

COURSE SUMMARY

This 1-day Crystal Server course is designed to teach the student standard Administration Setup and Maintenance of the CMC and User portal (BI Launchpad) when publishing Crystal Reports.

Here are some of the training concepts and features:

- **Publishing** Crystal Reports to CMC and setting Database Configuration
- Setting up **Users** (e.g., Enterprise, Windows AD, LDAP)
- Creating functional **Groups** (i.e., Departments)
- Create **folders** and sub-folders for Crystal Report User access
- Assign appropriate Group and Folder **security** levels
- Setup multiple **Scheduling** scenarios (e.g., single versus batching)
- Set **Notification** Alerts
- Work with **Events**
- Learn how the End User (via User Report Portal) can access and run Crystal Reports on demand and schedule reports in a secure environment

COURSE PREREQUISITIES

- Student should be familiar with windows operating system
- Crystal Server 2011/2013 or 2016 required (*free 60 day trial available*)
- Must be able to access your companies Crystal Server product (via the CMC - Central Management Console) with Administrator rights and End User portal (BI Launch Pad).

COURSE TOPICS

- Central Management Console (CMC) Access
- Launching the CMC
- Administration Configuration
 - Password Settings
 - Configuration Destinations
 - BI Inboxes
 - Email
 - FTP
 - File System
 - Print Settings
- Create/Maintain Groups (with applicable security levels)
- Create/Maintain Users (with applicable security levels)
- Add users to Groups
- Create Folders (with applicable security levels)
- Provide Group Access to folders
- Add reports to folders from CMC or Crystal Report
- Configure Report Options
 - ODBC Configuration
 - Set Default Prompts
 - Select Formats Output Options
 - Select Default Destinations – Email, FTP, etc.
- Scheduling
 - Create Report Instances
 - Choose format options
 - Determine Report Destination
 - Setting Instance Limits
- Test Access to folders via the BI Launch pad (reviewing security level access)
- How to use Publishing wizard – multiple reports
- Configuring Events/Triggers
 - File Events
 - Schedule Events
- Setting up calendars
- Using File Events in Report Scheduling
- Using Scheduled Events in Report Scheduling
 - Report Production Deployment process and more . . .