

CRD Internal Evaluation Guide

A shared guide for evaluating Crystal Reports automation

Use these sheets to decide how CRD could take over a recurring reporting job in your organization. Share the relevant sections with your manager, IT, security, operations and procurement team. Each sheet connects a business need to a practical evaluation using your own reports.

What CRD is

CRD is installed software for Windows environments that runs existing Crystal reports and automates their preparation and delivery. It combines scheduling, recipient-specific instructions, report packages, business-event conditions and configured tasks. Your organization manages the installation, source access and approved destinations.

Where to start

Choose the recurring job that matters most: customer statements, usable workbooks, complete report packs, delivery to business systems, or reporting requested by an application. Agree what the finished output must contain, where it must arrive and who handles an exception. The examples in this guide are illustrative, not customer endorsements or performance results.

What your colleagues need to confirm

IT and deployment	Supported Windows and Crystal components, database drivers, report paths, service identity, network access and any Office or API dependencies.
Security	Report data isolation, approved recipients and destinations, credential handling, document controls, retained files and third-party services.
Operations	Schedule ownership, recipient-data maintenance, alerts, retries, blank outputs, history, recovery and change control.
Procurement	Required features, installation and output scope, applicable licence rights, support and updates, implementation ownership and current quoted terms.

Use this guide alongside the current prerequisites and your actual trial results. CRD automates reporting; it does not replace the Crystal report designer or remove your organization's data-access and licensing responsibilities.

Further reading: [CRD prerequisites](#) | [Product and trial information](#)

1 Crystal Reports scheduling

Keep a recurring reporting job on the business timetable

The business need

A report may be ready to use, yet someone still has to open it, enter yesterday's dates, export it and send it on. The work becomes harder to hand over when month-end rules, holidays or unattended runs are involved.

What CRD does

- Run existing Crystal reports on recurring schedules, working-day rules or configured custom calendars.
- Supply report parameters, output settings and approved destinations as part of the saved reporting job.
- Use configured blank-report handling, notifications, retries and history to support unattended operation.

Practical example

A finance team needs its month-end operations report on the fourth working day. CRD supplies the reporting period, produces the required file and delivers it to the finance folder through the configured service account.

Value to the organization

The reporting team can hand over a defined recurring process, including who handles an exception, instead of relying on someone remembering each export.

Questions for IT security operations and procurement

Confirm the calendar, reporting-period calculation, RPT files and subreports, database access, runtime and driver combination, service identity and destination. Agree the expected output and the person responsible for exceptions.

Suggested evaluation

Run one representative report unattended. Check the next scheduled dates, the actual period in the file, delivery and one failed-destination scenario. A successful preview alone does not establish that the service can run the job.

Further reading: [Single-report schedules](#) | [Custom calendars](#)

2 Bursting and personalized distribution

Match each customer or location to the right information

The business need

Customers, branches and departments may need different report data, file types and delivery routes. Preparing each combination manually creates a growing list of jobs and makes recipient changes difficult to keep consistent.

What CRD does

- Use Data-Driven schedules to take report parameters, formats, filenames, messages and destination instructions from database records at run time.
- Use group Bursting when a grouped Crystal report must be separated into individual outputs.
- Use Dynamic schedules for repeated parameter-driven report runs; choose the mode that fits the actual reporting requirement.

Practical example

One customer needs its statement as a PDF by email; another needs an Excel file in an approved folder. The maintained customer records supply the required report parameter and delivery instructions.

Value to the organization

The business can maintain reporting instructions alongside its customer or branch data and use a repeatable process to produce the corresponding outputs.

Questions for IT security operations and procurement

Who owns recipient data and authorizes changes? Which report parameter or selection formula limits the data? What identifies each driver record? Confirm burst groups, formats, destinations, expected volume and exception handling.

Suggested evaluation

Use at least two recipients with deliberately different permitted data. Inspect each file and destination, then test a changed recipient and a failed delivery. The email address does not itself filter the report. Grouping Data-Driven reports by email disables embedding in that mode.

