

Crystal Report Delivery User Guide

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CR Delivery version: 1.0.10

Contents

Crystal Report Delivery User Guide 1

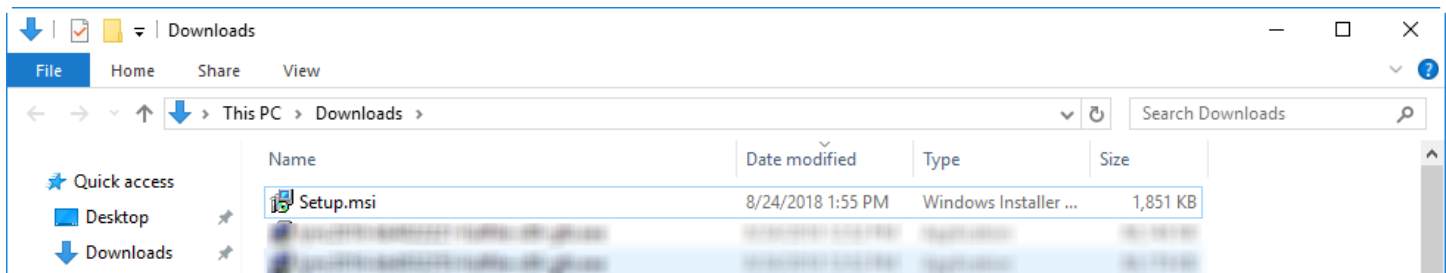
Install Crystal Report Delivery..... 3

Setup a Crystal Report Delivery File..... 5

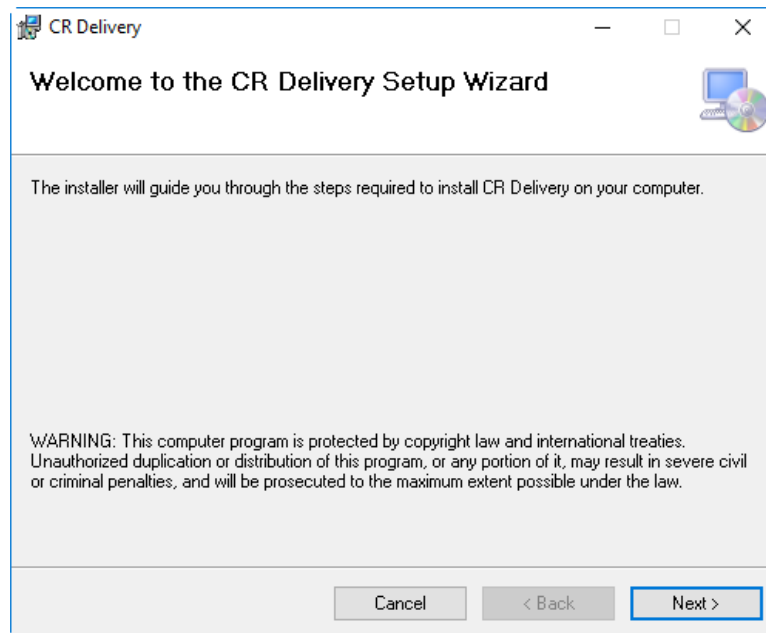
Schedule the CR Delivery through NextGen BBP 8

Install Crystal Report Delivery

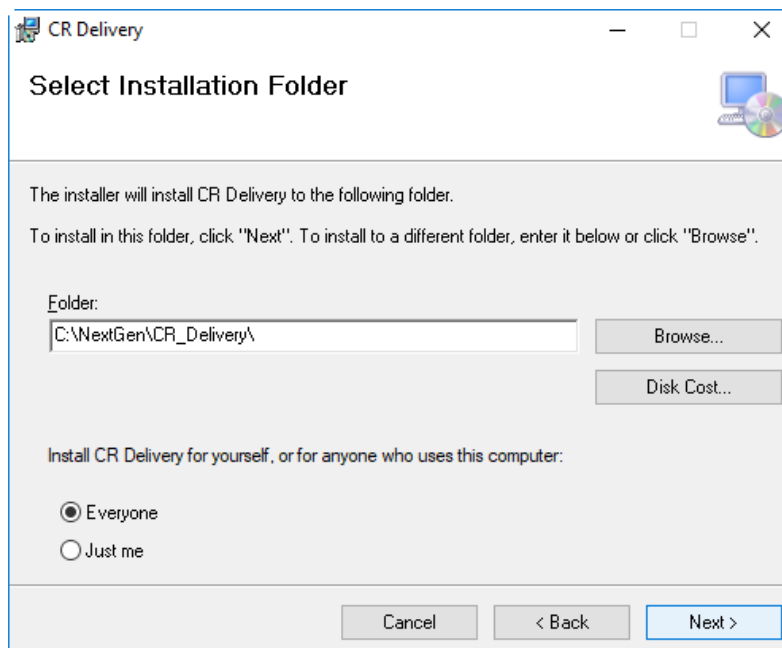
- 1.) Download the installer
- 2.) Install the package.



