

# **Crystal Reports**



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# Reports



## Reports Overview

ServiceCEO contains a large number of reports. These reports are designed to help you generate useful data to help you make better business decisions.

All of the ServiceCEO reports can be accessed by clicking **Reports** on the Navigator Bar. For more, see the [Printing/Previewing Reports](#) section.



**Tip:**

To navigate through the reporting topics in order, please click on the  and  buttons at the top of the page.

## Entering the Crystal License Code into ServiceCEO

To create or customize Crystal Reports® for use within ServiceCEO, you need either:

- **A full version of Crystal Reports 9.0.** At the moment, only Crystal Reports version 9.0 works with ServiceCEO.
- **An Integrated Crystal Reports Designer License.** For licensing and pricing details, point your browser to <http://www.insightdirect.com/services/custom-reporting/crystalreports/>. You can also purchase one from Online Store in the [Member Center](#). After purchasing your license, you will receive a license code from Insight Direct. The license can be purchased directly from the <http://www.insightdirect.com/login.html>



**Note:**

The report designer within ServiceCEO provides a 14-day trial (from the date of first use), but after this time you will need to purchase a license to use the designer.

**Tip:**



If you are not comfortable with editing your own reports, we can always create your report for you! To learn more, please visit

<http://www.insightdirect.com/services/custom-reporting/>

Custom report quotations can be purchased directly from the Online Store in the [Member Center](#).

If you have the full version of Crystal Reports, you can create or customized reports right away. See the [Editing Crystal Reports](#) and [Adding New Reports](#) sections.

If you have purchased the Integrated Crystal Reports Designer License code, follow these steps to enter it into ServiceCEO:

1. Login to ServiceCEO as an Administrator.

## Crystal Reports

2. Select **Help > Enter Crystal Reports License**. The Confirmation dialog box appears. The License Code dialog box appears.
3. Select **Yes** when prompted to continue.
4. Type the Integrated Crystal Reports Designer License code into the field. Note that any code you were provided with the full version of Crystal Reports will not work here.
5. Click **OK**.
6. Close ServiceCEO.
7. Login to ServiceCEO as an Administrator. The report designer is now enabled. Note that only the Administrator can edit Crystal Reports through ServiceCEO.





### *Tip:*

If you have a full version of Crystal Reports version 9, you can create or edit a report in that program and then import your changes into ServiceCEO. See the [Managing the Report List](#) section for details.

## Report Categories

### Report Types

There are two types of reports in ServiceCEO:

- **Active Reports.** Indicated by , these reports are default ServiceCEO system reports. These reports cannot be customized.
- **Crystal Reports.** Indicated by , these reports are built using Crystal Reports®. If you have purchased an Integrated Crystal Reports Designer License, you can edit the structure and format of these reports.

### Customer Reports

ServiceCEO's Customer reports display information about your customers. These reports include:

Name	Description	Report Type
<b>Alert Activity</b>	Displays all alerts for a given date range by customer and alert type.	<a href="#">Crystal Report</a>
<b>Birthday and Anniversary</b>	Generates a list of all customers with a birthday or service anniversary (based on the <a href="#">Entered Date</a> ) within your defined date range.	<a href="#">Crystal Report</a>

<b>Credit Card Expiration</b>	Generates a listing of all customers whose credit card expires within your defined date range.	<a href="#">Crystal Report</a>
<b>Customer Listing</b>	Generates a list of all customers and their essential contact information (name, organization and phone numbers). You can generate a listing of all corporate customers and/or individual customers.	<a href="#">Active Report</a>
<b>Location Access Details</b>	Generates a listing of customers with their essential data and the values in their Alarm Code and Access fields as defined in the <a href="#">Address Information</a> dialog box.	<a href="#">Active Report</a>
<b>Marketing Module</b>	Generates printed mailing labels, conducts <a href="#">mail merges</a> , and exports contacts to Microsoft® Excel®. See the <a href="#">Demographic Filters</a> section for an explanation of the filters in this report.	<a href="#">Active Report</a>
<b>Notes</b>	Generates a list of all customer notes in your date range. You can also include system notes - notes generated by ServiceCEO.	<a href="#">Crystal Report</a>
<b>On-Site Equipment Warranty Expiration</b>	Generates a list of all equipment warranties expiring within your defined date range.	<a href="#">Crystal Report</a>
<b>Service Contract Expiration</b>	Generates a list of all service contracts expiring within your defined date range.	<a href="#">Crystal Report</a>

To learn how to print and/or preview these reports, see the [Printing/Previewing Reports](#) section.

## Scheduling Reports

The Scheduling Reports display information about your schedules and jobs. These reports include:

<b>Name</b>	<b>Description</b>	<b>Report Type</b>
<b>Active Recurring Schedules</b>	Generates a listing of all schedules with a status of “Active Recurring” within your defined date range. You can sort these schedules by customer name or by the date	<a href="#">Active Report</a>

## Crystal Reports

	they are scheduled to occur.	
<b>Crystal Route Sheet</b>	Generates a route sheet for every team working on jobs for every day in your defined date range.	<a href="#">Crystal Report</a>
<b>E-mailable Work Order</b>	Generates a basic work order that is ready to be emailed to your customers.	<a href="#">Crystal Report</a>
<b>Job Cancellations</b>	Generates a listing of all job and/or schedule cancellations within your defined date range.	<a href="#">Crystal Report</a>
<b>My Tasks</b>	Generates a listing of tasks assigned to the current user within the defined date range.	<a href="#">Crystal Report</a>
<b>New Schedules</b>	Generates a listing of all new jobs and schedules created within your defined date range. You can display these schedules by date, customer, frequency, or <b>campaign</b> .	<a href="#">Active Report</a>
<b>Project Management</b>	Generates a detailed summary of all <b>projects</b> and project visits within your defined date range.	<a href="#">Active Report</a>
<b>Route Sheet</b>	Generates a listing of all jobs for each day in the defined date range. The Classic Style is grouped by date while the CLIP™ style is grouped by team.	<a href="#">Active Report</a>
<b>Route Sheet including Tasks</b>	Identical to the standard route sheet report except that it includes <b>tasks</b> .	<a href="#">Crystal Report</a>
<b>Schedule Cancellations</b>	Displays all schedules that have been cancelled in the defined date range.	<a href="#">Active Report</a>
<b>Schedule Frequency Report</b>		<a href="#">Crystal Report</a>
<b>Weekly Schedule</b>	Generates a detailed summary of the schedule for the week. You can organize this report for all teams by date or by team for each week.	<a href="#">Crystal Report</a>
<b>Work Order</b>	Generates all the information an individual or team of employees needs to know for a single job, including any customer or job notes. The work orders are generated based on the selected date range with a single work order	<a href="#">Crystal Report</a>



generated for every scheduled job within your selected date range. The work order report can be run for just a particular client or a particular team of employees.

To learn how to print and/or preview these reports, see the [Printing/Previewing Reports](#) section.

## Employee Reports

**Previous Topic:** [Scheduling Reports](#)

ServiceCEO Employee Reports display information about your employees. These reports include:

Name	Description	Report Type
<b>Birthday and Anniversary</b>	Generates a list of all customers with a birthday or service anniversary (based on the Hire Date field) within your defined date range.	<a href="#">Crystal Report</a>
<b>Employee Loss</b>	Generates a list of all schedules that have been <a href="#">cancelled</a> or <a href="#">rescheduled</a> within your selected date range. Also includes the employee who serviced the customer before the schedule was cancelled or rescheduled so that you can identify problematic schedules along with the employees who are losing customers.	<a href="#">Crystal Report</a>
<b>Employee Payroll Summary</b>	<p>Displays all pay for all employees within the date range (based on the date you select when creating a paycheck). If a payroll item has not yet been included on a paycheck, it will not appear in this report. Other information that appears on this report includes:</p> <ul style="list-style-type: none"> <li>• <b>Employee Name.</b> All employees with at least one paycheck in the date range will appear.</li> <li>• <b>Pay Types.</b> The amount of payment for each payment type will appear in its own column. Payment types are salary, hourly pay, commissionable pay, flat fees, tips, and miscellaneous pay.</li> <li>• <b>Total Pay.</b> The total payment for each</li> </ul>	<a href="#">Crystal Report</a>

	<p>employee in the date range.</p> <ul style="list-style-type: none"> <li>• <b>Grand Totals.</b> The totals for every payment type, and total pay for all employees in the date range, appears at the bottom of the report.</li> </ul> <p><i>Tip:</i> Once run, you can take the information from this report and input it into your accounting package, where you can deduct taxes, etc. from it and generate the actual paycheck. You can do this in two ways:</p> <ol style="list-style-type: none"> <li>1. Export this gross pay to another format and import it into your accounting package. For details, read the <a href="#">Exporting Report Data</a> section.</li> <li>2. Manually enter the gross pay for each employee into your accounting package.</li> </ol>	
<p><b>Job/Task/ Adjustment History</b></p>	<p>Displays all jobs, tasks, and adjustments in the selected date range. This report was known as the Payroll report in versions of ServiceCEO before 6.0.</p>	<p><a href="#">Crystal Report</a></p>
<p><b>Listing</b></p>	<p>Generates a listing of all current employees, including the employee's name, SSN, title, home phone, work phone and e-mail address. The <a href="#">Reservice Rate</a> is the amount of times an employee has worked on a job that has generated a reservice divided by the number of jobs the employee has worked on. The three numbers in the report column show the percentage for three time periods:</p> <ul style="list-style-type: none"> <li>• The last 90 days</li> <li>• The last year</li> <li>• All jobs for the employee</li> </ul> <p><i>Note:</i> A <a href="#">reservice</a> is created by clicking the Re-do button on the customer's Jobs tab.</p> <p>The Rank column's value is determined by adding up all the note ranks on the employee's <a href="#">Personnel File tab</a>. Each note has a rank associated with it when it is created, that is</p>	<p><a href="#">Active Report</a></p>

	<p>stored on the employee's personnel file. The three numbers in the report column show the employee's rank for three time periods:</p> <ul style="list-style-type: none"> <li>• The last 90 days</li> <li>• The last year</li> <li>• All jobs for the employee</li> </ul>	
<b>Mailing Label</b>	Prints mailing labels for your employees. If you do not filter the report, ServiceCEO will print labels for all employees in the list.	<a href="#">Active Report</a>
<b>Notes</b>	Based on the contents of an employee's Personnel File tab, the Notes report can be run for all employees, a select employee and/or for a specific note type.	<a href="#">Crystal Report</a>
<b>Paycheck</b>	Summarizes the employee's paycheck(s) in the defined date range, details the paid jobs and tasks, and its corresponding monetary information. Designed so you can easily export this information into a third party accounting application if necessary.	<a href="#">Crystal Report</a>

To learn how to print and/or preview these reports, see the [Printing/Previewing Reports](#) section.

## Financial Reports

ServiceCEO's Financial Reports display information about your company's payment, deposit, and revenue details.



**Tip:**

The data that appears on ServiceCEO's financial reports is controlled by the **Posted** value. Please see the [Posting Invoices](#) section for details.