Further reading: [Data-Driven schedules](#) | [Group bursting](#)

3 Automated Crystal report emails

Send a message recipients can use without rebuilding it each time

The business need

A shipment update, account statement or management summary often needs more than an attachment. Staff may be assembling a message, inserting customer details and adding several documents every time it is sent.

What CRD does

- Send report attachments or embed report content in an HTML or text message using the supported mail configuration.
- Use Inserts and maintained values in recipients, subject lines and message bodies; configure To, CC and BCC as required.
- Use approved sending accounts, including configured SMTP or Microsoft 365 routes, with the permissions required by the organization.

Practical example

A dispatch team sends a shipment email containing the pick-ticket information, with a PDF attachment where the recipient also needs a separate document. The message includes the relevant customer and shipment details.

Value to the organization

The recipient receives the information and documents together, while the reporting team maintains the message and delivery rules in the reporting workflow.

Questions for IT security operations and procurement

Confirm sender authority, mail authentication, tenant consent, recipient rules, attachment size and retention. Test embedding in the recipient's mail client. Optional AI report summaries require the configured account, applicable terms, data-use approval and accuracy review.

Suggested evaluation

Deliver an embedded-report example and an attachment example to controlled mailboxes. Verify layout, links and files. HTML embedding requires the appropriate supported mail route; MAPI has different restrictions. A sent message or receipt does not prove that a person read it.

Further reading: [Email destination settings](#) | [CRD knowledgebase](#)

4 Crystal Reports PDF delivery

Produce the document that must arrive and be retained

The business need

A recurring PDF may serve as a customer statement, operating record or management pack. Its usefulness depends on the right data, readable pages, a recognizable filename and the required document controls.

What CRD does

- Export Crystal reports to PDF and configure page selection, naming and file-summary information.
- Apply documented passwords, permission settings and a watermark or stamp when the workflow requires them.
- Deliver the resulting file through the configured destination; use separate package or ZIP settings when several outputs belong together.

Practical example

A customer statement is produced with its approved account data, reporting period and filename. The configured PDF protection is applied before it is sent to the customer's authorized destination.

Value to the organization

A maintained workflow replaces repeated export, naming and attachment work while making the expected document easier to check.

Questions for IT security operations and procurement

Confirm fonts, subreports, page completeness, passwords, permissions and the recipient's PDF viewer. The published PDF guide describes 128-bit encryption; security reviewers should assess the actual generated file against policy. PDF protection, ZIP protection and transport security are different controls.

Suggested evaluation

Inspect the final PDF, including long reports and subreports. Test the required password and permissions in the intended viewer, verify delivery and confirm retention rules. Do not treat permission settings as a guarantee against copying or as a compliance certification.

Further reading: [PDF export and protection](#) | [Report packages](#)

5 Usable Excel workbooks

Deliver the workbook people need for the next part of their job

The business need

Finance and operations teams often need a workbook they can reconcile or share, rather than a report saved with an Excel extension. Tabs, identifiers, layout and the difference between formatted and data-only output all matter.

What CRD does

- Choose the documented formatted XLS or data-only Excel modes, including data-only XLSX where supported.
- Use Excel Group Bursting to place report groups on separate worksheets, with the required grouping in the report.
- Configure supported worksheet naming, workbook passwords and freeze panes; use package merging when multiple report outputs must be assembled.

Practical example

A finance team receives one workbook with a worksheet for each department. The meaningful tab names help reviewers find their information without splitting and renaming the export manually.

Value to the organization

Recipients can start their review with a consistent workbook structure, and the reporting team has a clear output specification to maintain.

Questions for IT security operations and procurement

Confirm the exact export mode, workbook structure, group field, Excel or Office dependencies and runtime. Group values must be in the report's Group Header for documented Excel Group Bursting. Do not assume a formatted XLS option produces the same result as data-only XLSX.

Suggested evaluation

Open the delivered workbook and check tabs, row counts, leading zeros, dates, numbers and any password. Treat report-group worksheets, multi-report workbook merging and an existing Excel-template workflow as different requirements; demonstrate the specific combination you need.

