

Knowledge Base Article

Table of Contents

Overview	
Setting Up Crystal Reports XI	
Using the Connection to View Data	
Modifying the Query to View Statewide 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).

🂫 Crystal Reports - [Start Page]		
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Getting Started		▲ Add ▼ Create a new project:
Resources	New Reports	Recent
 ☑ Type a keyword for index Go ☑ Sample Reports ☑ Show online resources 	 Standard Report Wizard Blank Report Cross-Tab Report Wizard Mailing Label Report Wizard OLAP Cube Report Wizard 	No recent Popen
For Help, press F1		

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.



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.



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

🔊 Data Explorer	×
	Log O <u>n</u>
tere in Favorites tere in thistory tere in the term in term in the term in	Log Off
⊞- <mark>—</mark> Repository	Add to <u>F</u> avorites <u>D</u> elete Favorite
Data Explorer Browse through the folders to find your servers. To log on to a server, click on its plus icon or press Log Dn. When you are finished, press Close.	<u>Options</u>
	Close

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

Options	X
Database	
Tables and Fields Show Name Show Description Show Both	 ✓ Sort Tables Alphabetically ✓ Sort Fields Alphabetically
Data Explorer ✓ Tables ✓ Views System Tables ✓ Synonyms Stored Procedures Advanced Options ✓ Use Indexes or Server for Speed ✓ Perform Grouping On Server ✓ Database Server is Case-Insensitive ✓ Select Distinct Data for Browsing Perform Query Asynchronously ✓ Verify On First Refresh Verify Stored Procedures On First Refresh	Table name LIKE: (%,_) Owner LIKE: SACWIS%
I ✓ Verify When Database Driver Upgrade ✓ Automatic Smart Linking	ed
	K Cancel Help

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



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

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

🔊 Data Explorer	×
The Interview In	Log O <u>n</u>
	1 0%
🕀 🛄 ODBC (RDO)	Log Un
🕀 💼 Olap	
🕀 🧰 Oracle Server	Add to Eavorites
E Outlook	
🕀 🧰 Outlook/Exchange	<u>D</u> elete Favorite
🔁 🧰 Public Folder ACL	
😟 💼 Public Folder Admin 📃 💌	
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Data Explorer	
Browse through the folders to find your servers. To log on to a server, click on its plus icon or press Log	Options
On. When you are finished, press Close.	
	<u>H</u> elp
	Close

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



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

0	racle Server								X
	Connection								
Ī	<u>S</u> ervice:		ADHO	C_SACRP	T				
	<u>U</u> ser ID:								
	<u>P</u> assword:		••••	•					
	OS Authentication:								
	< Back	Nevts		Finish		Cancel	1	Help	1
	/ Eacy	Hem /		THIST		Cancel		Help	



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

11. Select ADHOC_SACRPT and click the Add to Favorites button

💾 Data Explorer	×
ODBC (RDO) ODBC (RDO) Olap OLE DB (ADO) Oracle Server Make New Connection ADHOC_SACRPT Outlook Outlook Outlook/Exchange Public Folder ACL Public Folder Admin	Log O <u>n</u> Log Off Add to <u>Favorites</u> <u>D</u> elete Favorite
Data Explorer Browse through the folders to find your servers. To log on to a server, click on its plus icon or press Log On. When you are finished, press Close.	Options Help Close

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

💾 Data Explorer	×
Ole DB (ADO) Oracle Server Able New Connection ADHOC SACRPT Add Command SACWIS SACWIS_APP SACWIS_AUD SACWIS_AUD SACWIS_VPD Outlook Data Evaluate	Log O <u>n</u> Log Off Add to <u>F</u> avorites <u>D</u> elete Favorite
Browse through the folders to find your servers. To log on to a server, click on its plus icon or press Log On. When you are finished, press Close.	Options Help Close



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.



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.

Standard Report Creation Wizard	×
Data Choose the data you want to report on.	
Available Data Sources:	> > <
< <u>B</u> ack Next	> Finish Cancel Help

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.



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





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.

