Using Crystal Reports with Eralis Job

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1. Introduction

The intention behind this guide is to outline how Crystal Reports can be used in conjunction with Eralis Job. There are two primary categories of integration that are discussed:

1. Reports – Crystal Reports that are run from the *Reports* sub-menu in Eralis Job.
2. Forms and Layouts – Crystal Reports that are launched from a button on an Eralis Job form.

Eralis Job will continue to support existing reports and forms that have been created within Enprise Report Writer. The Report Writer tool will continue to be supplied with Eralis Job, but all new forms and reports will be created in Crystal Reports. Over time, we will be converting all of our existing reports across to Crystal Reports.

2. Reports

Reports refer to any document which displays information relating to multiple jobs or subjobs and is initiated by the user rather than a business process. With regards to Eralis Job, reports encompass all documents that are launched from the Eralis Job *Reports* sub-menu. Any document that is generated from a button on an Eralis Job related screen will follow the format outlined in the Forms and Layouts section of this document. This includes reports launched from user defined buttons.

No additional installations are required to use Crystal Reports with Eralis Job. Using the standard *Report and Layout Manager* within SAP Business One, new Crystal Reports can be added directly to the Eralis Job *Reports* menu.

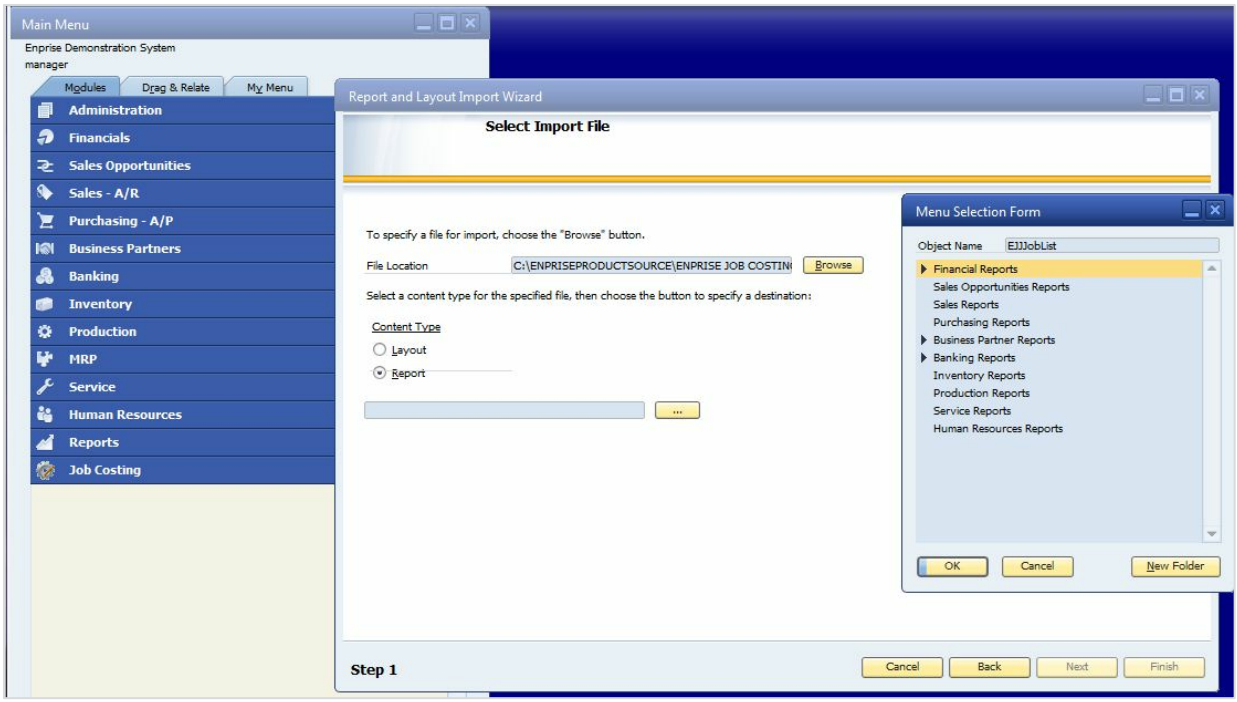
2.1. Attaching a Report to the Eralis Job Reports Menu

Attaching a Crystal Report to the Eralis Job *Reports* menu is carried out through the standard SAP Business One *Report and Layout Manager*, but does require a two-step process. The two-step process is required as the report import wizard does not currently display add-on menu structures when a report is initially imported, but does allow the report to be attached to add-on menus when edited.

Watch a short video tutorial of the process.

