

Crystal Report Delivery User Guide

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CR Delivery version: 1.0.8

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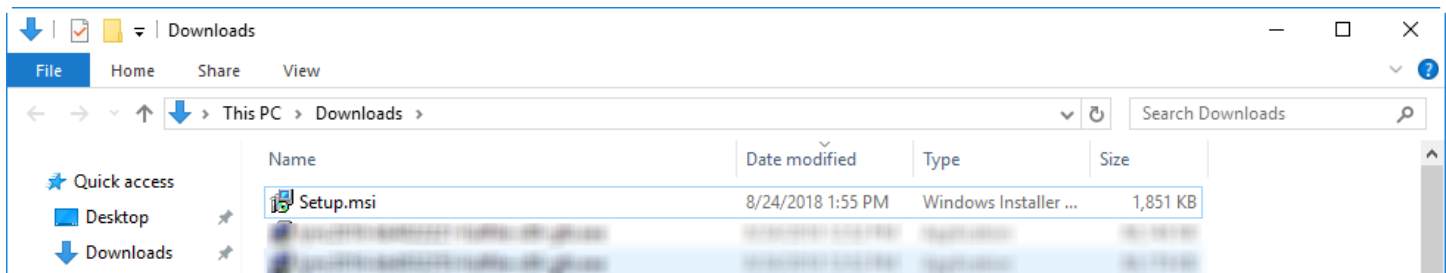
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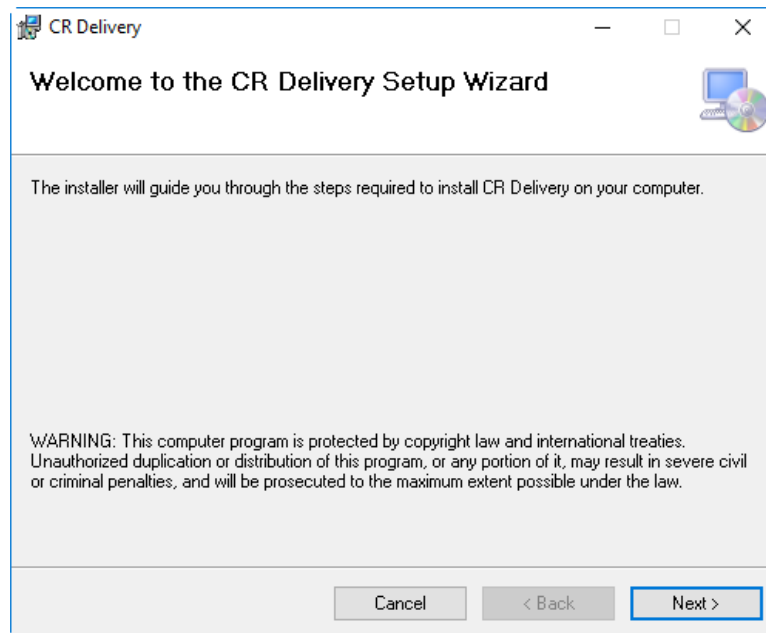
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Install Crystal Report Delivery

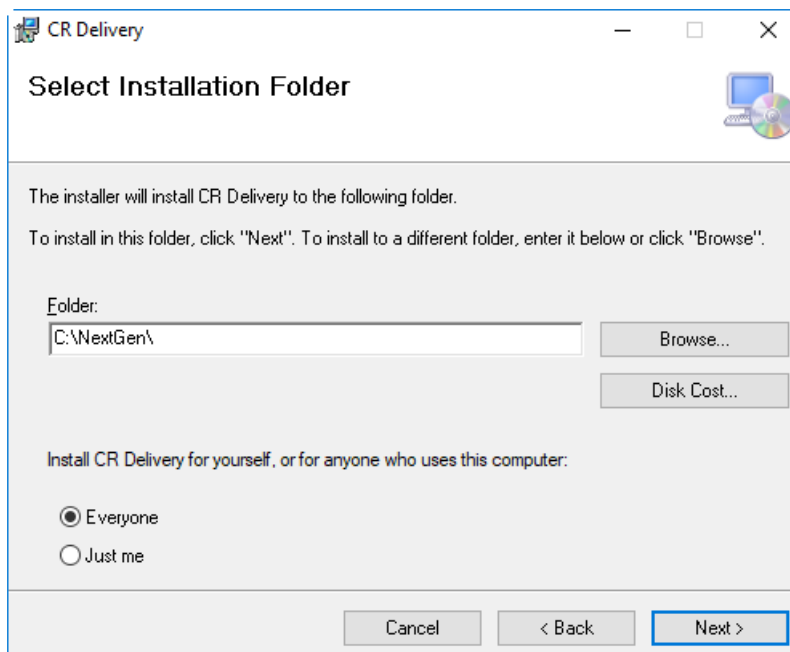
- 1.) Download the installer
- 2.) Install the package.



