

Setup Guide

Crystal Reports – Beyond the Basics

- Version 9.0

To complete the activities in the Crystal Reports – Beyond the Basics curriculum, review the information in this setup guide to ensure you have the correct modules, case studies, and settings defined.

Software Requirements

<i>Software</i>	<i>Version</i>
<i>Sage MAS 90 and 200</i>	
• Library Master	4.20
• Common Information	4.20
• General Ledger	4.20
• Accounts Payable	4.20
• Accounts Receivable	4.20
• Sales Order	4.20
• Purchase Order	4.20
• Payroll	4.20
• Inventory Management	4.20
• Custom Office	4.20
<i>Crystal Reports – Beyond the Basics Case Study (SB1/LAB)*</i>	9.0
<i>Crystal Reports for Sage MAS 90 and 200</i>	10.0
<i>SOTAMAS90 ODBC Driver</i>	4.10.0700 or higher
<i>Microsoft Word</i>	2000

* **Note:** Refer to the Welcome and Introduction lesson in the Crystal Reports – Beyond the Basics course curriculum for information on downloading the case study.

Special Security Settings

Some activities may require you to select a specific user of RMD or Supervisor. These users were created in Sage MAS 90 as part of the classroom training and have full access to all tasks, security events, module options, and ODBC table and fields.

- If you are able to create user logons and modify roles, create RMD and Supervisor as users. Assign them to a role with full access to all tasks, security events, module options, and ODBC table and fields. Provide access to all companies created as part of the case study.

- If you cannot create these users, substitute your logon name when prompted to select either RMD or Supervisor.
- If security is not enabled, you may not be able to complete all steps in an activity. For example, some activities may require you to create a specific user logon. If this occurs, skip the activity.

Additional Information

- In Sales Order Options for the SB1 and LAB companies, select to print sales orders.
- The case study includes reports and files for you to use in the activities.
 - The reports are in the Crystal folder. Place them on your work station in the \MAS90\Reports\Crystal folder.
 - The My Documents folder contains pictures used in activities and labs. Place these files in a \MAS90\Reports\My Documents folder on your workstation.
- The last activity in Lesson 2 requires a user-defined field (UDF) normally created by the trainer prior to class. You have two options:
 - Skip the last activity in Lesson 2.

Note: If you do not create this UDF, some sample reports may generate a message indicating a database file has changed. When you receive the message, click OK to fix the report.
 - If you have Custom Office, you can create the UDF before doing any activities or labs. Before creating a UDF, consult with your Sage MAS 90 administrator. The steps to create the UDF are as follows:
 1. In the SB1company, create a UDF called CONTRACTNO for the SO Sales Order Header table. Select Manual Entry as the source and accept all other defaults.
 2. Add the CONTRACTNO UDF to the PHeader form for Sales Order Entry. You can add the field to the right of the Split Comm button.
 3. In Sales Order Entry, enter contract number 10-5678 for sales order 39 and contract number 10-5685 for sales order 41.

Special Settings for Crystal Reports

Set the parameters as displayed below and on the following page in Options on the File menu in Crystal Reports before beginning the activities.