Further reading: [Excel formats and worksheet controls](#) | [Package assembly](#)

6 CSV and receiving-system files

Deliver a file the next system can actually accept

The business need

A vendor, finance system or operational process may require a recurring text file with exact separators, headers, dates and identifiers. A file arriving on time is only useful if the receiving system can read it.

What CRD does

- Export Crystal report data to CSV using documented separator, delimiter and formatting controls.
- Maintain filenames and approved delivery destinations as part of the recurring reporting job.
- Use the available export mode for the installed Crystal runtime; configure additional tasks separately if the receiving specification needs further processing.

Practical example

An operations team sends a daily transaction file to an approved folder for another system to import. The file uses the agreed naming convention and preserves the identifiers the importer expects.

Value to the organization

The teams on both sides of the handoff can work from one agreed file specification and a repeatable delivery process.

Questions for IT security operations and procurement

Confirm column order, headers, delimiter, encoding, line endings, dates, decimals, leading zeros and handling of empty or quoted values. Changing a filename extension does not change the file contents. An export configuration is not an included bank or ERP integration.

Suggested evaluation

Use a production-like sample with awkward values, then run it through the receiving system. Compare source totals and imported records. Test the actual runtime and legacy or standard CSV mode; a successful upload does not prove that the receiving application accepted the data.

Further reading: [CSV export settings](#) | [Delivery destinations](#)

7 Complete report packages

Send the finished pack instead of assembling files by hand

The business need

A customer or management delivery may require several reports in a particular order. Someone has to collect the outputs, check that the pack is complete and decide whether to attach separate files, merge them or create a ZIP.

What CRD does

- Use Package schedules to coordinate several Crystal reports and their configured output and delivery settings.
- Prepare separate attachments, a merged PDF, supported Excel merging or ZIP output according to the package configuration.
- Use Data-Driven Package schedules where each recipient needs a package controlled by maintained data.

Practical example

A month-end customer pack contains an account summary, open items and a transaction report. The reporting team defines the contents and required output once, then runs the recurring package.

Value to the organization

The organization can maintain a complete deliverable instead of relying on people to collect and combine its components after every report run.

Questions for IT security operations and procurement

Confirm report membership and order, parameters, intended recipient scope, format and filenames. Decide what should happen if one component is blank, fails or takes too long. Separate attachments, one PDF and one workbook are different outputs; merging has format-specific conditions.

Suggested evaluation

Inspect one entire delivered pack against an agreed contents list. Deliberately fail or empty one component and check the resulting file, notification and operator action. If using data-driven packages, verify at least two recipients and their different permitted contents.

Further reading: [Package schedules](#) | [Data-Driven Packages](#)

8 Event-triggered reporting workflows

Run the report when the business condition is met

The business need

A clock cannot always tell whether a report is ready to run. Reporting may need to follow an incoming file, a changed database record or another business event, with a task before production or after delivery.

What CRD does

- Monitor documented conditions such as file or database changes and combine conditions using the configured ANY or ALL rule.
- Run a selected reporting schedule when the event condition qualifies.
- Attach supported Custom Tasks around report production or delivery, or configure an automation workflow where no report is needed.

Practical example

A completed import marks records ready for reporting. The configured event checks that condition, runs the required report and performs the agreed follow-up task.

Value to the organization

The reporting handoff can follow the business process, with its prerequisite and follow-up work maintained alongside the reporting job.

Questions for IT security operations and procurement

What proves the data is ready? Confirm polling intervals, operating windows, repeated-condition handling, task order and permissions. A modified file does not necessarily mean a recalculated workbook. Agree who owns any database write-back or external program.

Suggested evaluation

Test an unmet condition, a valid condition, a repeated condition and a failed task. Check that the same business item is not unintentionally processed again. Event checks are polled; do not assume zero delay or exactly-once processing without an appropriate design.

Further reading: [Event-Based schedules](#) | [Custom Tasks](#)

9 Destinations and delivery operations

Put reports where the business works and define how to recover

The business need

Not every report belongs in an inbox. Teams may need files in SharePoint or network folders, print output at a specific location, or delivery to an approved cloud or file-transfer service. Exceptions need an owner as well as a log.

