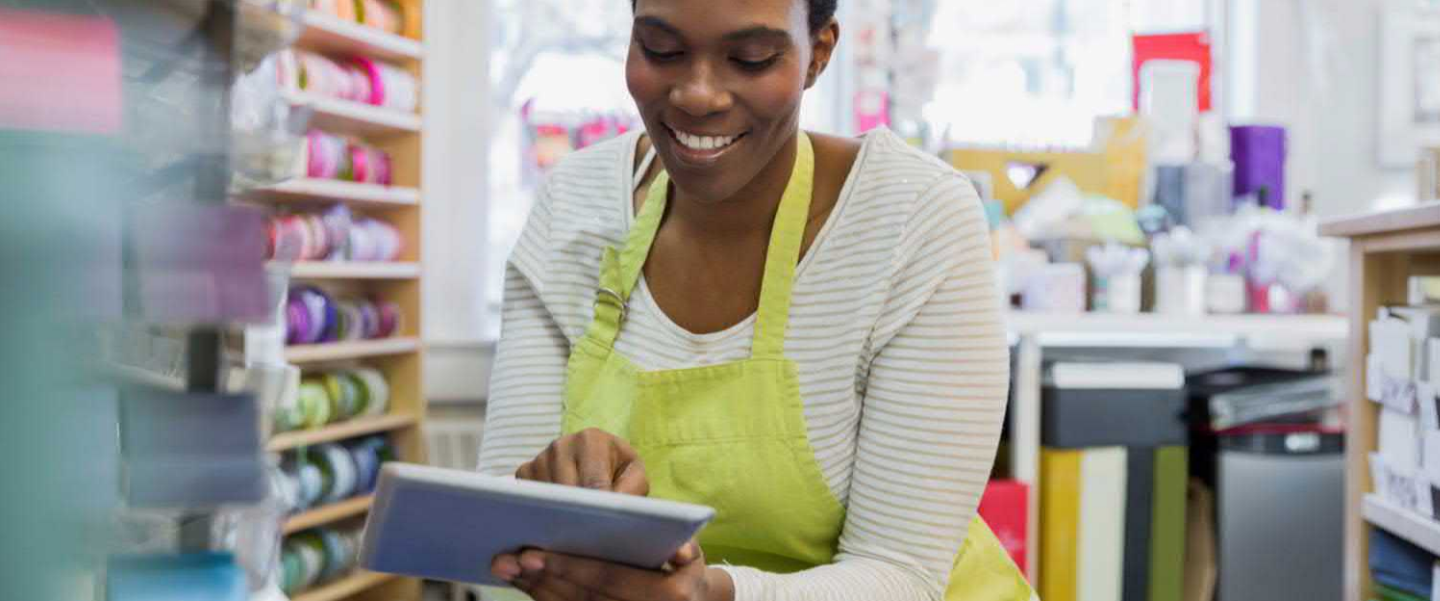


SAP Crystal Solutions
SAP Crystal Reports and SAP Crystal Server

Step by Step guide: Schedule Reports With SAP Crystal Server 2016





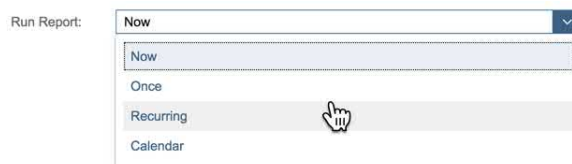
SCHEDULE REPORTS

Automated report scheduling allows you to run standard reports on a flexible schedule. This permits efficient report distribution while minimizing repetitive “hits” against your data sources and databases.

For example, you might schedule a report to run daily at 2 a.m., which can then be viewed by potentially hundreds of viewers who come in at 8 a.m. Hundreds of viewers can make business decisions with only one access to the database!

The sample report ‘World Sales Report’ has been used as an example in this guide. You can download this report along with a sample database, from https://www.crystalreports.com/ipp/samples_cr2016/





1. Click **Folders** at the top of the screen to change to Folder View.
2. Navigate to the Report Samples > Demonstration folder.
3. Click the ellipses **...** in the far right column of the World Sales Report and select Schedule from the context menu.
4. The schedule window will appear, with the Schedule Panel appearing at the left.
5. Click Recurrence. Click the Run report dropdown list.



6. Notice the variety of recurrence intervals. Select various options to explore.
7. After exploring, select the Once recurrence. Notice that the current date and time of day (in the demo server’s time zone) will appear. Click the **Schedule** button in the lower right.



Whenever you schedule a report, an instance of that report will be kept in SAP Crystal Server 2016 history. For example, if you schedule a report to run every six hours, four report instances will be retained for each day, plus a “recurring” instance that contains the scheduling information for the report.


