Crystal Enterprise Solution Kit for Baan 2.0

Reformatting Integrated Baan Reports

Overview

This document is designed to assist those who are responsible for the Integrated Baan Reporting implementation in making formatting changes to report designs in Crystal Enterprise Professional 8.0.2.672 and Seagate Info 7.5.2.0 environments. The Introduction section of this document is mostly taken from *Appendix A: Modifying Reports* in the Crystal Enterprise Solution Kit for Baan *User's Guide* with a few small changes and additions. The *User's Guide*, Uguide.pdf, is included on the Solution Kit for Baan CD. The Report Design in Detail section is new material that seeks to provide additional information to assist Baan/Crystal customers in making the most out of Integrated Baan Reporting. If you have any questions and/or suggestions regarding this document, please let us know by emailing baan@crystaldecisions.com

Contents

Introduction

Most Baan reports are typically created and maintained by Baan administration staff. For Integrated Baan Reporting, the situation will likely remain the same: Baan administration staff will create and maintain reports. Typically, administrators who work with Integrated Baan Reporting will have a solid understanding of Baan reports and the fields contained within these reports. Most Baan users will have the rights to change Baan reports within either Crystal Enterprise or Seagate Info.

The simplest way to modify a Baan report is to select a Standard Template when you print the report. A Standard Template defines the page header and footer for the report. A common corporate page header and footer will mean that all Baan reports will maintain a standard and common format and display structure.

NOTE	The Standard Template design will not affect other report sections (it will only affect the page headers and footers).

Before a Baan report is printed to a Crystal Device, you will only be able to change the reports by using Standard Templates. Therefore, to make a change within the other report sections of a Baan report (for example, the detail and group sections), you need to print the report at least once, which will result in a report without data being created and stored within the Baan Report Layouts folder.

NOTE	The exact location of the folder depends on the package, module, and VRC of the report.

A report and an instance (a report with saved data) will be created and stored within the Combined Reports folder. The combined report has been merged with the Standard Template report that was selected at print time. If no template was chosen, the report title will not have the name of the combined report appended to it.

Changing a report's design

Within Crystal Enterprise or Seagate Info, the Integrated Baan Report designer is able to change the design of your reports. There are two methods you can use to change the layout of your reports: modify the report within the Baan Report Layouts folder or modify the report within the Combined Reports folder. In most cases, you should modify a report within the Baan Report Layouts folder. For information on modifying reports, refer to the Online Help found within Crystal Enterprise or Seagate Info.

You may find it easier to modify a report with saved data. However, the reports stored within the Baan Report Layouts folder and the Combined Reports folder do not contain saved data. To work with a report with saved data, you can download a report instance from the Combined Reports folder and save it in Crystal Report format (.rpt) and open the report using the Report Designer. You can then make changes to this report and use it to replace the existing report within the Baan Report Layouts folder or the Combined Reports folder. To avoid losing changes already made to the original report, you may want to rename the original report instead of replacing it.

You cannot add fields to a report that do not exist on the original Baan report. To add a field to a report, you must first add the field in the Baan report using Baan's reporting tools, and then print that report to a Crystal device. It is possible, however, to delete fields from a report.

Modifying a report within the Baan Report Layouts folder

The recommended method is for you to modify a report within the Baan Report Layouts folder. By making changes in this folder, this means that regardless of which template is chosen for the report, the design defined within this report (in the Baan Report Layouts folder) will be used.

Modifying a report within the Combined Reports folder

You can modify a report within the Combined Reports folder, but this results in the fact that the report design for the modified report can no longer be changed within the Baan Report Layouts folder. As a result, depending on which templates are chosen by the user, your reports may look different. This also means that any future modifications within the Baan Report Layouts folder to these reports (modified within the Combined Reports folder) will be ignored, unless the report in the Combined Reports folder is deleted or renamed. Effectively, control of a report is contained within the Combined Reports folder if you modify a report within this folder.

Here is an example of why you may wish to modify reports within the Combined Reports folder.

You, as an administrator, create two Standard Templates that are exactly the same: one is labeled CorporateStandardBlue, and the other is labeled CorporateStandardBlack. After printing the reports for the first time, you modify the reports within the Combined Reports folder: one report now uses blue fonts, and the other uses black fonts. When the user prints the report from Baan, the selection of the template determines whether the entire report is printed in blue or in black. In general, the administrator (rather than the user) will decide how Integrated Baan Reports will be modified.

Report Design in Detail

Defining a Standard Template

Subsequent levels deal with topics that are more specific.

To define a template is a fairly simple process. Simply create a new report but do not connect to a data source in the report. Now you can add text, logos, etc. to the report headers/footers and the page headers/footers. Note that if you do not want a section to appear in the final combined report, you will need to suppress that section.