These reports include:

Name	Description	Report Type
<b>Accounts Receivable</b>	Generates a list of each customer's outstanding payments broken down to increments of current, 30 days, 60 days and 90 days. Invoices appear on the report based on the date of the invoice, even if the invoice's job(s) are not	<a href="#">Crystal Report</a>

## Crystal Reports

	completed. By default, the Detailed A/R report only displays customers with a non-zero (positive or negative) balance.	
<b>Business Analysis Report</b>	Summarizes your company's financial factors. Note that projects are not included in this report.	<a href="#">Active Report</a>
<b>Campaign ROI</b>	Displays the return on your investment from your <a href="#">campaigns</a> .	<a href="#">Crystal Report</a>
<b>Estimated Job Cost Detail</b>	Displays a forecast of job costing and profitability of scheduled jobs in a defined date range.	<a href="#">Crystal Report</a>
<b>Estimated Job Cost Summary</b>	Displays a forecast of job costing and profitability of scheduled jobs in a defined date range.	<a href="#">Crystal Report</a>
<b>Credit Card Transaction</b>	If <a href="#">Credit Card Processing</a> is enabled, displays all processed credit card transactions in the date range you define.	<a href="#">Crystal Report</a>
<b>Invoice</b>	Generates an invoice for every completed job within your defined date range.	<a href="#">Crystal Report</a>
<b>Job Costing</b>	Job Costing at the summary level.	<a href="#">Crystal Report</a>
<b>Job Costing - Line Item Level Details</b>	A detailed Job Costing report. <b>Caution:</b> Due to the amount of data contained in this report, it may take some time to open. Please be patient.	<a href="#">Crystal Report</a>

### ***Job Costing Caution:***

Travel time will only appear in the Job Costing report if:

- The employee is paid an hourly rate.
- The **Cost travel time to:** check box is selected in the Payroll Options dialog box. See the [Defining Payroll Options](#) section for details.



In addition, if you have more than one team assigned to different visits of a [project](#), the project will show as unassigned on the Job Costing report. The Job Costing - Line Item Level Detail report will show you the specific employee costing information for the project.

<b>Job PO</b>	Displays every inventory product assigned to a job during the report's date range, along with the job number(s) on which it is being used and the Purchase Order (PO) line item(s) or adjustment from which the stock originated.	<a href="#">Crystal Report</a>
<b>Past Deposits</b>	Displays details associated with payments that were deposited to an accounting package within the defined date range. If desired, these details can include any notes that may have been added from the <a href="#">Deposit Wizard</a> . In addition, the Past Deposits report can include all deposits in the selected date range or be limited to specific deposit IDs.	<a href="#">Active Report</a>
<b>Pending Deposit</b>	Displays all completed payments that have not yet been deposited—i.e., those displayed in the <a href="#">Deposit tab</a> of the <a href="#">Office Duties</a> section.	<a href="#">Active Report</a>
<b>Purchase Order</b>	Displays all <a href="#">Purchase Orders</a> in the selected date range. Only used if you are using the <a href="#">Inventory</a> module.	<a href="#">Crystal Report</a>
<b>QuickBooks Exports Transaction</b>	A detailed transaction report displaying all of your exports to QuickBooks for a defined date range.	<a href="#">Crystal Report</a>
<b>Revenue</b>	Displays projected or actual revenue for your defined date range. The report can be customized to include only revenue based on a particular customer or <b>campaign</b> . This report will use a job's date of service and not the job's invoice date.	<a href="#">Active Report</a>
<b>Service Contract</b>	Generates a listing of all service contracts in the system for your defined date range.	<a href="#">Crystal Report</a>
<b>Service Contract Costing</b>	Generates a listing of all costs associated with service contracts in your defined date range.	<a href="#">Crystal Report</a>
<b>Statements</b>	Generates a summary of invoices created during your defined date range. These reports can be used for general information purposes or as actual bills to be sent to the customer for remittance. Will only include customers with outstanding balances.	<a href="#">Crystal Report</a>

## Crystal Reports

<b>Transaction - By Job Date</b>	<p>Will display all job-related <a href="#">transactions</a> (<a href="#">charges</a>, <a href="#">payments</a>, and <a href="#">adjustments</a>) for completed jobs. Projects will be displayed in the following manner:</p> <ul style="list-style-type: none"> <li>• Fixed <a href="#">project</a> charges will appear on the project's first visit date, if at least one visit is completed.</li> <li>• Variable <a href="#">project</a> charges will appear on the visit to which they are assigned, if the visit is completed.</li> </ul>	<a href="#">Crystal Report</a>
<b>Transaction - By Invoice Date</b>	<p>Will display all <a href="#">transactions</a> present on invoices on the invoice date. Project charges will appear when the invoice is <a href="#">posted</a> (by default, when the final visit of the <a href="#">project</a> is <a href="#">completed</a>).</p>	<a href="#">Crystal Report</a>

To learn how to print and/or preview these reports, see the [Printing/Previewing Reports](#) section.

## Quotes/Estimates Reports

ServiceCEO's Quotes/Estimates Reports display specific information about the quotes and estimates in the system. These reports include:

Name	Description	Report Type
<b>Estimate</b>	Generates a list of all <a href="#">estimates</a> during your defined date range.	<a href="#">Crystal Report</a>
<b>Estimate Tracking</b>	Displays a listing of all jobs that originated as an <a href="#">estimate</a> in your defined date range.	<a href="#">Active Report</a>
<b>Quoting Wizard Canceled Quotes</b>	Displays all <a href="#">quotes</a> that were canceled in your defined date range and the notes that were entered when you canceled them.	<a href="#">Active Report</a>
<b>Quoting Wizard Quotes by User</b>	Displays all <a href="#">quotes</a> organized by user during your defined date range.	<a href="#">Active Report</a>
<b>Quoting Wizard Quotes with Schedules</b>	Displays all <a href="#">quotes</a> that involve schedules for your defined date range.	<a href="#">Active Report</a>
<b>Quoting Wizard</b>	Displays all <a href="#">quotes</a> that do not involve	<a href="#">Active</a>

<b>Quotes without Schedules</b>	schedules for your defined date range.	<a href="#">Report</a>
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To learn how to print and/or preview these reports, see the [Printing/Previewing Reports](#) section.

## Products/Services Reports

ServiceCEO's Products/Services Reports display information about your company's products and services. These reports include:

<b>Name</b>	<b>Description</b>	<b>Report Type</b>
<b>Inventory Levels – By Stock Location</b>	Displays the current <a href="#">inventory</a> levels for every stock location. Also displays the total value of inventory per stock location as well as for the entire company.	<a href="#">Crystal Report</a>
<b>Inventory Transaction</b>	Displays the flow of inventoried parts through ServiceCEO, from the time they are received to the time they are sold\removed.	<a href="#">Crystal Report</a>
<b>Inventory Turnover</b>	Displays the current <a href="#">stock level</a> threshold quantities and comments for every active inventory item. Note that this report will include all active products, not just those actively used in <a href="#">inventory tracking</a> .	<a href="#">Crystal Report</a>
<b>Master Products and Services</b>	Displays a list of either all <a href="#">products</a> , <a href="#">services</a> , or all products and services in ServiceCEO.	<a href="#">Crystal Report</a>

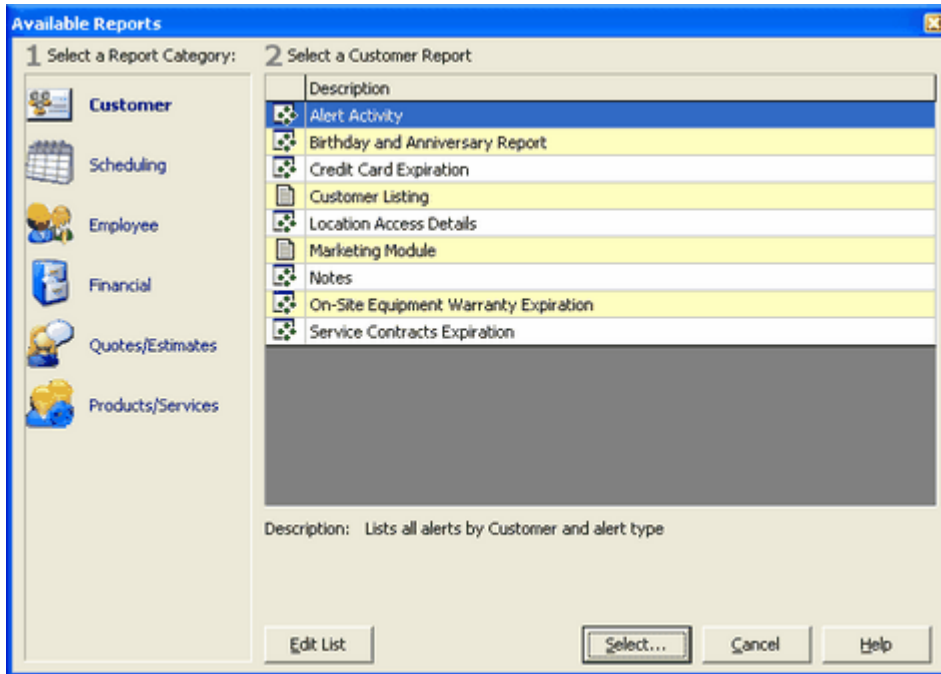
To learn how to print and/or preview these reports, see the [Printing/Previewing Reports](#) section.

## Printing/Previewing Reports

To print and/or preview a ServiceCEO report:

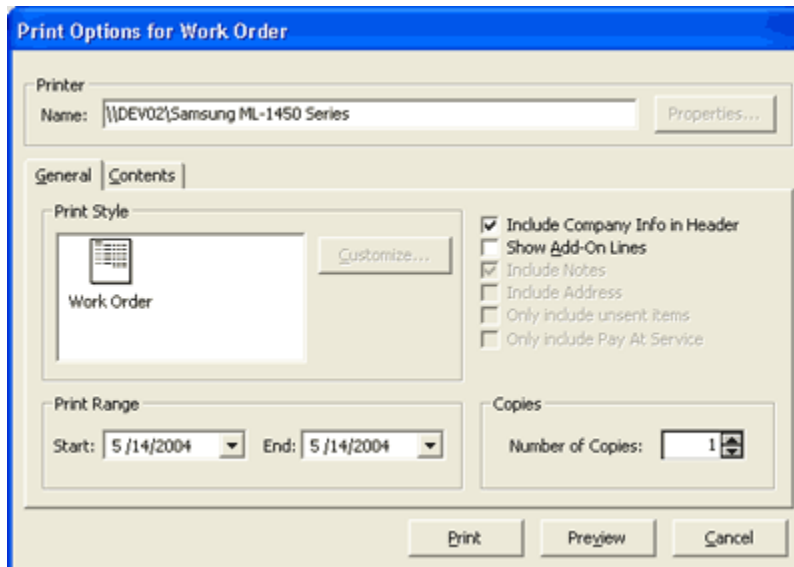
1. Click **Reports** from ServiceCEO's Navigator bar. The Available Reports dialog box appears.

## Crystal Reports



2. Select the appropriate report category. There are six report categories:
  1. [Customer Reports](#)
  2. [Scheduling Reports](#)
  3. [Employee Reports](#)
  4. [Financial Reports](#)
  5. [Quotes/Estimates Reports](#)
  6. [Products/Services Reports](#)
3. Highlight the report you want to run.
4. Click **Select**. The Print Options dialog box appears.





The Print Options dialog box enables you to define the criteria for the report. This criteria normally includes:

- **Print Style.** Some reports let you choose between different versions of the report (e.g., Summary and Detailed versions).
- **Group By.** Some reports let you define the grouping order of the report results by selecting it from the **Group By** drop-down list. (Note that this option is not available in the above screenshot.)
- **Print Range.** Many reports require that you select the range of dates for which you want to display information.
- **Check Boxes.** Some reports let you include or exclude information depending on what check boxes are selected. In the screenshot above, you have the option to include your company information on the report header and to display any add-on lines that may be present.
- **Copies.** If printing the report, select the number of reports you want printed from the **Number of Copies** spin box.

