

Crystal Report Delivery User Guide

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CR Delivery version: 1.1.3

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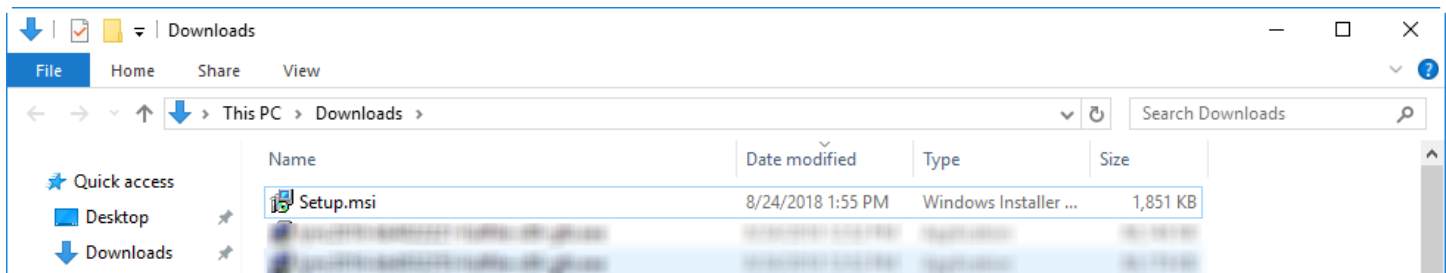
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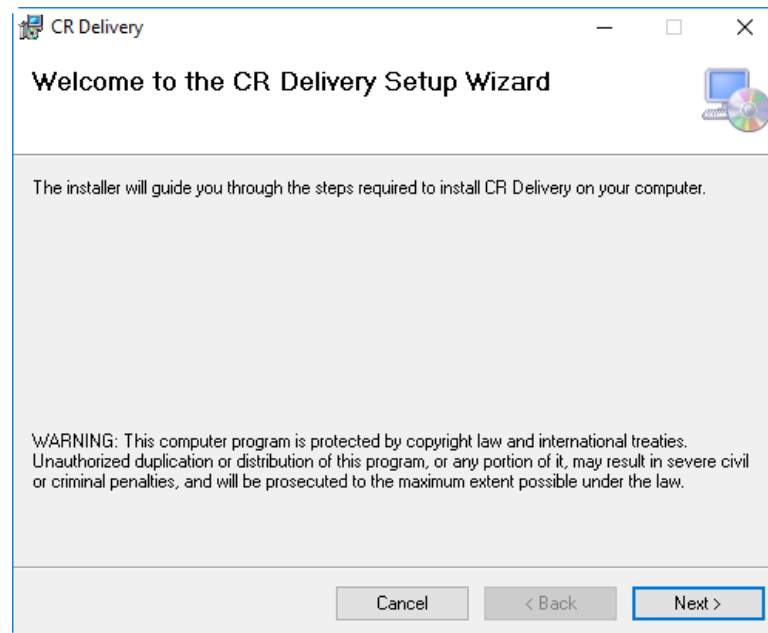
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Install Crystal Report Delivery

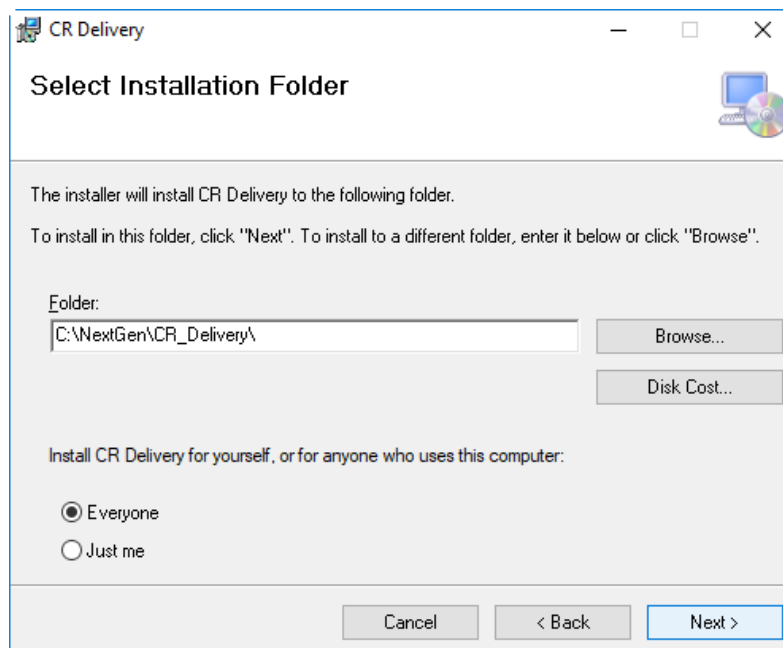
- 1.) Download the installer
- 2.) Install the package.



