

# CRYSTALREPORTS.COM

## Desktop Publisher User Guide

Date last updated :	September 17, 2008
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## What is the Desktop Publisher?

The Desktop Publisher is a client based scheduler for scheduling your reports locally and then publishing them to crystalreports.com. The Desktop Publisher can publish not only Crystal Report files, but other file types such as: Web Intelligence, Xcelsius swf files, PDF, TXT, MSFT documents (Word, Excel, and PowerPoint). You can either schedule/publish single documents or folders with documents to crystalreports.com. This guide will walk you through installing the Desktop Publisher on your machine as well as configuring your scheduled tasks.

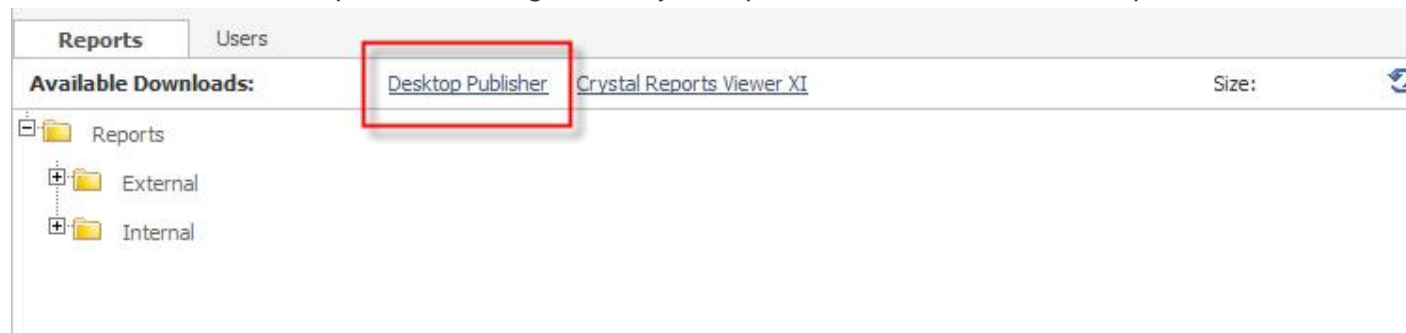
## Technical requirements and preparation

### Prerequisites:

For the desktop publisher to work, you will need Crystal Reports XI R2 SP2 or Crystal Reports 2008 SP0 designer installed on your desktop.

### Download:

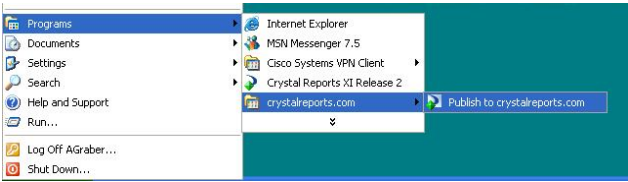
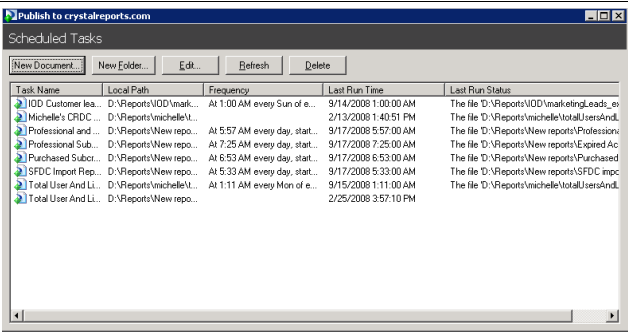
To download the Desktop Publisher, login into crystalreports.com, and select Desktop Publisher link:

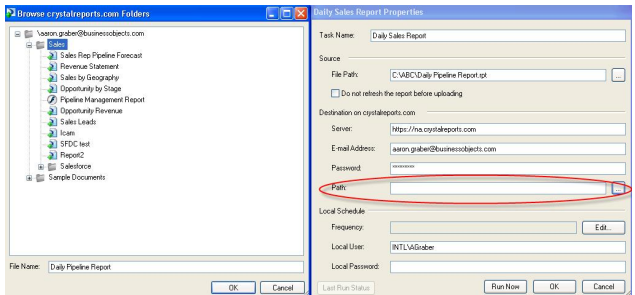
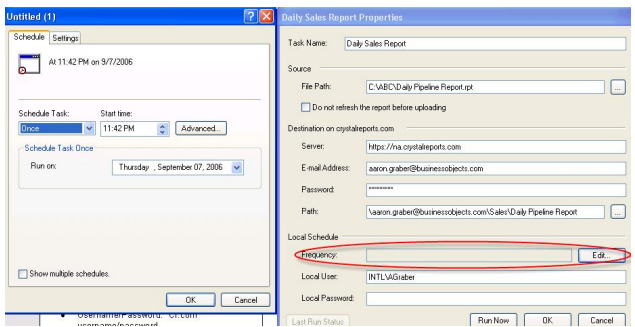
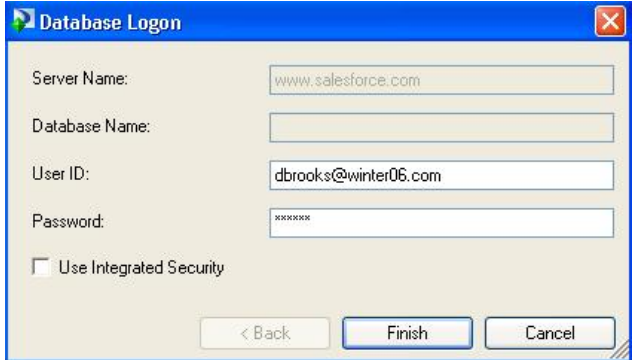