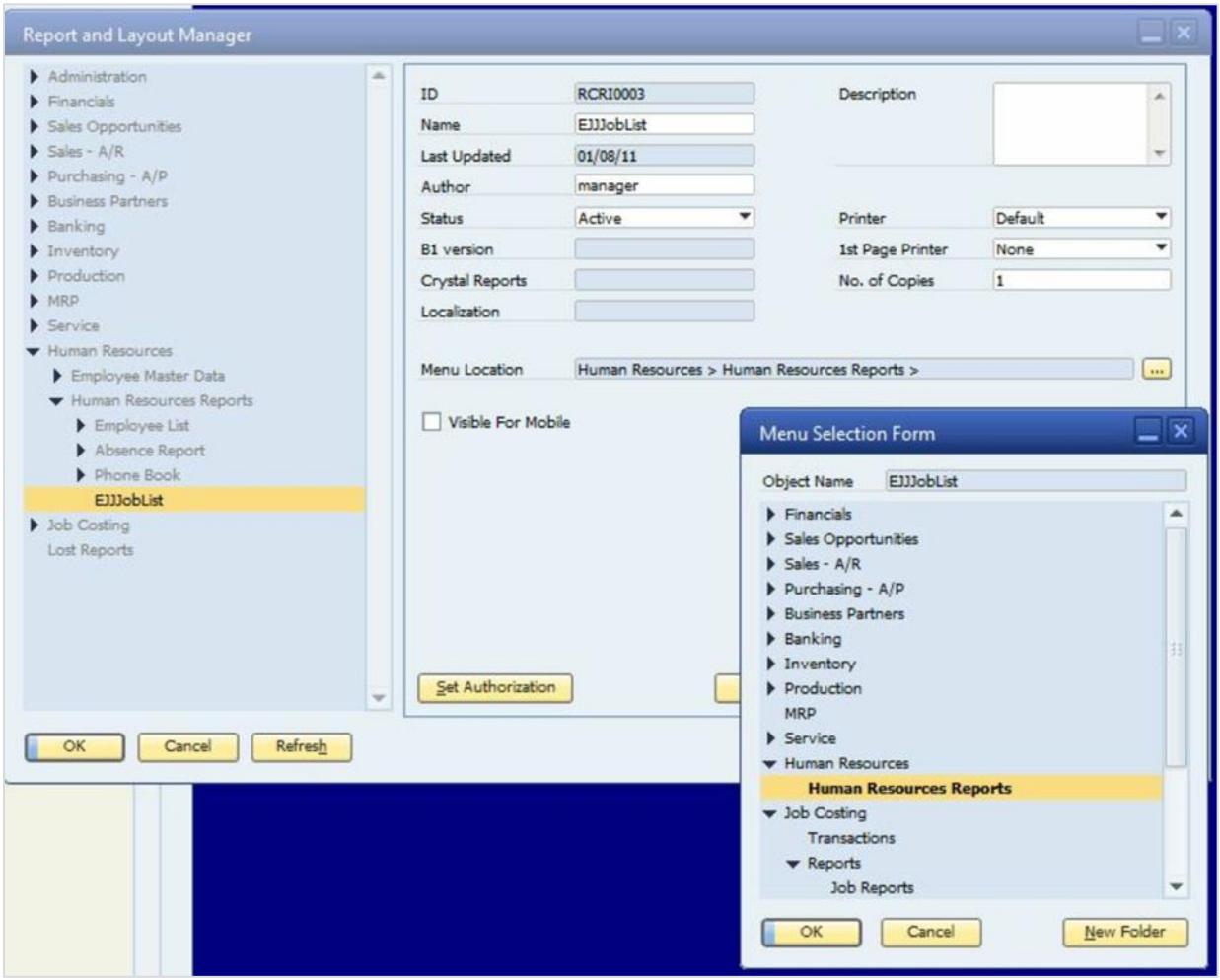
2.1.1. Step 1 – Add the Report

The first step of the process is to import the Crystal Report file through to a standard SAP Business One menu option using the import wizard available in the *Report and Layout Manager*. When the system displays a list of menu options to allocate the report to, the Eralis Job menu is not displayed. Choose another menu option to link the report to initially.



2.1.2. Step 2 – Edit the Report Location

Once you have added the report to a standard SAP Business One menu in Step 1, the report can then be edited. Using the *Menu Location* option within the SAP Business One *Reports and Layouts Manager*, move the report to the Eralis Job *Reports* menu.



2.2. Crystal Tokens

When creating reports that will be attached to the main reports menu (either the *Job Reports* menu or a standard SAP Business One reports menu), the standard token functionality introduced by SAP Business One as part of the parameters of a report, can be used in conjunction with reports based on Eralis Job information.

To make use of the tokens, an SAP Business One table must be included in the SQL script before the Eralis Job table. Failure to include the SAP Business One table in the SQL script will cause the token-based parameter to fail.

