

Quick Start User Guide

Accessing CSS Web



The screenshot shows a web browser window displaying the CSS Web Portal login interface. The header includes the CSS Christian Steven logo and a globe icon. The login form contains the following elements:

- User ID: Rcarter
- Password: [Masked with dots]
- Remember Me:
- Sign In button

Open your Web browser. Follow the appropriate link to the CSS Web Portal provided by your CRD Administrator.

User ID: Enter the User ID associated with your account. Login information is supplied to you via your CRD Administrator.

Password: Enter your password. This would also be supplied to you by your CRD administrator.

Remember Me: CSSWeb will remember your user credentials.

Click on Sign in to begin.

Setting Up a Schedule

A schedule is an item in CRD and CSSWeb that is created for the purpose of executing a specific task. This usually revolves around three different actions:

1. Running a Report
2. Executing a Task (ie updating a database, or deleting a file)
3. Running Both tasks and reports

Moreover a schedule can be run in three different ways:

1. On a specified date or time
2. On demand (manual executing the schedule within CSSWeb)
3. Event Based (based on triggers in data, files, etc)

Knowing this, you can create a schedule based on your objective.

Example: Billy needs to send a report to his team every morning at 8AM via email.

Solution: Make a single report Schedule scheduled to run at 8AM every weekday. The destination will be email, with the addresses of each team member indicated in the schedule.

Example: Randy wants to access his reports when the need arises. The report should be sent to his desktop.

Solution: Create a single report schedule with no timing. The destination will be disk, indicating the exact machine and folder where the report will be exported. Randy will log into CSSWeb, right click and execute the schedule at will.

Setting Up a Schedule

This quick guide will guide you through setting up a typical schedule. For a more in depth look at schedule creation, take a look at the full guide for each schedule type:

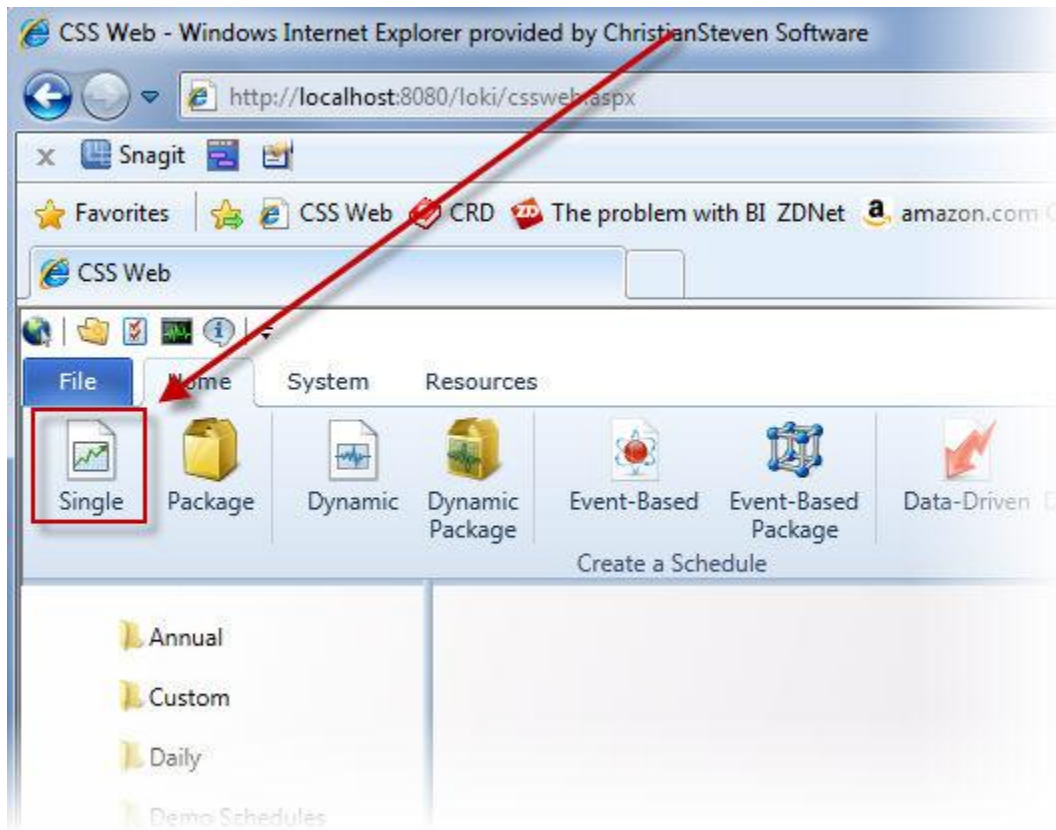
Single Schedule
Package Schedule
Dynamic Package
Data-Driven Package
Bursting Schedule
Event Based Schedule

