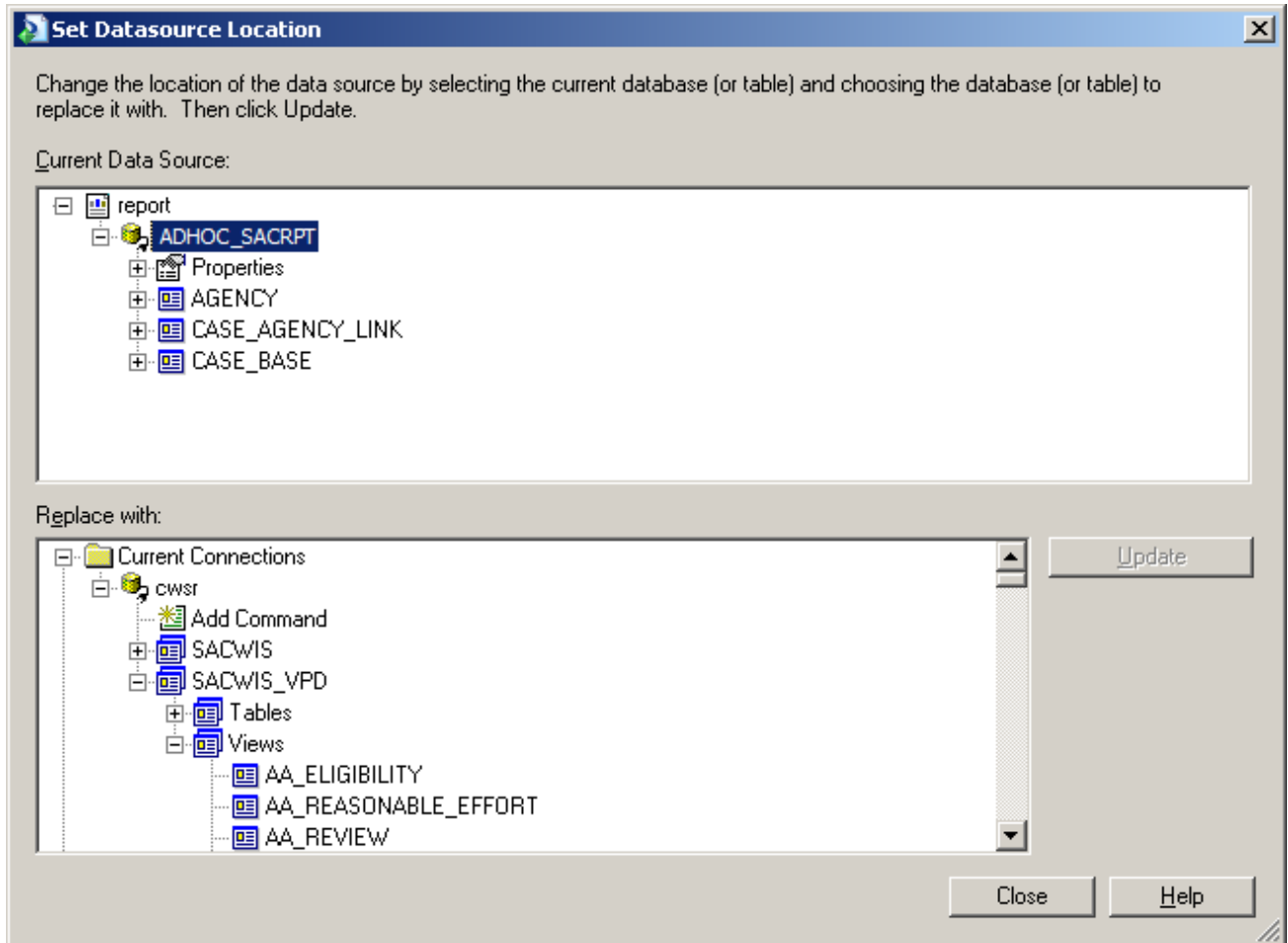
Data for a single county agency appears.