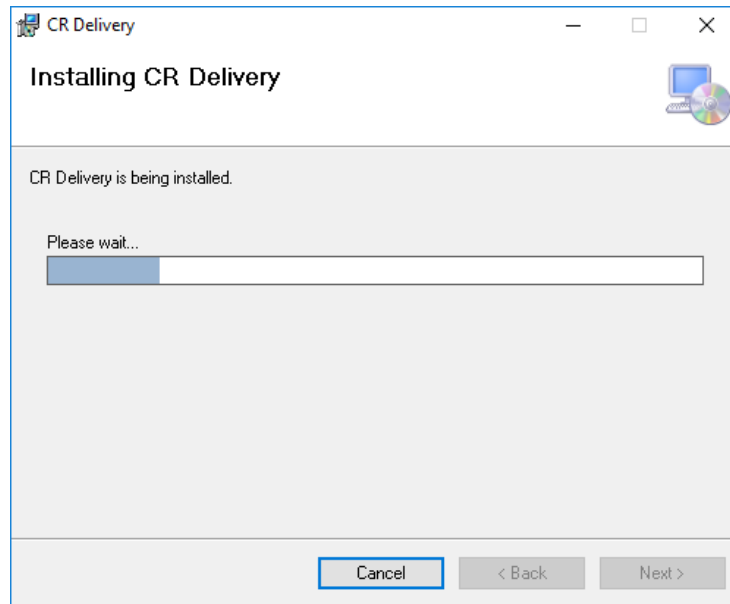
- 3.) Follow the installing instructions.



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



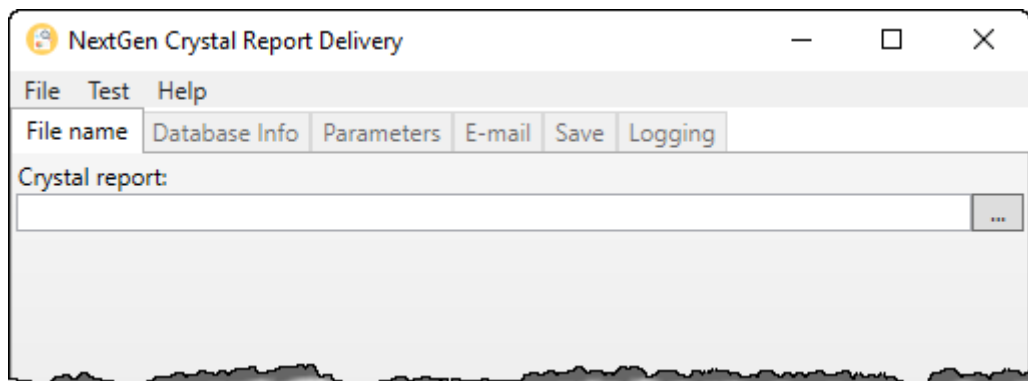
5.) Click Next and finish to install the application.