Step 1. Log into CSSWeb

Access CSSWeb

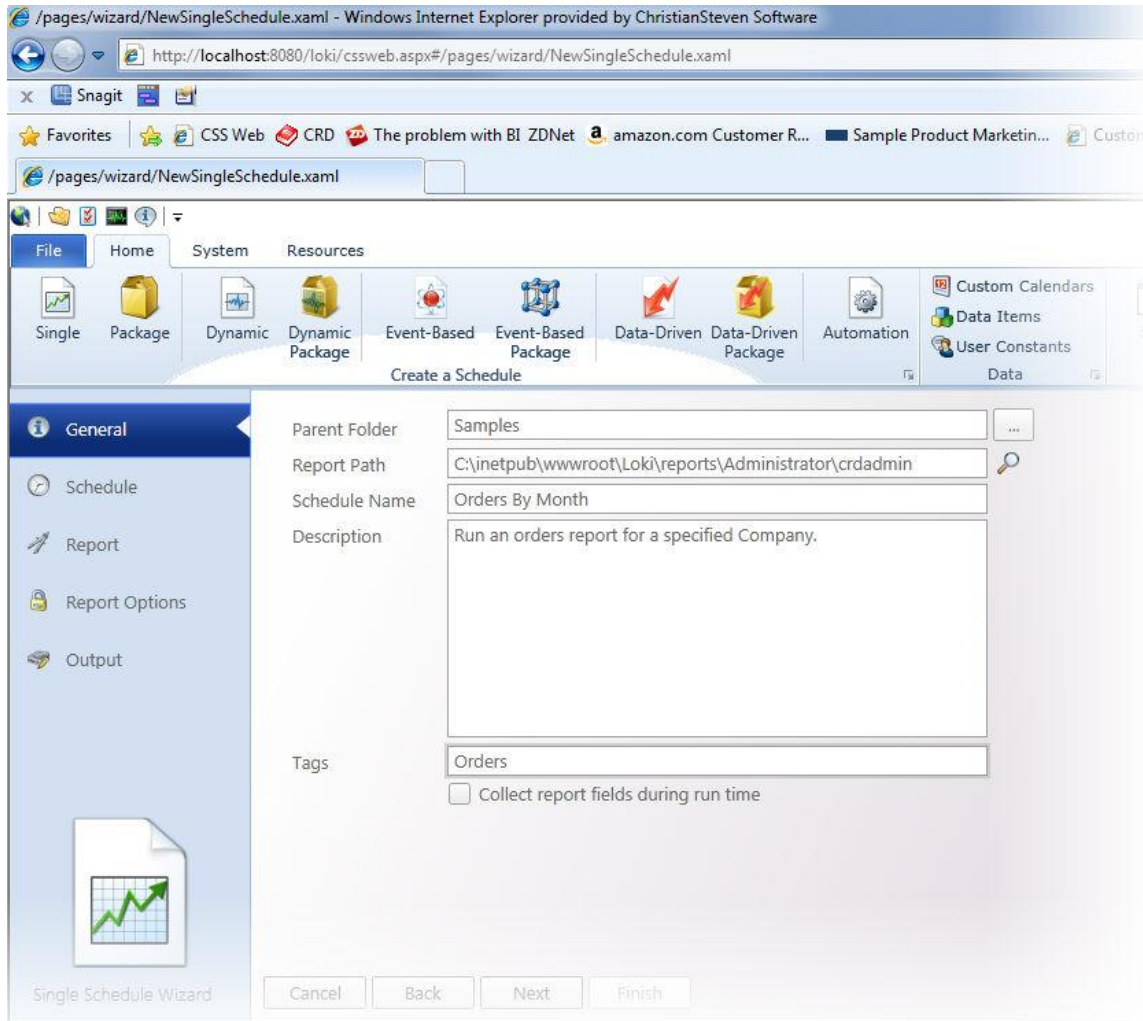
Step 2. Select a Schedule Type

Based on your objective decide what type of schedule you will need to create. In this quick start guide we will use a single schedule.



Select Single Schedules found in the home tab. The wizard will begin.

Step 3. Select the Report and Name the Schedule



In the General section, you will determine which folder will your schedule will be stored, select the report that needs to be executed, and describe the report.

Parent Folder: Decide which folder will the schedule be stored. This is not a folder in your file system, rather a CSSWeb specific folder. This is how your schedules are organized.

Report Path: click on the magnifying glass to browse to your report. This can be any report on your machine or a shared drive.

Schedule Name: Name your schedule. By default CSSWeb will pull in the name of the report.

Description: Describe the schedule.

Tags: Add keywords to your schedule. This is helpful when you are searching for a specific schedule or if you are using smart folders.

Collect report fields during run time: CSSWeb can interrogate the report for fields. Later, these fields can be used as inserts to customize the destination, or output.

Once you have completed the above, click next.

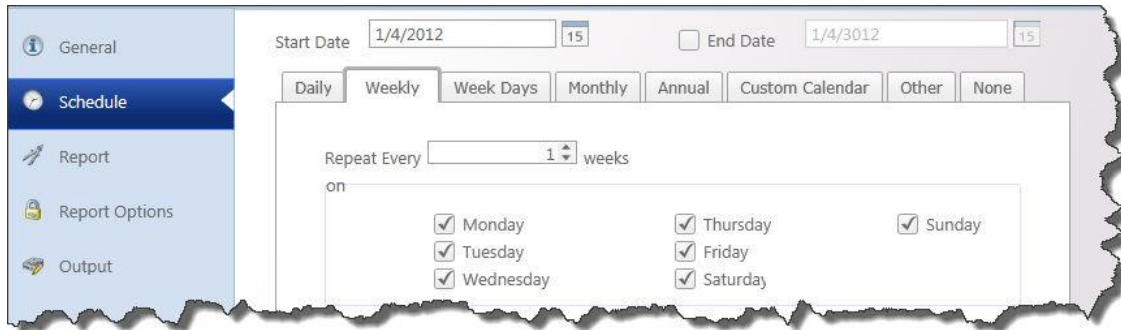
Step 4. Set the Schedule (if any)

The screenshot shows the 'Single Schedule Wizard' interface. The ribbon includes 'File', 'Home', 'System', and 'Resources'. The 'Resources' ribbon has buttons for 'Single', 'Package', 'Dynamic', 'Dynamic Package', 'Event-Based', 'Event-Based Package', 'Data-Driven', 'Data-Driven Package', 'Automation', 'Custom Calendars', 'Data Items', and 'User Constants'. The 'Create a Schedule' group is active. The 'Schedule' tab is selected in the left sidebar. The main area shows 'Start Date' as 1/4/2012 and 'End Date' as 1/4/3012. The 'Daily' frequency is selected. The 'Repeat Every' field is set to 1 days. The 'Schedule time' is 8:00 AM. The 'Next run on' is 1/4/2012 at 2:30 PM. The 'Repeat Every' field is set to 0.25 Minutes. The 'Enable this schedule' checkbox is checked. Buttons for 'Cancel', 'Back', 'Next', and 'Finish' are at the bottom.

This section determines when your schedule will be set to execute the report. CSSWeb can schedule your report in a plethora of ways.

Daily: Schedule the report to run every day or in an interval of days (i.e. every 3 days).

Weekly: Execute a schedule on a weekly basis. This can be weekly intervals (i.e. every 5 weeks) Also you can specify the day or days of the week the schedule will execute.



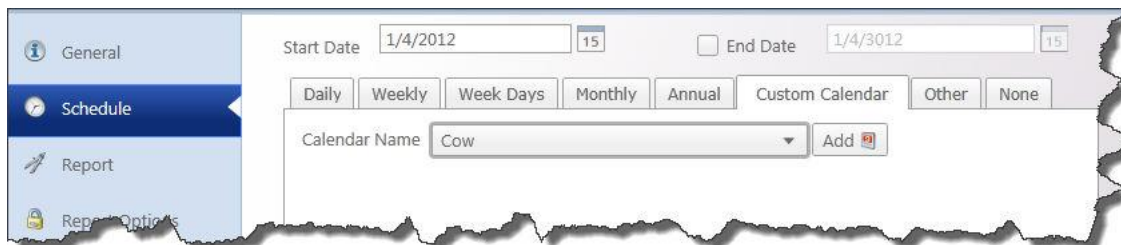
Week Days: Only run the report between Monday and Friday.

