

### Linking Reports Cloud Hosting

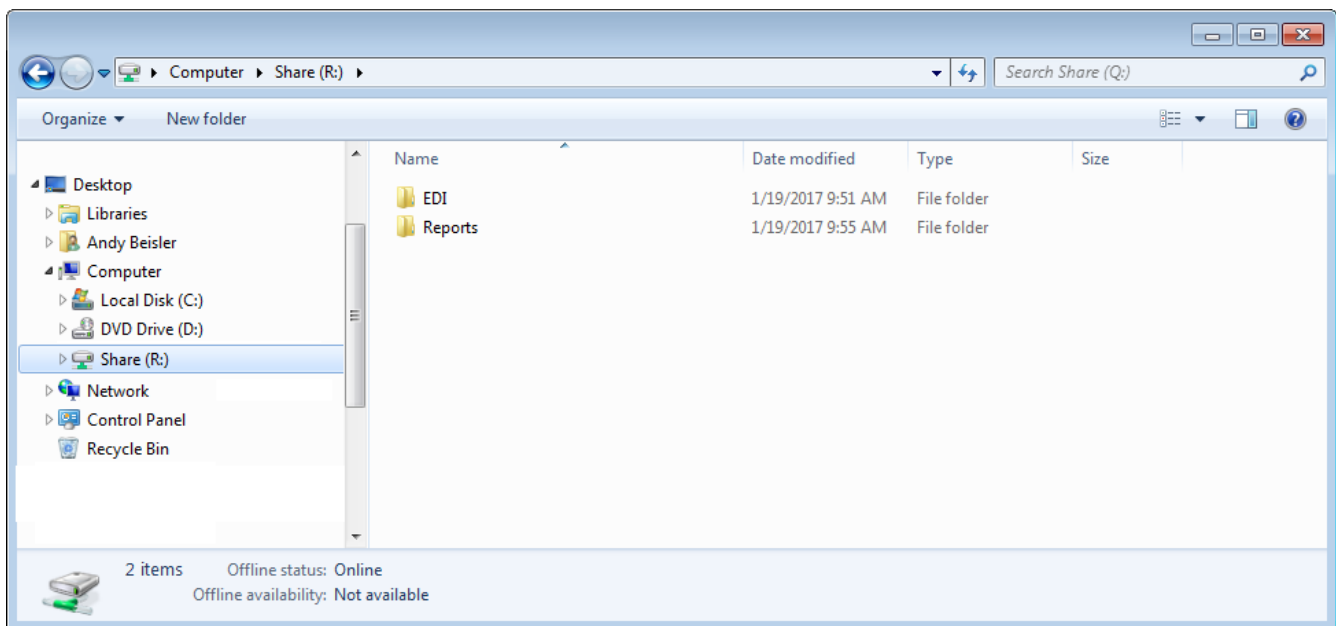
This document is intended for users utilizing “cloud” hosting for their application and are integrating Crystal Reports® software. In this case, the application runs as a “remote app” rather than software that is installed locally on your computer. As far as the application is concerned, the “local” computer is the cloud server, not your desktop computer. Due to this, there are differences in how custom reporting and other operations that involve sharing data must be handled.

Other documents are provided for customers who either have their own server or who are hosted by an independent provider (not ECi Software Solutions, Inc.).

### Accessing the Share Directory

While connected to the cloud server, a shared drive is usually established between your local computer and a specified “share” directory on the cloud server. The purpose of this drive is to provide the ability to move data files between your local computer and the cloud server in order for the remote application to have access to them. Reports, EDI files, import files, etc. must be located on the server for the “remote app” to access them.


The mapped drive is often assigned to the letter “R,” but it might be mapped to other letters in some cases.



You will often see a number of pre-established folders (directories) in the share. One should contain “reports.” The “reports” folder should contain at least one other folder. There should be one named Crystal Reports. If you don’t see a folder, you should be able use the “New Folder” option to create one.

Name	Date modified	Type	Size
CrystalReports	1/19/2017 9:50 AM	File folder	
UserReports	1/19/2017 9:50 AM	File folder	

When downloading, you can either (1) choose “save as” and choose your share directory – or – (2) download the file to your local download directory (or another location on your PC) and then move (copy) the file to the share.

Name	Date modified	Type	Size
 Customer_12_Month_Sales.rpt	12/16/2015 4:57 PM	RPT File	55 KB

If you browse (open) the share directory afterward, you should see the report listed.