Additional report criteria may be available on the Contents tab. Examples of possible additional criteria includes:

- **Customers.** You can include all customers in the report by keeping the **All Customers** check box selected.  
To run the report for a specific customer, deselect the All Customers check box and type search criteria for the customer you want to appear in the field beneath the All Customers check box. You can search by customer name or by customer ID. A list of customers corresponding to your search criteria appears in the list box. Select the customer you want to display from this list.
- **Options.** You can filter the report by the values you select from the drop-down lists in the Options section. Only values that match the criteria you define here would appear in the final report.

## Crystal Reports

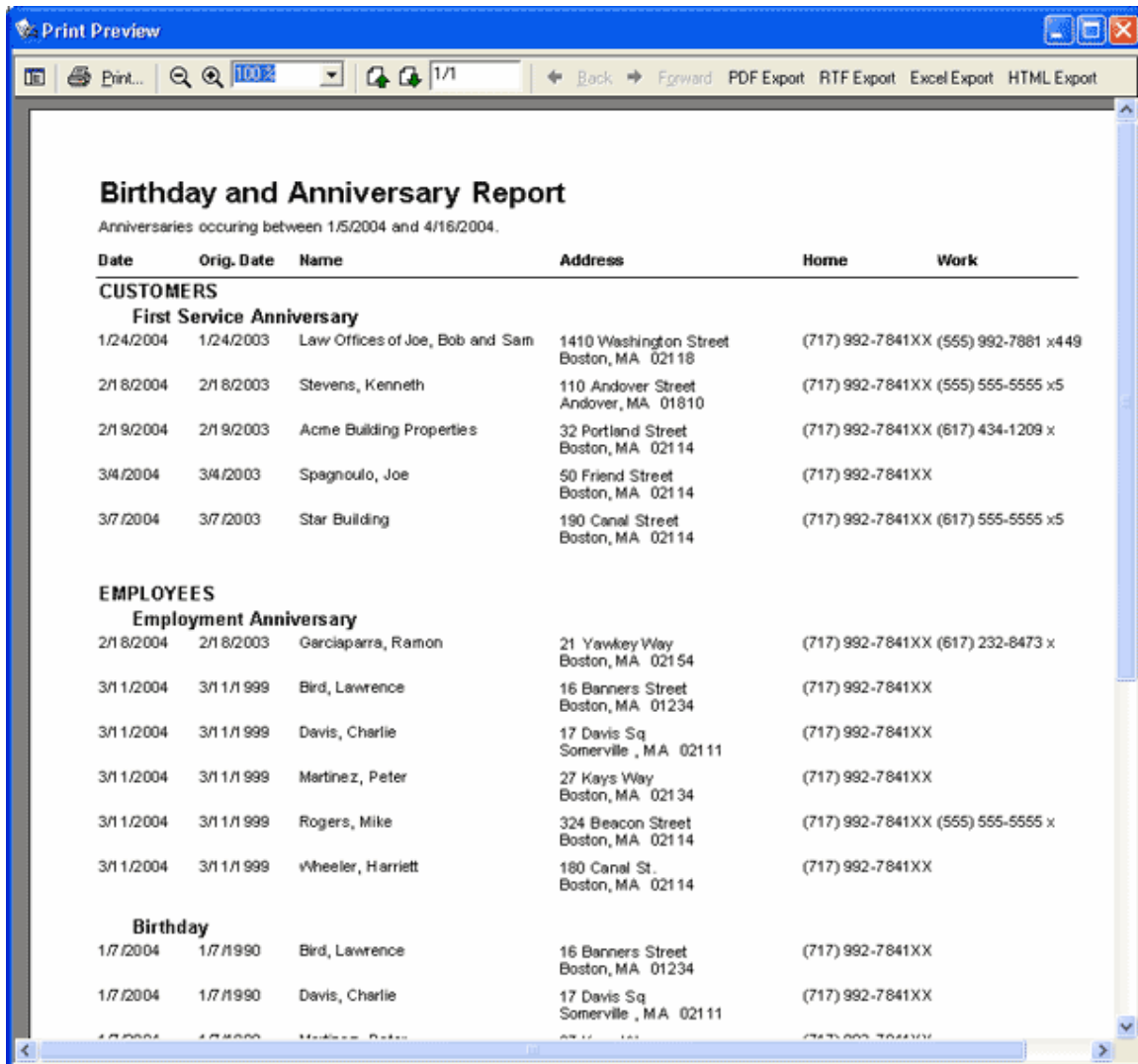
- **Company Structure.** If you are running ServiceCEO Enterprise, you can filter the report by company structure. Depending on your security rights and login level, you may not see this tab.

Some reports, such as the Revenue and Marketing Module report, have more extensive report criteria options. For a report of this nature, you would define your report criteria by selecting a tab or tabs in the first section and defining the appropriate criteria. Next, you would select the remaining criteria—the sections numbered two and three—before previewing or printing your report.

For all reports, you can either print your report directly or preview it before you decide to print the report. To print the report without seeing it first, click **Print**. The Report will automatically print on your default system printer.

To preview the report, click **Preview**. The Report Preview page appears. For more on Standard reports, see the [Standard Report Preview page](#) section. For more on Crystal Reports reports, see the [Crystal Reports Report Preview page](#) section.

## Standard Report Preview page



The Report Preview page enables you to view your report before you print it out. To navigate between the report records, use these buttons:



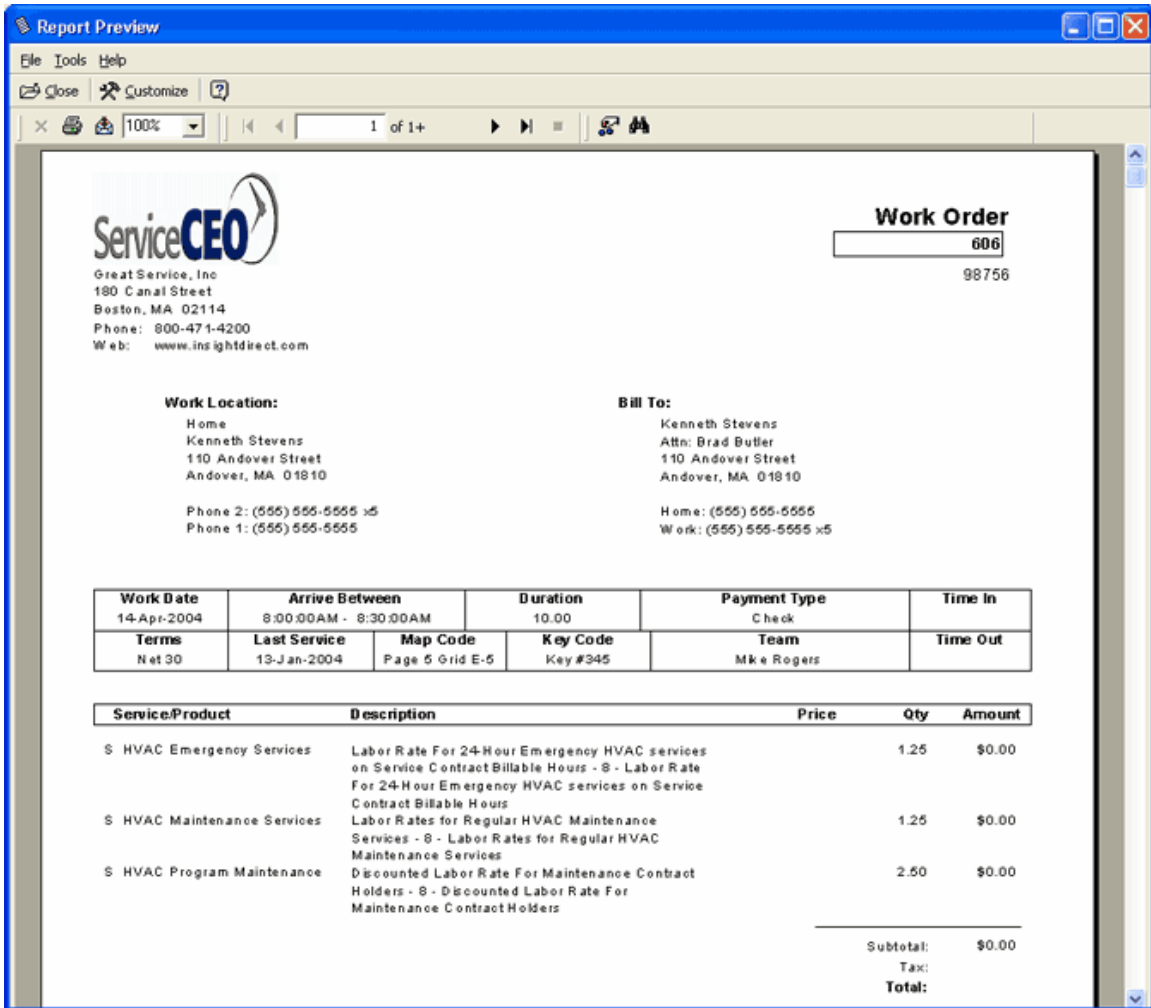
Previous record



Next record

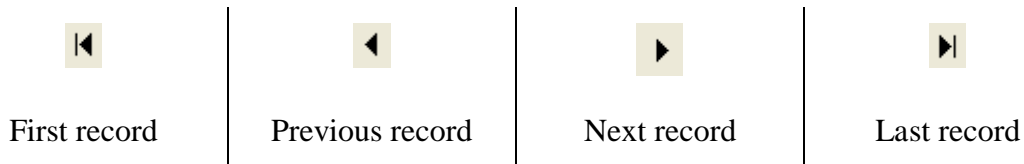
## The Crystal Reports Report Preview page

To preview a Crystal Reports report, click **Preview** from the [Print Options](#) page. The Report Preview page appears.



This page will be different if previewing a Standard report. See [Standard Report Preview page](#) for more.

The Report Preview page enables you to view your report before you print it out. To navigate between the report records, use these buttons:



To print the report, click .

### Exporting Report Data

While ServiceCEO's reports are extremely useful, there may be time where you want to manipulate the data contained within them. To do this, you can export report data to different formats.

## Exporting Data from a Standard Report

You can export data from one of ServiceCEO's Standard reports into the following formats:

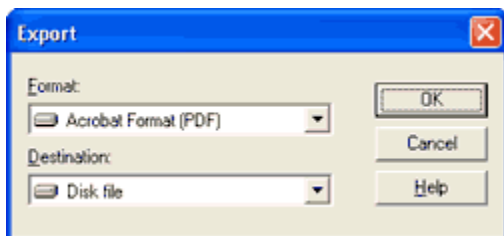
- **Microsoft® Excel®.** Click **Excel Export**. Saves the report in a Microsoft Excel format
- **PDF.** Click **PDF Export**. Saves the report in .pdf format, so it can be opened with Adobe Reader.
- **RTF.** Click **RTF Export**. Saves the report in Rich Text Format.
- **HTML.** Click **HTML Export**. Saves the report in a .html format so it can be opened with a browser like Microsoft Internet Explorer®.

Clicking one of these buttons displays a Save As dialog box, where you can navigate to and select the location on your computer where you want to save the exported information. Once saved, you can open the file with the appropriate program.

## Exporting Data from a Crystal Reports Report

To export data from a Crystal Reports report:

1. Click . The Export Report dialog box appears.



2. Select the format to which you want to export the report from the **Format** drop-down list. Your options are:
  - **Acrobat Format (PDF).** Will save the report as a .pdf file.
  - **HTML 3.2.** Will save the report in a .html file, compliant with [HTML 3.2](#).
  - **HTML 4.0.** Will save the report in a .html file, compliant with [HTML 4.0](#).
  - **MS Excel 97-2000.** Saves the report in a Microsoft Excel format, with formatting.
  - **MS Excel 97-2000 (Data only).** Saves the report in a Microsoft Excel format, with no formatting.
  - **MS Word.** Saves the report in Microsoft Word® format (.doc).
  - **Rich Text Format.** Saves the report in a [.rtf format](#).
  - **Tab-separated text.** Saves the report in a .ttx format.
  - **Text.** Saves the report in a .txt format.

