Software Features

This document only outlines the main features of CRD – please contact us to arrange a demo to see every feature in action.

Call +1 888 781 8966 or email info@christiansteven.com today!
CRD is the Crystal Reports Scheduler

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CRD is the Crystal Reports Scheduler

Schedule Crystal Reports to XLSX, DOCX, PDF, CSV & more. Send to Email, Printer, Folder, FTP, DropBox & Sharepoint.

CRD saves time and money by making it easy to automate Crystal Reports. Simply define single or packages of Crystal Reports, schedule, run them automatically and send the reports to print, fax, folder, FTP, SMS, DropBox, Sharepoint & email in a number of standard formats including Excel, Word, PDF, RPT and more.

By automating repetitive reporting tasks, CRD - Crystal Reports Distributor - ensures that reports are created and distributed when needed, without error, and without costly support time.
Bursting Schedules

Use Bursting Schedules to burst out individual report groups

Burst individual report groups and deliver each group to a different destination. For example, burst a sales report into individual groups based on "Department" and to email each department's group report to the head to that department. Advanced Crystal Report bursting.
Define the report parameter

Use a static parameter or use CRD Inserts to dynamically populate the parameter from the Crystal Report.
Advanced Bursting Mode

Useful for reports with lots of groups where each group may be delivered to multiple destinations in different formats.
Use inserts to determine report destination

Use a Data item to determine the destination for each group. Email addresses from a database using a SQL Query & CRD inserts
Simple Bursting Mode

Useful for Crystal Reports with small groups where each group is delivered to a single destination in the same format.
Event Based Schedules

Distribute Crystal Reports based on events & triggers

Distribute Crystal Reports and respond to your business needs by setting schedules to run based on events and triggers rather than date. Add real-time monitoring to your Crystal Reports distribution process with CRD’s Event Based Schedules, reports are fired off when events occur e.g. database value is present, file is modified, window is open, an email is received, etc. CRD makes sure the reports are created and distributed on time and error-free. Just what you want from a Crystal Reports Scheduler.
Event Triggers

Database Record Exists
Apply to new database records only, or to any matching database records.

Database Record Has Been Modified
Choose to include New (Inserted) records and Deleted records. Use this for follow-ups by selecting to only match the condition if the record has been (or not been modified) in x minutes. Repeat the action every x minutes until the condition is no longer true, or run just once.

Unread email is present
Monitor a POP or IMAP mailbox for new emails. Forward or Redirect. Delete mail after processing. Read the body text and other mail sections (sender email, subject, etc.) and use the values to populate report parameters, email addresses, etc. For example, send the report to the sender of the email.

File Exists
Use this trigger to respond to the existence of a new file in a local or network folder.

File has been Modified
Great for monitoring log files, but works equally well for all other types of local or network files.

Process Exists
Great for monitoring for certain key processes on your machine. If those processes are not running then CRD can automatically restart them.

Window is Present
Use this to monitor for open Windows

Data is received on a Port
CRD can monitor specified ports for data and then execute tasks such as reports or database updates.
Event Triggers

Fire off reports when a defined system event occurs.
Date & Time Scheduling

Schedule Crystal Reports to run at a specific date and time

It's easy to schedule Crystal Reports to run at a specific date and time, or to run them hourly, daily, weekly, or monthly or set up your own custom frequencies e.g. 4-4-3, every other day, third Monday of the month, and so on. And the same report can be scheduled to be run multiple times with different parameters, formats, frequencies, and destinations. It makes Crystal Reports scheduling simple, hassle-free and convenient for you.
Create your desired scheduling frequency

Set a schedule weekly on a Sunday and a Monday at a set time. Repeat the schedule every x minutes until a certain time.
Schedule a Crystal Report to run daily

Schedule a report to run every day at a set time excluding specific days by using exception calendars.

![Create a Single Schedule](image-url)
Schedule your Month End Crystal Reports

Schedule a report to run the last day of every Month at a set time.

Create a Single Schedule
Schedule Crystal Reports for the 1st day of every Month

Schedule a Crystal report to on the 1st day of every Month except for certain user specified dates.
Run Crystal Reports on your own schedule

Can't find what you need? Use Custom Calendars to set your own business driven scheduling frequency e.g. 4-4-3
Dynamic Schedules & Packages

Use CRD’s unique Dynamic Schedule processes

Use CRD’s unique Dynamic Schedule processes to trawl through your database to find the parameter values to use and then generate and deliver a unique report for each value.

Dynamically generate and deliver individualized export packages for multiple recipients using the same set of reports. Dynamic Schedules for Packages! For example, you can use the same set of reports to generate individual monthly report packages for all your clients.
Compose a Dynamic email

Using Dynamic inserts CRD will automatically enter the required values from your own database.
Set up a Dynamic destination

CRD will automatically enter the required parameter values, export & deliver the report to the corresponding email.
Set up packages of Dynamic Schedules

Packages make it easy to send many reports in the same email. Reports can be zipped before delivery and password protected.
Data Driven Schedules & Packages

Use CRD's unique Data Driven Schedule processes

Bring advanced Data Driven functionality to your Crystal reports distribution infrastructure.

