Sage HRMS Learning Series

SAP® Crystal Reports and Sage HRMS (HR)
Report Sections and Parameter Fields

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

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Sage HRMS Training Classes

Sage HRMS Learning Series

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

ES - Sage HRMS - SAP Crystal Reports - Level 1: Laying the Foundation (VILT)

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

ES - Sage HRMS - SAP Crystal Reports for Sage HRMS Level IIIA: Introducing Parameter Fields (Webex)

Gain unprecedented control over your SAP® Crystal Reports with parameter fields. During this course you will learn to use parameter fields to allow your reports to prompt the user for information that then determines the data that is returned in the reports. Topics will include using parameter fields to
provide the user the ability to filter the report, as well as allowing the user to enter in mathematical information for planning reports.

After attending this realtime learning, you will be able to:

- Recognize the Parameter Fields

- Successfully use Parameter

- Use fields with SAP® Crystal Reports

- Build a Parameter Field to use in a filter and a mathematical formula

ES - Sage HRMS - SAP Crystal Reports - Level III: Honing your Craft (VILT)

During this course we will deep dive into SAP® Crystal Reports for Sage HRMS with advanced topics related to designing flexible, customized reports. Beyond the basics of report-writing, you will learn to create SAP® Crystal Reports with sub-reports, parameter fields, complex formulas, and running totals. Become the SAP® Crystal Reports expert for your business. This training includes hands-on exercises so you can practice what you have learned in a demo environment.

After completing this course you will be able to:

- Navigate the Subreports interface of SAP Crystal Reports

- Create Subreports

- Add Subreports to your SAP Crystal Report

- Select the data source, tables, fields, and more using the SAP Crystal Reports interface

- Use parameter fields with your reports

- Indicate how the various elements work together in SAP Crystal Reports

- Create a report using multiple subreports and a parameter field

- Use advanced formula fields with your SAP Crystal Reports

- Use running totals when needed in your reports

- Add SAP Crystal Reports to the Sage HRMS menu

Sage University

To find training and register for training courses, visit Sage University at 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.

Session Objective

In this session the instructor will:

- Describe the behavior of each Report Section
- Insert a field from the Field Explorer
- Demonstrate the result of placing fields in different Report Sections
- Identify the use of a Parameter Field
- Create a Parameter Field to use in the Select Expert to prompt the user to enter data when running a 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.

Parameter Fields

Parameter fields allow you to prompt the user to enter in specific information that is then incorporated into your SAP Crystal Report. This allows you to open up the report to direct user input.

Examples of Parameter Fields are a user entering dates to filter a report, or have the user enter in a cost of living increase to show the different scenarios of employee raises.

Parameter Fields are created and edited through the Field Explorer. To create or edit an existing Parameter Field, open the Field Explorer and navigate to the Parameter Fields section.

From here, you can either click on the "New" button to create a new Parameter Field or if you have an existing Parameter field select the "Edit" button to edit an existing Parameter Field.

Parameter Field in the Select Expert

The most frequent use of Parameter Fields is in conjunction with the Select Expert. Using Parameter Fields with the Select Expert allows the report user to filter the SAP Crystal Report based on their direct input.

To add a Parameter Field to the Select Expert, select the "OK" button with any field selected. Once you are viewing the Select Expert interface, click on the "Formula Editor" button to continue.

Once at the Formula Editor interface, you can tie the Parameter Field in by using a "Field = Value" formula and substituting the Value with the Parameter Field. For example, to create a Report where the report viewer can select the employee they wish to view by entering the Employee Number, you would first create the Parameter field:
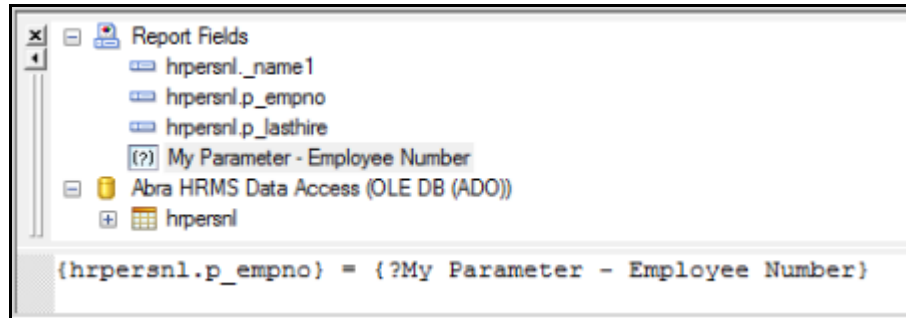
After saving the Parameter Field, you would then access the Formula Field for the Select Expert and enter in the following formula:

Once you have saved the Formula Field, when the user runs the report they will receive the following Enter Values prompt:
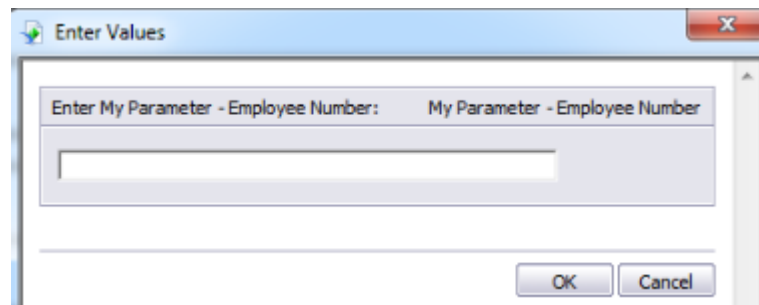
Enter in the Employee Number and press "OK" to filter the report to that particular employee number.

