

Crystal Reports

Using the Data Explorer in Crystal Reports version 8

Overview

The Crystal Reports Data Explorer is a new interface for selecting a data source in Crystal Reports 8.0 (CR). This paper explains how the Data Explorer in CR 8 works and how to fully utilize its features.

Contents

INTRODUCTION	2
VIEWING YOUR CURRENT CONNECTIONS	3
WORKING WITH FAVORITES.....	4
To add a data source connection to the Favorites folder	4
To delete a data source from the Favorites folder:	4
VIEWING YOUR HISTORY FOLDER	5
WORKING WITH ODBC DATA SOURCES.....	6
To connect to an ODBC data source	6
To create a new ODBC data source	6
To connect to a database using File Data Source	6
To Connect to an existing data source.....	7
WORKING WITH DATABASE FILES	8
To Connect to a PC-based database	8
WORKING WITH MORE DATA SOURCES	9
To connect to a data source in the More Data Sources folder	9
WORKING WITH DICTIONARY/QUERY	11
To Connect to a Dictionary File	11
To Connect to a Query File.....	11
SELECTING TABLES, VIEWS, OR STORED PROCEDURES	12
Selecting Tables, Views, or Stored Procedures	12
CONFIGURING THE DATA EXPLORER OPTIONS.....	13
CONTACTING CRYSTAL DECISIONS FOR TECHNICAL SUPPORT	14

Introduction

CR 8 is the first version of Crystal Reports to implement the Data Explorer. Using the Data Explorer, you can select the data source for any type of database connection. For example, PC databases, ODBC, Native SQL connections, and so on. This paper identifies the folder structures in the Data Explorer and how they should be used.

The Data Explorer contains six folders: Current Connections, Favorites, History, ODBC, Database Files, and More Data Sources. These folders contain sub folders that list all available data sources and data source tables.

Viewing your Current Connections

The Current Connections folder contains a list of all open data source connections that have been established in the Crystal Report Designer. This list includes data source connections made with ODBC, native SQL, and OLE DB.

NOTE

PC databases are not included in the 'Current Connections' folder because there are no active connections between CR and these types of databases.

Working with Favorites

The Favorites folder in the Data Explorer contains a list of data sources you connect to on a regular basis.

Connections made to ODBC databases and other Data Sources such as, PC-based databases, may be added to the Favorites folder.

To add a data source connection to the Favorites folder

1. Click on the data source label that you want to add from either the ODBC or More Data Sources folder. The **Add to Favorites** button is enabled.
 - An ODBC data source does not need to have an active connection, in order to add it to the Favorites folder from the ODBC folder.
 - A direct data source must have an active connection in order to add it to the Favorites folder from the More Data Sources folder.
 - Database File data sources cannot be added to the Favorites folder since the Report Designer does not maintain an active connection.
2. Click **Add to Favorites** to add a data source to the Favorites folder.

To delete a data source from the Favorites folder:

1. In the Favorites folder, click on the data source that you want to delete. The **Delete Favorite** button is enabled.
2. Click **Delete Favorite** to remove the data source from the Favorites folder.

Viewing your History folder

The History folder in the Data Explorer contains a listing of recently opened data source connections. In the following screen shot, the five most recent data source connections appear.

Working with ODBC data sources

The ODBC folder in the Data Explorer contains all of the ODBC Machine Data Sources. All System and User ODBC data sources that appear in your 32-bit ODBC Administrator will be listed in the ODBC folder.

Once you have successfully connected to your data source and the requested login prompts have been fulfilled, tables, views, or stored procedures will appear below the chosen data sources' folder. For more information on reporting on

Tables, Views, and Stored Procedures, see *Select Tables, Views, or Stored Procedures*.

To connect to an ODBC data source

There are three methods available for connecting to an ODBC data source:

- Select an existing ODBC data source
- Create a new ODBC data source
- Connect to an existing ODBC data source using the File Data Source option.

NOTE	If you select a data source from the ODBC folder, you may be prompted for login information.
-------------	--

To create a new ODBC data source

1. Double-click the New Data Source folder.
 - The Create New Data Source expert appears.
2. Enter the required information to create a new data source. Once the data source is created, it will be listed in the ODBC administrator and it will appear among the original ODBC data sources.
3. Select the data source, click **Add**.

Once you have successfully connected to your data source and the requested login prompts have been fulfilled, tables, views, or stored procedures will appear below the chosen data sources' folder. For more information on reporting on Tables, Views, and Stored Procedures, see *Select Tables, Views, or Stored Procedures*.