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3. Click **OK**. A Save As dialog box, where you can navigate to and select the location on your computer where you want to save the exported information. Once saved, you can open the file with the appropriate program.

## Editing Crystal Reports

To customize a Crystal Report within ServiceCEO, you must first preview it. For details on previewing a report, see the [Running/Previewing Reports](#) section.

If you have [a full version of Crystal Reports](#), you can use it to edit any Crystal Report outside of ServiceCEO.



### Tip:

For a template you can use to create a brand new crystal report, download the following report file: [rptNew.rpt](#). [Add this report to ServiceCEO](#), preview it, then customize it based on the steps below.

From the Report Preview page, click **Customize** to edit the report. The Design View page appears:

**Note:**

If the Customize button is not active, you do not have a Crystal Reports license. To edit Crystal Reports reports, users must either purchase a full copy of Crystal Reports version 9.0 or obtain an Integrated Crystal Reports Designer License through Insight Direct. Go to <http://www.insightdirect.com/services/custom-reporting/crystalreports/> to learn more about obtaining an Integrated Crystal Reports Designer License.

**Tip:**

You must be logged into ServiceCEO as an administrator to edit a Crystal report.

There are two views on the Report Preview page:

- **The Design View.** This view enables you to make changes to the report. Click **Customize** to display this view.
- **The Report Preview View.** This view displays how the report will appear when run. Click **Preview** to display this view.

When you make changes to the report, it is a good idea to preview them to make sure the changes work correctly. You can toggle back and forth between the Customize and Preview views at any time.

**Note:**

If you are customizing a report, we recommend you import it to the database. Doing so means that you can easily share it with other users, and all changes will be backed up when you back up your database. See [The RPT File Location](#) section for details.

## ***Creating a New Crystal Report***

The easiest way to create a new Crystal Report is to use a blank report file located on your computer. In order to keep the blank report file intact, we'll make a copy of the blank report and use the copy to create the new report.

1. In Windows Explorer, navigate to C:\Program Files\Insight Direct\ServiceCEO\Reports\ and find the blank report file **rptNew.rpt**. If for whatever reason you can't find rptNew.rpt, you can always download it by [clicking here](#).
2. Create a copy of rptNew.rpt. The easiest way to do this is to copy and paste the report file into the same C:\Program Files\Insight Direct\ServiceCEO\Reports\ directory.
3. Rename the copy of the rpt file to reflect the name of the report you will be creating.

4. [Add the renamed report](#) to ServiceCEO.
5. [Edit the report](#) to return the information that you want it to contain.

## **Crystal Reports Fields**

### **Crystal Reports Fields**

Use the different branches of the tree on the left side of the designer view to access the different types of fields in your report. From here, you can editing, renaming, or deleting formulas, creating new formulas, or inserting formula fields into your report.

- **Database Fields.** A database is a receptacle designed to store related data. Each database record is made up of one or more database fields. Each database field can hold one piece of data (aka value).
- **Formula Fields.** A formula is an equation designed to produce specific data for your report. You can use formulas to perform many calculations, including the calculation of numeric values and the comparison of multiple values.



**Tip:**

Creating a formula field is similar to creating a formula in Microsoft Excel®.

- **Parameter Fields.** A parameter field will prompt the user to enter a value when used. You can use parameter fields for report titles, record selection, sorting, and a variety of other uses. Using parameter fields enables you to create a single report that you can modify quickly to fit a variety of needs.
- **Group Name Fields.** A group is a set of records that are related to each other in some way. For example, you might group together all of your customers in the same Zone. A Group Name field is created when you insert a group into your report. The Group Name Fields list displays the Group Name fields currently in your report.



**Tip:**

Unlike other types of fields, you cannot create a Group Name field through the Field Explorer. Group Name fields are only created when you insert a group into your report.

- **Running Total Fields.** A running total totals all records (in the report, in the group, and so forth) up to and including the current record. For example, if your first three records have values of 2, 4, and 6, the running total for each of the three records would be 2, 6, and 12, respectively. You can use running totals to create customized summaries and totals. For more, see Running Totals.
- **Special Fields.** General information, such as Page Numbers, Print Date, and Report Comments, are located in the Special Fields list.



- **Unbound Fields.** Fields with no specific format. Note that ServiceCEO does NOT use unbound fields in any of its default Crystal Reports.



**Caution:**

Text in Crystal Reports does not support Superscript and Subscript tags.

## Adding Fields to a Crystal Report

A database field is a specific field in the ServiceCEO database that can be imported into your report.

Fields generally come from three types of data sources:

1. **Table.** The raw data that exists in the ServiceCEO database. Examples include:
  - **RawCustRecord** - all of the fields located in a customer record
  - **RawServLocRecord** - all of the fields located in a Service Location
  - **RawBillLocRecord** - all of the fields stored in a customer's Bill To location
2. **Views.** A virtual table that pulls data together from different database tables for ease of use.
3. **Stored Procedures** - a pre-compiled collection of SQL statements and optional control-of-flow statements (i.e., variables, conditional expressions, and variable arguments) stored under a name and processed as a unit. For example, in the Work Order report, there are two stored procedures: WorkOrders and WorkOrderItems. A stored procedure can be used to define a SQL query that you can use over and over again.



**Tip:**

If the stored procedure is designed to prompt a user for information on which to base its query, Crystal Reports will prompt you for that information when you select the stored procedure for your report.

To display the fields that are already located in the report, expand the current database fields on the left side of the [Design View page](#) under the **Database Fields** icon.

To add a field to a Crystal Report:

1. Preview the report you want to edit.
2. Click **Customize**. The **Design View** appears.
3. Expand the **Database Fields** icon.
4. Navigate to the field you want to include. Typically, this involves expanding either a table, view, or stored procedure.

## Crystal Reports

5. Click and drag this field to the location where you would like it to appear on the report.
6. Click **Preview**. Your changes appear.
7. To add additional fields to the report, repeat steps 2-6. You can toggle between the Preview and Design views as necessary by clicking the appropriate button.

### *Note:*



Each field that is present in the current report will have a check mark added in front of its name in the Field Explorer.

Duration  
 ManHours

8. Click **Save and Close**. For more on saving your report, see the [Saving Reports](#) section.

### *Caution:*

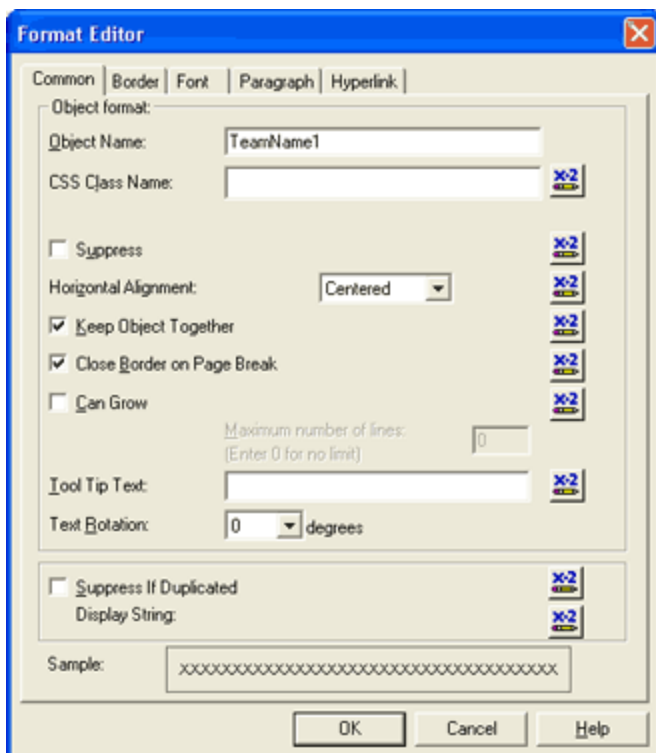



If you click **Close** to close the report without first saving your changes, your modifications will be lost! Be sure to save your changes before closing this dialog box. See the [Saving Reports](#) section for details.

## Formatting Crystal Reports Fields

To adjust the formatting (font, display, style, alignment, etc.) of a Crystal Reports report field:

1. On the right-side of the [Design View](#) page, right-click on the field whose formatting you want to edit and select **Format Field** from the pop-up menu. The Format Editor dialog box appears.



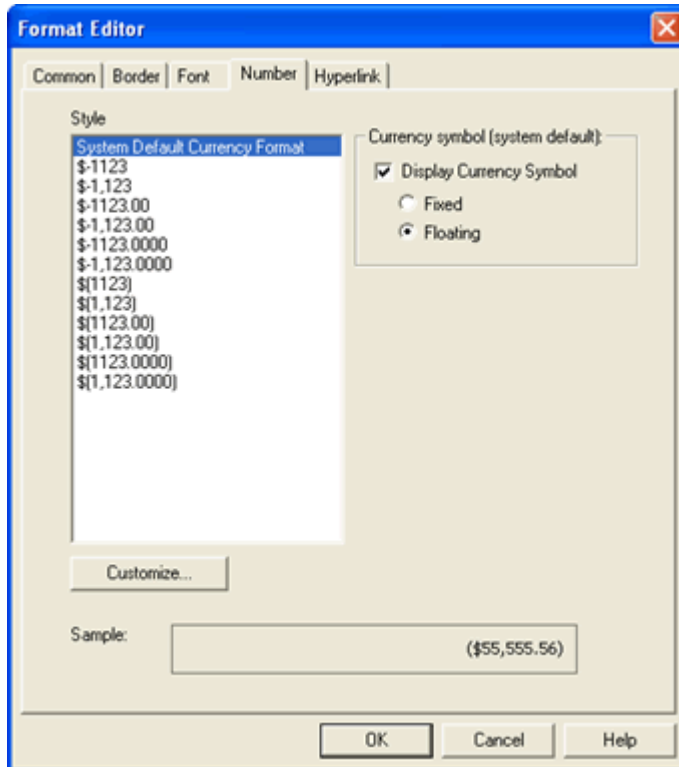
2. Select the formatting options you want to use from this dialog box. Your options include:
  - **Common.** Basic commands. Common commands include:
  - **Suppress.** This will hide the field, but will not remove it from your report.
  - **Horizontal Alignment.** Controls the alignment of the text within the field parameters.
  - **Can Grow.** Typically used with [Formulas](#), this command lets the field's text expand past the field's borders.
  - **Tool Tip Text.** The text that will appear when you mouse over the field.
  - **Border.** Add a border around your field.
  - **Font.** Control the appearance of the field's text.
  - **Paragraph.** Define how the paragraph appears.
  - **Hyperlink.** Define any hyperlinks you want to be included with this field.
3. Note that you can define a formula for each section by clicking . See the [Formulas](#) section for more.
4. When complete, click **OK**. The Design View page reappears.

More advanced features are accessible by right-clicking on the **Database Fields** line from the Main Report tab of the Design View page. These features include changing grouping, ordering and filtering, or adding new database tables to the report. See the [Data Sources](#) section for details.

## Formatting Numbers in Crystal Reports

To format a number field in Crystal Reports, you access the Format Editor dialog box for the field as described in the [Formatting Crystal Reports Fields](#) topic.