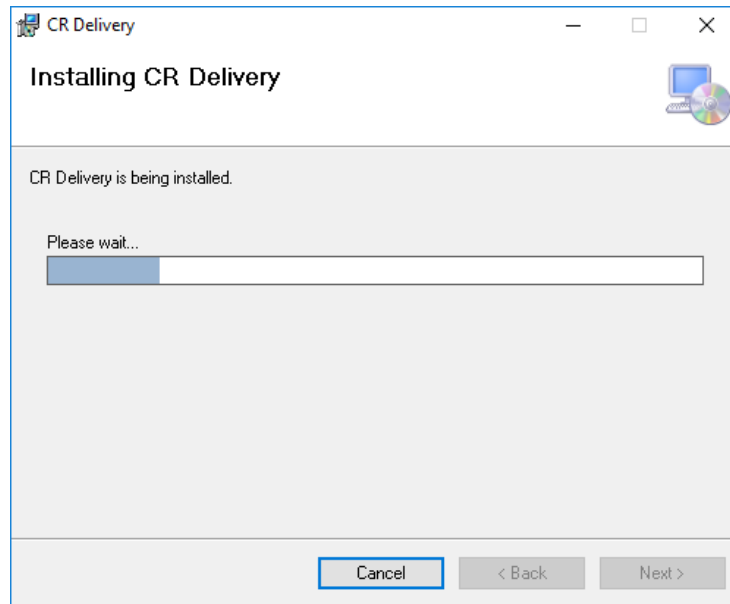
- 3.) Follow the installing instructions.



- 4.) The installation path needs to be the local NextGen folder.



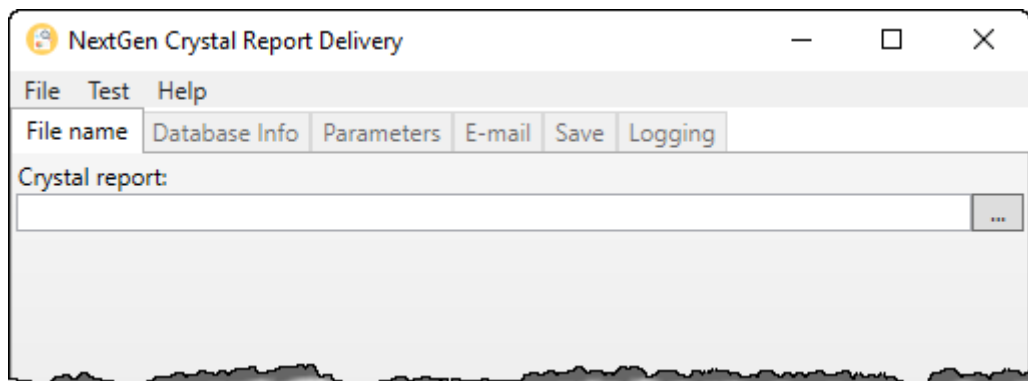
5.) Click Next and finish to install the application.