## Data Links

Every hosted customer is provided a shared drive that is accessible while connected to the cloud server. You may have a shortcut on your desktop or you may have to use Microsoft Windows Explorer to browse the mapped drive. This is required for accessing any type of external data using the “remote” application. For example, if you want to import a spreadsheet, you’d place the file in the “share” and then open it from the application. The same is true of Crystal Reports report files.

Initially, your share directory (drive) should include at least one “Microsoft Data Link” file (with an extension of “.lnk” if extensions are displayed). The name of the file can vary; however, the purpose of this file is to provide a link between custom reports and the SQL database where your data is maintained.

 reportlink.udl	12/28/2010 6:19 PM	Microsoft Data Link	1 KB
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Any reports that you write or download, need to be placed in the share directory. They also must be updated so that the database connection points to the “data link” file.

If you open your share and don’t see a data link listed, please contact support so that we can set one up. It is important that the file not be renamed, deleted, or moved from this location so that you don’t affect any custom reporting you may do.

## Reports

We provide over 200 Crystal Reports report files for our customer’s use. These can be downloaded from a few different sources. Currently, reports are available from our new support portal (<https://help.ecisolutions.com>). Both areas require a user account and login for access to the report library. Once you login, choose “Software Downloads” and choose either the menu or article for the reports library or article (depending on the source you chose).

The web site lists reports by category with a description, and provides both the ability to download an archived copy of the report (ZIP) as well as view a PDF sample so that you can get an idea of how the report is formatted. ZIP archive files must be “extracted” before attempting to use the report file (RPT) file they contain.

## Report Software

Paid and free report viewer software is available; however, these products don’t allow changes to reports. For cloud hosted applications, the Logicity software is the default report viewer. For licensing reasons, it is required that companies using “free” report viewers have at least one Crystal Reports software license.

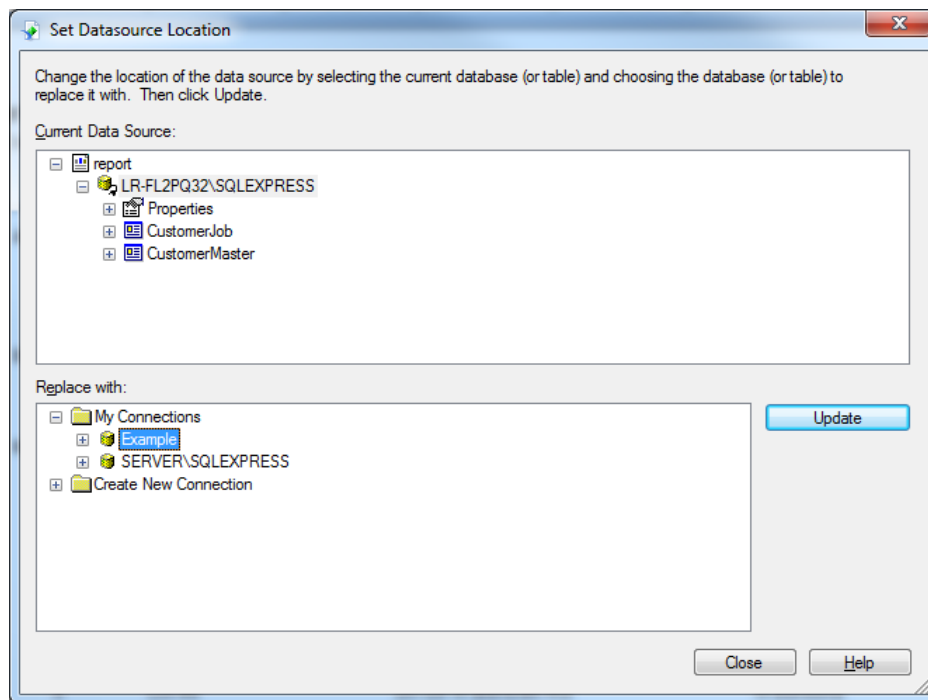
Please note that Crystal Reports and any other viewer software are not products of ECi Software Solutions, and we are unable to provide support or training for their use. We do provide documentation and other resources to assist you with reporting. Training classes and other resources are available for learning Crystal Reports from other providers. Several users have recommended the web site [www.staffkit.com](http://www.staffkit.com) for on-line training in Crystal Reports.

The following pages include instructions for linking reports to your data are specific for Crystal Reports; however, they should be similar for other products. Please consult your selected product's documentation if you have questions.