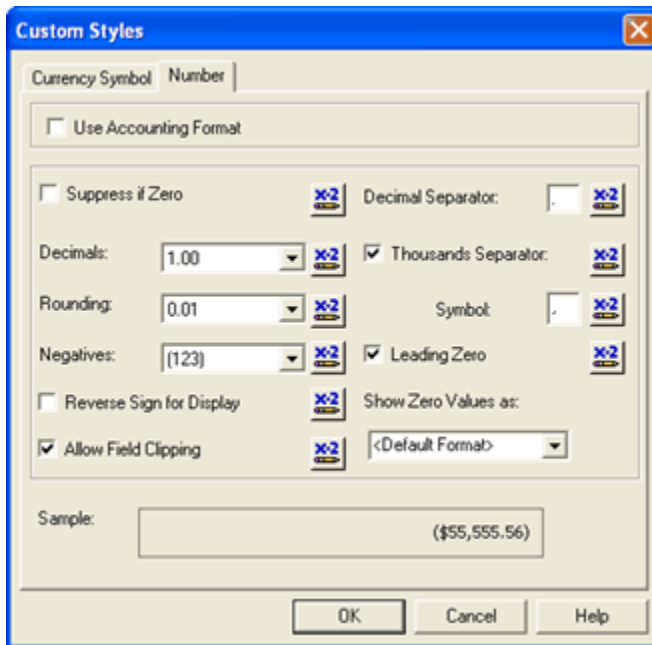
The fourth tab of this dialog box will be a Number tab if you are formatting a number. (If you were formatting text, this tab would read Paragraph.)




This dialog box enables you to choose the currency style of your number. Simply select the style you want from the list.

### ***Advanced Options***

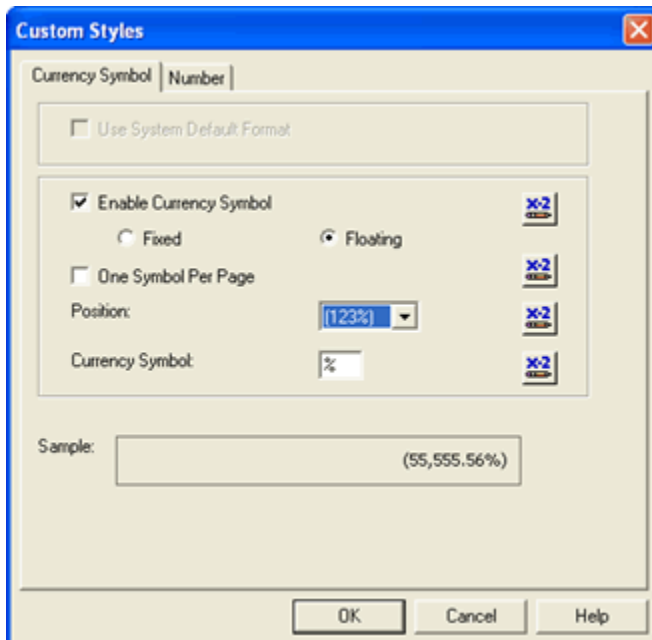
1. Click **Customize**. The Number tab of the Custom Styles dialog box appears.



This tab provides you further control over how the number appears.

Note that you can define a formula for most sections by clicking . See the [Formulas](#) section for more.

To change the currency symbol of the number (this includes if you want to change the number to a percentage), click the Currency Symbol tab.



1. To add a symbol to the field, select the Enable Currency Symbol check box.
2. Select the Fixed or Floating option button. For details, see the [Fixed vs Floating](#) topic.

3. Control the position of the symbol by selecting it from the drop-down list.
4. Type the symbol you want to display in the Currency Symbol field.
5. Click **OK**.

## Grouping Fields

You can create and/or modify the grouping of fields in your Crystal Reports report. To do so:

1. From the [Design View](#) page, right-click **Group Name Fields** and select **Group Expert** from the pop-up menu. The Group Expert dialog box appears.

This dialog box enables you to group the fields located in the report.

2. To group by a specific field, select the field by which you want to group.
3. Click. The field you selected appears in the Group By list box.

This level of grouping may be sufficient for you. However, if you'd like to further define the grouping options for a printed report, continue from step four.

4. Select a field in the Group By dialog box.
5. Click **Options**. The Change Group Options dialog box appears.
6. Select the name of the field by which you'd like to add an additional grouping rule from the first drop-down list.
7. Select the grouping order from the second drop-down list.
8. Click **OK**. The Change Group Options dialog box closes.
9. Click **OK**. The Group Expert dialog box closes.

## ***Advanced Crystal Reports Editing***

### **Formulas Overview**

A formula is a symbolic statement of the actions you want to perform on data before it is displayed on your Crystal Reports report. These are used to provide an extra degree of control over the report's output. Formula fields are constructed using a simple scripting language, very similar to Visual Basic. You can use formulas to calculate numeric values, compare one value to another and select alternative actions based on the comparison, join multiple values into a single string, and to perform a multitude of other operations.

**Tip:**

**Formula fields** are fields that appear on the report after the @ symbol.

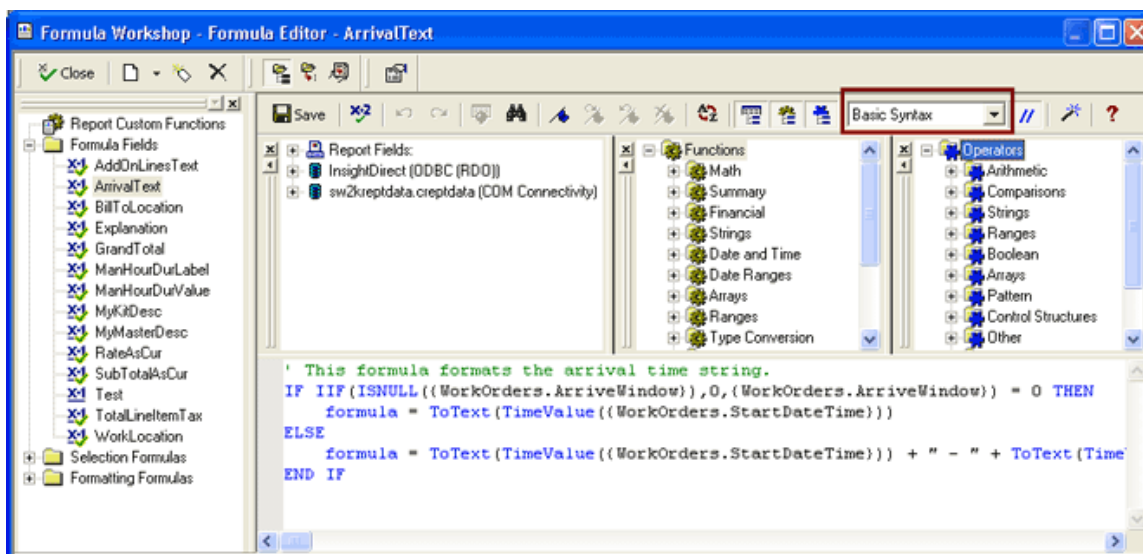
A two pass formula is a formula that requires two passes through the data for completion. The first pass performs some calculation or selection and the second pass performs a calculation or selection that uses the result generated by the first pass.

An example of a two pass formula is one that calculates the sales for each sales representative as a percent of total company sales. The first pass sums the sales for each representative to arrive at total company sales. The second pass divides the sales per representative by total company sales to calculate the percent of total sales.

## Editing Crystal Reports Formulas

To edit a formula field:

1. From the [Design View](#) page, right-click the field whose formula you want to edit and select **Edit Formula** from the pop-up menu. The Formula Workshop dialog box appears.



Edit the formula using this dialog box. For more, see the following sections:

- [Report Syntax](#)
- [Creating Crystal Reports Formulas](#)
- [Casting Numbers as Currency](#)

2. When you've completed editing the formula, click **Save**.
3. Click **Close** to close the Formula Workshop dialog box. The Design View page reappears.

## Report Syntax

Syntax is a set of rules that you must follow in order to create a correct formula in Crystal Reports. There are two types of syntax:

- Crystal syntax
- Basic syntax

Almost any formula written with one syntax can be written with the other. Reports can contain formulas that use Basic syntax as well as formulas that use Crystal syntax. In general, Basic syntax is similar to Visual Basic, the main difference being that it has specific extensions that handle reporting needs. You can only use one type of syntax when creating a formula.



**Note:**

While you can choose between Basic Syntax or Crystal Syntax, all existing ServiceCEO Crystal Reports use Basic Syntax for formula fields. Therefore, be sure to switch to Basic Syntax when copying one of these formulas.

You must follow the syntax rules to create correct formulas. Some basic rules are:

- Enclose text strings in quotation marks.
- Enclose arguments in parentheses (where applicable).



**Caution:**

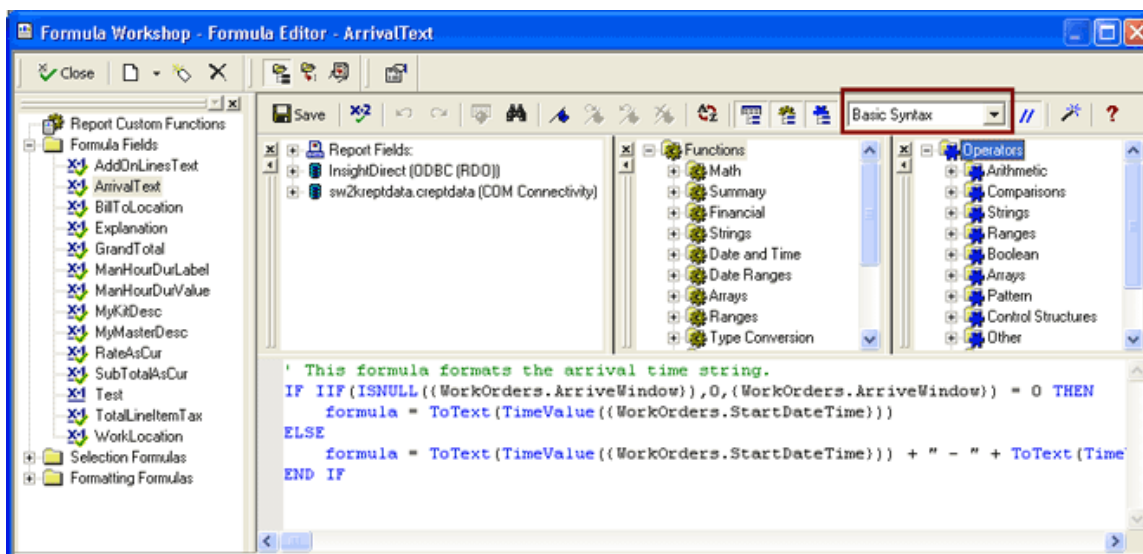
Record selection and group selection formulas cannot be written in Basic syntax; they can only be written in Crystal Syntax.


## Creating Crystal Reports Formulas

To create a formula in Crystal Reports:

1. From the [Design View](#) page, right-click **Formula Fields** and select **New** from the pop-up menu. The Formula Name dialog box appears.
2. Type a name for the formula in the **Name** field.
3. Click **Use Editor**. The Formula Workshop appears with the Formula Editor active.





4. Verify that Basic Syntax is selected from the drop-down list.
  5. Enter the formula by typing in the components or selecting them from the component trees.
- Tip:**
- Press CTRL + SPACE to display a list box of available functions. If you've already typed some text, the list box will display only the functions that are possible matches for what you've typed. Double-click the function you want to add it to the Formula Editor.
6. Click . If any syntax errors are found in your formula, a Crystal Reports ActiveX Designer dialog box appears, informing you of the problem.
  7. Fix any identified errors.
  8. When complete, click **Close**. A dialog box appears, asking you if you want to save your changes.
  9. Click **Yes**. Your new formula will appear in the Formula Fields section of the Design View page.
  10. To add the formula to your report, select and drag it to the location where you want it to appear on your report.
  11. Click **Save and Close**.