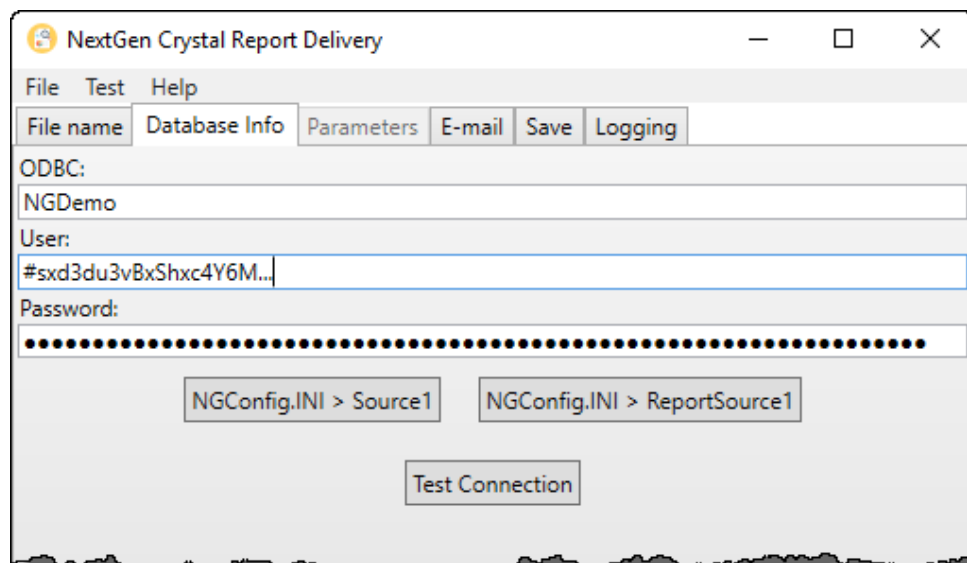
6.) Click Finish. Installation is completed.

Setup a Crystal Report Delivery File

- 1.) Place the desired custom crystal report in a folder accessible by the BBP service.
- 2.) Access the CR Delivery application.

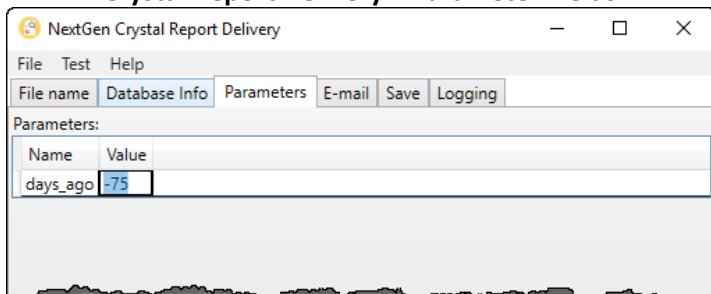


- 3.) On the File name tab, use the ellipsis button and browse to the report.
- 4.) On the Database info tab, add the desired ODBC connection to be used for the report
 - a. Two buttons at the bottom can pull in the NextGen NGConfig details for the source indicated.

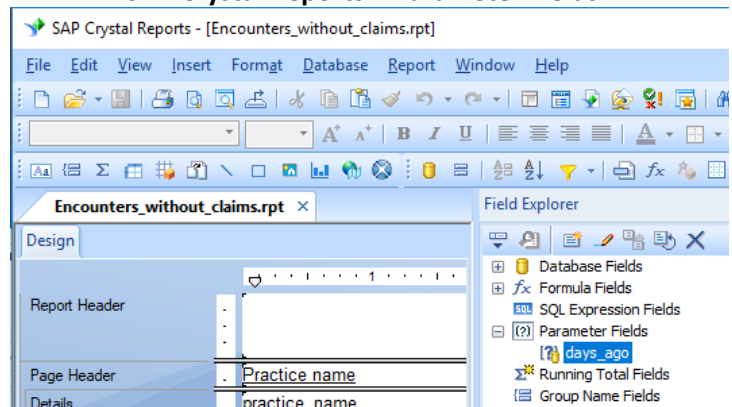


- b. Use the Test Connection button to verify the INI values will properly allow connection to the ODBC.
- 5.) If the parameter tab is active, the report has an input to define. Enter a value for all parameters in the list.