Monthly: Execute the schedule on a monthly basis. You can choose the day of the month and the instance of the day the task should occur. (i.e. the 2nd Sunday of the month).

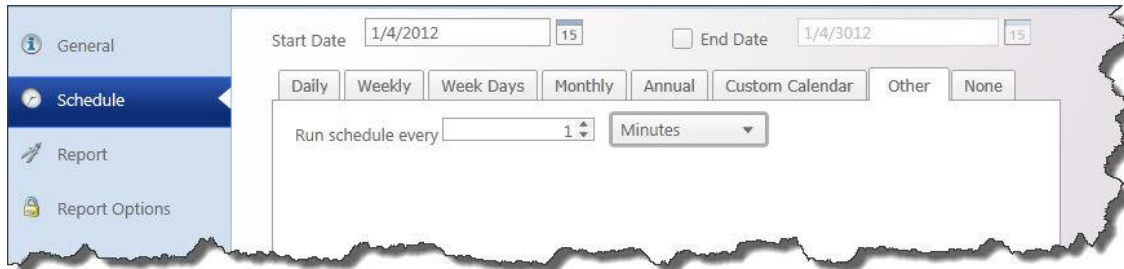


Annual: Run the report once a year on a specified date.

Custom Calendar: Run the report based on a customized calendar. Use the dropdown list to use a previously created calendar, or the Add button to create a new calendar for use. For more info check out Custom Calendars.

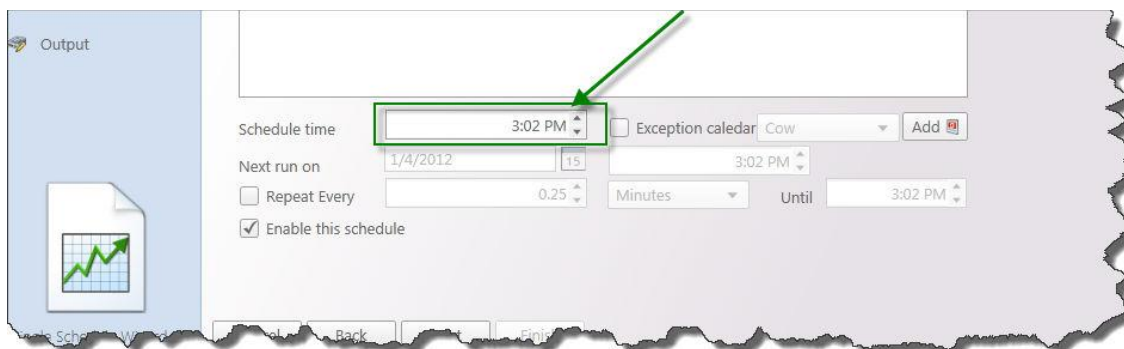


Other: Other options for running a schedule such as run every 5 minutes.



None: The schedule will not run at a specified time. Manual execution.

Next Set the schedule time.



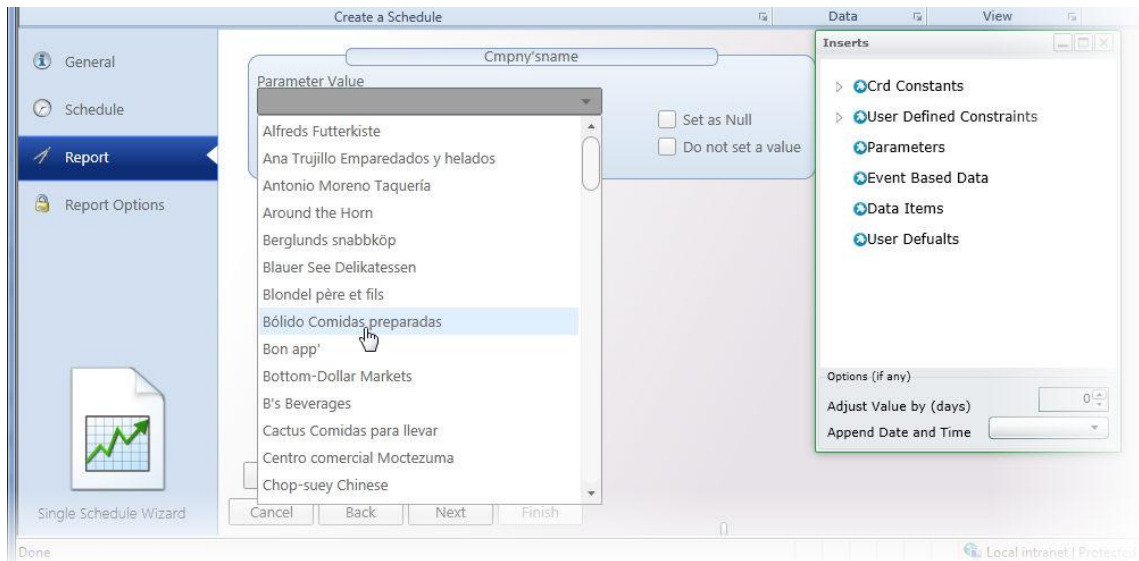
Exception Calendar: Similar to a custom calendar, an exception calendar determines when a schedule WILL NOT run. For example, you would create a holiday custom calendar to prevent CSSWeb from running the schedule on holidays. See Custom Calendars for more info.

Repeat Every: repeat a schedule for certain intervals.

Enable this schedule: check this box if you desire for it to be enabled. If you want to create it disabled (as in it will not run unless commanded manually), uncheck the box.

Click Next to set your report parameters.

Step 5. Setting the Reports Parameters (if any)



If your report has parameters, you can set them here. CSSWeb will interrogate your reports and display parameters and their values here. If parameters are not displaying then please ensure the following:

1. The parameters are not hidden
2. They are set to be prompted at run time
4. They are being used in the Crystal Report

From the dropdown lists, select the parameter values that CSSWeb will populate when the report runs. select the value for which the report will run.

Set as Null: The report value will be set to null at run time.