2.2.1. Token for Selecting the Job Number

The following script can be used as a base for creating a token to do a lookup for the job number.

JobID@SELECT JOBID,JOBTITLE FROM OADM CROSS JOIN ENPRISE_JOBCOST_JOB

By including the *OADM* table in the token script, SAP Business One will process the token as it normally would. Since the *OADM* table only contains a single record, there is no impact on the results of the query.

2.2.2. Token for Selecting the Subjob Number

The following script can be used as a base for creating a token to do a lookup for the subjob number:

SubjobID@SELECT SUBJOBID,JOBTITLE FROM OADM CROSS JOIN ENPRISE_JOBCOST_SUBJOB

If the list of subjobs displayed in the parameter needs to be restricted to the job number selected, then the script can be altered as follows:

SubjobID@SELECT SUBJOBID,JOBTITLE FROM OADM CROSS JOIN ENPRISE_JOBCOST_SUBJOB WHERE (JOBID = '@JobID')

The script above is based on the job selection parameter outlined in Section 2.2.1. It is important to note that the parameter name used in the *WHERE* clause to restrict the subjobs being selected is case sensitive.

2.2.3. Token for Selecting Job Types

The following script can be used as a base for creating a token to provide a list of job types for the user to select.

JobType@SELECT SEQNO,TYPE FROM OADM CROSS JOIN ENPRISE_JOBCOST_JOBTYPE

2.3. Crystal Drill Through

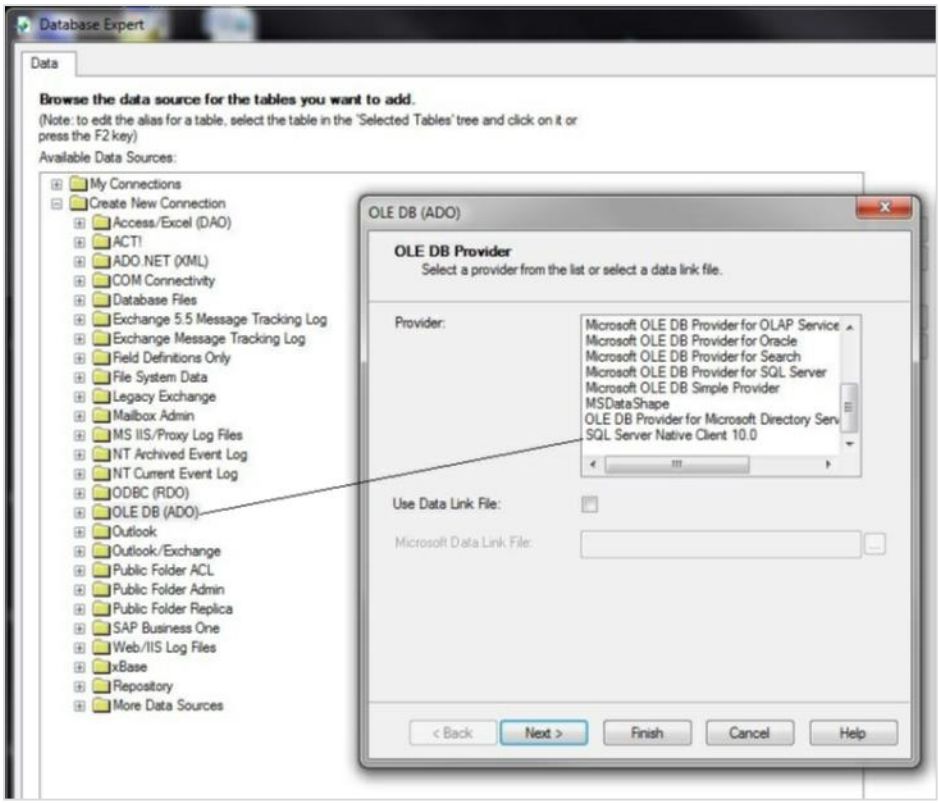
For reports, the standard drill through functions are available with the current exception being the ability to drill through and open the *Master* or *Subjob* screens.

3. Forms and Layouts

Forms and layouts include all documents that are generated from a button attached to an Eralis Job form. These could be documents that are created as the result of business processes, such as invoices, or could be documents that are generated from a user defined button on the job.

3.1. Report Design

The same version of Crystal Report Designer that is available for SAP Business One can be used to design forms that will be launched from Eralis Job screens. However, when a new report is created, the connection method used to connect to the database must be set to *OLE DB (ADO)* and not to SAP Business One.