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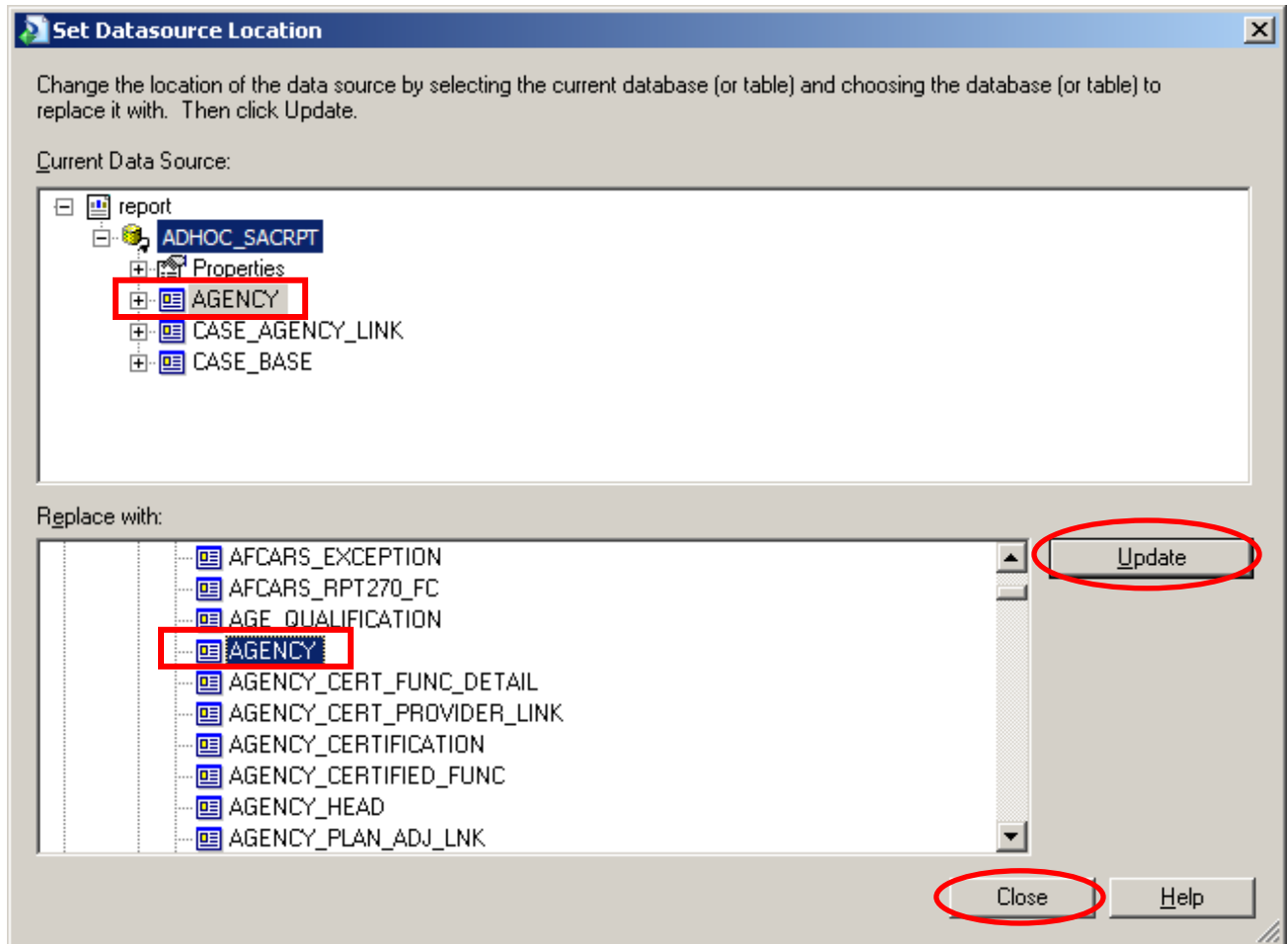
Modifying the Query to View Statewide Data

1. Select **Database / Set Datasource Location**.



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2. In the **Current Data Source** section, select **AGENCY**.
3. In the **Replace With** section, select **AGENCY** under **SACWIS**.
4. Click the **Update** button to make the change.