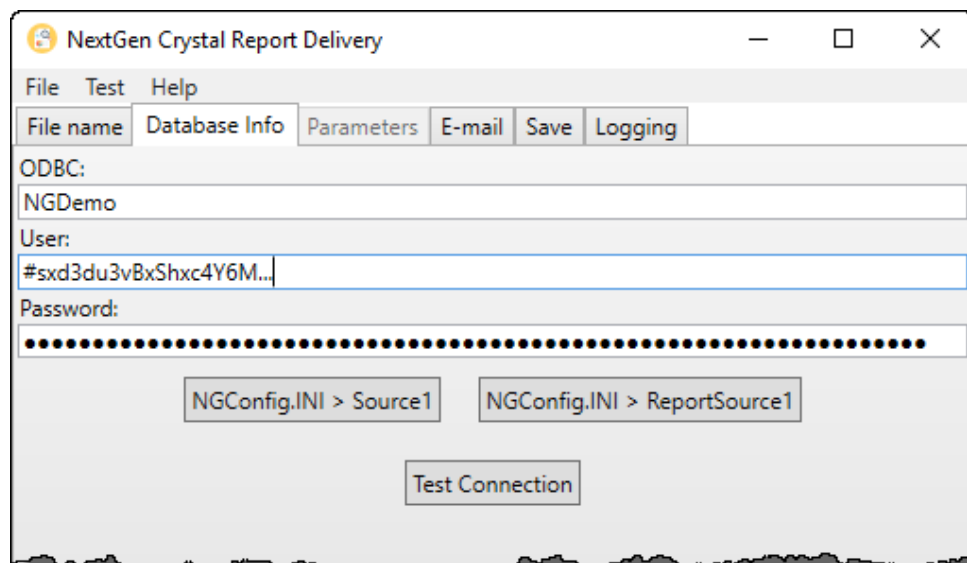
6.) Click Finish. Installation is completed.

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.

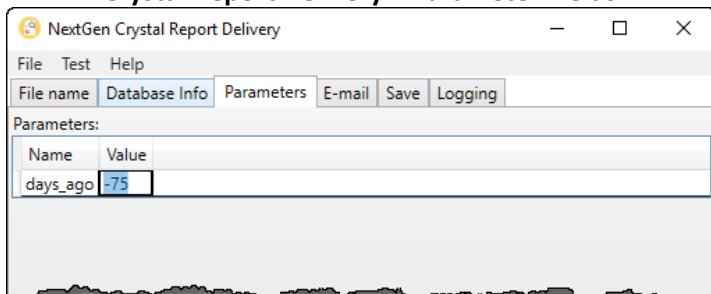


- 3.) On the File name tab, use the ellipsis button and browse to the report.
- 4.) On the Database info tab, add the desired ODBC connection to be used for the report
 - a. Two buttons at the bottom can pull in the NextGen NGConfig details for the source indicated.

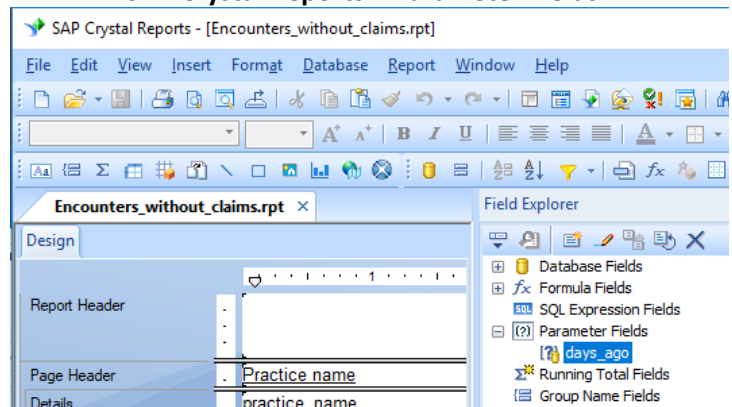


- b. Use the Test Connection button to verify the INI values will properly allow connection to the ODBC.
- 5.) If the parameter tab is active, the report has an input to define. Enter a value for all parameters in the list.