Crystal Report Delivery – Parameter Fields



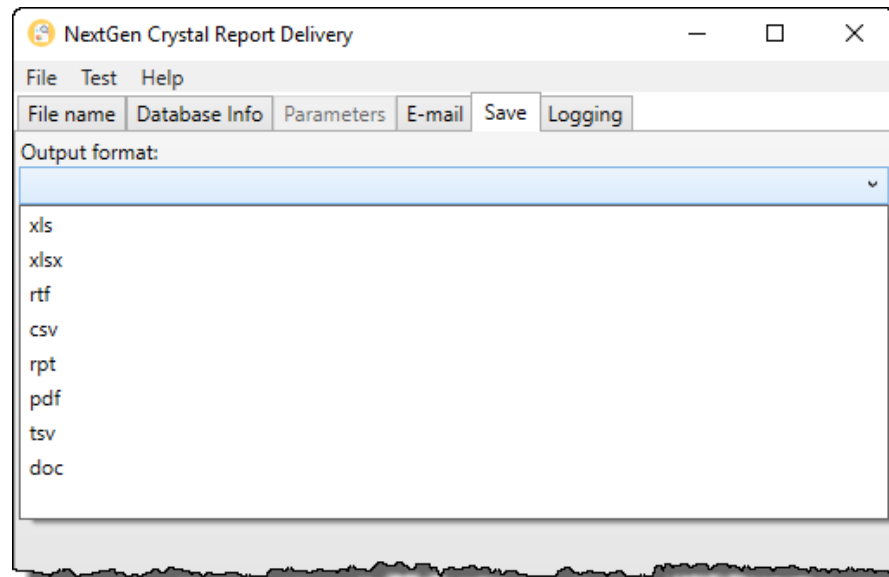
SAP Crystal Reports – Parameter Fields



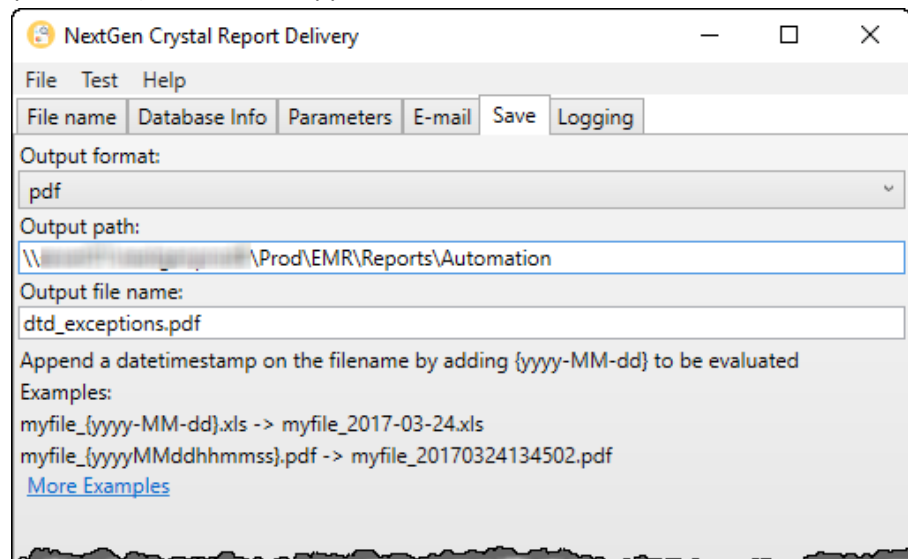
6.) Set the desired report output(s) by filling in the E-mail or Save tabs.

a. Save requires a file type, a file path, and a file name.

i. File types supported are selections in the “Output format” drop down box.

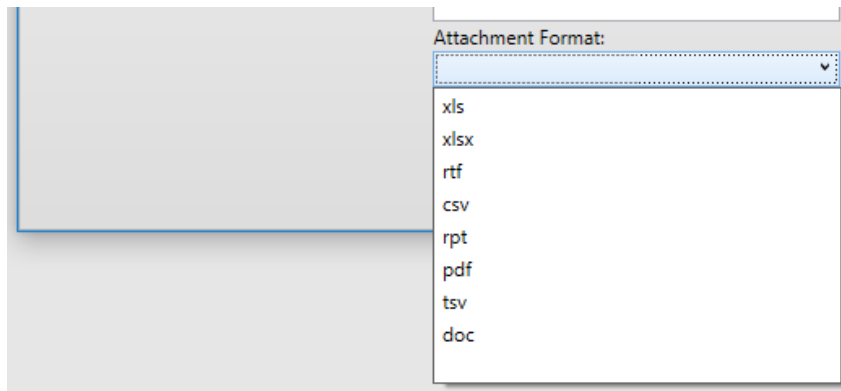


ii. Note that the file name can have a timestamp pattern (e.g. {yyyy-MM-dd}) to append to the exported file) if desired. Supports [Microsoft custom date and time format strings](#).

