CRYSTAL REPORTS

Data Selection: Adding prompting query fields and related record selection criteria to a report (Parameter Fields, Select Expert Record)

Prompt = requires a user to enter or select information that is then used in an associated parameter.

Parameter = field used in a formula to generate a report with specific data.

Note –Most of the actions listed below may be performed in **both the Design and the Preview tabs**. The instructions below state the recommended tab to use. If using a different tab, some steps listed below may not apply.

How to add a parameter field

Adding a parameter field to a report is a three-step process:

1. Create a parameter field with a prompt
2. Add the parameter field to the Report or Page Header so the entered value from the prompting query field will be displayed on the report
3. Add a field associated to the parameter field to the record selection criteria of the report - without this step, the parameter field has no impact on the running of the report.

Note - you only need to add a parameter field if you want the report to prompt you to enter a value. If there is no need for a prompt (search criteria for that field will always remain the same), add the search criteria directly to the report by adding/editing a field to the record selection criteria report.

How to create a parameter field with a prompt

The **Field Explorer dialog box** is used to insert fields – it appears on the right-hand side of the report window. If it is not visible, click on the Field Explorer icon on the toolbar.

1. In the **Preview** tab, **click** on the "**+**" sign next to Parameter Fields in the Field Explorer dialog box. This will list the current parameter fields (prompting query fields) associated with the report.

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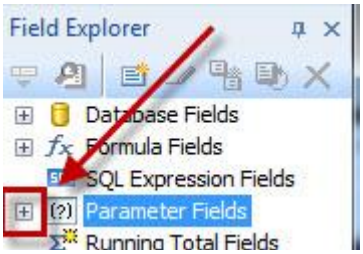


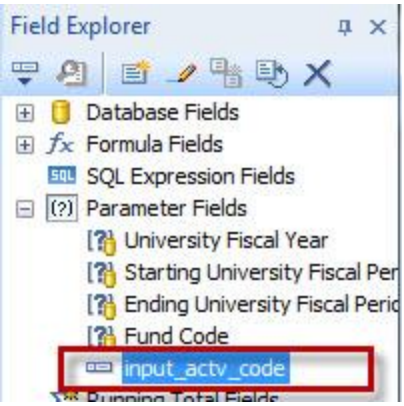
2. **Right-click** on the heading Parameter Fields.
3. **Click** on **New** in the displayed menu.
4. The **Create New Parameter** dialog box will open.
5. Enter a name for the parameter in the Name field. Make note of this "Name" - it will be used when adding a field to the record selection criteria (Step 8 below).

   TIP: Naming convention
   Start the name with “input_xxxx” to denote that this is a prompting query field. For example, input_actv_code.

6. Select a **Type** from the pull down menu.
   Note: Leave as "String" for values which will be a combination of characters and numbers (for example, activity or location codes).
7. In the **Value Options** section, modify the **Prompt Text** – this text will appear in the Enter Values window which prompts a user to enter search criteria.
   Note: The prompt text automatically displays the word “Enter” followed by the parameter name you entered at Step 5 – replace this name with a phrase (for example, Enter input_actv-code: = Enter an Activity code:).
8. **Click** on **OK**. The new parameter now appears in the listing of Parameter Fields in the Field Explorer.

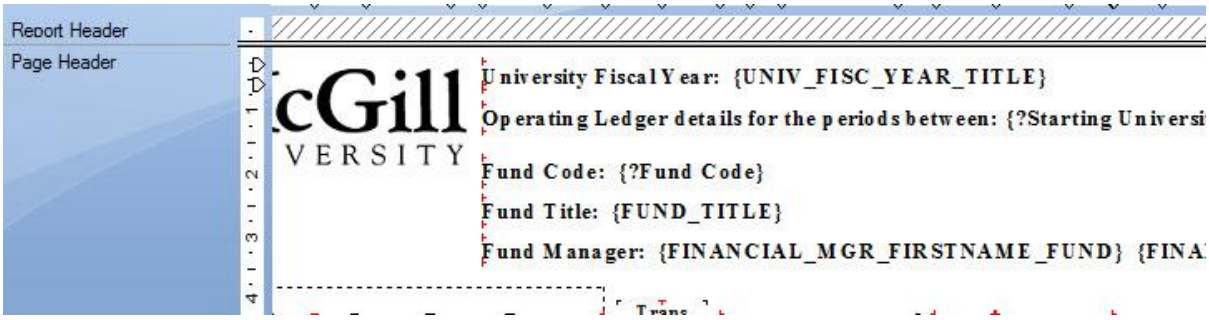
How to add the parameter field to the Report Header Display so the entered value from the prompting query field will be displayed

