



Step-by-Step Guide:

Step 1: Open Report and Layout Manager

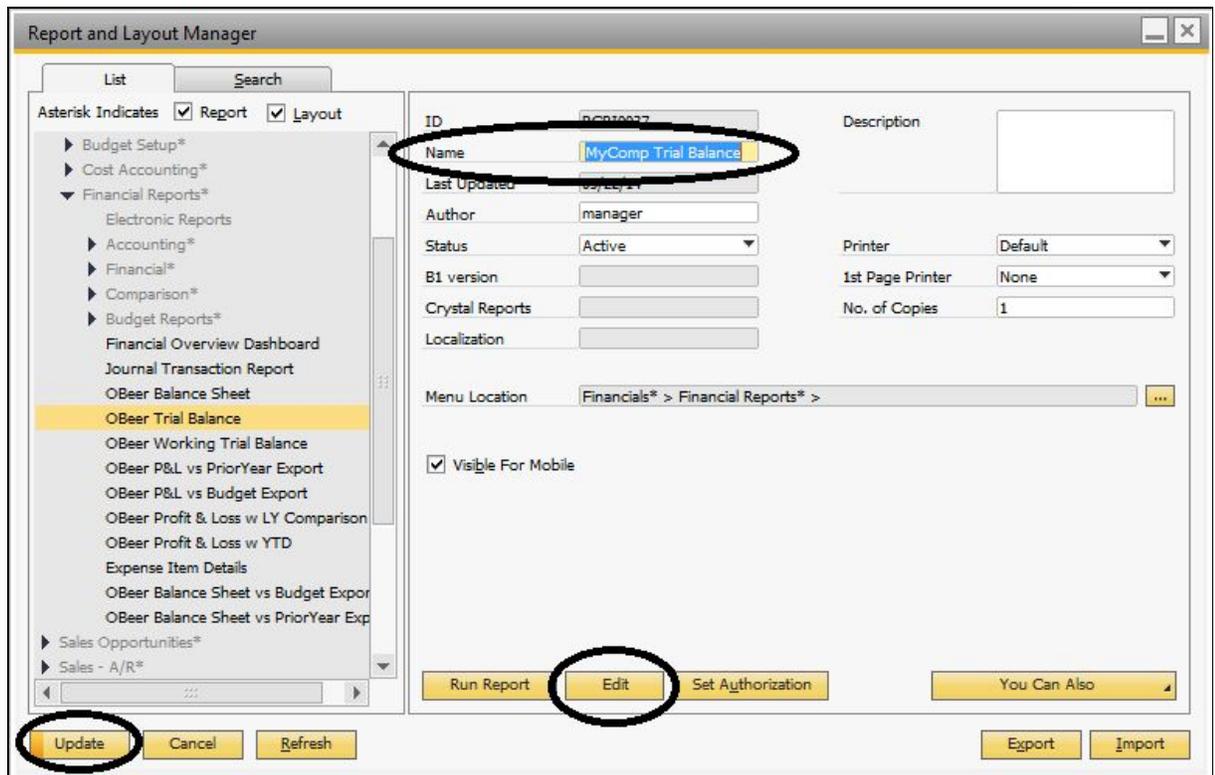
1. Open the Report & Layout Manager by going to Administration > Setup > General > Report & Layout Manager
2. Find the layout or report that you wish to adjust by navigating through the module tree

3.

The screenshot displays the 'Report and Layout Manager' application window. On the left, a 'My Cockpit' sidebar shows the 'Administration' module tree, with 'Report and Layout Manager' circled. The main window is divided into three panes. The left pane shows a tree view of reports, with 'OBeer Trial Balance' selected and highlighted. The middle pane shows a list of reports with columns for 'Asterisk Indicators', 'Report', and 'Layout'. The right pane shows the details for the selected report, including its ID (RCR10037), Name (OBeer Trial Balance), Last Updated date (05/22/14), Author (manager), Status (Active), Printer (Default), 1st Page Printer (None), No. of Copies (1), and Menu Location (Financials* > Financial Reports* >). Buttons for 'Run Report', 'Edit', 'Set Authorization', 'You Can Also', 'Export', and 'Import' are visible at the bottom.

Step 2: Name the New Layout or Report

1. If you are using the OnDemand environment, rename the report to something that identifies that it has been customized (generally company initials - report name)
2. If you are an Enterprise customer, you will be given the option to 'Save As' upon completing the modification.
3. Regardless of your software platform or method, you will want to give your modified document a name that differs from the stock crystal report name, or it may be overwritten upon an Orchestrated update
4. Once you have given your document a new name, click on the 'Update' button to save the changes, and then click on the 'Edit' button to launch the Crystal Reports editor.

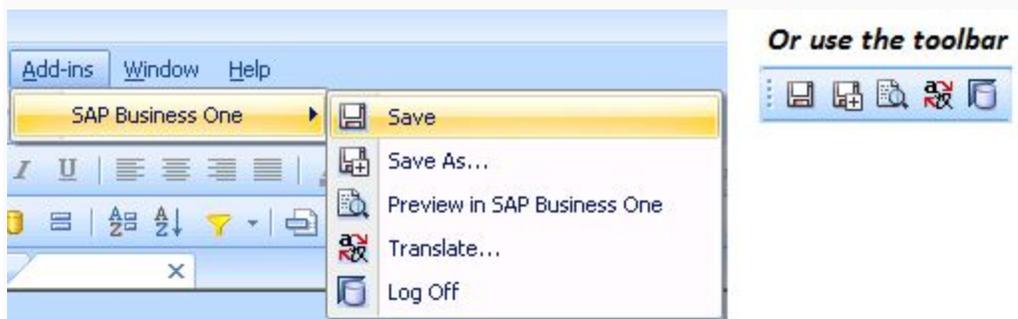


5.

Step 3. Make Edits and Modification in Crystal Reports

Step 4. Save Changes

1. You may use either the 'Add-Ins' menu option or the shortcut buttons within Crystal Reports



1. If using OnDemand, 'Save' will be the only working option ('Save As' will be available, but due to certain limitations within this platform, will not load the file back into your system.
2. If Enterprise, you may use 'Save As', but you will have to associate a location with the document once the process is complete
 1. Till a location is associated, your document can be found in the 'Lost Reports' portion of the Report & Layout Manager. Please see the following image on



how to move the newly created report from 'Lost Reports' to a designated location:

The image shows two screenshots from a software interface. The left screenshot is titled "Report and Layout Manager" and displays a report configuration page. On the left side, there is a tree view of report categories. A red box highlights the "Lost Reports*" category, with a blue circle containing the number "1" next to it. The "Item Sales Analysis EDITED EXAMPLE" report is selected within this category. The main area of the window shows details for this report, including its ID (RCR10132), name, last updated date (11/21/16), author (manager), status (Active), printer (Default), and menu location (Sales - A/R > Sales Reports > Orchestrated Reports >). A blue circle with the number "2" is placed over the menu location field, and a red circle with three dots is placed over a button next to it. At the bottom of the window are buttons for "Run Report", "Edit", "Set Authorization", "You Can Also", "Update", "Cancel", "Refresh", "Export", and "Import".

The right screenshot is titled "Menu Selection Form" and shows a tree view of report categories. A red arrow points from the button in the first screenshot to this form. The "Object Name" field contains "Item Sales Analysis EDITED EXAMPLE". The tree view shows the "Sales - A/R" category expanded, with "Orchestrated Reports" selected and highlighted in yellow. A blue circle with the number "3" is placed over the "Orchestrated Reports" item. At the bottom of the window are buttons for "OK", "Cancel", and "New Folder".