

SAP Crystal Solutions
SAP Crystal Reports and SAP Crystal Server

Step by Step guide: Sophisticated Distribution With SAP Crystal Server 2016





PERFORM SOPHISTICATED DISTRIBUTION WITH PUBLICATIONS

Perhaps the most powerful feature of SAP Crystal Server 2016 is the ability to automatically distribute reports that are customized for each individual recipient. Report Publications provide infinite flexibility to send invoices, form letters, statements – any pixel-perfect content imaginable – completely customized and automated (note that this feature is available with Concurrent Access Licensing).

Publications involve three major steps:

- Create a content report
- Create the “data driver” report
- Combine the reports together in a publication

This step-by-step guide will take you through all three steps.

1. If necessary, log off the Fiorified BI Launchpad.
2. Navigate to the traditional BI Launchpad by typing the following URL into the browser:
<http://localhost:8080/BOE/BI>
3. Login with your User ID/password combination.
4. Click the Documents tab in the upper left.
5. Click Folders at the bottom right.



CONTENT REPORT

1. Navigate to the Invoice Processing folder.
2. From the list of reports on the right side of the screen, view the Invoice For Publication using one of two methods:
 - a. DOUBLE-CLICK the report name.
 - b. RIGHT-CLICK on the report and choose View from the context menu.
3. You will be prompted for a Customer #. Type in 6 and click OK. Notice that a "Rockshock for Jocks" invoice appears.
4. Display the prompt panel in the report by clicking  in the upper left. Replace customer #6 with 10. Click . A "Rowdy Rims" invoice results.
5. Try customer #s 12, 15, and 22. Notice that there either is no customer # 15, or that customer has no open orders to invoice.
6. You now see that the invoice can be customized to an individual customer by providing the desired customer number when the report is run. This is an example of a content report. Close the report by clicking the small X in the upper right of the report's tab.

"DATA DRIVER" REPORT

The data driver report determines who will receive the content report. It can be filtered by any method supported by SAP Crystal Reports – customers with transactions in the previous month, new members of your softball club, employees that are due paychecks – the possibilities are limitless.

1. From the list of reports on the right side of the screen, view the Invoice Publication Driver.
2. Without any prompts, the report displays the list of customers that require an invoice. The report includes the customer number, customer name, and e-mail address.
3. Close the report by clicking the small X in the upper right of the report's tab.

PUBLICATION

Once a content report and data driver report are created, they are combined into a Publication.

1. With the Invoice Processing folder still open, click New above the folder list. Select Publication from the dropdown menu.



2. The New Publication screen will appear, with General Properties (visible on the left panel of the New Publication screen) selected.

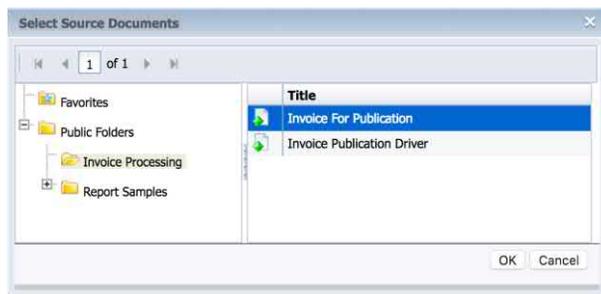
3. Type Monthly Invoices as the name of the publication. Optionally, add descriptive text to the Description portion of the screen.



4. Click Source Documents in the left panel. You'll begin by selecting the content document (the actual invoice) to add to the publication.

5. Click the **Add** button. The Select Source Documents window will appear, displaying the server's folder structure.

6. Select the Invoice Processing folder, then the Invoice for Publication report. Click OK.



7. Click Dynamic Recipients in the left panel. Choose Crystal Reports Dynamic Report Provider from the dropdown list.



8. To select the "driver report" that determines who receives invoices, select the Invoice Processing folder, then the Invoice Publication Driver report. Click OK.

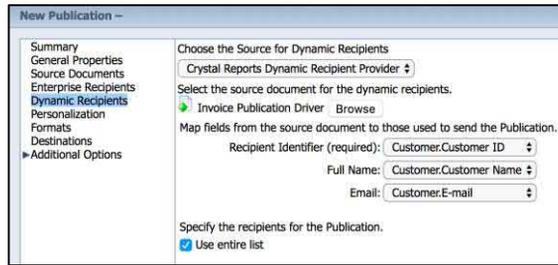
9. In the Map Fields from the source document section, select the matching fields from the driver report to control who will receive invoices:

a. Recipient Identifier Customer ID

b. Full Name Customer Name

c. Email E-mail





10. Click Formats in the left panel. Uncheck Crystal Reports and check PDF to attach the invoices in PDF format.

11. Click Destinations in the left panel. Uncheck Default Enterprise Location and check Email to send invoices via e-mail.

12. Type the desired e-mail address in the From box. Notice that %SI_EMAIL_ADDRESS% already appears in the To box. This indicates that the server will fill in the e-mail address from the driver report as the publication runs.

13. Click **Add Placeholder** to the right of the Subject text box. Notice various options for adding automatic values. Select User Full Name. %SI_USERFULLNAME% will be added to the Subject text box.



14. In the subject text box after the automatic field, type a space, followed by Monthly Invoice.

15. Type The, followed by a space in the Message text box.

16. Click **Add Placeholder** below the Message text box. Note the various automatic values that can be inserted into the message of the e-mail.

17. Select User Full Name. Notice that %SI_USERFULLNAME% is inserted after the text you typed – this will insert the full name of the customer into the e-mail message automatically. Now type monthly invoice is attached in .PDF format. to describe to the recipient what the e-mail contains.

18. Click the Use Specific Name radio button under File Name. This lets you provide a meaningful name for the e-mail attachment, rather than the cryptic “unique identifier” filename automatically generated by the server.



10. Click **Add Placeholder** to the right of the Use Specific Name text box. Select User Full Name. Notice that %SI_NAME% is inserted. Type a space, followed by the word Invoice. This will attach a filename consisting of the customer's full name, followed by the word Invoice to the e-mail.

Select Destinations:

- Default Enterprise Location
- BI Inbox
- Email
- FTP Server
- File System
- SFTP Server

Show options for selected destinations:

Email

Merge Exported PDF

Package As ZIP File

Deliver objects to each user

From: gpeck@ablazegroup.com Add Placeholder

To: %SI_EMAIL_ADDRESS% Add Placeholder

Cc: Add Placeholder

Bcc: Add Placeholder

Subject: %SI_USERFULLNAME% Monthly Invoice Add Placeholder

Message: The %SI_USERFULLNAME% monthly invoice is attached in PDF format.

Add Placeholder

Add Attachment

File Name:

Use Automatically Generated Name

Use Specific Name %SI_USERFULLNAME% Invoice Add Placeholder

Add File Extension

Enable SSL

11. Click **Save & Close** at the bottom right of the New Publication screen. The publication will be added to the folder with the reports.

12. The publication can be scheduled just like a report – perhaps on the 1st day of the month (because the demo server is not configured to actually send e-mail, if you attempt to schedule a publication, it will fail).



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