1. In the **Design tab**, decide where you wish to insert the parameter field in the Report or Page Header - ensure there is enough space.
2. **Drag and drop** the parameter you just added in the Field Explorer to the Report or Page Header

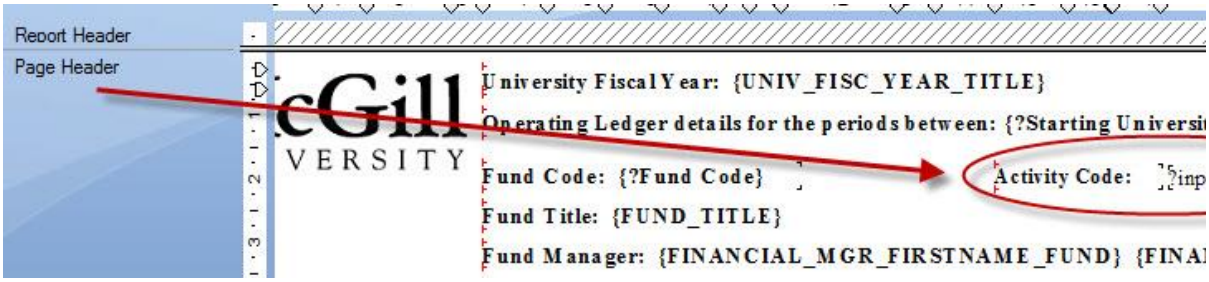


3. **Add** a **text object** as a label for this field.
   - For instructions on adding a text object, consult CRYSTAL REPORTS - Inserting, deleting, and moving text objects and fields
   - For instructions on how to format text objects and fields, consult CRYSTAL REPORTS - Modifying the formatting of text objects and fields.

BEFORE



AFTER



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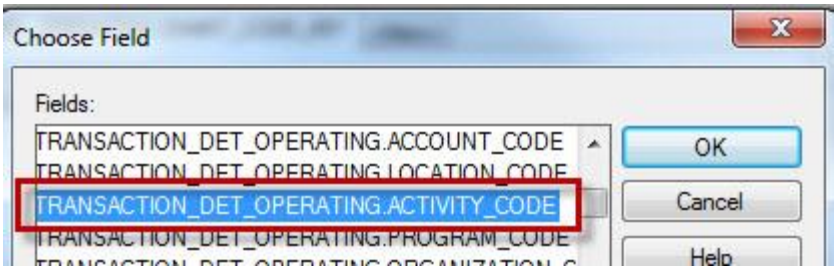
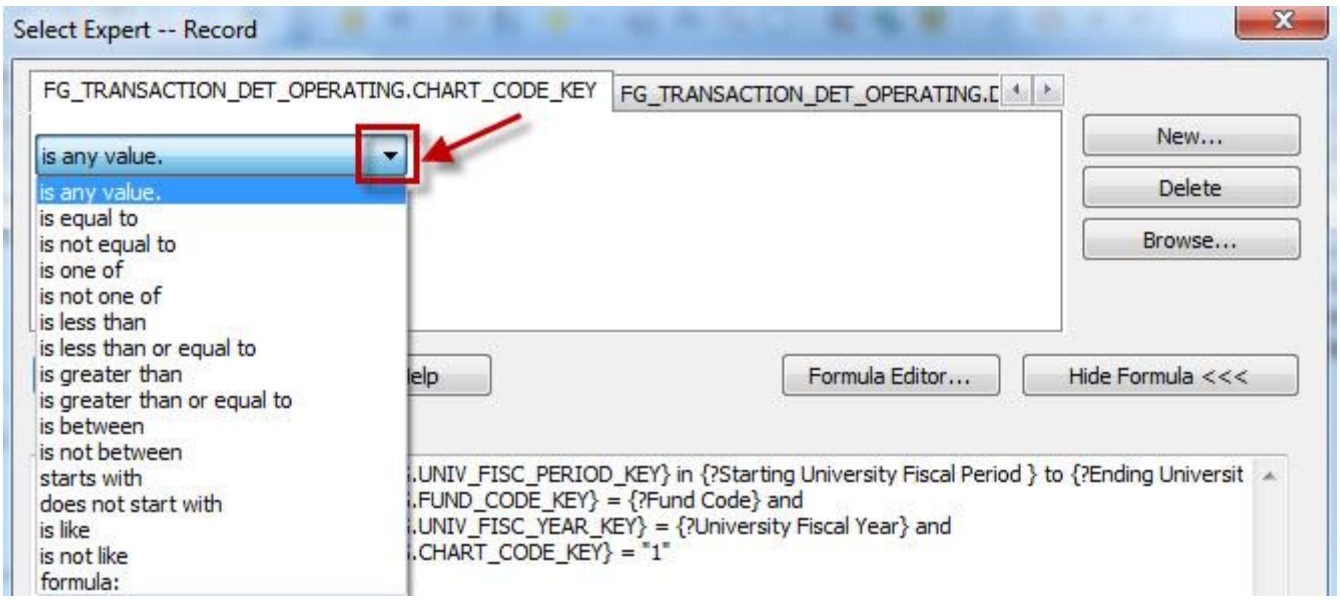
Data Selection: Adding prompting query fields and related record selection criteria to a report (Parameter Fields, Select Expert Record)

