



# Sage HRMS Learning Series

## SAP® Crystal Reports for Beginners



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Visit our Web site at [www.SageU.com](http://www.SageU.com) or call (866) 888-6062 to learn about training classes that are added throughout the year.

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## TABLE OF CONTENTS

<b>SAGE HRMS TRAINING CLASSES</b> .....	<b>1</b>
HRMS - SAGE HRMS - SAP CRYSTAL REPORTS - LEVEL 1: LAYING THE FOUNDATION .....	1
<b>SAGE UNIVERSITY</b> .....	<b>2</b>
<b>SESSION OBJECTIVE</b> .....	<b>2</b>
<b>ICONS</b> .....	<b>2</b>
<b>SAP CRYSTAL REPORTS TERMINOLOGY</b> .....	<b>3</b>
REPORT WIZARD .....	3
DATA SOURCE.....	3
TEXT OBJECT.....	3
DESIGN TAB.....	3
PREVIEW TAB.....	3
GRIDS AND GUIDELINES .....	3
<b>TOOLBAR ICONS</b> .....	<b>4</b>
<b>REPORT SECTIONS</b> .....	<b>5</b>
<b>LINKS AND CONTACT INFORMATION</b> .....	<b>6</b>

## Sage HRMS Training Classes

### Sage HRMS Learning Series

This learning session uses concepts contained in the following training classes on Sage University:

### HRMS - Sage HRMS - SAP Crystal Reports - Level 1: Laying the Foundation

SAP® Crystal Reports for Sage HRMS connects you to data above and beyond the standard reports included with Sage HRMS by allowing you to create powerful, formatted reports with Sage HRMS as your centralized database and single point of truth. During this course we will train you to use SAP® Crystal Reports to extract the data you need from Sage HRMS and turn it into interactive, actionable information. Topics will include understanding the file structure of Sage HRMS, as well as using formulas and expressions. We will discuss creating and editing reports and using the Report Wizard. This training includes hands-on exercises so you can practice what you have learned in a demo environment.

After you have completed this course, you will be able to:

- Recognize the various files and fields of Sage HRMS in preparation for creating SAP Crystal Reports
- Locate the Data Dictionary Reports in Sage HRMS
- Use the functionality of the SAP Crystal Reports Start Page to quickly start SAP Crystal Reports Projects
- Differentiate between the different Start Page portions and options
- Navigate the interface to meet your report creation needs
- Recognize SAP Crystal Report terms and definitions
- Use the Report Wizard to build a report
- Select a data source, table, fields, selection criteria, and template style using the Report Wizard
- Properly print your report
- Save your report
- Create a report with group, summaries, totals and a graph
- Make modifications to an existing report
- Add report and column titles, adjust font sizes and field length, as well as a currency symbol
- Create a report from scratch using the SAP Crystal Reports interface
- Add data text box, boxes, shading, lines, drop shadows, and graphics to a report

## 79075 - Session Details

Session · WebEx · 8 hours · \$549.00 (C\$549.00) | 549.00 Training Units

### Location

Sage HRMS Virtual Classroom, Sage HRMS Online  
Scheduled Events, Sage North America - Sage HRMS,  
Sage North America

English (US)

### Duration

2/14/2020, 9:30 AM EST - 2/14/2020, 5:30 PM EST

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## 79083 - Session Details

Session · WebEx · 8 hours · \$549.00 (C\$549.00) | 549.00 Training Units

### Location

Sage HRMS Virtual Classroom, Sage HRMS Online  
Scheduled Events, Sage North America - Sage HRMS,  
Sage North America

English (US)

### Duration

3/2/2020, 9:30 AM EST - 3/2/2020, 5:30 PM EST

## Sage University

To find training and register for training courses, visit [Sage University](http://www.sageu.com) at [www.sageu.com](http://www.sageu.com). If you have Gold Support, you are entitled to 50% off Sage HRMS instructor-led training and Sage HRMS Any-time learning (ATLs) are free. If you register for an instructor-led training class, use code HRMSResource to receive 10% off. If you have Gold Support, this is in addition to the 50% discount.

To enroll in a course, go to <https://sageu/hrms>, and log on. If you do not have a log on, you will need to [create one](#). For registration assistance call Sage University Help Desk at 1-855-724-3864 or email [SageUniversity@sage.com](mailto:SageUniversity@sage.com).

## Session Objective

In this session the instructor will:

- Create an SAP Crystal Report using the Report Wizard
- Discuss report terminology and report sections
- Modify the report

## Icons



## SAP Crystal Reports Terminology

### Report Wizard

The Report Wizard is an excellent tool for new users. The Report Wizard will walk you through report creation in a step by step process, allowing you to quickly create reports.

### Data Source

The data location from which SAP Crystal Reports is currently reporting and the method used by SAP Crystal Reports to connect to said data. For the purposes of this webinar, the Data Source will always be Sage HRMS data, using the Abra HRMS Data Access connection method.

### Text Object

A text object can contain text, multiple data fields, calculations, or any combination thereof.

