Demo – 10/16/2009: Using an Excel Spreadsheet as a Table in a Crystal Report

1- Create the Excel spreadsheet. For this demo:

a) WIA, Wagner-Peyser, One-Stop Line Item, and DTA JSJR (estimated based on near final earnings) funds were summed by region for FY'09. Note that ARRA funds were excluded. (**Show FY'09 Funds by Region**)

b) The total customers served, the total entered employments, and the total visits for FY'09 were obtained from the June 30, 2009 OSCCAR results by summing actuals. Totals are NOT distinct counts.

c) The expected customers served, expected entered employments, and expected visits per region were based on the percentage share of all funds times the total for each category.

d) Excel takes the datatype from the first row in the spreadsheet, but numbers that are intended as strings sometimes need to be converted using the "Convert Text to Columns Wizard" (toolbar->data). Choose "delimited"->"tab"->"text."

e) Manually add in zeros to make the field two digits in all cases.

f) Label the worksheet tab—this provides the table name in the report.

f) Save the file and remember the location.

2- Open Crystal Reports and add in the CS_OSCCAR_Reports table.

3- Go to Create New Connection->Database Files->browse and find the Excel file, and add it to the report. Link the Excel spreadsheet to the OSCCAR table on the SDA field.

4- Add a record selection formula:

```
{CS_OSCCAR_REPORT.PERIOD_END_DATE} = date(2009,6,30) and
{CS_OSCCAR_REPORT.COUNT_INDEX} in [2010,4010]
```

5- Create formulas {@Expected Results} and {@Expected Visits} in order to get these in the same column:

```
if {CS_OSCCAR_REPORT.COUNT_INDEX} = 2010 then
        {'Regional_Goals_'.Expected Enrollments} else
if {CS_OSCCAR_REPORT.COUNT_INDEX} = 4010 then
        {'Regional_Goals_'.Expected Placements}
```

if {CS_OSCCAR_REPORT.COUNT_INDEX} = 2010 then
{'Regional_Goals_'.Expected Visits}

6- Insert a group on SDA (mask this using display string):

"Region "+chr(int(groupnumber/2)+65)

Insert a Group on Count Index. Go the group expert->options->select Count Heading as the group header display.

7- Add fields to the Count Index group header:

YTD_Total (Re-label to read "Actual Total")
YTD Visits

Insert a maximum on YTD visits and do a group sort. Add remaining fields/formulas:

Expected Results
% of Expected Results
Expected Visits
% of Expected Visits

Percent formulas as follows:

{CS_OSCCAR_REPORT.YTD_TOTAL} % {@Expected Results}

{CS_OSCCAR_REPORT.YTD_VISITS}%{@Expected Visits}

8- Conditionally suppress GH#1 and GH#2 with this formula:

{CS_OSCCAR_REPORT.YTD_TOTAL} = 0

Or: {CS_OSCCAR_REPORT. SERVICE_DELIVERY_AREA} = '75'

9- Alternatively, you could insert a crosstab in the report footer, adding the SDA and the Count Index as the rows, and each field as a summary field, using maximum as the summary.

Mask SDA by using group options->customize group name->formula->

Whilereadingrecords;
Numbervar cnt := cnt + 1;
"Region "+ chr(cnt+64)

a) Also suppress subtotals, choose horizontal summary display, and suppress column grand totals. Change the labels and right justify.

b) Select each field in the crosstab and suppress the initial zero rows (if they exist) using:

gridrowcolumnvalue("CS_OSCCAR_REPORT.
SERVICE_DELIVERY_AREA ") = ""