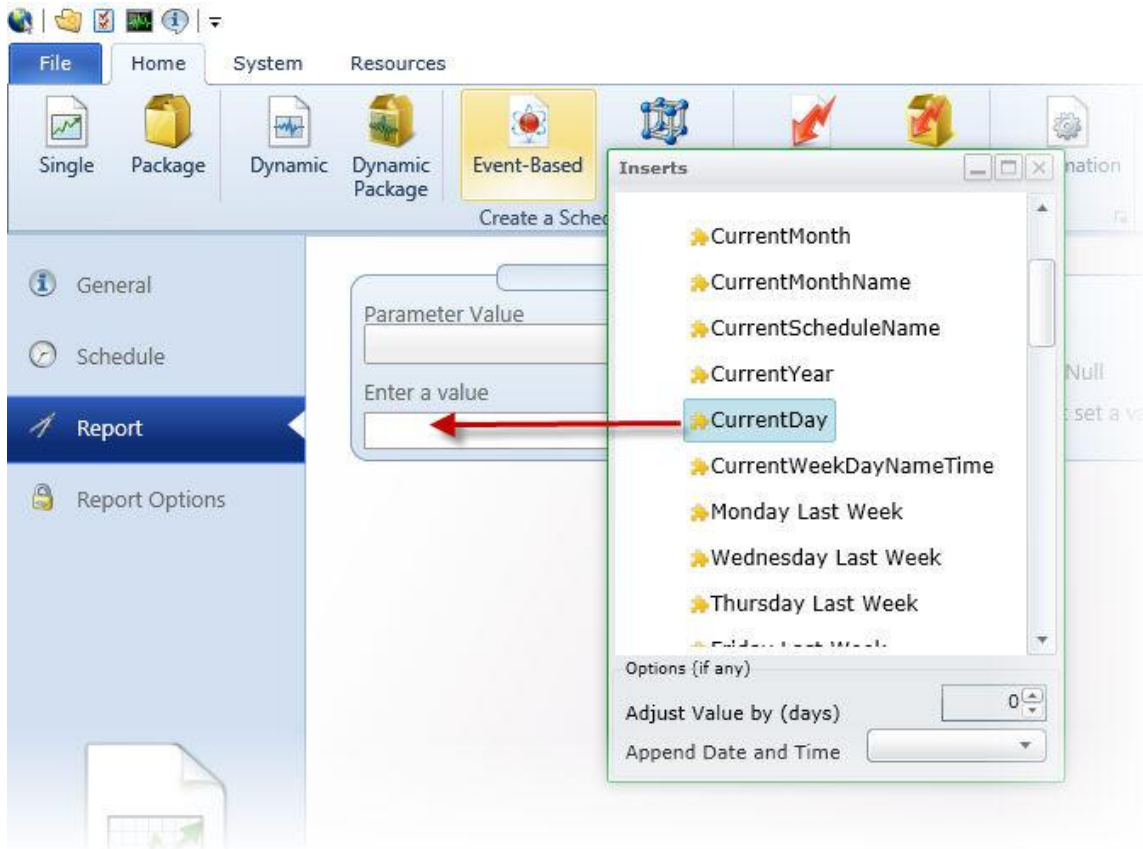
Do not set a value: Different from setting a value to null, the parameter will be ignored all together.

Formulae: You can parse, and edit formulae in your Crystal Report.

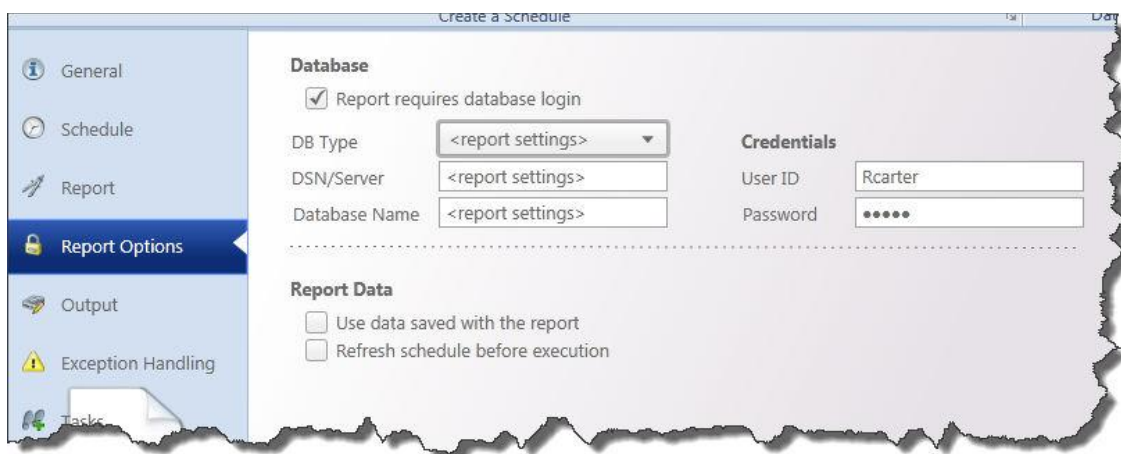
Using Inserts

You can use inserts to plant data items, constants, or user defaults into your parameters.

for example if you have a Date Parameter you can simply drag and drop a constant value such as Current day or Current day minus 7.



Step 6. Report Options



This section sets database authentication for your report, as well as report data options.

Database Type, Server, and Name: By default CSSWeb will use the report settings to determine which database the report will run against. However if you need to specify the database, it can be done here. If you do not have this info, contact your administrator.

Credentials: Place your database authentication information here. If you do not have this info, and your report/database requires this, contact your administrator.

Report Data

Use data saved in the report: If your Crystal Report is saved with data, then use the saved data at run time.

Refresh Schedule Before Execution: CSSWeb Caches your report after the schedule is created. If you report changes regularly (fonts, columns, etc are edited) then use this option to ensure CSSWeb runs with the latest version of your report.