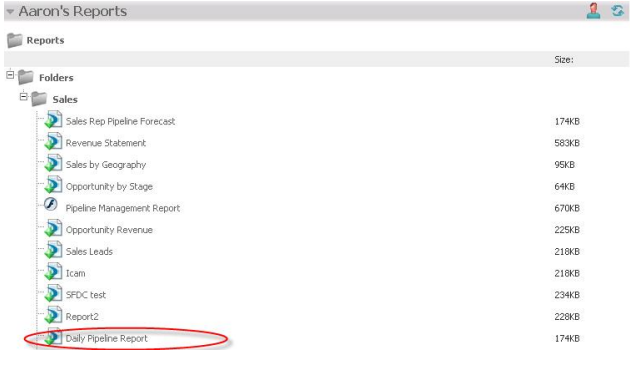
### Installation:

To install the Desktop Publisher, double-click the Publish\_to\_crystalreports\_com.msi file. There is a Readme.txt file that contains more information on installation guidelines as well as version fixes.

## Step-by-step Using Desktop Publisher

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<ul style="list-style-type: none"> <li>After the Desktop Publisher is installed, Go to Start, Programs, crystalreports.com, Publish to crystalreports.com.</li> </ul>																																														
<ul style="list-style-type: none"> <li>You can see your scheduled tasks and determine whether or not the tasks have run successfully. You can either upload a single document to be scheduled or you can upload multiple documents on a schedule to crystalreports.com using the New Folder button. Note: Uploading a folder will not refresh your Crystal Reports on upload.</li> </ul>	 <table border="1" data-bbox="726 612 1352 943"> <thead> <tr> <th>Task Name</th> <th>Local Path</th> <th>Frequency</th> <th>Last Run Time</th> <th>Last Run Status</th> </tr> </thead> <tbody> <tr> <td>IOD Customer lea...</td> <td>D:\Reports\IOD\mark...</td> <td>At 1:00 AM every Sun of e...</td> <td>9/14/2008 1:00:00 AM</td> <td>The file D:\Reports\IOD\marketing_lead...</td> </tr> <tr> <td>Michelle's CRDC ...</td> <td>D:\Reports\michelle\l...</td> <td></td> <td>2/13/2008 1:40:51 PM</td> <td>The file D:\Reports\michelle\totalUserAnd...</td> </tr> <tr> <td>Professional and ...</td> <td>D:\Reports\New repo...</td> <td>At 5:57 AM every day, stat...</td> <td>9/17/2008 5:57:00 AM</td> <td>The file D:\Reports\New reports\Professio...</td> </tr> <tr> <td>Professional Sub...</td> <td>D:\Reports\New repo...</td> <td>At 7:25 AM every day, stat...</td> <td>9/17/2008 7:25:00 AM</td> <td>The file D:\Reports\New reports\Expried Ac...</td> </tr> <tr> <td>Purchased Subco...</td> <td>D:\Reports\New repo...</td> <td>At 6:53 AM every day, stat...</td> <td>9/17/2008 6:53:00 AM</td> <td>The file D:\Reports\New reports\Purchased...</td> </tr> <tr> <td>SFDC Import Rep...</td> <td>D:\Reports\New repo...</td> <td>At 5:33 AM every day, stat...</td> <td>9/17/2008 5:33:00 AM</td> <td>The file D:\Reports\New reports\SFDC impc...</td> </tr> <tr> <td>Total User AndLI...</td> <td>D:\Reports\michelle\l...</td> <td>At 1:11 AM every Mon of e...</td> <td>9/15/2008 1:11:00 AM</td> <td>The file D:\Reports\michelle\totalUserAnd...</td> </tr> <tr> <td>Total User AndLI...</td> <td>D:\Reports\New repo...</td> <td></td> <td>2/25/2008 3:57:10 PM</td> <td></td> </tr> </tbody> </table>	Task Name	Local Path	Frequency	Last Run Time	Last Run Status	IOD Customer lea...	D:\Reports\IOD\mark...	At 1:00 AM every Sun of e...	9/14/2008 1:00:00 AM	The file D:\Reports\IOD\marketing_lead...	Michelle's CRDC ...	D:\Reports\michelle\l...		2/13/2008 1:40:51 PM	The file D:\Reports\michelle\totalUserAnd...	Professional and ...	D:\Reports\New repo...	At 5:57 AM every day, stat...	9/17/2008 5:57:00 AM	The file D:\Reports\New reports\Professio...	Professional Sub...	D:\Reports\New repo...	At 7:25 AM every day, stat...	9/17/2008 7:25:00 AM	The file D:\Reports\New reports\Expried Ac...	Purchased Subco...	D:\Reports\New repo...	At 6:53 AM every day, stat...	9/17/2008 6:53:00 AM	The file D:\Reports\New reports\Purchased...	SFDC Import Rep...	D:\Reports\New repo...	At 5:33 AM every day, stat...	9/17/2008 5:33:00 AM	The file D:\Reports\New reports\SFDC impc...	Total User AndLI...	D:\Reports\michelle\l...	At 1:11 AM every Mon of e...	9/15/2008 1:11:00 AM	The file D:\Reports\michelle\totalUserAnd...	Total User AndLI...	D:\Reports\New repo...		2/25/2008 3:57:10 PM	