5. Click the **Close** button to return to the report.

The QUERY has been updated, but the results in the report have not been updated.

In this example, the query has asked for ALL agencies and Case information for one county. These “mixed-scope” queries can be confusing, so it is better to use all **SACWIS** tables or all **SACWIS_VPD** synonyms.

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6. Select **Report / Refresh Report Data** (or press **F5**). The data will be updated.

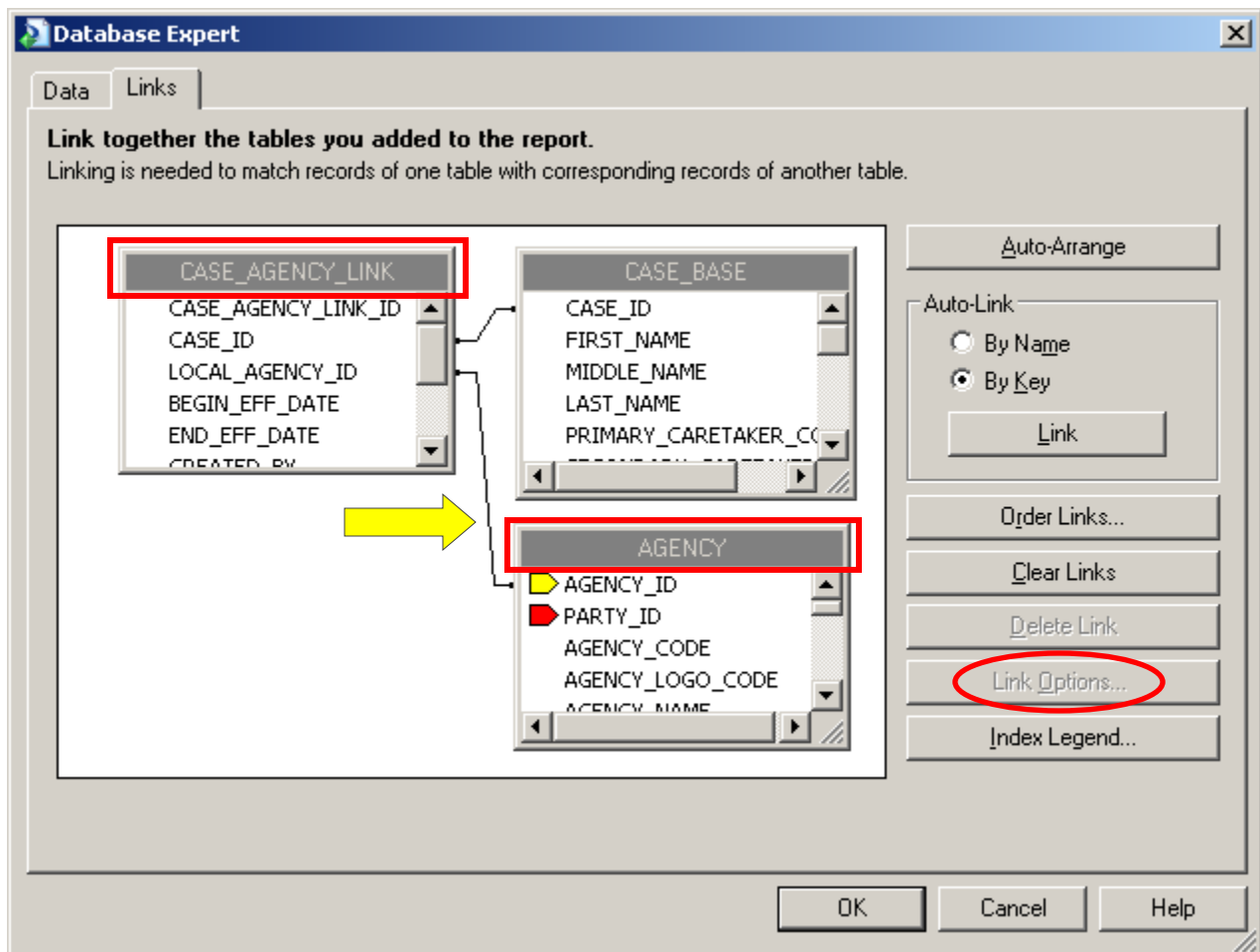
Note: There is no apparent change in the data yet.