What CRD does

- Configure supported routes such as email, disk or network folders, printers, FTP/SFTP, SharePoint and documented cloud destinations.
- Maintain destination-specific credentials, format, filename and routing settings for the selected workflow.
- Use available history, error views, configured retries and retained snapshots to support investigation and recovery.

Practical example

A recurring operations pack is saved to the required SharePoint folder while an authorized copy goes to a network location. If one route fails, the reporting team checks the result for that destination before deciding what to resend.

Value to the organization

The report can become part of an existing business handoff, with defined delivery locations and a practical process for handling exceptions.

Questions for IT security operations and procurement

Confirm the installed build, destination account, tenant consent, service permissions and required output format. Agree retention and access to snapshots and logs. If collaboration or failover is required, review its configuration and recovery procedure separately; it is not an automatic zero-downtime promise.

Suggested evaluation

Run under the intended service identity, deny one destination and inspect the outcome. Verify the file at every required location, then test an approved resend or rerun. Check current cloud authentication and SharePoint requirements rather than assuming all accounts behave alike.

Further reading: [Destinations](#) | [SharePoint configuration](#)

10 Reporting from your application

Let the application request the reporting work CRD will perform

The business need

A business application may need to produce customer documents after billing, an import or an operational process finishes. Building the surrounding schedules, recipient handling, package assembly and monitoring can become a separate development project.

What CRD does

- Expose documented REST operations for discovering schedules, managing supported single-report schedules and changing parameters or email destinations.
- Provide documented package, data-driven package and bursting operations for the relevant reporting workflow.
- Start supported executions and return identifiers that the application can use to follow execution status.

Practical example

After a billing cycle completes, an authorized backend requests its configured Crystal reporting job, records the execution identifier and checks progress before the business process marks reporting complete.

Value to the organization

The application can keep its business rules while CRD performs the configured report production and delivery work.

Questions for IT security operations and procurement

Confirm the installed API Service, authentication, exact operation and schedule type, network access and error policy. Updating a saved schedule is not automatically an isolated per-request override; design for concurrent requests. Desktop features do not all imply matching public API operations.

Suggested evaluation

Use one working report or package. Authenticate, initiate it once, track its execution and check the destination separately. Include a rejected request, an execution failure and a delayed status check. A successful request does not return or prove delivery of a PDF unless that operation explicitly documents it.

Further reading: [CRD API guides](#) | [Execute and verify a schedule](#)

11 Replacing a Crystal Reports scheduler

Preserve the business outputs while changing the reporting process

The business need

An older Crystal Server installation, another scheduler or a collection of scripts may be difficult to maintain. The replacement must preserve the recurring documents and delivery arrangements people depend on, not just demonstrate a successful export.

What CRD does

- Run compatible existing Crystal reports through configured schedule, distribution, package and event workflows.
- Use documented output settings and destination controls to reproduce the business deliverable you require.
- Provide a dedicated reporting configuration that can be evaluated against the work your present approach leaves with its operators.

Practical example

A team retiring an old reporting server recreates a recurring customer pack in CRD. It checks the same report period, customer scope, workbook or PDF structure, destination and exception procedure before switching delivery.

Value to the organization

The organization can judge CRD against the continuity and maintenance of its real reporting service, with an explicit cutover plan.

Questions for IT security operations and procurement

Inventory reports, recurrence, parameters, recipients, destinations, package contents and operational dependencies. SAP Crystal Server already supports scheduling, browser access and personalized publishing under the applicable licensing; other tools also share capabilities. Compare the exact version, entitlement and workflow.

Suggested evaluation

Choose a representative recurring job and compare the finished results. Run an approved parallel evaluation with controlled destinations, resolve differences and agree the cutover and rollback procedure. Do not assume SAP schedules or another product's configuration import automatically into CRD. Confirm current licensing and installation scope in the quote.

Further reading: [CRD requirements](#) | [SAP product and licensing distinctions](#)

12 Reporting in your customer portal

Keep the user experience in your application

The business need

Customers or internal users may repeatedly ask staff to run a report or change its delivery. An existing portal can offer approved reporting choices, but it needs a backend process to translate those choices into reporting work.