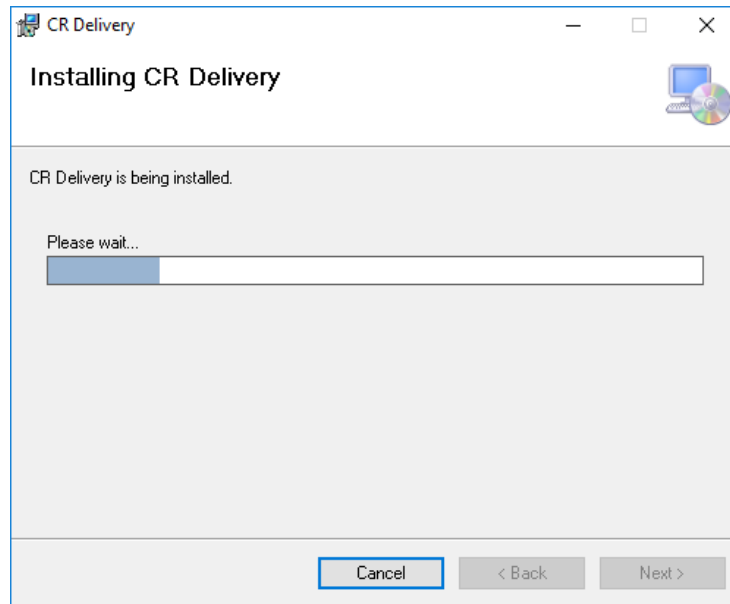
- 3.) Follow the installing instructions.



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



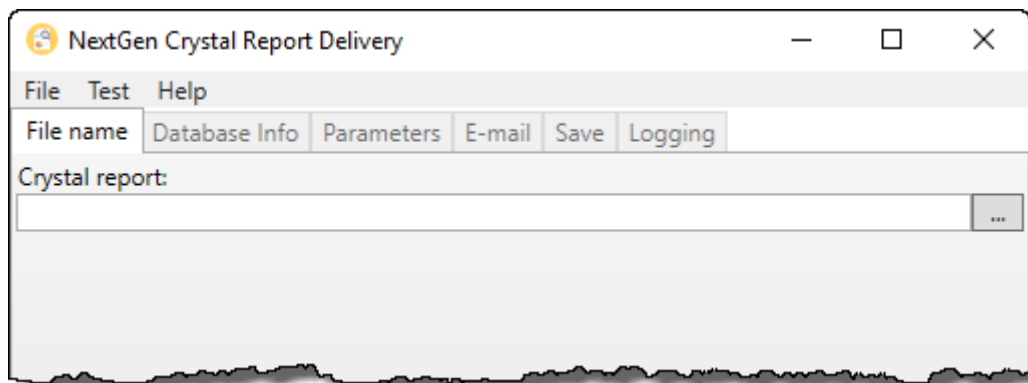
5.) Click Next and finish to install the application.



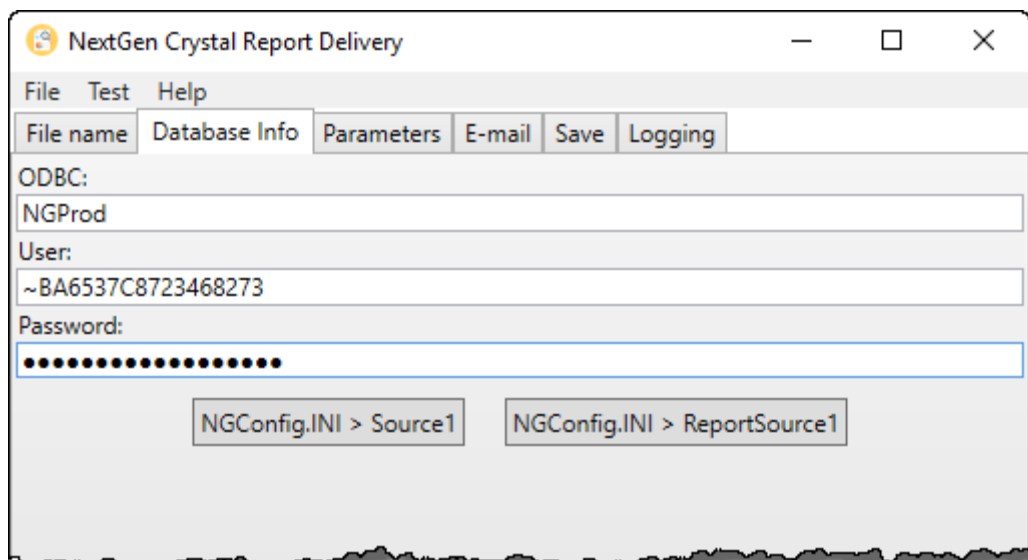
6.) Click Finish. Installation is completed.