7. Select **Database**.

8. Select **Database Expert**.

9. Select **Links**.

10. Click on the link from **CASE_AGENCY_LINK** to **AGENCY**.

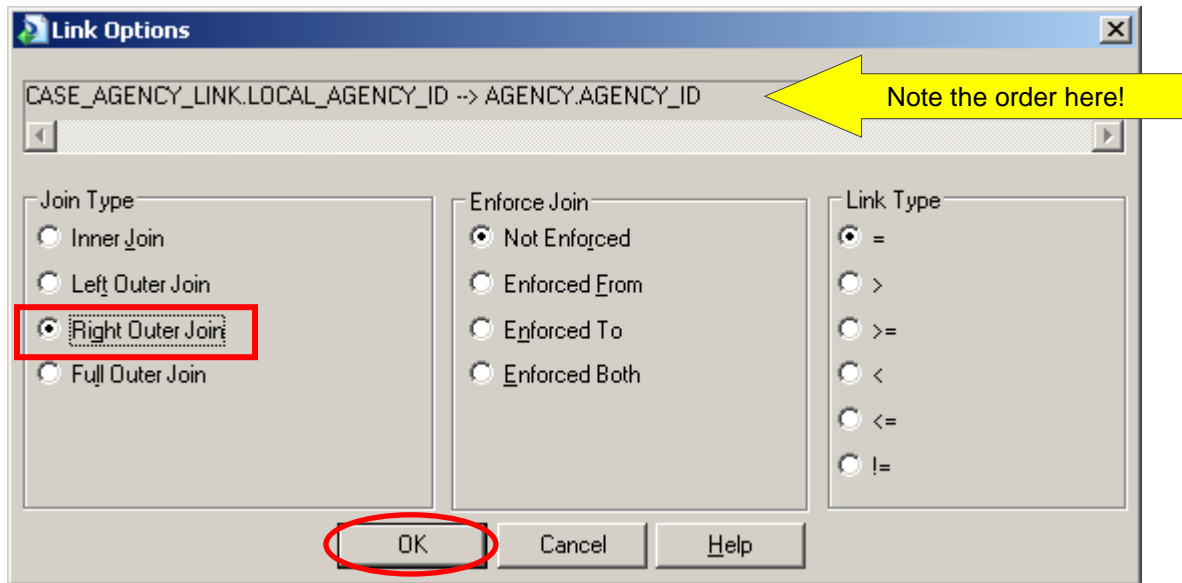


11. Then click the **Link Options** button.

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12. Select the **Right Outer Join** radio button.

Note: This will include all rows from the table on the right side of this join, even if there is no matching record in the table on the left.