To add logos (pictures) or other objects to a template, complete the following steps. On the menu, click Insert > OLE Object and then select 'Create from File'. Click the 'Browse' button to locate the file you wish to add. The file should be stored on the Crystal Report Job Server computer in a public folder. Remember to use the UNC path to the file. When you have located and selected the file, select the 'Link' checkbox and click 'OK'. Drag and drop the object to the desired location on the report. Save the template to the "Standard Templates" folder.

To make templates available in Baan, log on to Baan and go to 'Maintain Report Templates' in the 'Device Management' module of 'Baan Tools'. Open the session and add in the device by clicking the 'Insert Group' button and the drill-down triangle located beside the 'Device' field. Select your device and then click the 'Copy Templates' button. The report names (templates) that you saved to the Standard Templates folder will be uploaded to this session.

Now, when the device is selected when printing a Baan report, you will be able to select a template from the list for that device.

Modifying a report in the Baan Report Layouts folder

Integrated Baan Reporting was designed so that existing Baan reports could be reproduced in Crystal Enterprise Professional and Seagate Info. The design for the report the first time it is sent to a Crystal Device from Baan matches closely to the design of the original Baan report. However, because the solution is designed first to replicate the existing Baan report, some complexity is introduced to the report design that would not exist in more typical database reporting. Some of this complexity will be evident as tables/fields in the XML files as discussed below.

Tables

There are at most 51 fields in each table. If the XML file has over 51 fields, the Solution Kit will create a second table. If there are over 102 fields (51 x 2) in the XML file, it will create a third table, etc.

Fields

Regular Baan fields are represented in the report as "table_field". Two examples are: tdsls041_item and tccom010_nama. These fields can be formatted, added to a report, or deleted from a report. Calculations, summaries, or formulas may be based on these fields. Typically, the fields that an administrator will wish to include on the report would be one of these fields. If a field has been added to the original Baan report, you can then add this field to the Crystal Report as well.

Another type of field in a Baan report is a calculated field. An example of this type of field is "itemtot". Usually, this field will be a Number field in the Crystal Report that is not actually on the initial report. Instead, the field on the report is a string form of the same field. This field will always bear the "_BXPrintValue" extension, for example, itemtot_BXPrintValue. Often, in designing the report you may want to put the actual number field on the report so that calculations, formulas, charts, etc., can be based on this field. To find the appropriate field to replace the original string form field, look for the same field minus the "_BXPrintValue" extension and add that field to the report.

BXLabel fields are simply the column headings and other text replicated from a Baan report. So, the easiest way to reduce the number of fields in the XML file coming from Baan would be to eliminate a lot of the headings and other labels in the Baan report. You can simply replace this text in the Crystal report by adding a text object to the report.

Some examples of "BXLabels" are: tcgen_page_BXLabel_2 (which is the word "Page") and tccom010_nama_BXLabel_5 (which is a column heading).

Typically, these are not fields that would be added to a report. Usually, if there are changes made to a report, these fields are either reformatted or deleted altogether. In the report design, you would most likely replace these labels with text fields in the Crystal Report to have more flexibility over the content of the label.

The following list how Baan field types and field names are converted.

Baan Field Type Conversion

Baan Field Type	Physical Database Type
Byte	NUMERIC
Integer	NUMERIC
Long	NUMERIC
Float	NUMERIC
Double	NUMERIC
String	String
Enumerated	String
Set	String
Set	String
MultiByteString	String
UTCDateTime	String
Label	String
CompanyNumber	String
CompanyName	String
ReportDescription	String
Date	DateTime
Time	DateTime

Field Name Conversion

Field Type	Converted Field Name
Memo	FieldName_BXText
Label	FieldName_BXLabel_# e.g., ttaad200_cmen_BXLabel_8
Summary	FieldName_BXSummary_# e.g., itemtot_BXSummary_12
Number of Record Field	reportID_BXNumOfRec_#
NonDatabaseField	FieldName_BXNonDB_# e.g., cost_totl_BXNonDB_91

Finding More Information

For more information, review the following documentation or contact Technical Support.

Product Documentation

The Crystal Enterprise Solution Kit for Baan includes the following documentation on the product CD:

- Crystal Enterprise Solution Kit for Baan User's Guide, Uguide.pdf - This User's Guide leads you through the Solution for Baan components that enable you to generate Crystal reports from Baan reports and to report directly off your Baan data.

- Readme.txt - Includes last minute notes concerning the Crystal Enterprise Solution Kit for Baan product.

- Crystal Enterprise Solution Kit for Baan Installation Guide, Install.pdf - This Installation Guide leads you through the client and server installations of both Solution Kit for Baan components.

Contacting Crystal Decisions for Technical Support

We recommend that you refer to the product documentation and that you visit our Technical Support web site for more resources.

Self-serve Support:

http://support.crystaldecisions.com/

Email Support:

http://support.crystaldecisions.com/support/answers.asp

Telephone Support:

http://www.crystaldecisions.com/contact/support.asp