Crystal Report Delivery – Parameter Fields



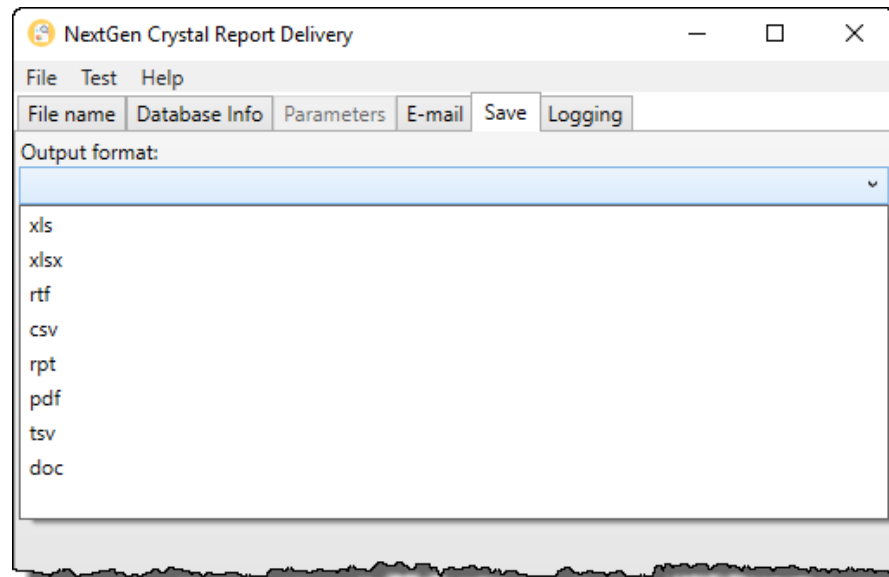
SAP Crystal Reports – Parameter Fields



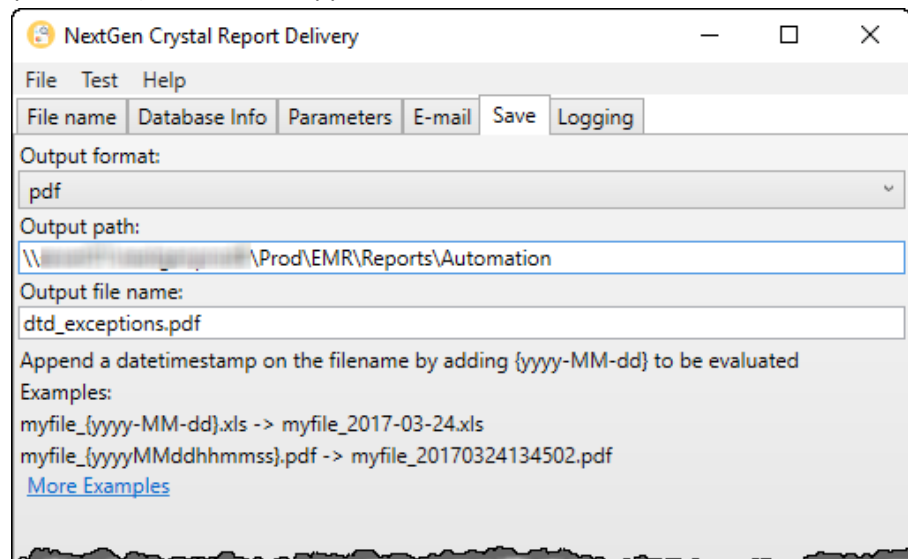
6.) Set the desired report output(s) by filling in the E-mail or Save tabs.

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.

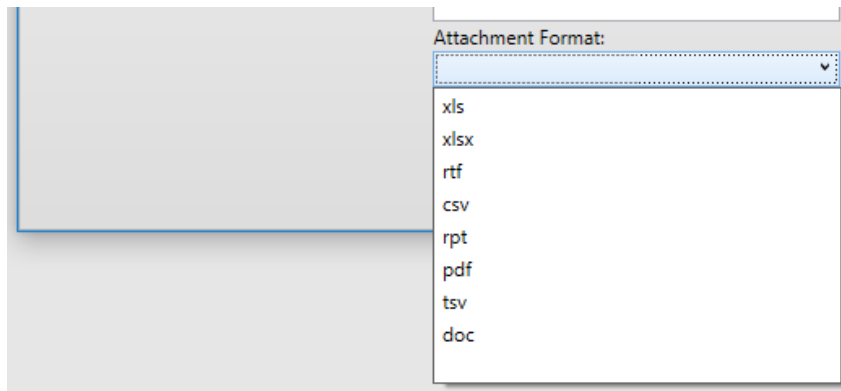


ii. Note that the file name can have a timestamp pattern (e.g. {yyyy-MM-dd}) to append to the exported file) if desired. Supports [Microsoft custom date and time format strings](#).