13. Click the **OK** button to return to the report.

14. If prompted to refresh the report, click **Yes**.

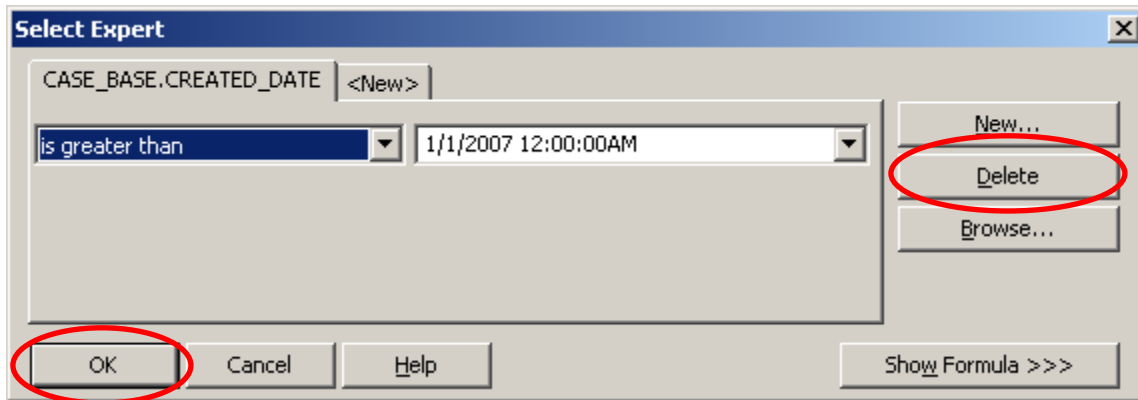
Note: If not prompted to refresh, select **Report / Refresh Report Data** (or press **F5**) to refresh.

Note: If no change appears, remember there is a limit on the date. That limit must be removed for all of the NULL dates to display, as described on the next page.

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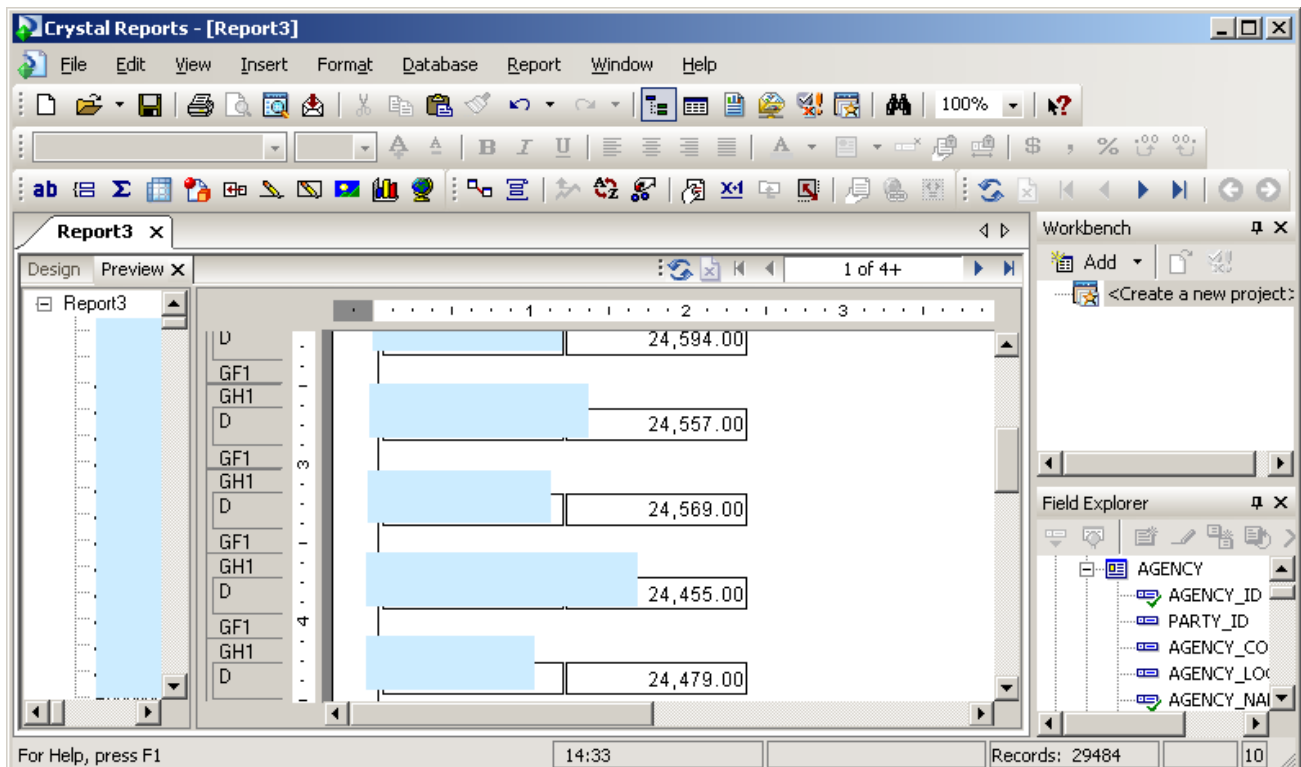
15. Select **Report / Select Expert**.