## Casting Numbers as Currency

If a Crystal Reports [formula field](#) results in a number that you want to display as currency (i.e., \$1,235.99), you must cast this number as currency in order to ensure that it is correctly displayed. This step is essential because Crystal Reports may read a field with a

## Crystal Reports

monetary amount NOT cast as currency as a simple (non-currency) number, omitting the partial values (decimal values) from the amount.

To cast a number as currency, use one of the following arguments:

- CCur (number)
- CCur (string)

For example:

' Forces the rate field to a CURRENCY value so  
Crystal will apply correct international formatting.  
formula = CCUR ({WorkOrderItems.Rate})

### Running Totals Overview

In Crystal Reports, a running total totals all records (in the report, in the group, and so forth) up to and including the current record. For example, if your first three records have values of 2, 4, and 6, the running total for each of the three records would be 2, 6, and 12, respectively. You can use running totals to create customized summaries and totals.

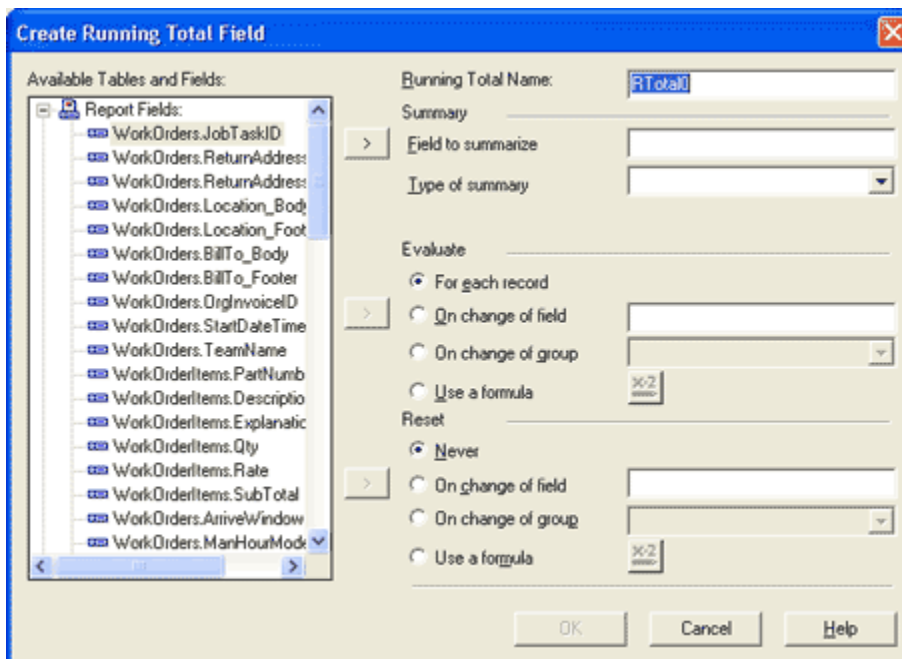
Running total fields are similar to summary fields, but provide you more control over how the total is calculated and when the total is reset. Running total fields are specifically suited to:

- Display totals as they are accumulated record by record.
- Total a value independent of the report's grouping.
- Total a value based upon conditions you define.
- Total a value after applying a group selection formula.
- Total a value from the driving table in a one-to-many linking relationship.

### Creating a Running Total

To create a running total in Crystal Reports:


1. From the [Design View](#) page, right-click **Running Total Fields** and select **New** from the pop-up menu. The Create Running Total Field dialog box appears.

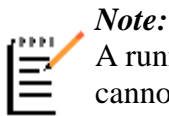


2. Type a name for the running total field in the **Running Total Name** field.
3. Select the field you want to total from the Available Tables and Fields list box.
4. Click **>**. The field will appear in the **Field to summarize** field.
5. Select the type of running total you want to produce from the **Type of summary** drop-down list. Your options will vary depending on the field you chose to summarize.
6. In the Evaluate section of the dialog box, click the appropriate option button. Your options are:
  - **For each record.** The running total will run for every record.
  - **On change of field.** The running total will only run when a specified field has changed. Use the **>** button to copy a field from the Available Tables and Fields list to the On change of field list.
  - **On change of group.** The running total will only run when a specified group has changed.
  - **Use a formula.** The running total will use the identified formula when performing its calculations. Click **x2** to create identify a formula.
7. In the Reset section of the dialog box, click the appropriate option button.
  - **Never.** This means that the running total will never reset; that is, the running total continues throughout the report. your running total will perform its calculations on that field throughout the entire report.
  - **On change of field.** Use the On change of field list to have your running total evaluate or reset when a designated field changes. Use the **>**

## Crystal Reports

button to copy a field from the Available Tables and Fields list to the On change of field list.

- **On changing of group.** The running total will run or reset when a designated group changes.
  - **Use a formula.** The running total will use a formula to determine when to reset. Click  to create identify a formula.
8. Click **OK** to save the running total field. The program returns you to the Field Explorer dialog box.
  9. Insert the running total field in the Details section of the report.



### *Note:*

A running total field can be used on database fields and first-pass formulas, but cannot be used on second-pass formulas or formulas that reference other second-pass formulas.

The following list identifies the records that are included in the calculation when a running total is placed in the specified report sections. This list assumes the running total is not reset.

- **Report Header** - only the first record in the report
- **Page Header** - all records up to and including the first record on the current page
- **Group Header** - all records up to and including the first record in the current group
- **Details** - all records up to and including the current record
- **Group Footer** - all records up to and including the last record in the current group
- **Page Footer** - all records up to and including the last record on the current page
- **Report Footer** - all records in the report

## Data Sources Overview

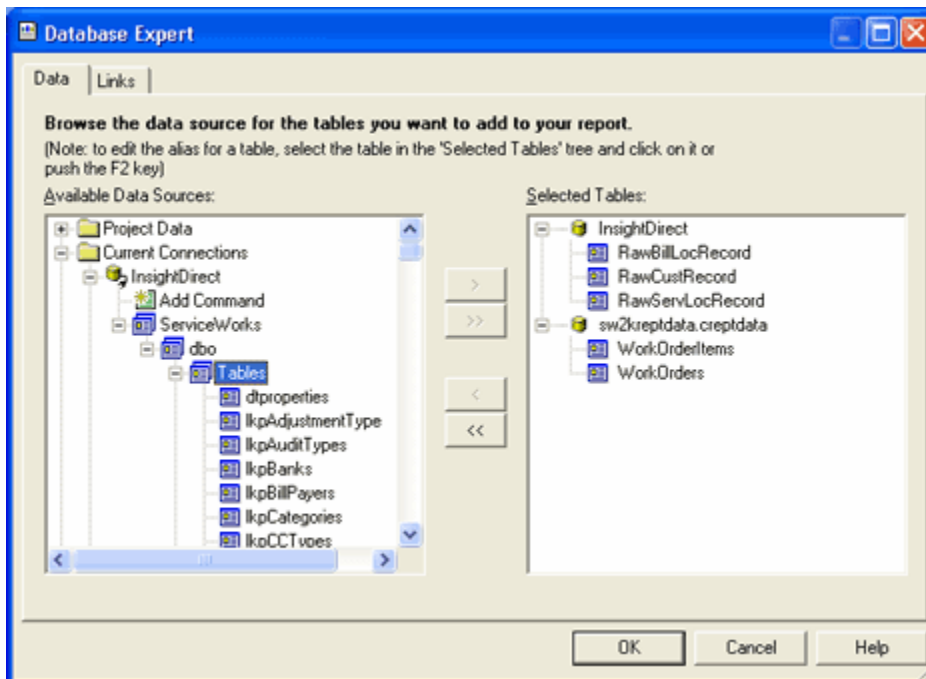
Data for ServiceCEO reports can come from three sources:

- **Tables.**
- **Views.**
- **Stored Procedures.** Stored procedures are pre-compiled collection of SQL statements and optional control-of-flow statements stored under a name and processed as a unit. For more, see the [Crystal Reports Fields](#) section.


## Adding Tables


To add a table to a [Crystal Report](#):

1. From the [Design View](#) page, right-click **Database Fields** and select **Database Expert** from the pop-up menu. The Database Expert dialog box appears.



2. Expand the Available Data Sources folder structure as displayed in the screenshot above by clicking the appropriate plus signs. All of ServiceCEO's tables are located in the **Tables** folder.

To add a table to the report, simply select the table you want to add and click . The table will appear in the Selected Tables list box.

To remove a table from the report, select the table you want to remove in the Selected Tables list box and click .

## Stored Procedures

In retrieving data for Crystal Reports reports, the Stored Procedure is called, is wrapped through COM (such a process was required due to a 'known' issue for Crystal Reports), and then the stored procedure accesses the ServiceCEO database to obtain the data. An example of Stored Procedure can be seen in the Work Order report.

## Subreports

A Crystal Reports subreport is a report within a report. It has all of the characteristics of a regular report, but cannot include other subreports within itself. Subreports can be free-standing or they can be linked to the data in the primary report. You to insert as many subreports as you want into a regular report.

There are four instances in which a subreport would typically be used:

- To combine unrelated reports into a single report.

## Crystal Reports

- To coordinate data that cannot otherwise be linked.
- To present different views of the same data within a single report.
- To perform one-to-many lookups from a field that is not indexed on the lookup field.

For example, the picture below shows a report that contains the “RSEmployees” subreport, designed to display the employees for each job type. If no team is assigned to the job, it will be displayed as “unassigned” (Team Name).

To add a subreport to a Crystal Report:

1. In the Customize view, right-click on any empty space in the report and select Insert > Subreport from the pop-up menu. A frame box appears.
2. Mouse to where you would like the subreport to appear and click the mouse to place it on the report. The Insert subreport dialog box appears.
3. If you want to use an existing subreport:
  1. Select the Choose a report option button.
  2. Click Browse. An Open dialog box appears.
  3. Browse to and select the subreport you want to use and click **OK**.
4. If you want to create a new subreport:
  1. Select the **Create a subreport** option button.
  2. Type a name for the subreport in the **Report Name** field.
  3. Click **Report Wizard** and follow the steps to create the subreport.
5. If you would like the subreport to only be run when asked for, select the **On-demand Subreport** check box.
6. Click **OK**.

## Parameters

### *Parameter Fields*

Parameters prompt the user of a report to enter information. Think of a parameter as a question that the user needs to answer before the report is generated. The information that you enter, or the way in which you respond, determines the information that appears in the report.

For example, in the Work Order report, the date range is defined by two parameters:

- Start Date (CEOStartDate)
- End Date (CEOEndDate)

The report then uses the values the user selects (in ServiceCEO's Print Options dialog box) to define a 'Time Frame'. The results returned by the report will fall within this 'Time Frame' rather than returning the results for all time periods.

The Parameter Fields list on the Main Report tab of the [Design View](#) page displays the names of all the Parameter Fields currently in your report. You insert Parameter Fields by dragging them into the report, or by selecting them and then clicking **Insert to Report**.

You can create a New parameter field, or edit, rename and/or delete the parameter field by right-clicking **Parameter Fields** and select the appropriate value from the pop-up menu.

### ***Defining the Default Value of a Parameter***

All [Parameter Fields](#) must have a defined default value in order to avoid being prompted for parameters at runtime. To define a default value:

1. From the [Design View](#) page, right-click on the parameter to which you want to define a default value and select **Edit** from the pop-up menu. The Edit Parameter Field dialog box appears.