### Design Tab

The Design tab is where the SAP Crystal Report is built and contains all of the information for your report. For this purpose, the Design tab is separated into sections and contains guidelines to facilitate SAP Crystal Report creation.

When building your SAP Crystal Report from the Design tab, you will only be viewing the field name for data you wish to view. The report will not populate with data until you use the Refresh button to actually pull the data from Sage HRMS. This allows you to build your report from the ground up without taxing Sage HRMS or your network resources by constantly bringing in data during report creation.

### Preview Tab

The Preview tab gives you the ability to view the SAP Crystal Report as it will appear when printed, run, or exported.




Similar to the Design tab, you can also make adjustments and additions to your SAP Crystal Report directly from the Preview tab. This allows you to make adjustments and see how they will appear as a finished product.

### Grids and Guidelines

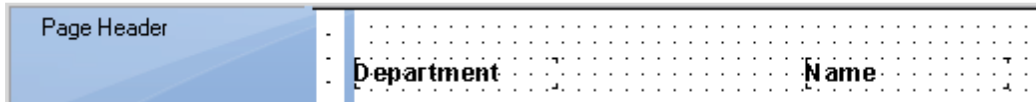
When working in either the Design or Preview tab, you have the ability to use guidelines and grids to ensure the precise placement of your fields. Guidelines are located in the rulers, and appear as arrows. They are located both vertically and horizontally, and allow you to “snap” your fields to the guideline to ensure proper alignment.


When a field is properly “snapped” to the guidelines, you will see indicators appearing as red marks where the field is set.



 To delete a guideline, click the guideline with the left mouse button and, while holding down the mouse button, “drag” the guideline to a location outside of the ruler. The guideline will disappear.






Grids place a matrix of dots across your SAP Crystal Report and, much like guidelines, allows you to ensure proper placement. However, gridlines do not have “snap to” functionality, and are used as navigational markers to ensure alignment. In the screenshot below, we have manually aligned our fields using gridlines.



 Grids are turned off by default in SAP Crystal Reports. To enable the gridline feature, navigate to View > Grid and select where you wish to use them (Design and/or Preview.) In addition, you can also opt to adjust the grid size from here as well.

## Toolbar Icons

The following icons will be used when modifying a report:

	Print Preview – Displays how your SAP Crystal Report will appear when printed
	Refresh (F5) – Used to “run” the SAP Crystal Report, populating the report with data
	Undo – Standard Microsoft Office Undo functionality
	Record Sort Expert – Allows you to sort the records on your report
	Select Expert – This icon allows you to create criteria for which records are returned when running your SAP Crystal Report

## Report Sections

The different SAP Crystal Report sections define where the data will appear on the SAP Crystal Report, and the manner in which it appears.

**Report Header** – The report header displays information that will appear once, at the top of the report on the first page of the report only.

**Page Header** – The page header displays information that will appear at the top of each page of the report. For example, if the report is one hundred pages, the page header will display at the top of each of the one hundred pages.

**Details** – The details area contains the body of the report and will display all records that have been returned. There will be a separate Detail line for each record. In addition, any objects placed in this section will appear with each new record.


**Report Footer** – The report footer displays information that is to appear once, at the end of the report. This section is usually used for grand totals.

**Page Footer** – The page footer will display at the bottom of every page of the report. As per the example above, if your SAP Crystal Report was one hundred pages long, any items in the page footer would appear at the bottom of all one hundred pages.

If your report contains Groups, you will see the following two sections:


**Group Header** – The group header will appear once, at the beginning of the group.

**Group Footer** – The group footer will appear once, at the end of the group.

	If your SAP Crystal Report does not contain any groups, the group header and group footer will not be present. If your report contains multiple groups, you will have multiple group headers and group footers; one for each group.
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## Links and contact information

Topic	URL	Additional Information
<a href="#">Sage City – HRMS Forum</a>	<a href="https://www.sagecity.com/support_communities/sage_hrms/f">https://www.sagecity.com/support_communities/sage_hrms/f</a>	Ask product questions Share tips and tricks with Sage peers, partners, and pros
<a href="#">Questions and Answers relating to Sage HRMS Learning Series</a>	<a href="https://www.sagecity.com/support_communities/sage_hrms/f/sage-hrms---training">https://www.sagecity.com/support_communities/sage_hrms/f/sage-hrms---training</a>	This link will take you directly to the Sage HRMS – Training forum on Sage City
<a href="#">Sage University</a>	<a href="https://www.sageu.com/hrms">https://www.sageu.com/hrms</a>	Log on Training and certification View training by subject Create a Profile Test your knowledge View training schedule
Sage University Help Desk		Telephone: 1-855-724-3864 Email: SageUniversity@sage.com
Discount code when registering for Sage HRMS instructor-led training	HRMSresource	10% off
<a href="#">Register</a> or access on demand recording for Sage HRMS Learning Series	<a href="https://get.sage.com/HRMSLearningSeries">https://get.sage.com/HRMSLearningSeries</a>	
Grad Cap icon in Sage HRMS		A link to Sage University to browse for training on the related area in Sage HRMS