Today we will be creating a new Parameter Field to prompt the user to enter the employee status when previewing or printing the report.

The instructor will demonstrate how to create a new Parameter Field using 'Blank HR' Report. If you would like to use this report to practice creating a Parameter Field, it is located where the program application is installed in the following directory:

> …\Sage\SageHRMSServer\Data\CustomReports\HR.

	Contact your IT department if you are unable to locate Blank HR.rpt.

Demonstration

The instructor will demonstrate how to create a parameter field to prompt the user to enter the employee status code.

1. Create a new Parameter Field as follows:

2. In Select Expert, click Formula Editor button and enter the following formula:
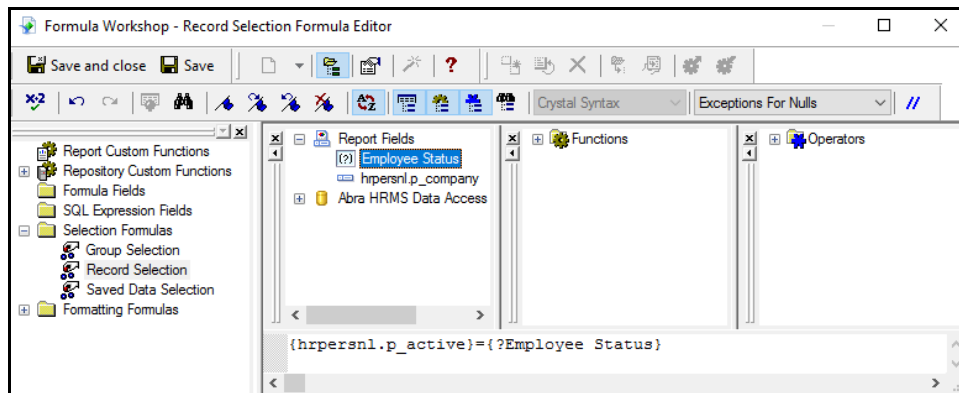
3. Click Save and close, then click OK.

4. Refresh (F5) the report and select an available value(s).
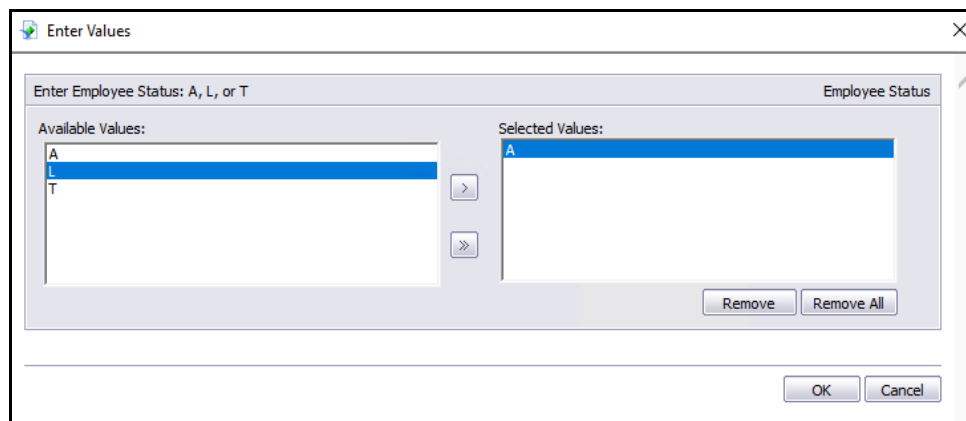
5. Click OK.

Summary

In this learning session we have:

- Described the behavior of each Report Section
- Inserted a field from the Field Explorer
- Seen the result of placing fields in different Report Sections
- Identified the use of a Parameter Field
- Created a Parameter Field to use in the Select Expert to prompt the user to enter data when running a report

Links and contact information

Topic	URL	Additional Information
Sage City – HRMS Forum	https://www.sagecity.com/support_communities/sage_hrms/f	Ask product questions Share tips and tricks with Sage peers, partners, and pros
Questions and Answers relating to Sage HRMS Learning Series	https://www.sagecity.com/support_communities/sage_hrms/f/sage-hrms---training	This link will take you directly to the Sage HRMS – Training forum on Sage City
Sage University	https://www.sageu.com/hrms	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
Register or access on demand recording for Sage HRMS Learning Series	https://get.sage.com/HRMSLearningSeries	
Grad Cap icon in Sage HRMS		A link to Sage University to browse for training on the related area in Sage HRMS