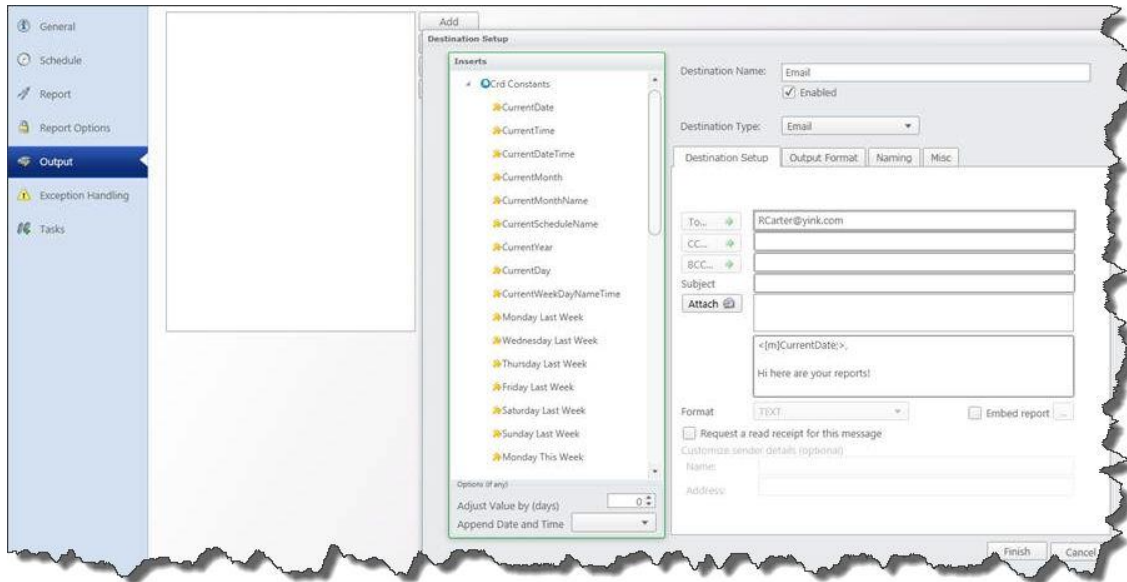
Save Snapshots: CSSWeb can take a "picture" of there report as it is produced and hold these snapshots for set number of days. You can use Snapshots to review older reports after they have been exported.

Step 7. Set a Destination

Now it is time to decide where the report will be sent. In CRDWeb, the report can be sent to:

- Disk
- email
- FTP
- SharePoint
- SMS
- ODBC
- Printer
- Fax

In this quick start guide we are using email.



Destination Type: Select the type of destination from the dropdown list. This will enable more options regarding a destination.

For More information on Destination Types consult Destinations.


In this case, Select email. In the TO: field, enter the email address the report will be sent to. You can use the CC and BCC fields as well.

By default the report will be attached to the email. an added option of embedding the report can be added as well.

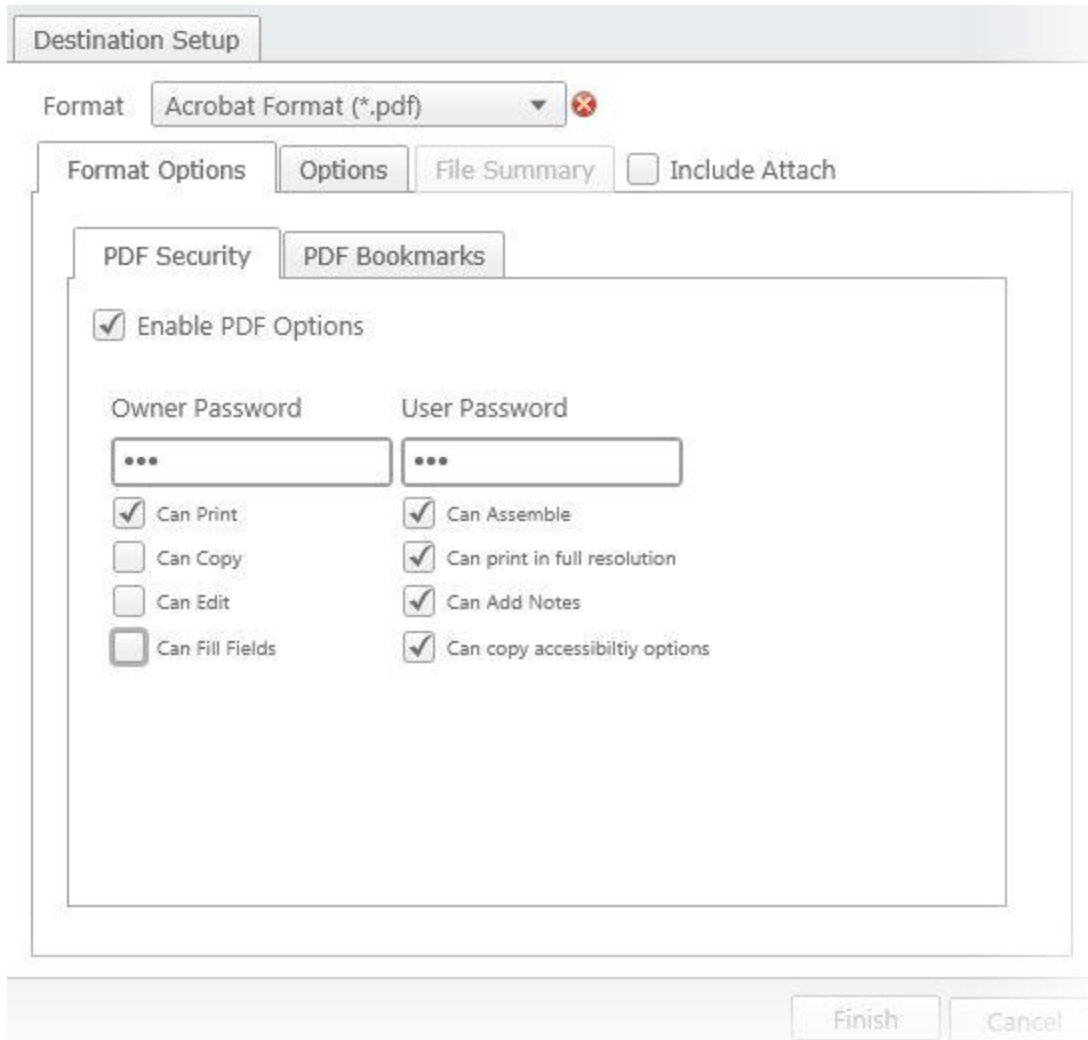
Speaking of attachments, you can attach any file in addition to the report as well. Simply click the **attach** button.

Compose a message in the email. Customize the message using inserts to add dates or data items.