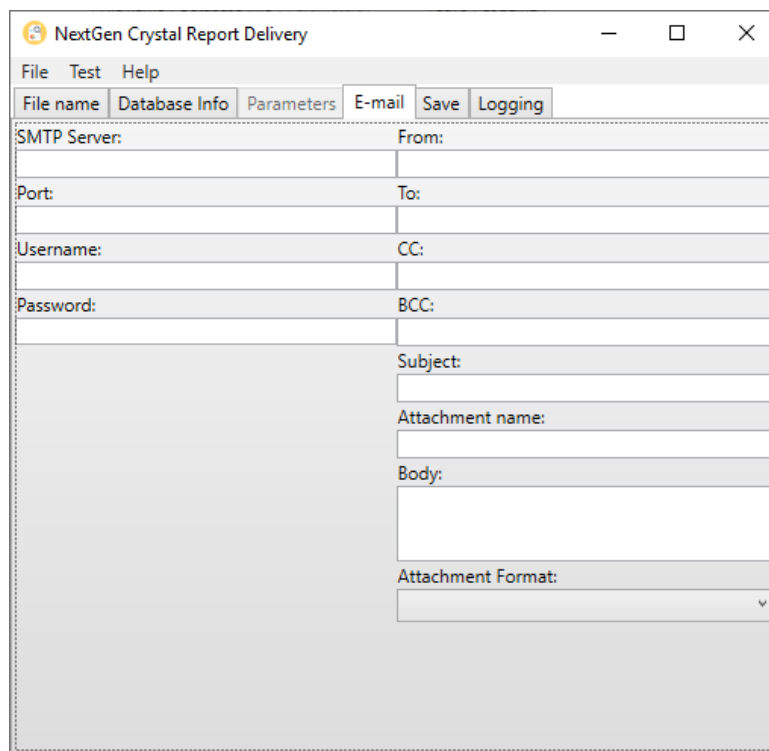


b. E-mail requires SMTP server detail, email destination addresses, a subject, body, filename to be attached to the email, and a file type.

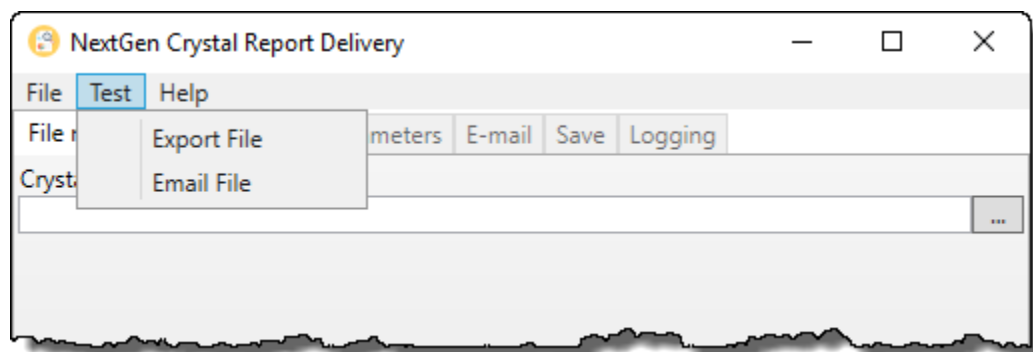
i. File types supported are selections in the “Output format” drop down box.



- 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.
- iv. Username and password are optional fields to authenticate as a user instead of sending anonymously.



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 *.crxml 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.