The other parameter options include:

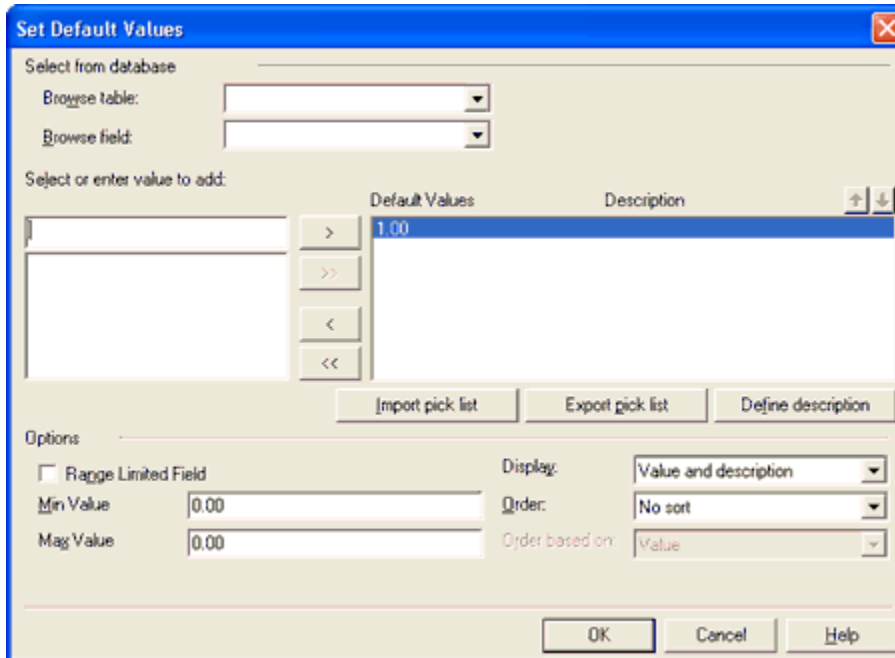
- **Allow multiple values.** Select this check box to identify more than one default value for the parameter field.
- **Discrete value(s).** Select this option button to select only single values for the parameter field. If you have selected the **Allow multiple values** check box, you will be able to select more than one discrete value for your parameter field, though those discrete values will continue to function as single values as opposed to a range value.
- **Range value(s).** Select this option button to select a range of values for the parameter field.
- **Discrete and Range Values.** Select this check box (if you have selected the **Allow multiple values** check box) to enable the selection of both discrete and range values for the parameter field.



**Caution:**

You can only select Discrete value(s) OR Range value(s). Both cannot be used at the same time.

2. Click **Set Default Values**. The Set Default Values dialog box appears.



- To add a default value: Type a value in the **Select or enter value to add:** field and click **>** to add the value to the Default Values list box.
  - To remove a default value: To remove the existing default value, select the value in the Default Values list box and click **<**.
3. After you've finished configuring the default values, click **OK**. The Set Default Value dialog box closes.
  4. Click **OK**. The Edit Parameter File dialog box closes.

**Supported Parameters**

ServiceCEO supports the following parameters. Note that they are presented in no particular order.

- CEOTeamVocab
- CEOStartDate
- CEOEndDate
- CEOTeamID
- CEOEmployeeID



- CEOLoginID
- CEOJobID
- CEOInvoiceID
- CEOCustomerID
- CEOShowAddOn
- CEOServConStatusID
- CEOServConSubStatusID
- CEOShowCompanyInfo
- CEOJobStatusID
- CEOJobSubStatusID
- CEOOrgID
- CEOBatchJobID
- CEOInvStatusID
- CEOInvCustOnly
- CEOOrgStructID
- CEOOrgStructLevel
- CEOOnlyUnsent
- CEOEstStatusID
- CEOEstSubStatusID
- CEOTaskStatusID
- CEOTaskSubStatusID

### ***Passing Parameters to Subreports by Name***

Parameters that begin with "CEO" - such as **CEOStartDate** and **CEOEndDate** in the **Work Orders** table - are scanned by ServiceCEO and used to adjust the Print Options dialog box to provide user interaction.

If you have the same parameters in the subreport as those in the Parent report, name the subreport's parameters the same as those in the **Parent Report**. Matching parameter names will ensure you will not be prompted for parameters at runtime. For example, the **CEOCustomerID** parameter is present in the **Work Order** report. To pass that parameter within the subreport, rename the existing **CustomerID** parameter in the subreport to **CEOCustomerID**. To do this, right-click it and select **Rename** from the pop-up menu.

### ***Defining a Default Date Range***

Users with Crystal Reports version 9 or the [Integrated Crystal Reports License](#) can now edit the default Start and End dates for any of ServiceCEO's Crystal Reports. You can define the date range for a Crystal Report in two different ways:

1. [Use a Default Date Range](#)
2. [Encode a Default Start/End/Single Date using Offset Notation](#)

### ***Use a Default Date Range***

To use a default date range, you need to create a parameter named **CEODefDateRange**, with a data type of Number. You can set the default value of this parameter in the **Public Enum eDateFiltRange** table:

To set the default values, you'll need to use the following terms:

Code String	Value	Description
eDFR_All	0	All dates.
eDFR_Today	1	The current date.
eDFR_Today_Morning	2	The morning of the current date.
eDFR_Today_Afternoon	3	The evening of the current date.
eDFR_Yesterday	4	The day before the current date.
eDFR_Tomorrow	12	The date after the current date.
eDFR_ThisFullWeek	5	The entire week containing the current date.
eDFR_LastFullWeek	6	The entire week starting the week BEFORE the current date.
eDFR_NextFullWeek	8	The entire week starting the week AFTER the current date.



**Note:**

A full week starts on the Monday previous to the current date.

Code String	Value	Description
eDFR_ThisFullMonth	9	The entire month containing the current date.
eDFR_LastFullMonth	10	The entire month occurring the month before the month containing the current date.
eDFR_NextFullMonth	11	The entire month occurring the month AFTER the month containing the current date.



**Note:**

The full month starts on the first and ends on the last day of the month (the 30th or the 31st).

Code String	Value	Description
eDFR_LastWeek	13	The week (seven days) previous to and including the current date. For example, if today was 8/25, the last week would be 8/18 through 8/25.
eDFR_NextWeek	14	The week (seven days) after and including the current date. For example, if today is 8/25, the next week is 8/25 through 9/1.



**Note:**

The LastWeek and NextWeek strings contain seven days from (and including) the current date, so they don't necessarily start on Monday.

Code String	Value	Description
eDFR_LastMonth	15	The month previous to and including the current date. For example, if today is 8/25, the last month is 7/26 through 8/25.
eDFR_NextMonth	16	The month after and including the current date. For example, if today is 8/25, the last month is 8/25 through 9/24.



**Note:**

The LastMonth and NextMonth strings contain 30 days from (and including) the current date, so they don't necessarily start on the 1st or 31st of a month.

**Encode a Default Start/End/Single Date Using Offset Notation**

To use offset notation, you will need to create either a pair of parameters (**CEODefStartDate** and **CEODefEndDate**) or, for reports driven from only one date, a single parameter (**CEODefSingleDate**). The data type of these parameters will be a String.

Set the default value of each of these parameters to a string in the format: [+/-][#][m/d/yyyy/...]. For example, defining **CEODefStartDate = -5d** and **CEODefEndDate = +12ww** will generate a report with a start date of five days ago and an end date of twelve weeks from the current date.

The table below contains the set of strings which can be included as part of the above parameter string.

Setting	Description
yyyy	Year
q	Quarter
m	Month
y	Day of year
d	Day
w	Weekday
ww	Week of year
h	Hour
m	Minute
s	Second

## Saving Crystal Reports in ServiceCEO

When you are done editing a report, save your changes. All Crystal Reports are saved as a **Report Definition File**.

Note that if you are storing the ServiceCEO reports in

### Tip:



Before you save your report, it's always a good idea to run Verify Database. To do so, right-click on any white space of the report in the [Customize tab](#) and select **Verify > Verify Database** from the pop-up menu. Doing so will ensure that all of the report fields will work properly.

### Caution:

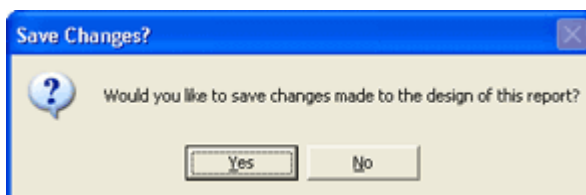


Installing a ServiceCEO upgrade will update all of ServiceCEO's default reports (located at C:\Program Files\ServiceCEO\Reports), overwriting all previous versions. If you have edited any ServiceCEO reports and have NOT saved them under a different file name (i.e., you have overwritten the default report files with your own custom versions), be sure to save a copy of these files elsewhere on your computer/network BEFORE proceeding with the upgrade. Rename the copies of these report files using unique file names (the rptWorkOrderAcmeCo.rpt, for example).

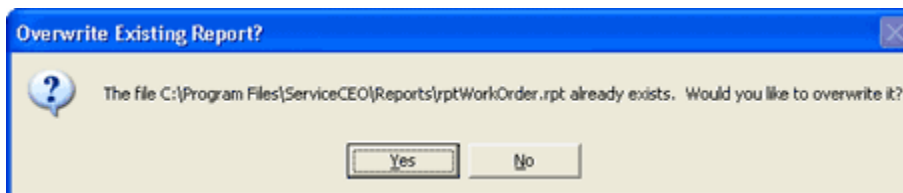
After the upgrade is complete, you may copy these renamed report files back to the original ServiceCEO Reports folder or simply leave them in the separate location in which they were copied. See [Managing the Report List](#) for more.

To save a Crystal Report:

1. On the [Report Preview](#) page, click **Save and Close** to save your changes. A Save Changes? dialog box appears.



2. Click **Yes** to save the report. An Overwrite Existing Changes? dialog box appears.



**Caution:**



This dialog box is asking if you want to overwrite the existing report definition file. You should only click **Yes** if you are making further changes to a report you have previously modified and saved under a different name. Do NOT overwrite any of the core system reports (listed below).

3. Click **No** to save the report yourself. You will click No most of the time, especially if you are editing one of the core system reports, such as:
  - **Work Orders** - rptWorkOrder.rpt
  - **Invoices** - rptInvoice.rpt, rptClassicInvoice.rpt
  - **Estimates** - rptEstimate.rpt, rptClassicEstimate.rpt

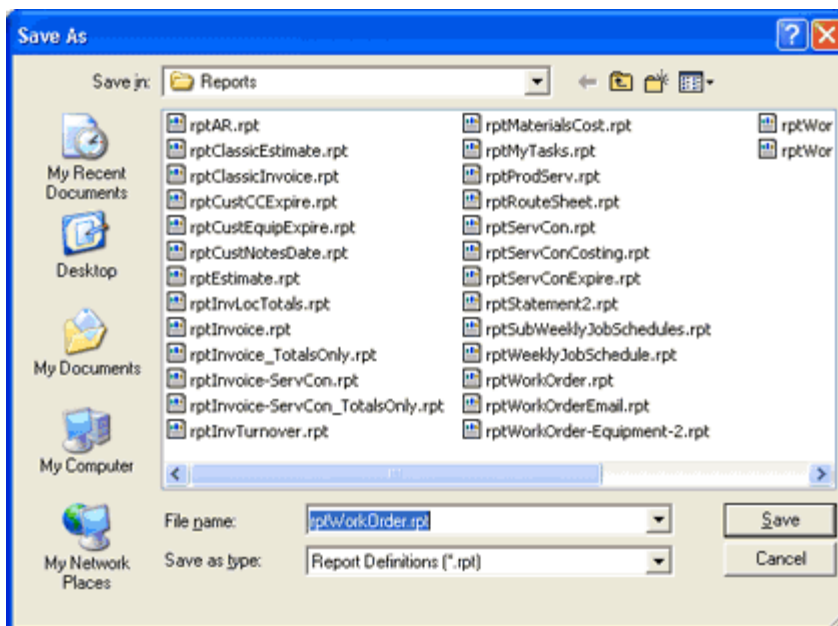
Clicking Yes will overwrite the existing .rpt file, making your new report the default report within ServiceCEO. If you do this, be aware that upgrading the software will overwrite your .rpt file and you will lose any customizations you may have made. If you click Yes, the report is saved and you can skip the rest of the steps.