To connect to a database using File Data Source

Use the File Data Source folder to connect to an ODBC data source located outside the default directory or to locate an ODBC File DSN.

There is also a link to establish a connection through a File Data Source. When chosen, an ODBC File DSN open dialog box appears.

1. Search for the <filename>.DSN.
2. Select the <filename>.DSN.
3. Select the data source, click **Add**.

Once you have successfully connected to your data source and the requested login prompts have been fulfilled, tables, views, or stored procedures will appear below the chosen data sources' folder. For more information on reporting on Tables, Views, and Stored Procedures, see *Select Tables, Views, or Stored Procedures*.

NOTE	If you select a data source from the ODBC folder, you may be prompted for login information.
-------------	--

To Connect to an existing data source

1. Select the data source, click **Add**.
2. Select tables to add to the report.
3. Click **Close**, you are finished selecting tables to the report.

Once you have successfully connected to your data source and the requested login prompts have been fulfilled, tables, views, or stored procedures will appear below the chosen data sources' folder. For more information on reporting on Tables, Views, and Stored Procedures, see *Select Tables, Views, or Stored Procedures*.

NOTE

If you select a data source from the ODBC folder, you may be prompted for login information.

Working with Database Files

The Database Files folder allows you to select PC-based database files that you want to connect to. When this folder is expanded, a sub-folder labeled Find Database File appears.

To Connect to a PC-based database

1. If you double-click the Find Database File folder, an **Open** dialog box appears for you to select a database file. The types of files that are available to select from are:
 - MS Access (*.MDB)
 - Xbase, ACT! (*.DBF)
 - Paradox (*.DB)
 - Pervasive/Btrieve (*.DDF)
2. Once you've selected your PC-based database file a listing of all available tables appears enabling you to insert these tables into the Report Designer.
3. Select the table that you want to report on and then click **Add**.

Working with More Data Sources

The More Data Sources folder provides connectivity to data sources that are not direct to PC databases or ODBC-based. The only types of data sources available in this folder are for native connections and OLE DB connections.

Data Sources that appear in the More Data Sources folder are:

- Active Data
- Local File System
- NT Archived Event Log (Windows NT)
- NT Current Event Log (Windows NT)
- OLE DB

You must have the database client installed before any of the following data sources will become available:

- Microsoft SQL Server
- DB2 Server
- Informix Online Server
- Oracle Server
- Sybase Server
- Lotus Notes/Domino Server
- Exchange Folders/Address Book
- Outlook

For example, if *Oracle's SQLNet* or *Net8* client software is not installed on the machine, then the item *Oracle Server* will not appear under More Data Sources.

To connect to a data source in the More Data Sources folder

1. Double-click on the file folder you want to connect to.
2. Supply the required information, such as logon information.
3. Click **OK**.

All available Tables, Views, and so on will appear. Select what you want to insert into the Report Designer. For more information on reporting on Tables, Views, and Stored Procedures, see *Select Tables, Views, or Stored Procedures*.

Working with Dictionary/Query

Crystal Dictionaries and Crystal Queries can be selected through the Data Explorer. Upon expanding the Dictionary/Query folder, two components will appear:

- Find Crystal Dictionary File
- Find Crystal SQL Query File

To Connect to a Dictionary File

1. Double-click on Find Crystal Dictionary File.
2. Search for your <filename>.DC5 in the **File Open** dialog box.
3. Select the <filename>.DC5 file, and click **OK**.

To Connect to a Query File

1. Double-click on Find Crystal SQL Query File.
2. Search for your <filename>.QRY in the **File Open** dialog box.
3. Select the <filename>.QRY file, and click **OK**.

Selecting Tables, Views, or Stored Procedures

Once you have logged on to your data source, a listing of available Tables, Views, or Stored Procedures will be available for you insert into the Report Designer.

Selecting Tables, Views, or Stored Procedures

Tables, Views, or Stored Procedures may be selected to included in the report in one of two ways:

- Double-click on the object from the object list. A green check mark will appear next to the object.
- Highlight the object and click **Add**. A green check mark will appear next to the object.

Configuring the Data Explorer Options

Options button in the Data Explorer facilitates the configuration of what objects will appear in any expanded folder and how they are to appear.

For further information regarding the **Options** window, click **Help** to access the Crystal Reports Help.

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>