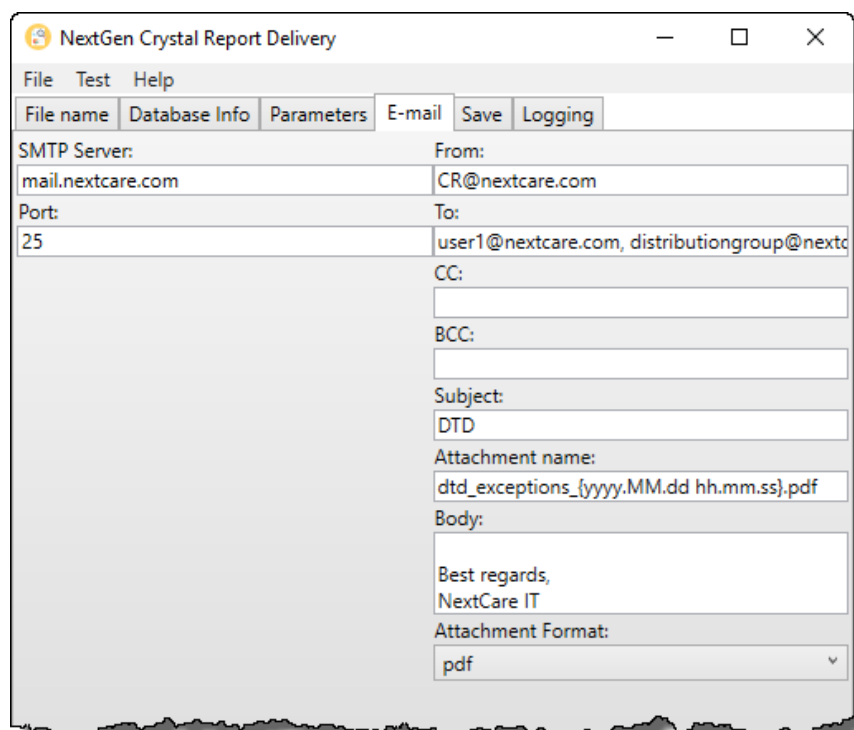


b. E-mail requires SMTP server detail, email destination addresses, a subject, body, filename to be attached to the email, and a file type.

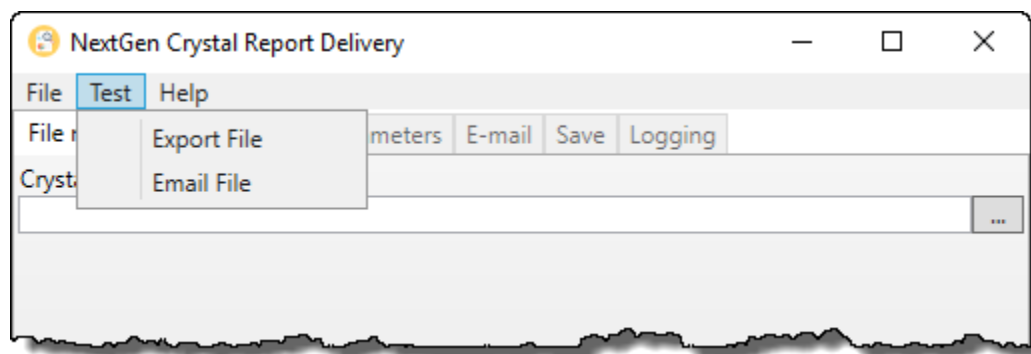
i. File types supported are selections in the “Output format” drop down box.



- ii. Note that the file name can have a timestamp pattern (e.g. {yyyy-MM-dd}) to append to the email file attachment) if desired. Supports [Microsoft custom date and time format strings](#).
- iii. Multiple email addresses can be entered in the To, Cc, and Bcc fields separated by either a comma or semicolon.



7.) Test any of the outputs if you wish to verify the configuration by picking the output method from the Test menu.



8.) Save the configuration into a *.cxml file and save it in a path similar to the report from step 1.) above.

Schedule the CR Delivery through NextGen BBP

- 1.) Access the NextGen BBP app
- 2.) Create a package with one step to call the crxml file created in step 8.) above
- 3.) The one step should be a User-Specified Application setup as follows:

Job Properties

Job number:

Job name:

Job type:

Run as practice:

Upon completion:

Notification e-mail:
(separated by commas)

Available NextGen Users and Groups:

On success / failure flow

If job succeeds, then:

If job fails, then:

Enabled? ☒

Settings

Setting Name	Value
User-Specified Application	C:\NextGen\CR_Delivery\cr_delivery.exe
Command Line Arguments	Reports\Automation\Encounters_without_claims_75days.crxml
Use Database For Exit Code	No
Job runtime alert setting (minute...)	30 Minutes
Job runtime alert email	@nextcare.com

OK Cancel

- a. Currently the BBP does not support running non-EXEs without failure (Reference KI75546). When this is resolved, the crxml file can be called directly once associated with the CR Delivery application.
- 4.) On the BBP package, set a schedule to deliver the report to the business unit on the desired frequency.