Destination Setup

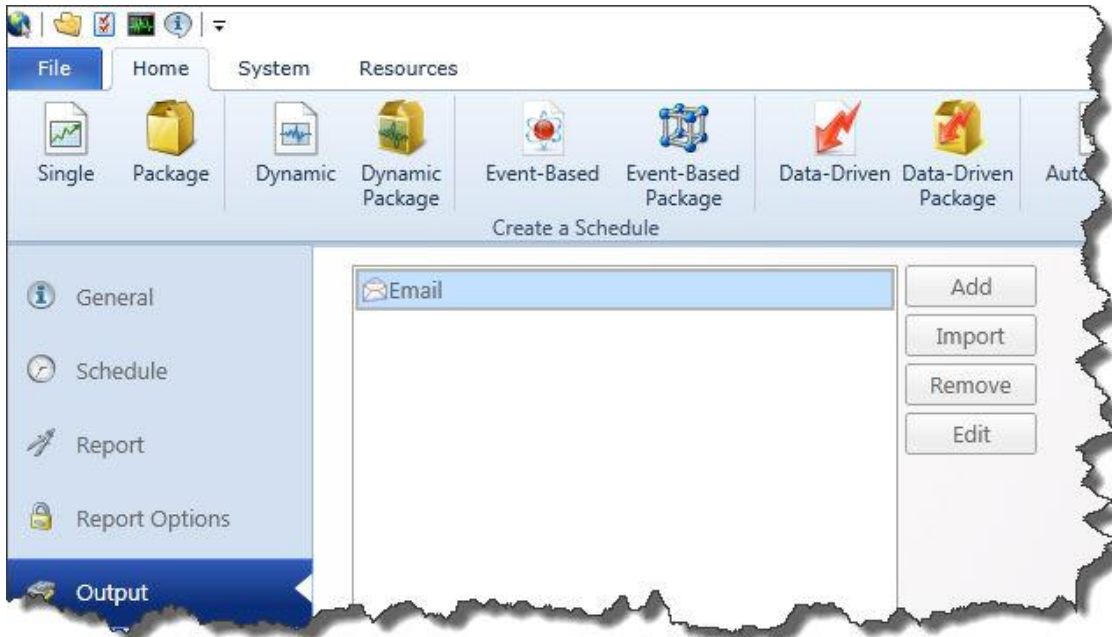
To...	<input type="text" value="Rcarter@myinc.com"/>
CC...	<input type="text" value="manager@myinc.com"/>
BCC...	<input type="text"/>
Subject	<input type="text"/>
Attach 	<input type="text"/>
	<input type="text" value="Hello,
Here is your report.
Reports Team"/>
Format	<input type="text" value="TEXT"/> <input type="checkbox"/> Embed report <input type="button" value="..."/>
	<input type="checkbox"/> Request a read receipt for this message
Customize sender details (optional)	
Name:	<input type="text"/>
Address:	<input type="text"/>

Next click the file format tab.



Select the format the report will be rendered in. Simply pick the desired format from the dropdown list.

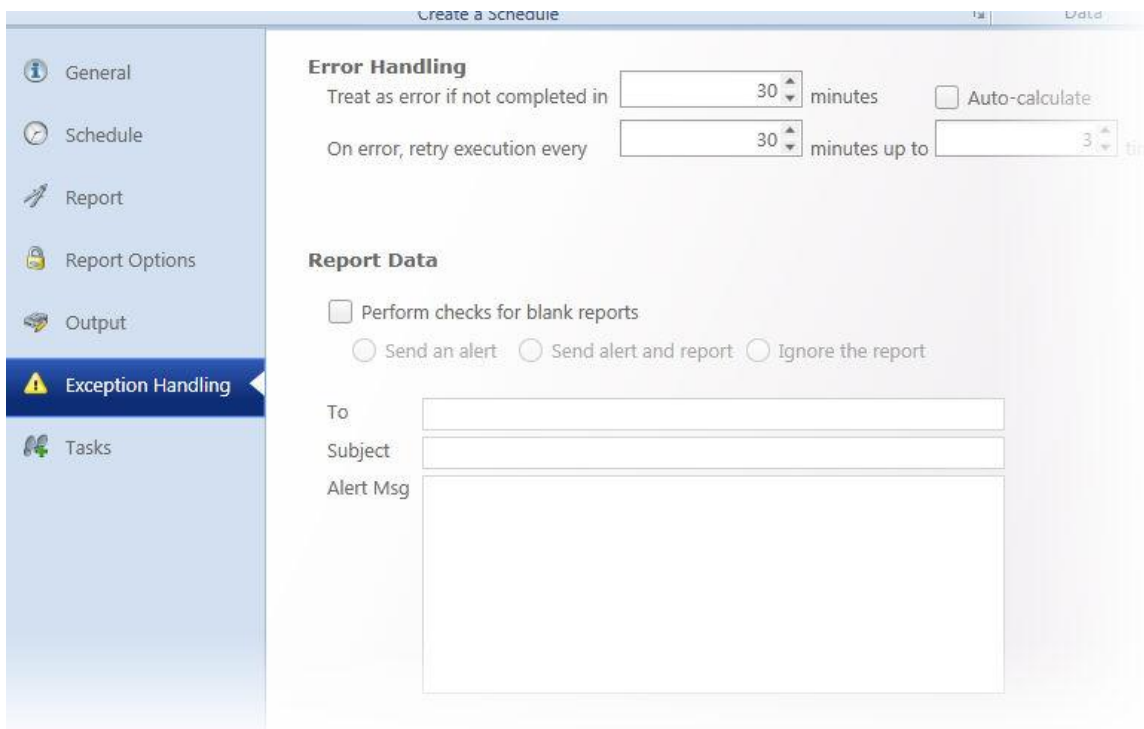
Most formats have additional options that allow you to customize the file output. In this case, selecting PDF, enables you to password protect, and add permissions to the file output. Click finish to complete your destination.



You can add more destinations as needed, or import default destinations created in CRD. Click next to continue to exception handling.

Step 8. Exception Handling

With exception handling, you can set what happens if a report is blank or fails.



Error Handling

You can set CSSWeb to treat a schedule as an error if it has not completed within a specified amount of time.

*Note: it is recommended that you use the auto-calculate feature.

Also CSSWeb can retry errored or failed schedules. simply select the interval and frequency that the schedule will be re-attempted.

Report Data

Perform Checks for blank reports: the system can be checked to look for blank reports. If the report is blank, three things can be done:

Send an alert: An alert will be sent to the specified person or group of people.