16. Click the **Delete** button then click the **OK** button to remove the limit on **CREATED_DATE**.



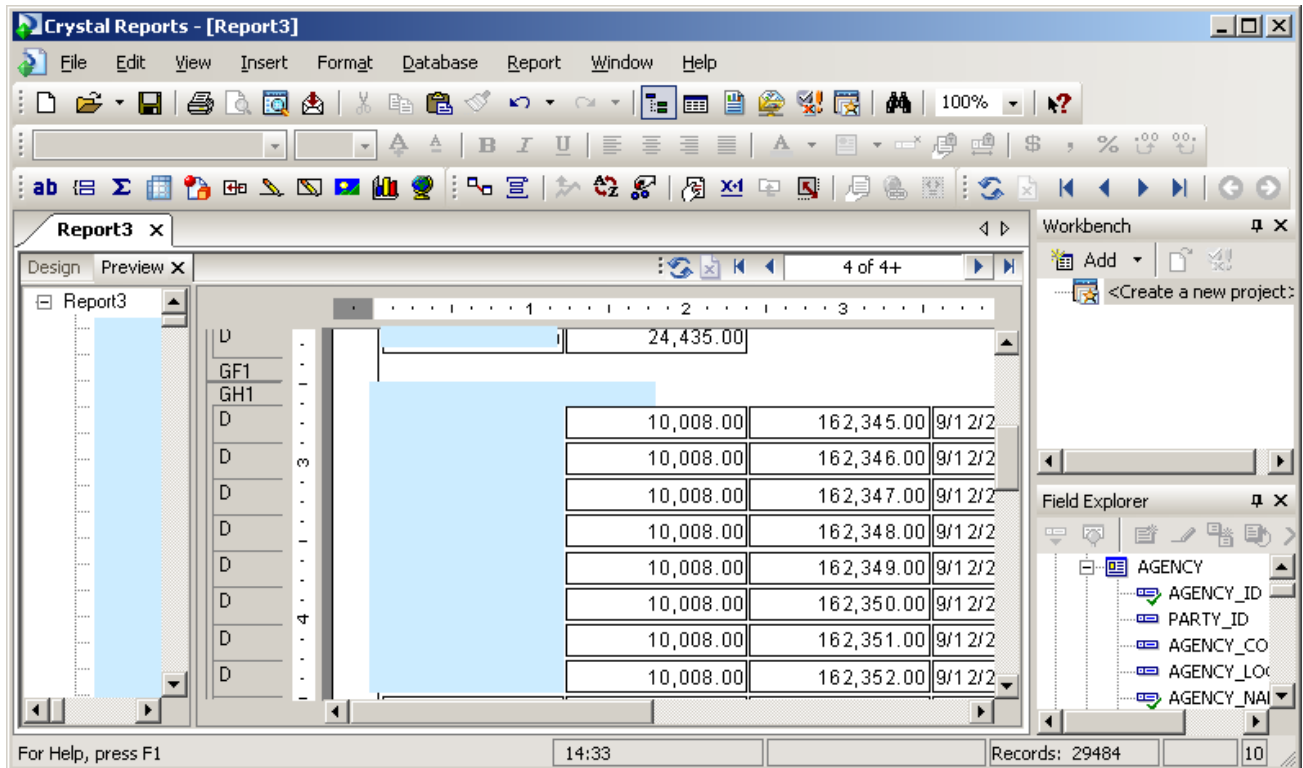
17. When Crystal Reports displays a message asking to refresh the report data, click **Yes**.

The names for ALL agencies should now appear. (If not, check the outer joins on the data source links.)



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18. Scroll down to your **County** to see the county detail.



If you need additional information or assistance, please contact the SACWIS Help Desk.