Distribute a report to a fluctuating list of recipients. For example, you can distribute a report throughout a large organization where recipients vary from one month to the next or use other criteria to determine group membership from an existing set of users. E.g. select * from mytable where firstname = 'john' will generate the report and distribute only for records where the recipient's first name is John.

Filter the report output using report parameter values that are retrieved at run time. For example, the parameter value returned from the table for Last Name will be Doe for John Doe and Smith for John Smith. Determine the delivery type and report format dynamically at run time. For example John Smith gets the report as a PDF file by email with a customized email body and John Doe gets the report as an Excel spreadsheet by FTP upload to his web server.
Set up a Data Driver

Use the data in your database to populate Report Parameters, destinations, formats and much more.
Create a Data Driven Email

Use Data Driven inserts to populate an email with Names, Dates, Order numbers and much more.
Package Schedules

Schedule more than one report at the same time

Set up a package of reports to be generated at defined intervals and delivered to one or more defined destinations - together. For example, a monthly report pack (consisting of a number of reports) can be sent to a client with all reports attached to the single email or compressed into a single zip file, or merged into a single Excel workbook, or PDF file before delivery.
Create a Package of Reports

A report pack can be sent to a client with all reports compressed into a single zip file, or merged into one Excel workbook.
Set output format options for a merged Excel file before delivery.
Pre & Post Delivery Automation

Use Custom Actions to update a DB pre or post delivery

Once your schedule has been executed, why stop there? Use CRD’s unique Custom Actions to run another program, enter values in a database, modify a file and lots more. Or use Automation Schedules for general business process automation without scheduling any reports at all.
Available Custom Tasks

Additional Report Schedules Task Actions

Run Custom Tasks before report delivery.

Run Custom Task after report production.

Run Custom Task after report delivery.

Run Custom Task before and after a report has exported.

Use custom tasks to create Automation Schedules.
Available Custom Tasks

**General**
- Run Program (bat, exe, com)
- Open, Print Document
- Wait/Pause
- Send SMS
- Execute Schedule
- Create Exchange Appointment

**Files and Folders**
- Copy, Rename, Move, Delete File
- Write to Text File
- Zip, Unzip Files
- Create, Rename, Move Folder
- Merge PDF Files.

**Folder Housekeeping**
- Manipulate PDF
- Build Excel Workbook
- Merge Excel Files
- Manipulate Excel
- Upload to SharePoint

**Internet & FTP**
- Send an Email
- Open a Web Address
- Upload to FTP
- Download, Delete from FTP
- Create, Delete FTP Directory

**Database**
- Execute SQL Script
- Run Stored Procedure
- Insert, Update, Delete Database Record
- Create, Delete Database Table
- Create, Delete Table Column
- Execute SSIS Package
- Export Data to a Report
- Save BLOB to SQL Server
- Get BLOB from SQL-Server

**Registry**
- Set Value
- Delete Key
- Create Key
Merge PDF Files

Use Automation Schedules to Merge pdf files in a specified folder
Custom Actions

Use Custom Actions pre or post-delivery of a schedule to create a workflow
Add several Custom Actions to the same Schedule

Create your own workflows by adding as many Custom Actions to an Automation Schedule
Add a Custom Action to a Schedule

Create a custom action which can be executed at the end of a report schedule to confirm schedule completion for example.
Customize Report Outputs

CRD offers a variety of formatting and manipulation options.

Acrobat (PDF): Include watermarks & stamp, add bookmarks based on group header, set document properties, add password protection, merge a package of multiple reports into a single PDF file & merge any existing PDF files into a single file.

Character Separated (CSV): Use any character separator, or use "tab", choose comma, or any delimiter.

MS Excel (XLS), Data Only, Excel 7, 8, & 97-2000: Customize the worksheet (tab) name, burst report groups into separate worksheets in the same workbook, merge a package of multiple reports as individual worksheets (tabs) in a single workbook, set password protection, set document properties.

MS Word (DOC): Set document properties, raster Image (TIF), choose from Uncompressed, LZW, RLE and fax formats; Select 24-bit color, 256 color or Black & White.
Set Acrobat output format options

Add watermarks, bookmarks, set properties e.g. title. Add password protection e.g. Print, Edit, Owner & User Passwords.
Set CSV output Format options

Use any character separator, or use "tab", choose comma, or any delimiter (or not, if you do not require one).
Set MS Excel output format options

For MS Excel (XLS), Data Only, Excel 7, 8, & 97-2000: burst report groups into separate worksheets in the same workbook.
Set MS Word output format options

For MS Word (DOC): Set document properties (Title, Author, Company, etc) choose from Uncompressed, LZW, RLE.
Exception Handling

Set error handling for reports and options for blank reports.

Use Exception handling to determine what should happen if a report fails to run or if the report executes but contains no data.

For example: If a report takes longer than the specified amount of time to run, treat the schedule as an error and follow the appropriate action. The “Auto-calculate” option instructs CRD automatically determine how long a schedule should take to run the report. If it takes longer than the calculated amount of time, then it is an error.

Should an error occur with a schedule, specify the retry interval and number of times the schedule should attempt a retry.

Check for blank reports and determine what actions should be taken if a blank report is detected.
Exception Handling

Should an error occur define the action(s) CRD should follow
Blank report Exception handling

If a report genuinely has no data behind it, CRD can be configured to do a number of things with the report & schedule.