### Linking a Report to an Existing Connection

Please follow the steps outlined below for linking a downloaded report to your data.

- Begin by opening the Crystal Reports software.
- Choose “Open” from the “File” menu or CTRL-O.<sup>1</sup>
- Open the share directory where you saved or moved your report file. In order to do this, you must have a mapped drive to the network share. If you don’t see a drive (“R:” for example), contact support.<sup>2</sup>
- Select the report and choose the “Open” button on the dialog.
- You may receive a warning message “Invalid Printer.” If you do, select OK to ignore the warning.
- Choose “Database” and from the drop down menu select “Set Datasource Location.” A dialog will open.



- From the lower panel titled, “Replace with,” and expand the node named “My Connections.”
- Look for your server which may be listed by either name or IP address. If you don’t see any connection, you will need to define one. Please see the section of this document titled “[Creating a New Connection.](#)”

<sup>1</sup> If users have the “Custom Reports Folder” set from the User ID Maintenance form, any reports listed in the library form will open using the Logicity Viewer software rather than Crystal Reports. Reports in Logicity are read-only; therefore, they only allow users to refresh and review the report, but not make changes. Also, browsing to the Hosted File Share shortcut and double-clicking on a Crystal report it will open the report in Logicity Viewer.

<sup>2</sup> Shortcuts to your share directory via remote apps can’t be used to link reports. For reporting, you need a mapped drive. The setup for this is different for each customer. Usually, implementation personnel are responsible for setup.

- Click the “Update” button on the “Set Datasource Location” dialog. The “current data source” panel should change to display your server’s name or IP address.
- Choose “Close” to close the dialog.
- Next, it’s important to save the change to the connection for the report (or you will have to repeat this process). Choose “Save” from the “File” menu.
- To run the report using your data, press F5 (refresh).
- A dialog named, “Refresh Report Data,” may display. Choose the radio button named “Prompt for new parameter values.”
- Reports with parameters require that you enter information or make selections necessary for retrieving the data. These will vary for each report. Not all reports have parameters; however, most do.
- If the parameters and data meet the conditions of the report, data should display.
- If you make any changes or want to save the data with your report, change the “save data with report” option on the “File” menu and resave the report.

### Making changes to Existing Reports

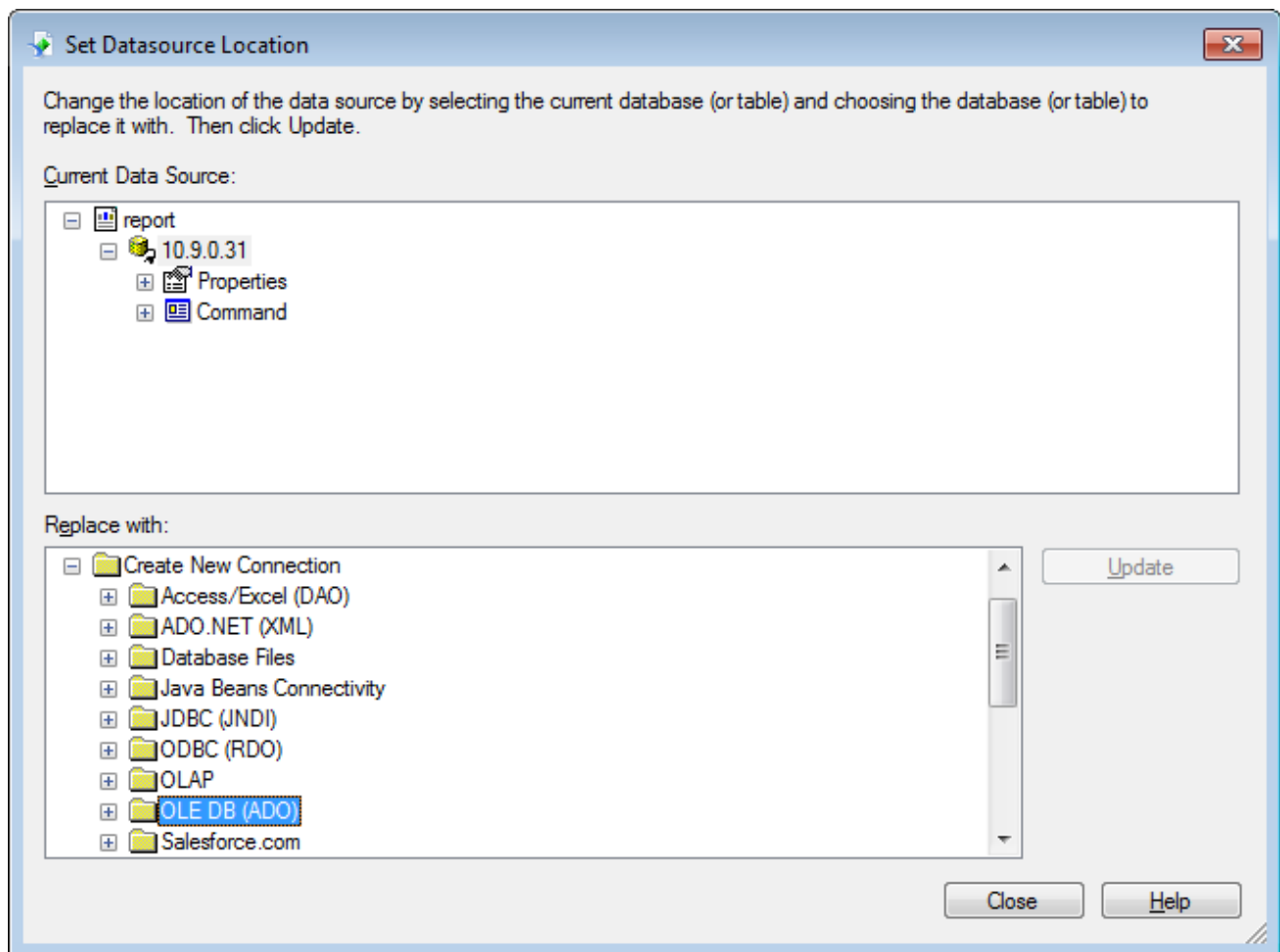
If you have access to Crystal Reports software, you have the ability to make changes to any reports you download; however, here are a few tips to help you:

1. It’s a good idea to make a back-up copy of any original report before changing it, just in case.
2. Most sections on reports we provide are set to “read-only” to prevent accidental changes. If you want to modify one or more sections, you have to open the section expert and uncheck the “read-only” check boxes for any sections you want to modify. This will then allow you to make changes.
3. Some reports directly access tables, others use SQL statements. The reports with SQL statements tend to be more complex, so you may need assistance if changes are required to the data the statement retrieves.

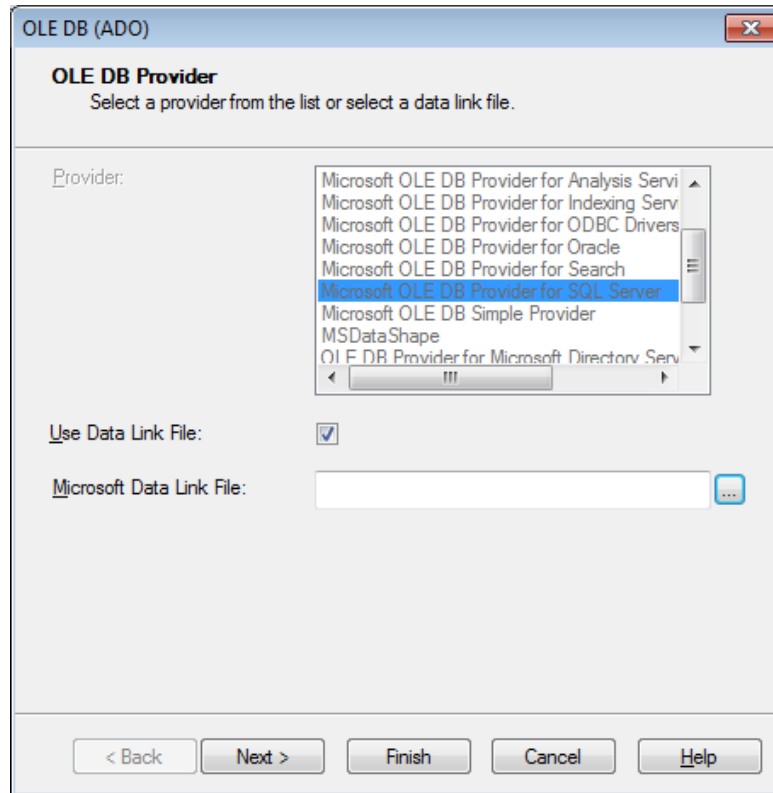
## Creating a New Connection

This section discusses defining a new connection using the Crystal Reports software. Please following the steps listed below:

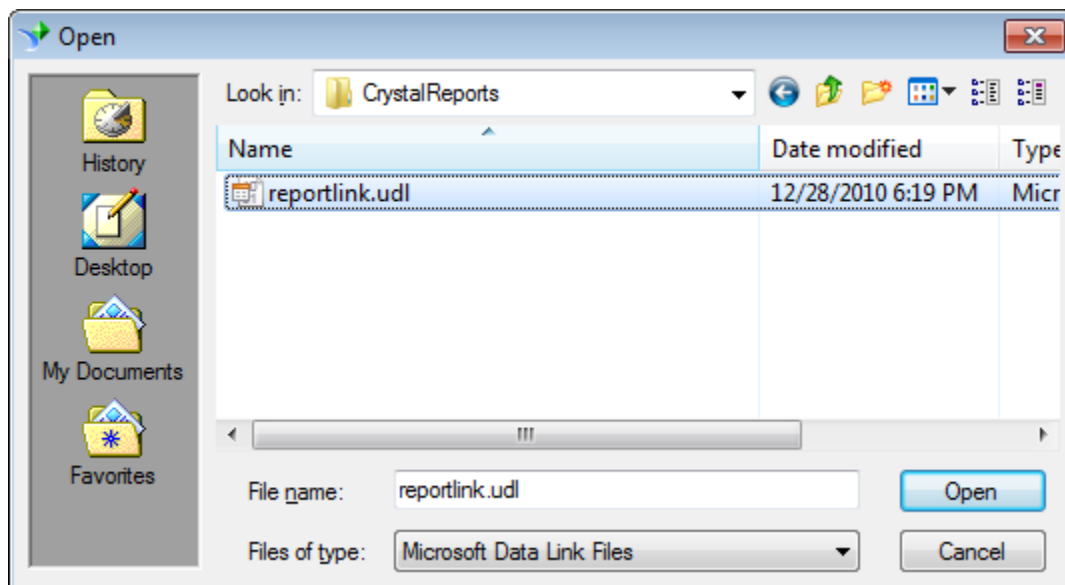
- Begin by opening the Crystal Reports software.
- Create a new or open an existing report.
- Choose “Database” and from the drop down menu select “Set Datasource Location.” A dialog will open.
- Expand the node for “Create New Connection.”
- From the listing shown, locate the “OLE DB (ADO)” node and click the “+” as if you were expanding the node.



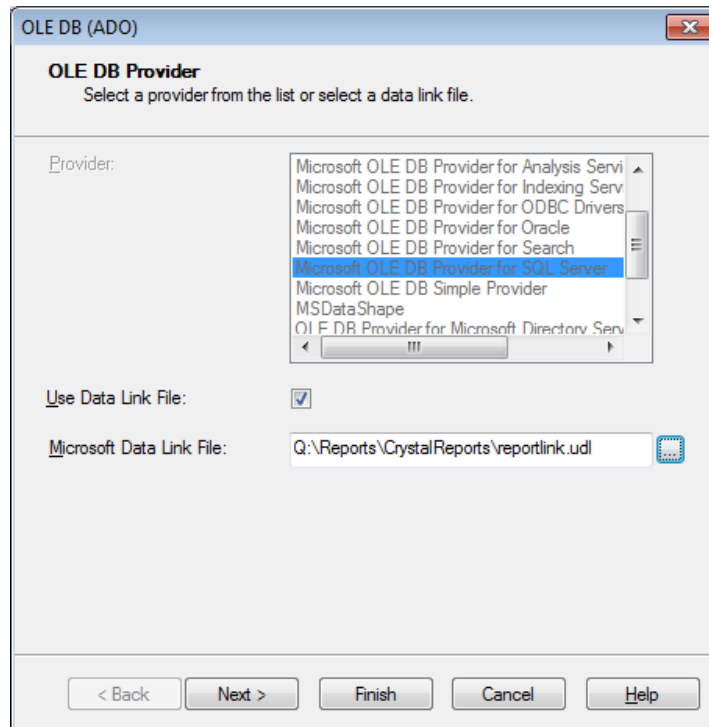
- The “OLE DB (ADO)” dialog will open.
- Select the “Use Data Link File” check box.