Standard Report Creation Wizard Link Link together the tables you added to the report.	
CASE_AGENCY_LINK_ID CASE_AGENCY_LINK_ID CASE_ID LOCAL_AGENCY_ID BEGIN_EFF_DATE END_EFF_DATE CDEATED BY AGENCY_ID PARTY_ID AGENCY_LOGO_CODE AGENCY_NAME	Auto-Arrange Auto-Link
< <u>B</u> ack Next > Finish	Cancel Help

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



12. Select the columns to include in the report.

🔊 Standard Report Creation Wizard		×
Fields Choose the information to display on the report		
Available Fields: AGENCY AGENCY CASE_AGENCY_LINK CASE_BASE CASE_ID CASE_ID FIRST_NAME MIDDLE_NAME NIDDLE_NAME PRIMARY_CARETAKER_CODE CLOSED_CASE_ADDRESS_ID CREATED_DATE MODIFIED_BY CREATED_DATE MODIFIED_BY MODIFIED_BY CREATED_CASE_FLAG CRESTRICTED_FLAG RESTRICTED_FLAG RESTRICTED_COMMENTS_TEXT RESTRICTED_DATE	Fields to Display:	
Browse Data Find Field		
< <u>B</u> a	ack Next > Finish Cancel	Help



14. Select the Group (sort) columns.

Standard Report Creation Wizard Grouping (Optional) Group the information on the report.		× E
Available Fields:	AGENCY_AGENCY_NAME - A	*
	< Back Next > Finish Cancel H	



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

Standard Report Creation Wizard Summaries (Optional) Add summary information to	the report.		2	× 3
Available Fields:		Summarized Fields:	NAME	
	< <u>B</u> ack <u>N</u> ext	Finish	Cancel Help	



18. Add other filtering options.

Standard Report Creation Wizard Record Selection (Optional) Select a subset of information to display.				×
Available Fields Report Fields AGENCY_AGENCY_ID AGENCY_AGENCY_NAME CASE_BASE.CASE_ID CASE_BASE.CREATED_DATE AGENCY CASE_AGENCY_LINK CASE_BASE CASE_BASE	> <	Filter Fields: CASE_BASE.CREATE is greater than 1/1/2007	D_DATE	
	ick	<u>√ext</u> > Finish	Cancel	Help



20. Select a template.

Standard Report Creation Wizard Template (Optional) Select a template for the report.	
Available Templates No Template Block (Blue) Confidential Underlay Corporate - Page Sections Only Corporate (Blue) Corporate (Green) Double-Sided Page Headers/Footers Executive Summary or Title Page Form (Maroon) Gray Scale High Contrast Contrast Index Table Grid Template Wave	
< <u>B</u> ack	Next> Finish Cancel Help

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



Data for a single county agency appears.

🔊 Crystal Reports -	- [Report2]					
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	-	AGENCY_NAME	AGENCY_ID	CASE_ID	CREAT	
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	D .	County Chil	10,008.00	151,608.00	3/2/200	Parameter Fields
	D .	County Chil	10,008.00	151,609.00	3/2/200	Running Total Fields
	D	County Chil	10,008.00	151,610.00	3/2/200	E Group Name Fields
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		•		ì		
For Help, press F1			12:59		Recor	ds: 1423

Modifying the Query to View Statewide Data

1. Select Database / Set Datasource Location.

🔊 Set Datasource Location		x
Change the location of the data source by selecting the current database (or table) and choosing the replace it with. Then click Update.	ie database (or t	able) to
Current Data Source:		
 □ report □ ● ● ADHOC_SACRPT □ ● ● Properties □ ● ● AGENCY □ ● ● CASE_AGENCY_LINK □ ● ● CASE_BASE 		
, R <u>e</u> place with:		
		<u>U</u> pdate
Add Command		
AA_REASONABLE_EFFORT	•	
	Close	<u>H</u> elp



- 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.



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.

🔊 Database Expert	×
Database Expert Data Links Link together the tables you added to the report. Linking is needed to match records of one table with corresponding records of another table Image: Case_AGENCY_LINK_ID Case_ID Case_ID LocAL_AGENCY_LINK_ID BegIN_EFF_DATE END_EFF_DATE END_EFF_DATE Cheaten BW AGENCY_ID AGENCY_ID AGENCY_ID AGENCY_ID	e. <u>Auto-Arrange</u> Auto-Link By Name By Key Link <u>Order Links Clear Links Delete Link </u>
	Link Options
OK	Cancel Help

11. Then click the Link Options button.



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.

🔉 Link Options		×		
CASE_AGENCY_LINK.LOCAL_AGENC	Y_ID> AGENCY.AGENCY_ID <	Note the order here!		
Join Type C Inner Join C Left Outer Join Right Outer Join C Full Outer Join	Enforce Join Not Enfo <u>r</u> ced Enforced <u>F</u> rom Enforced To <u>Enforced Both</u>	Link Type		
OK Cancel <u>H</u> elp				

- 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.



- 15. Select Report / Select Expert.
- 16. Click the **Delete** button then click the **OK** button to remove the limit on CREATED_DATE.

Select Expert	×
CASE_BASE.CREATED_DATE <new></new>	
s greater than	New Delete Browse
OK Cancel <u>H</u> elp	Sho <u>w</u> Formula >>>

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.)







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

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