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.

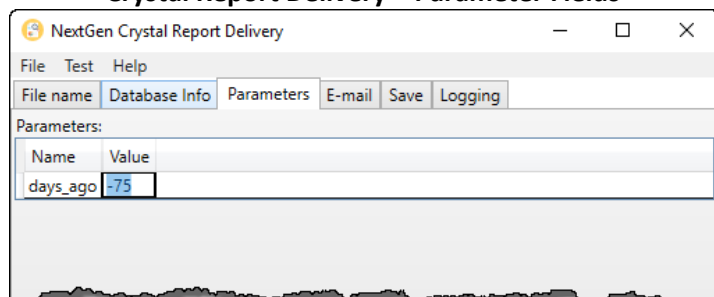


- 3.) On the File name tab, use the ellipsis button and browse to the report.
- 4.) On the Database info tab, add the desired ODBC connection to be used for the report
 - a. The two buttons at the bottom will pull in the NextGen NGConfig details for the source indicated.

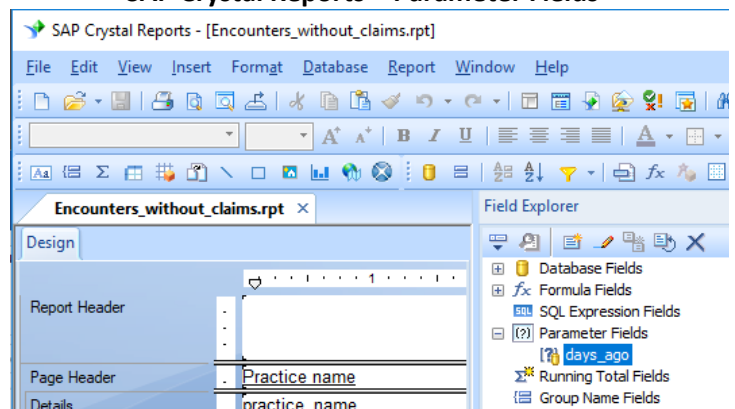


- 5.) If the parameter tab is active, the report has an input to define. Enter a value for all parameters in the list.

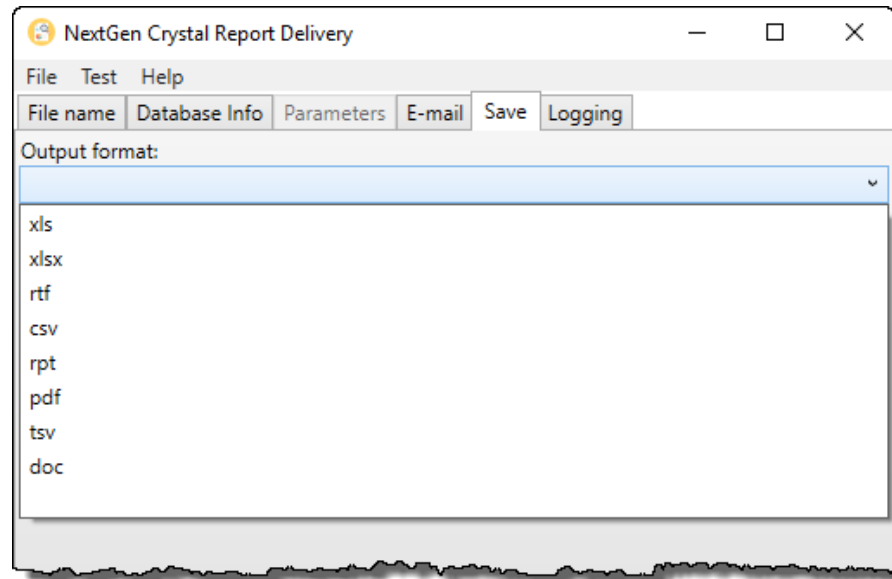
Crystal Report Delivery – Parameter Fields