How to add the parameter field to the record selection criteria of the report

1. In the **Preview** tab, select Report > Select Expert > Record.
2. The Select Expert – Record window will open. The current selection criteria for the report will be displayed along with the associated selection formula.
3. **Click** on **New**. The Choose Field window will open listing all fields used in the report followed by all fields in the associated table(s).
4. **Click** on the field associated with the newly created parameter field (for example, we created a prompting query field for activity code, so we now need to select this field in the report).

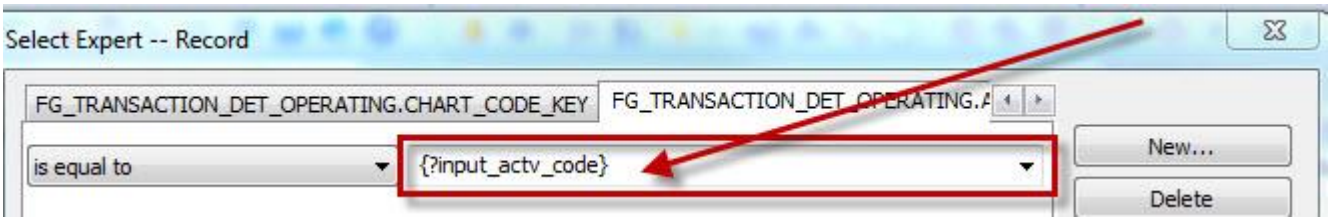


5. **Click** on **OK**.
6. **Click** to view the pull down options for refining the selection criteria for this field.

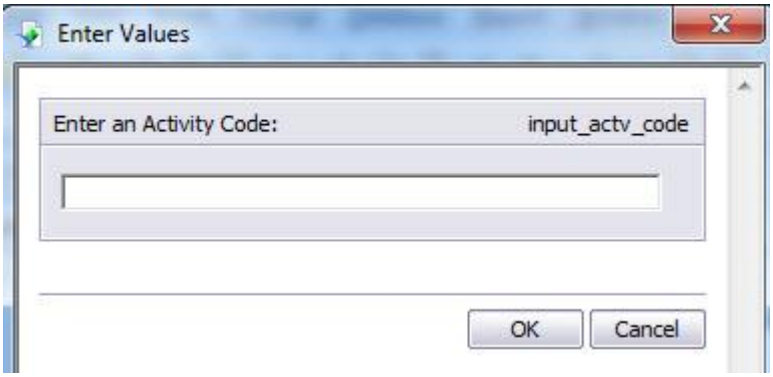


7. **Select** the option "**is equal to**"

8. The cursor will blink - **Enter {?Name}** since this field should be equal to the value entered by the user.
   {? } = denotes that this is a parameter field, prompting query field.
   Name = the Name of the parameter field we created above.
   For example, if the Name of the parameter field is input_actv_code, we must enter {?input_actv_code}



9. **Click** on **OK** to save your changes and close the window.
10. If the Change in Record Selection Formula window opens, click on **Use Saved Data**.
    Note: There is no need to refresh the report data if the data currently displayed in the report meets your needs.
11. The **Enter Values** window will open and you will be prompted to enter a value for the newly added field.



12. **Enter** a value.
13. **Click** on **OK**.
14. If prompted, re-enter your data warehouse password and click on Finish.
15. The data displayed in the report will now reflect the new selection criteria.

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Running the report again with different values for the prompting query field(s)

1. **Click** on the **Refresh icon** in the toolbar or hit F5 on your keyboard.

2. The Refresh Report Data window will open.
3. **Click** the radio button next to Prompt for new parameter values.
4. **Click** on **OK**.
5. The Enter Values window will open containing the previously entered search parameters.
6. **Enter** a new value.
7. **Click** on **OK**.
8. The data displayed in the report will now reflect the new selection criteria.

TIP: For advanced users
Use the **Formula Editor** to add and modify record selection criteria – there is added flexibility with the option to select functions, operators, and to manually enter formulas.