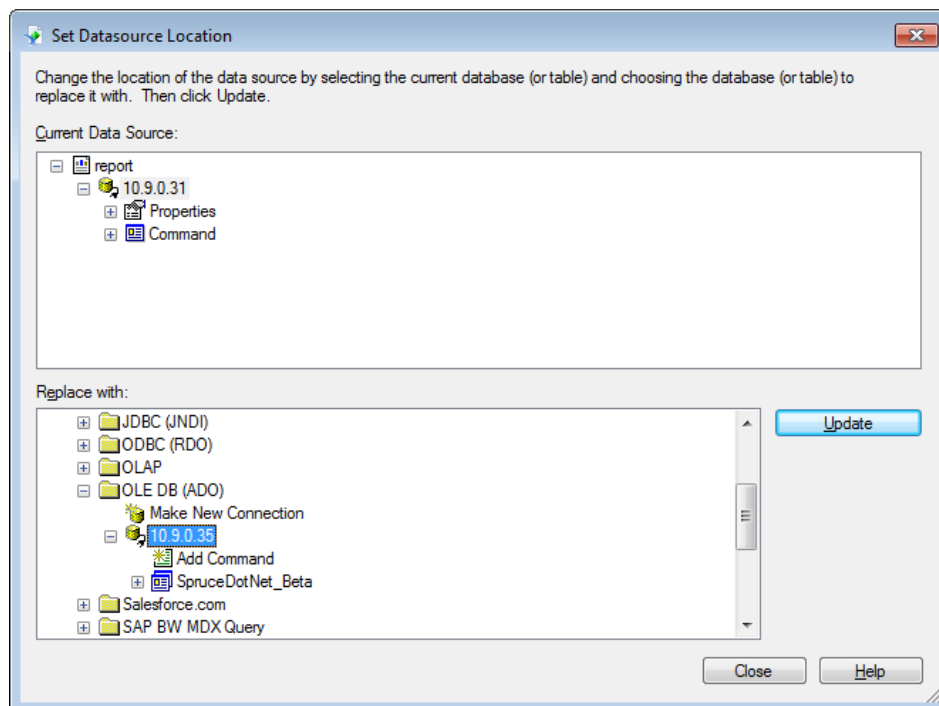
- Choose the browse (“...”) button next to the text area for the Microsoft Data Link File
- Browse to the drive letter that matches your file share (this must be setup).



- Locate the data link file for your company’s use and choose the “Open” button on the dialog.

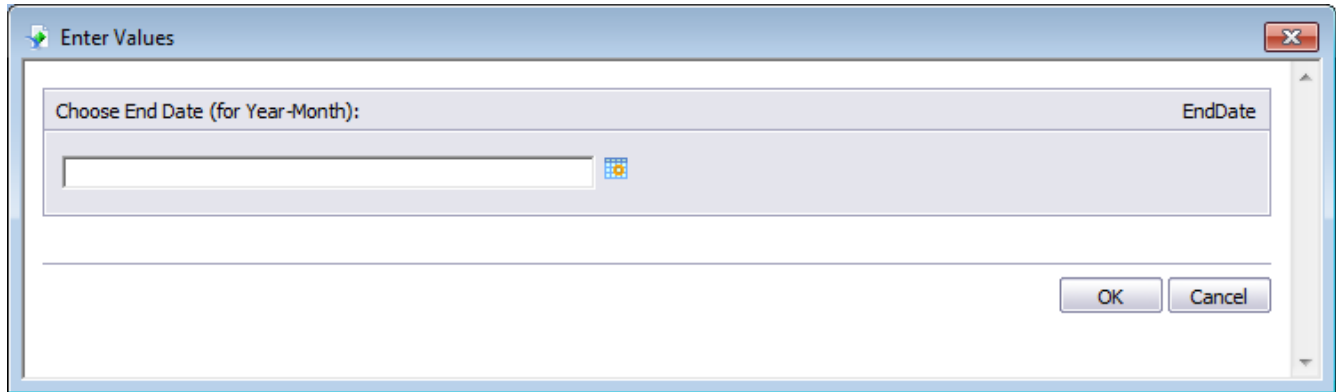


- Click “Finish” on the dialog.
- On the “Set Datasource Location” dialog, you will now see a new connection listed. Select the new node and choose “Update.”





If this was successful, the report may prompt for any required parameters (run settings) at this time.



**Important!** Make sure that you re-save your report after making any connection changes!

The next time you use Crystal reports this connection will already be saved in “My Connections.”

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