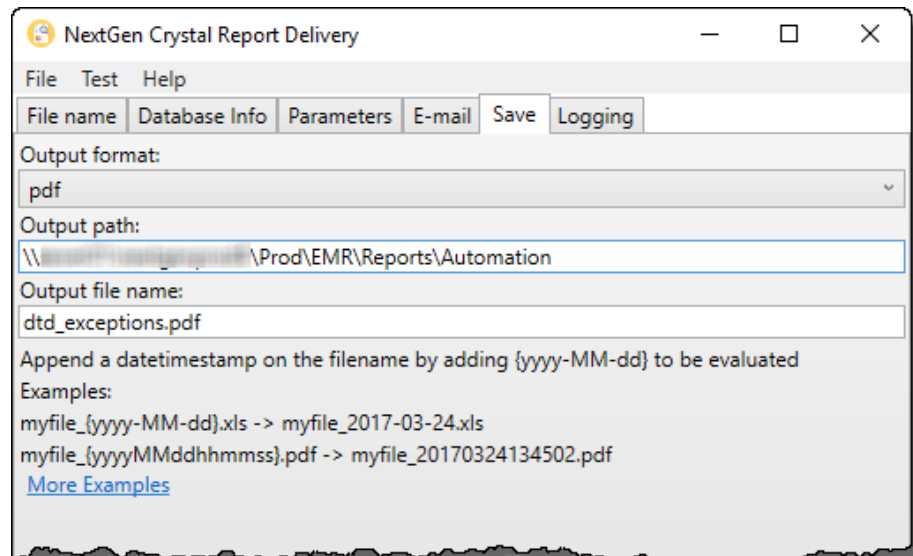
SAP Crystal Reports – Parameter Fields



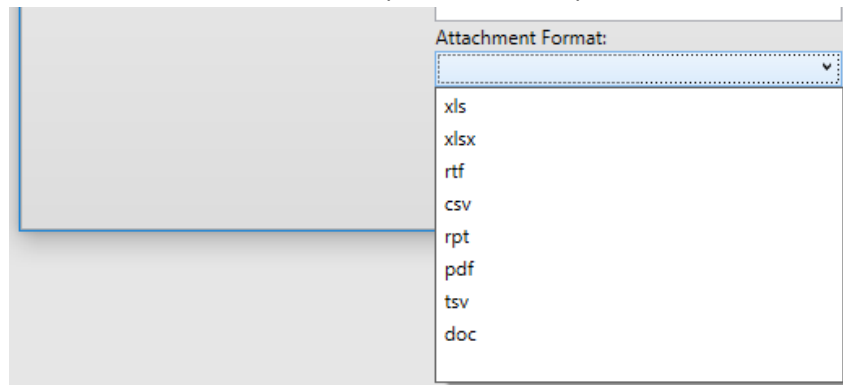
- 6.) Set the desired report output(s) by filling in the E-mail or Save tabs.
- a. Save requires a file type, a file path, and a file name.
 - i. File types supported are selections in the “Output format” drop down box.



- 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.

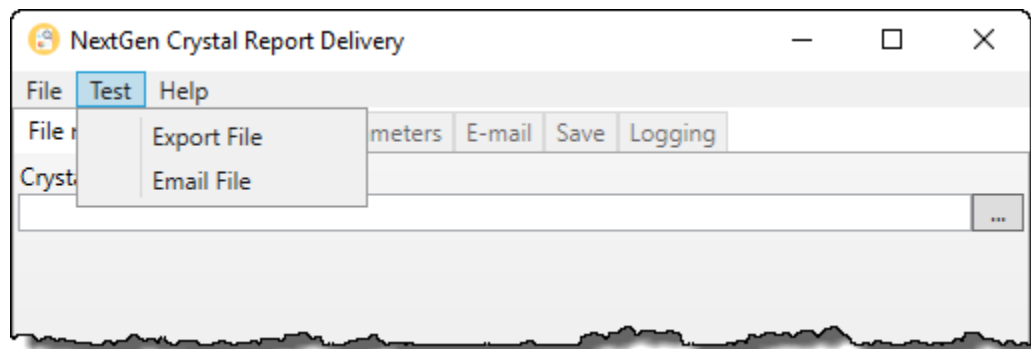


- ii. Note that the file name can have a timestamp pattern (e.g. {yyyy-MM-dd}) to append to the email file attachment) if desired. Supports [Microsoft custom date and time format strings](#).
- iii. Multiple email addresses can be entered in the To, Cc, and Bcc fields separated by either a comma or semicolon.

The screenshot shows the 'NextGen Crystal Report Delivery' application window with the 'E-mail' tab selected. The configuration fields are as follows:

Field	Value
SMTP Server:	mail.nextcare.com
Port:	25
From:	CR@nextcare.com
To:	user1@nextcare.com, distributiongroup@nextc
CC:	
BCC:	
Subject:	DTD
Attachment name:	dtd_exceptions_{yyyy.MM.dd hh.mm.ss}.pdf
Body:	Best regards, NextCare IT
Attachment Format:	pdf

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 cxml 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: [Click to select Mail Recipient\(s\)](#)

On success / failure flow

If job succeeds, then:

If job fails, then:

Enabled? ☒

Settings

Setting Name	Value
User-Specified Application	C:\NextGen\cr_delivery.exe
Command Line Arguments	...Prod\EMR\Reports\Automation\dtd_exceptions.crxml
Use Database For Exit Code	No
Job runtime alert setting (minutes):	15 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.