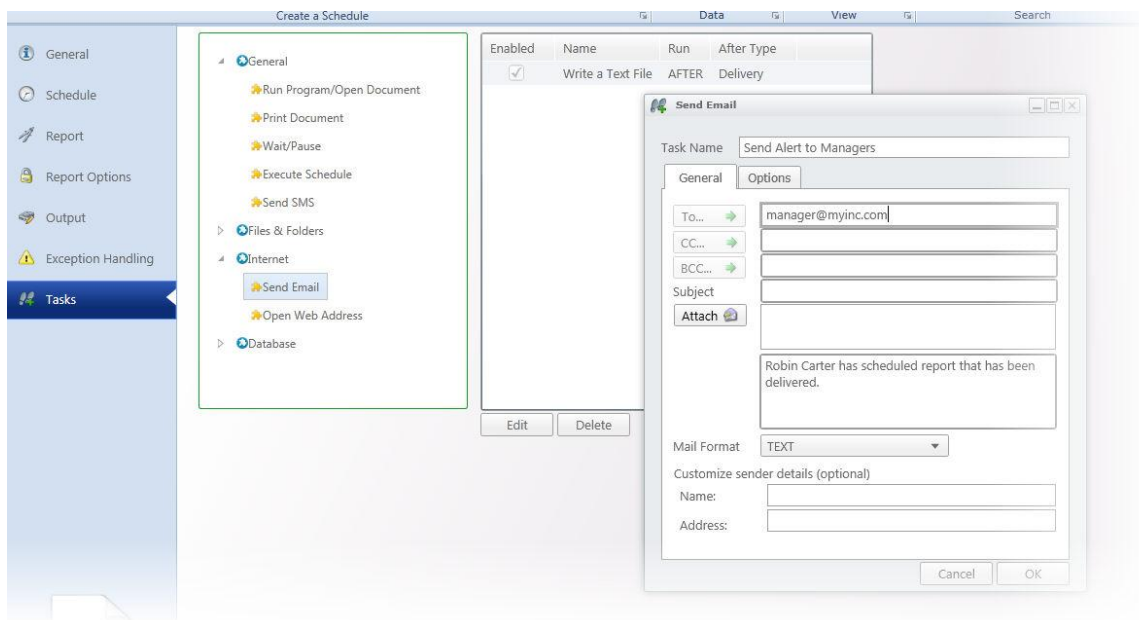
Send alert and report: An alert will be sent to a specified person (s) and the report will be sent to the destination.

Ignore the report: The system will not send the report. No alert will be sent either.

this feature is quite helpful if you wish to avoid sending reports with no data. Click next to continue to the next step.

Step 9. Add a task (optional)

In this final step you can add custom tasks such as email alert, or you can update a database record.



For more on Custom Tasks, please see Custom Tasks.

Step 10. You are done!

Your schedule is set to execute at the given time. If you manually executing a schedule, here is how: Executing a Schedule. Now kick up your feet and let CSSWeb and CRD do all of the work!

Executing a Schedule

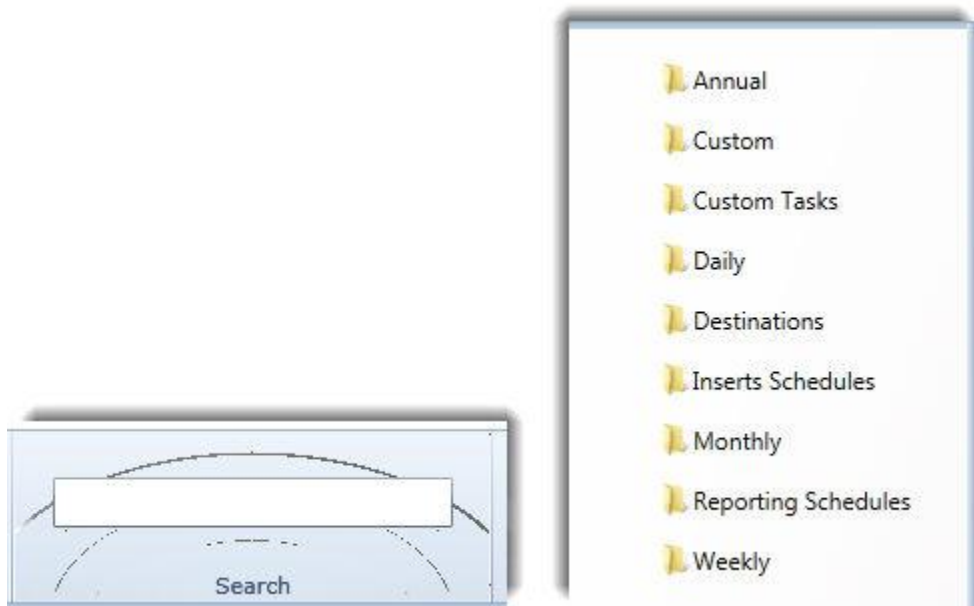
Whether you need to generate a report on demand or you desire to execute a scheduled report, manually executing a schedule is simple and easy.

Step 1. Log into CSSWeb

Accessing CSSWeb

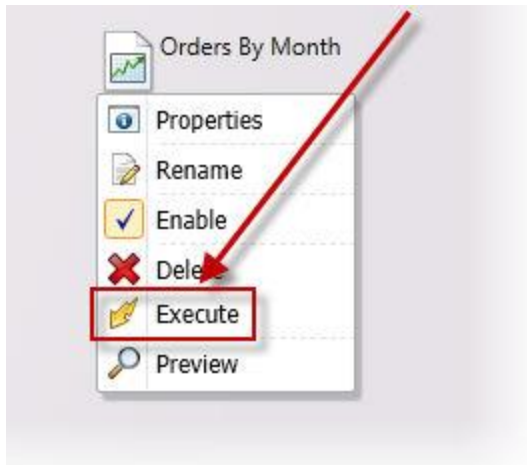
Step 2. Find and select the desired schedule

Browse through to the appropriate schedule. You may have created this schedule yourself or your Administrator may have assigned this schedule to you.



Step 3. Execute!