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<ul style="list-style-type: none"> <li>Click the Add button to add a new Schedule Task.</li> <li>Title: Name of Schedule Task – i.e Daily Sales Report</li> <li>Report: Select a report to schedule. The file format can be a (*.rpt, *.wid, *.swf, *.doc, *.xls, *.ppt, *.pdf, *.txt).</li> <li>Do not Refresh: Only check this box if you don't want the scheduler to refresh the report. This is only for Crystal Reports format.</li> <li>Username/Password: Your Cr.com username and password</li> <li>Path: The folder on cr.com you want to put this report. Put your Daily Sales Report in the Sales folder (see diagram to the right).</li> <li>Keep History: If you check this field, it will add a historical snapshot to the report when you schedule.</li> <li>Event: Schedule time you want the report to run. Click on Advanced button for more detailed scheduling. Schedule this report to run daily (see diagram to the right).</li> <li>Log on As: This account needs to be the Windows username and password on your machine (Note: this account should have admin rights).</li> <li>Run Now: This button overrides the Event schedule and runs the report right away.</li> <li>Once you hit OK, you'll be prompted for your database username and password and parameters (if you have them in the report). Do not check integrated security unless your using a Microsoft SQL Server database. (see diagram to the right).</li> </ul>	<p><b>Specifying the folder path on cr.com:</b></p>  <p><b>Specifying the event/schedule:</b></p>  <p><b>Specifying Database Login:</b></p> 

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<ul style="list-style-type: none"> <li>• Login into crystalreports.com and view the report published using the Desktop Publisher. If you selected Keep History checkbox, you'll see the report as a historical instance of the report.</li> </ul>	 <p>The screenshot shows a web browser window titled 'Aaron's Reports'. Under the 'Reports' section, there is a 'Sales' folder. Inside the 'Sales' folder, a list of reports is displayed with their respective sizes. The 'Daily Pipeline Report' is circled in red.</p> <table border="1"> <thead> <tr> <th>Report Name</th> <th>Size</th> </tr> </thead> <tbody> <tr> <td>Sales Rep Pipeline Forecast</td> <td>174KB</td> </tr> <tr> <td>Revenue Statement</td> <td>583KB</td> </tr> <tr> <td>Sales by Geography</td> <td>95KB</td> </tr> <tr> <td>Opportunity by Stage</td> <td>64KB</td> </tr> <tr> <td>Pipeline Management Report</td> <td>670KB</td> </tr> <tr> <td>Opportunity Revenue</td> <td>225KB</td> </tr> <tr> <td>Sales Leads</td> <td>218KB</td> </tr> <tr> <td>Team</td> <td>218KB</td> </tr> <tr> <td>SFDC test</td> <td>234KB</td> </tr> <tr> <td>Report2</td> <td>228KB</td> </tr> <tr> <td>Daily Pipeline Report</td> <td>174KB</td> </tr> </tbody> </table>	Report Name	Size	Sales Rep Pipeline Forecast	174KB	Revenue Statement	583KB	Sales by Geography	95KB	Opportunity by Stage	64KB	Pipeline Management Report	670KB	Opportunity Revenue	225KB	Sales Leads	218KB	Team	218KB	SFDC test	234KB	Report2	228KB	Daily Pipeline Report	174KB
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