What CRD does

- Provide operations a customer-owned backend can use to discover approved schedules, start runs and follow execution status.
- Support documented schedule creation or changes, including parameters and email destinations where the operation permits them.
- Perform the configured reporting job while users continue working in the organization's own interface.

Practical example

A customer requests its account report from an existing portal. The application checks that customer's rights, identifies the permitted job, requests it through CRD and displays the returned progress while delivery follows the approved configuration.

Value to the organization

The organization can add reporting controls to a familiar application while keeping the reporting process in CRD.

Questions for IT security operations and procurement

Who builds the interface and enforces customer permissions, data scope and allowed recipients? Keep API credentials on the backend. CRD does not supply the portal, an embedded viewer or an automatic tenant-isolation layer. An execution response is not an immediate report download.

Suggested evaluation

Use two users with different permitted reports or customer data. Check authorization, schedule ownership, concurrent requests, status display and the actual outputs. Confirm that one user cannot select another's data or redirect a report to an unapproved destination.

Further reading: [Portal integration guide](#) | [Supported single-report operations](#)

13 Choosing an API or SDK approach

Decide which reporting work your developers should own

The business need

A team integrating existing Crystal reports can use an SDK, a reporting platform or CRD. The decision depends on the complete reporting service the application needs, including the work after report generation.

What CRD does

- Offer a REST interface to documented CRD scheduling, package, destination and execution operations.
- Let an application initiate configured reporting workflows while CRD handles their report production and delivery.
- Provide execution information the application and operators can use alongside their own monitoring and business rules.

Practical example

An application needs a recurring personalized report pack, not just one exported file. The team compares building the service around a Crystal SDK, configuring the applicable Crystal Server interfaces and integrating the required CRD operations.

Value to the organization

The development team can make a build-or-integrate decision around its actual reporting obligations and the parts it is prepared to maintain.

Questions for IT security operations and procurement

Identify report type, version, runtime, licensing and supported operations for each option. SAP provides Crystal SDKs and platform integration capabilities; native scheduling is not absent. Crystal Server, classic Crystal reports, Crystal Reports for Enterprise and Web Intelligence have different interfaces. Keep application authorization and business rules in scope whichever route you select.

Suggested evaluation

Use the same report or pack and compare schedule persistence, personalization, file assembly, delivery and operational handling. Choose CRD when its configured workflow fits the reporting work you want to hand over. Ask for a demonstration and current terms; do not assume measured cost or performance superiority.

Further reading: [CRD API overview and guides](#) | [SAP developer and platform scope](#)

Agree the evaluation decision

Record the result your colleagues need before approving adoption

Use one representative workflow to make the evaluation concrete. Add further tests where report formats, recipient rules, integrations or workload differ. Keep a copy of the accepted outputs and the configuration that produced them.

Your evaluation record

Business job	What recurring reporting work will CRD take over?
Required result	Which reports, data scope, formats, package contents, recipients and destinations must be correct?
Deployment and access	Which installation, runtime, drivers, service identity and integration accounts were tested?
Acceptance evidence	Which generated files, destination checks and exception tests demonstrate the required behavior?
Workload	What representative volume, timing and concurrent work were tested, and what remains to be confirmed?
Ownership and approval	Who owns the job, recipient changes, security review, support, budget and go-live decision?

Before the recurring job goes live

Agree the response to a missing, blank, incomplete or misrouted output. Document who may rerun or resend, how duplicate deliveries are avoided, and how schedule or recipient changes are reviewed. Confirm current commercial terms for the tested scope. Security or regulatory approval depends on the full process and deployment, not a feature label.

Bring your reporting job to a demonstration

Choose a representative Crystal report, the required finished output and an exception you need to handle. Use them to assess how CRD would run the process and how your team would maintain it.

Further reading: [CRD product and demo options](#) | [Download trial resources](#) | [Current commercial options](#)

Further reading: [CRD knowledgebase](#) | [CRD API guides](#) | [Trust and security information](#)