1. Click the ellipses  in the far right column of the World Sales Report and select History from the context menu.
2. The report's history list will appear. As you wait, you may notice the instance's status change (you may click  at the upper right of the history list to refresh the instance status manually).
3. When the report is finished running, Success will appear in the Status column. Click the date and time under the Instance Time column, or the word Success, to view the report instance.
4. Note that all the drill down and group tree interactivity that was demonstrated in the View Interactive Reports section is available in a report instance. Experiment with drilling down and using the group tree.
5. When finished, click the small down-arrow to the right of the BI Launch Pad at the top center of the screen. Click the small x to close the report.
6. Schedule the World Sales Report several more times.
7. Experiment with different recurrence intervals.
8. Explore other options in the schedule pane (note that some destination options will not work properly because of limitations in the demo server's configuration).
9. Click the ellipses  in the far right column of the World Sales Report and select History from the context menu. Notice the various instances that resulted from your schedule options.
10. Click the ellipses  in the far right column of the World Sales Report and select View Latest Instance from the context menu. Notice the latest report instance will display. Close the report instance from the BI Launch Pad report list as before.

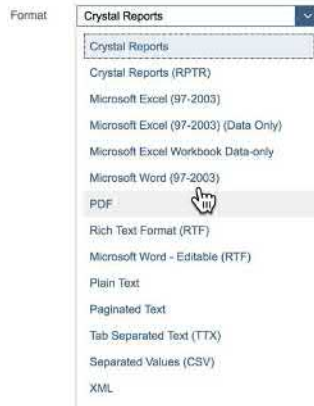


E-MAIL REPORTS ON A SCHEDULE

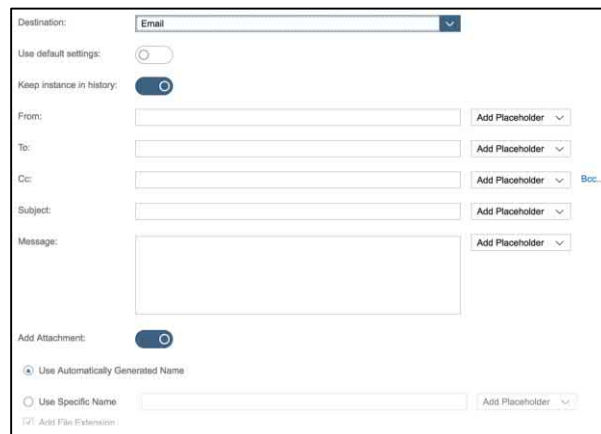
While viewing scheduled report instances (demonstrated in the Schedule Reports section) is invaluable for sharing interactive report content, you may also wish to e-mail report output to others who are not able to log in to Crystal Server directly.

This rich SAP Crystal Server 2016 capability permits wide distribution of content, in a variety of file formats, to anyone with an e-mail program.

1. Navigate to the Report Samples > Demonstration folder.
2. Click the ellipses  in the far right column of the Order Processing Efficiency Dashboard and select Schedule from the context menu.
3. Select Recurrence in the schedule panel. Note the default Now recurrence. Leave this default as-is to run the report one time immediately.
4. Select Formats in the schedule panel. Examine the dropdown list of available file formats.



5. Select PDF. Note the ability to select a range of pages, or all pages in the report.
6. Select Destinations in the schedule panel. Examine the dropdown list of available destinations.
7. Select Email.



8. Type desired e-mail addresses into the From and To boxes (if you want to send to more than one recipient, separate multiple e-mail address in the To box with commas).


9. Provide a meaningful Subject.


10. Type the word The followed by a space into the message text box.

11. Click  to the right of the Message text box. Note the various automatic values that can be inserted into the message of the e-mail.

12. Select Title. Notice that %SI_NAME% is inserted after the text you typed – this will insert the title of the report into the e-mail automatically. Now type report is attached in .PDF format. to describe to the recipient what the e-mail contains.

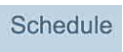
13. Click the Use Specific Name radio button under File Name. This lets you provide a meaningful name for the e-mail attachment, rather than the cryptic “unique identifier” filename automatically generated by the server.

14. Click  to the right of the Use Specific Name text box. Select Title. Notice that %SI_NAME% is inserted. This will attach a file with the same name as the report to the e-mail.


15. Click the  button in the lower right.


16. Display the history list and follow the progress of the instance. Because the demo server is not configured to actually send e-mail, the process will fail. A properly-configured server would send an e-mail with the report attached in PDF format.


17. Close the report's history list by clicking the left arrow  at the upper left of the screen.

18. Examine all the reports you scheduled in one convenient place by clicking  at the top of the screen.

18. Click any column of a desired report to view the instance.

19. Click  at the upper left of the screen to move back to the scheduled report list.

20. Click the ellipses  in the far right column of a desired report. Select View to view the instance or Run Now to schedule the report to run again immediately.

21. Click the  down arrow to view of list of all open reports. Click the small x as necessary to close all open reports.



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