**Note:**



We recommend that if you make changes to any of the reports that are shipped with ServiceCEO, you save these changes under a different file name. Changing the name of the RPT file ensures that the file will not be overwritten if you update your ServiceCEO software. In fact, it is a good idea to save a backup copy of edited reports on a different location on your network just in case the edited report is accidentally overwritten.

A Save As dialog box appears.



4. Save your report using a different file name and/or in a different location on your computer. Note that, by default, report definitions are stored in the **C:\Program Files\ServiceCEO\Reports** directory.
5. Click **Save**. The report is saved.

**Caution:**



It is a good idea to backup your customized reports. While reports that are embedded in ServiceCEO are automatically backed up as part of the normal database backup procedure, customized reports are not. Thus, it is a good idea to have a copy of these reports in a safe place (and outside of the C://Program Files/ServiceCEO directory) to ensure that you will have a copy of the report if something happens to the original.

Please note that if you have saved the rpt file to the ServiceCEO database (as described in the [RPT File Location](#) section), you will not be prompted to save your changes to a different location if you use the above steps. Instead, you should save the report in this manner:

1. Right-click the white space on the left-side of the Customize Report section (below or next to where the tree of all the report/database elements are) and select Report > Save to Crystal Reports from the pop-up menu.

## ***The Report List***

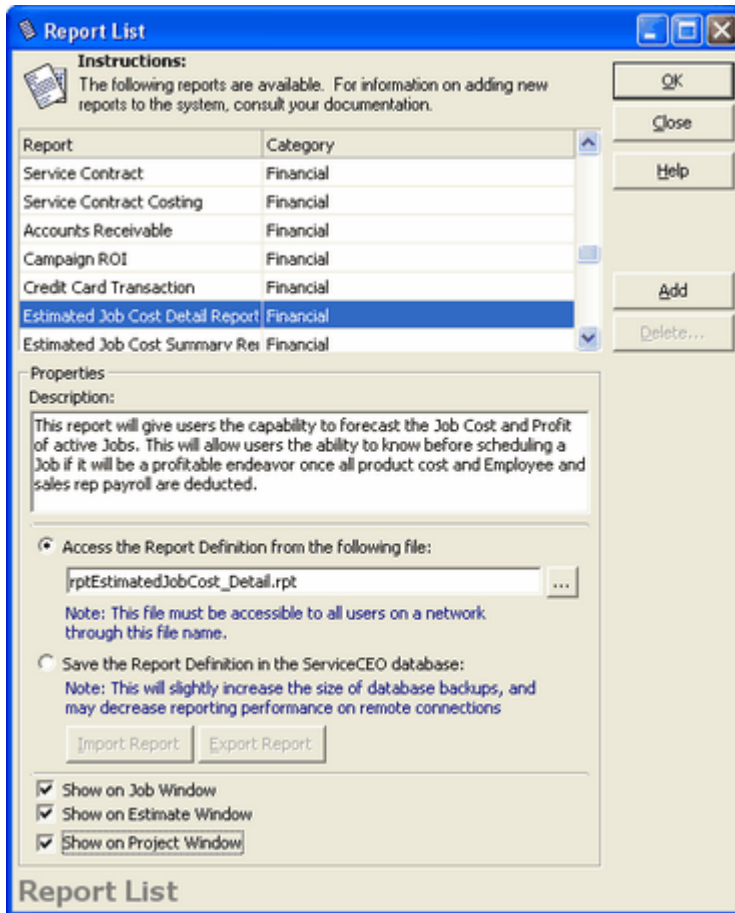
### **Managing the Report List**

The Report List defines where your reports are located and how they can be accessed.

## Crystal Reports

To access the Reports List, log in to ServiceCEO as an Administrator, and then follow these steps:

1. Select **Reports** from the Navigator bar. The Available Reports dialog box appears.
2. Click **Edit List**. The Reports List dialog box appears.



From the Report List dialog box, you can do several things:

- [Add new reports to ServiceCEO](#). See the [Adding New Reports](#) section.
- [Edit the configuration of existing ServiceCEO reports \(including the category, description, and location of the report\)](#). See the [Editing Report Descriptions/Sections](#) section.
- [Remove custom reports from ServiceCEO](#). See the [Removing Reports](#) section.
- Add reports to the [Job](#), [Estimate](#), and/or [Project](#) record. If added to a window, you'll be able to run it by clicking the Report Preview button from the appropriate record.

## Adding New Reports to ServiceCEO

To add a report to ServiceCEO:



1. From the [Report List dialog box](#), click **Add**. A new row appears in the report list.
2. Type a name for the new report in the **Report** field.
3. Select a section for the new report from the **Section** drop-down list. The report section is the Report Category under which it appears on ServiceCEO's main Available Reports page.
4. Type a description for the report in the **Description** field.
5. Indicate the **Report Definition File** location. See the [RPT File Location](#) section for details.
6. Repeat steps 3-7 to add additional reports.
7. Click **OK**.



**Tip:**

For a template you can use to create a brand new crystal report, download the following report file: [rptNew.rpt](#).

## Adding Reports to Jobs, Estimates and Projects

You can add reports to [jobs](#), [estimates](#) and [projects](#) so that they can be run outside of the Reporting section.

**Caution:**

Any reports you display on the job record will need to have CEOJobID as the only required parameter.



Any reports you display on the Project Control Panel will need to have CEOBatchJobID as the only required parameter.

If the reports are constructed in any other way, it will not run correctly. For more on editing reports in ServiceCEO, please see the [Editing Crystal Reports](#) section.

To add a report to the job record report list:

1. Click **Reports** from the Navigator bar. The Available Reports dialog box appears.
2. Click **Edit List**. The Report List dialog box appears.
3. Select the report you would like to add to the report list from the list of reports.
4. Select the **Show on Job Window** check box.
5. Click **OK**.

To add the report to the estimate or project, select the appropriate check boxes.

## Crystal Reports

Reports will display according to these rules:

- Selecting **Show on Job Window** will display the report for jobs and project visits.
- Selecting **Show on Estimate Window** will display the report for estimates.
- Selecting **Show on Project Window** will display the report for the [Project Control Panel](#), not for individual project visits.
- Schedules (Master Jobs) will not display any of the reports.

Once added, you can run the report from two locations from the job, estimate, or project:

- **Print.** Click the arrow next to the print icon or select **File > Print > [Report Name]**.
- **Print Preview.** Click the arrow next to the Print Preview icon or select **File > Print Preview > [Report Name]**.

### Editing Report Description and/or Section


To edit the description and/or section of a ServiceCEO report:

1. From the [Report List](#) dialog box, find the report you want to edit and select it.
2. To change the report section, select a new section from the **Section** drop-down list. To open the drop-down list, click in the Section column for the report you want to edit. The report section is the report Category under which it appears on ServiceCEO's main Available Reports page.
3. Edit the report description by editing the text in the **Description** dialog box.
4. Repeat steps 1-3 to edit additional reports.
5. Click **OK**.

### The RPT File Location

By default, all reports are saved in each **client computer's** local hard drive. By default, this location is C:\Program Files\ServiceCEO\Reports.

You can easily change the location of the **RPT file** from the [Report List](#) dialog box:

1. Select the **Access the Report Definition from the following file:** option button.
2. Click . The Select Report File dialog box appears.
3. Navigate to the location where the report file (with an ".RPT" extension) is located and select it.
4. Click **Open**. The name of the report definition file appears in the field.
5. Click **OK**.

This configuration is the most efficient method of managing your report files, and is recommended for:

- All standard reports shipped with ServiceCEO
- Single-computer installations
- Reports that will not change

This configuration requires that you distribute copies of these reports to all users running ServiceCEO (i.e., each user's Reports folder must be identical). You must also be responsible for backing up changes to these reports and ensuring that they are not overwritten when upgrading ServiceCEO (see the warning in the [Saving Crystal Reports in ServiceCEO](#) section).

If you have multiple users connecting to a single ServiceCEO database, you can utilize two other methods of managing your report files:

- **Save the RPT files in your database.** Saving your reports in the ServiceCEO database means that reports will be automatically downloaded to your computer whenever you print or preview a report that you have not used before or one that has changed. This is recommended for customized reports in an installation where users will be accessing the reports over remote connections. To do this:
  1. Open the [Report List](#) dialog box.
  2. Select the **Save the Report Definition in the ServiceCEO database** option button.
  3. Click **Import Report**. The report is now located in the database.
- **Save the RPT files on a network drive.** Saving reports on a network drive is recommended for customized reports where users will be accessing reports over a high-speed LAN. The fileserver containing the reports should be backed up on a regular basis. This configuration is not as efficient as saving the .rpt files in the database.

**Caution:**



It is a good idea to backup your customized reports. While reports that are embedded in ServiceCEO are automatically backed up as part of the normal database backup procedure, reports not embedded in the database are never backed up or saved. For this reason, it is a good idea to have a copy of these reports in a safe place (and outside of the C://Program Files/ServiceCEO directory) to ensure that you will have a copy of the report if something happens to the original.

If you wish to centrally locate your report definitions for easier management, you have two options:

## Crystal Reports

1. **Place your RPT files on a network drive.** Edit the report definition file location to point to this new shared drive by clicking the button from the Report List dialog box. Navigate to the network location where the report files are located.
2. **Load the report definition files directly into the ServiceCEO database.** This will allow report access from any system which has access to ServiceCEO, regardless of whether ServiceCEO is on a network or not.

## Removing Crystal Reports from ServiceCEO

To remove a Crystal Reports report from ServiceCEO:

1. Select **Reports** from the Navigator Bar. The Available Reports dialog box appears.
2. Click **Edit List**. The [Report List](#) dialog box appears.
3. Find the report you want to delete and select it.
4. Click **Delete**. A confirmation dialog box appears.
5. Click **OK**. The report will be deleted from ServiceCEO.



### **Note:**

You will not be able to delete the default ServiceCEO system reports (i.e., the reports detailed in the [Report Types](#) section).



### **Caution:**

Deleting a custom report only removes the report from ServiceCEO. It does not erase the RPT file from the C:\Program Files\ServiceCEO\Reports directory.

## **Additional Information**

For more on modifying Crystal Reports, you can attend our live Crystal Reports class. For more information, please point your browser to <http://www.insightdirect.com/classes.html>.

In addition, we strongly recommend you purchase and use some of the third-party resources listed below:

- **Crystal Reports 9 for Dummies** (Paperback)  
ISBN: 0764516418  
Purchase from: <http://www.amazon.com/gp/product/0764516418/103-4708519-4012629?%5Fencoding=UTF8&v=glance&n=283155>
- **Mastering Crystal Reports 9** (Paperback)  
ISBN: 0782141730

Purchase from: <http://www.amazon.com/gp/product/0782141730/103-4708519-4012629?%5Fencoding=UTF8&v=glance&n=283155>

- **Crystal Reports 9: The Complete Reference** (Paperback)  
ISBN: 007222519X  
Purchase from: <http://www.amazon.com/gp/product/007222519X/103-4708519-4012629?%5Fencoding=UTF8&v=glance&n=283155>
- **Computer Based Training CD ROM (CBT): Crystal Reports 9 Report Design Users** from Business Objects (Computer-Based Training)  
Item #: CG7UTD  
Purchase from:  
<http://www.buy.com/retail/product.asp?sku=10354144&loc=101&sp=1>



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