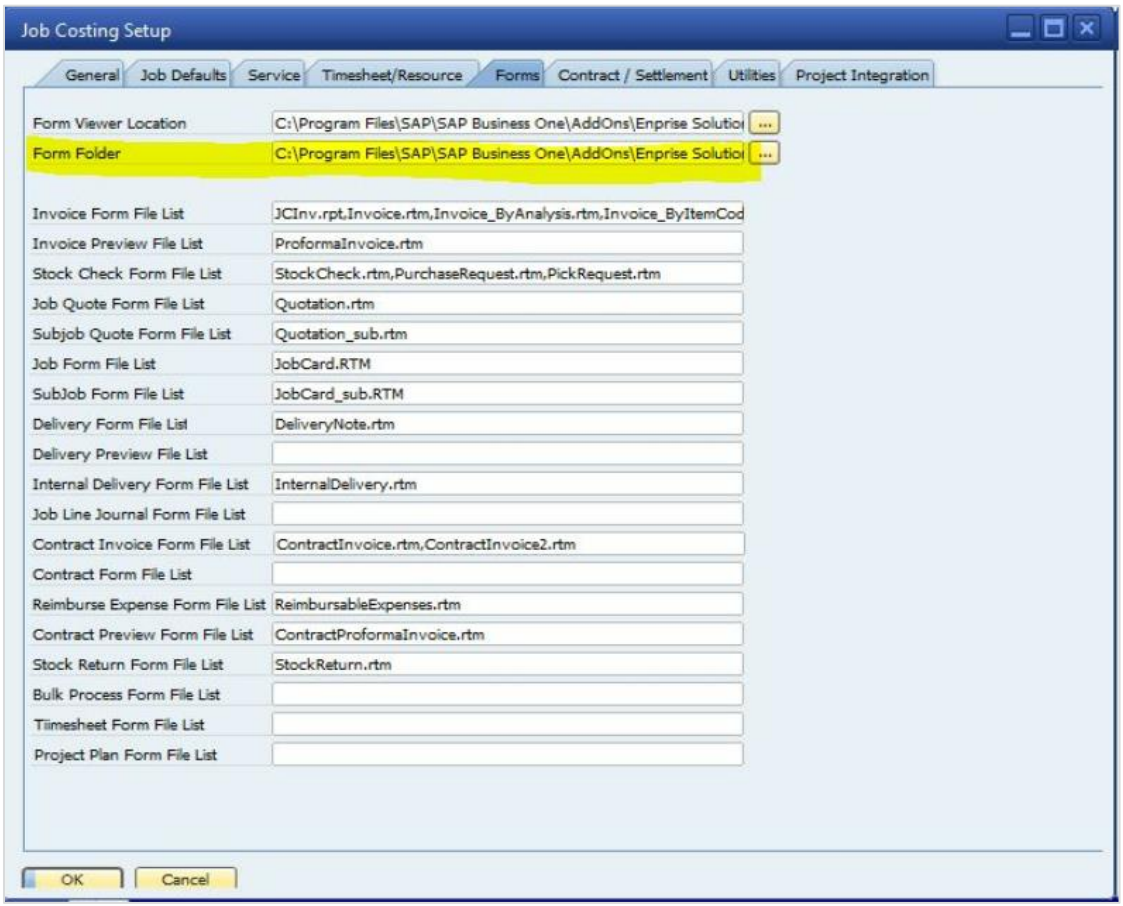
3.2. Adding to Required Button

The methods used to attach report files to the various buttons within Eralis Job have not changed. The only difference in this version is that the system will now look at the extension of the report file which will determine which report viewer the system will use. Where a report file ends with the extension .RTM, the system will use the Enprise Report Viewer while a report file ending with the extension .RPT will trigger the system to use the Crystal Report viewer.

3.2.1. Eralis Job Forms

Report files relating to forms such as the invoice layouts, etc., which are configured under the *Administration* > *System Initialization* > *Job Costing* > *Form* tab, need to be saved in the directory indicated in the Eralis Job setup, and the name of the file added to the relevant category.

When creating the forms below, a parameter called *Current* needs to be created within the Crystal Report which is then linked to the source identity field for the specific document type. When the report file is then launched from the relevant button, Eralis Job will automatically populate the current parameter with the identity reference of the specific document so that the user does not have to select this option from the selection parameter screen.



3.2.2. User Defined Buttons

An option exists in the setup of user fields associated with Eralis Job to create a button which can then launch a report, website or application. When the option is selected to launch a report, the user is required to identify where the required report file is located. Again, based on the extension of the report file, the system will determine whether to use the Enprise Report Viewer or the Crystal Report Viewer.

3.3. Tokens and Drill Through

SAP Business One tokens and the ability to drill through to master data is not supported in Crystal Reports that are launched from Eralis Job buttons.