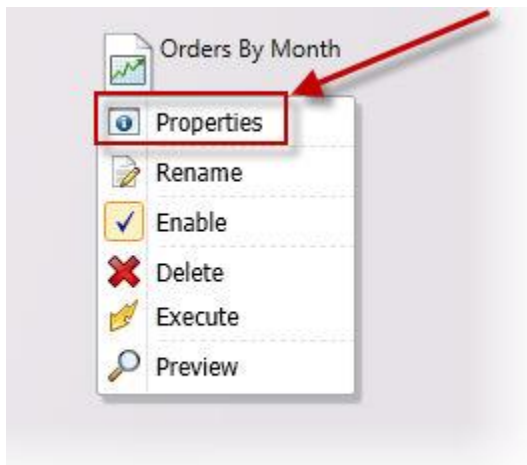
Right click on the desired schedule. click on Execute. The schedule will be added to an execute queue on the CRD server for immediate delivery.



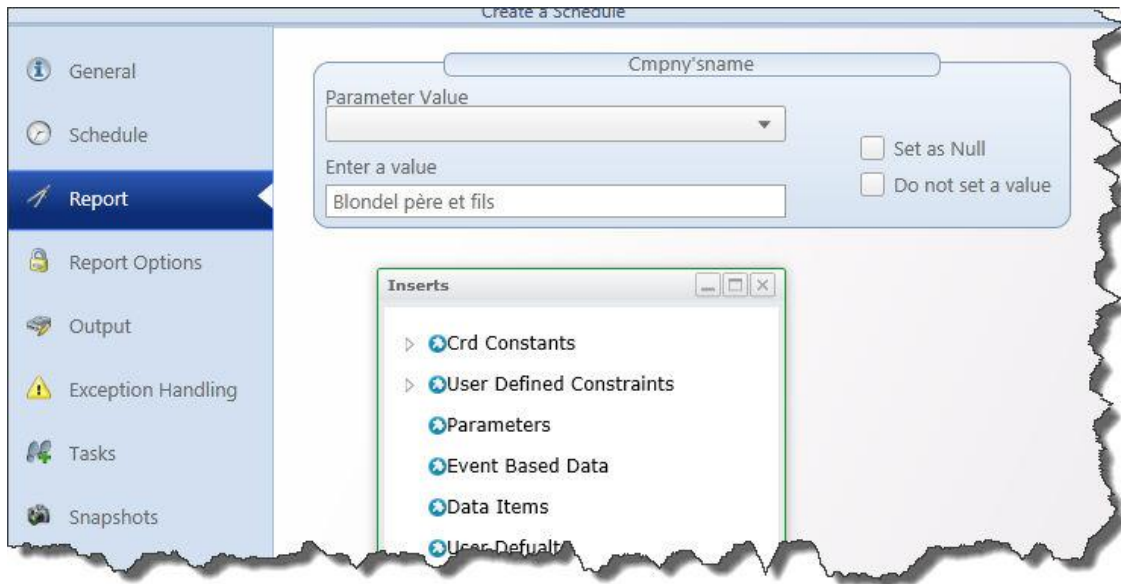
*Note: Execution speed can depend on many factors: Report size, current load on CRD server, CRD Server Settings. If a schedule appears to be executing far slower than it should, contact your CRD Administrator, or consult with technical support. Logging a Support Ticket

Manipulating the schedule properties

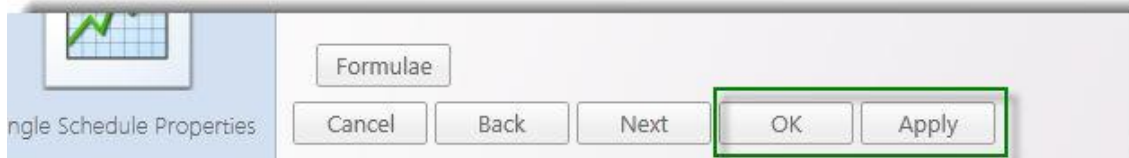
In some cases you may want adjust certain settings in your schedules such as parameters and destinations. Right click on the schedule select properties.



Now you can edit any settings in the schedule such as parameters.



Click Apply and ok to complete your changes.

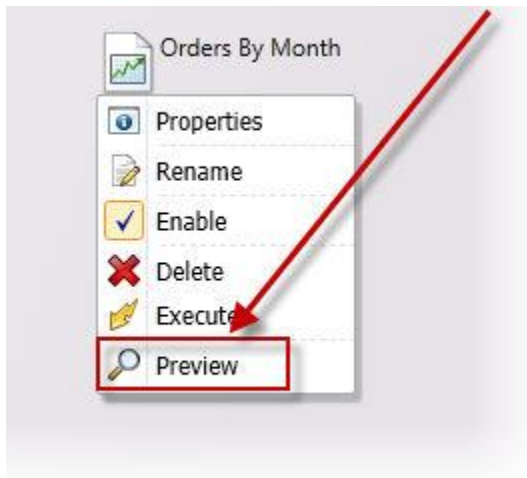


You can now execute the modified schedule.

Viewing a Report in CSSWeb

You can quickly view a report in CSS web without the need to manually execute a schedule.

right click on the schedule that contains the desired report. Select Preview.



The Report will display in your browser.

The screenshot shows a web browser window displaying a report viewer. The URL is `http://localhost:58078/reportviewer.aspx?reportid=379018610&snap=`. The interface includes a navigation bar with 'Parameters' and 'Group Tree' buttons. The main content area is titled 'TOP 20 COMPANIES REPORT' and features a bar chart and a table. A 'View Report Parameters' callout points to the 'Parameters' button. A 'Save your report to disk, or print it!' callout points to a save/print icon. A 'Quickly Review Report Groups' callout points to a list of company names on the left. An orange callout labeled 'Your Report!' points to the table data.

Company	Total Orders
Save-a-lot Markets	31
Ernst Handel	30
QUICK-Stop	28
Folk och få HB	19
Hungry Owl All-Night Grocers	19
Berglunds snabbköp	18
HILARIÓN-Abastos	18
Rattlesnake Canyon Grocery	18
Bon app'	17
Frankenversand	15
Lehmanns Marktstand	15
Wartian Herkku	15
Bottom-Dollar Markets	14
Hanari Carnes	14
Königlich Essen	14
La maison d'Asie	14
LILA-Supermercado	14
White Clover Markets	14
Around the Horn	13
Mère Paillearde	13

With the report viewer you can view the report, print, or save it.

*Note: If you prefer to use advanced output settings (i.e. PDF encryption), you would need to manually execute the schedule. Executing a Schedule