



Crystal Reports Viewer and Scheduler

v1.9 User Guide

2018.04.19

Introduction

Logicity is a Crystal Reports viewer and scheduler application that can be installed on any computer or server running the Windows operating system.

Logicity is a ground-up re-write of SaberLogic RPT Tool, which has been used by several hundred customers since its initial release in 2001.

There are two versions of Logicity that are now available. The free version of Logicity is designed to be feature compatible with SaberLogic RPT Tool. The introduction of the Professional version adds installation support, discounts on technical support, along with several new features.

We encourage you to test out the free version first to ensure you are entirely satisfied before purchasing the key to unlock the Professional features.

About SaberLogic

Logicity is designed, developed, and supported by SaberLogic. SaberLogic provides Crystal Reports programming and development services to over 500 customers, ranging in size from SMB to Fortune 100. We have developed nearly 5,000 new Crystal Reports since the company's inception in 2002.

For more information, please visit our corporate website at www.saberlogic.com.

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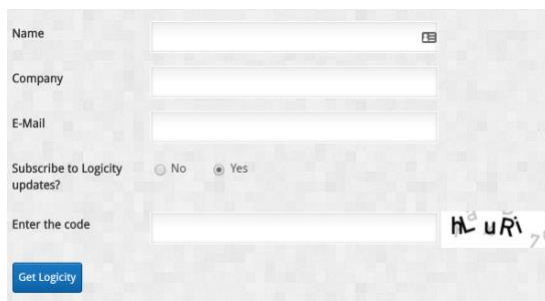
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Installation & Registration

Download and Install

Let's begin by downloading the latest version of Logicity from www.logicitysuite.com.

- 1) Go to: <http://www.logicitysuite.com/free.html>
- 2) Complete the short form and click "Get Logicity".

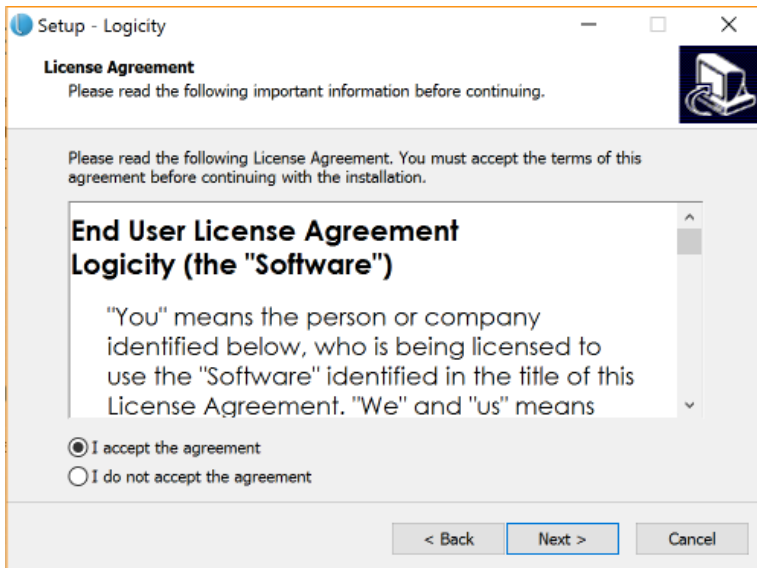
A screenshot of a registration form for Logicity. The form includes fields for Name, Company, and E-Mail. Below these is a section for "Subscribe to Logicity updates?" with radio buttons for "No" and "Yes". At the bottom, there is a field for "Enter the code" with a CAPTCHA image showing the letters "H u R". A blue button labeled "Get Logicity" is positioned at the bottom left of the form.

- 3) You will receive an email from us with links to the EXE and the MSI version of the software.
- 4) Download the software to your local system.

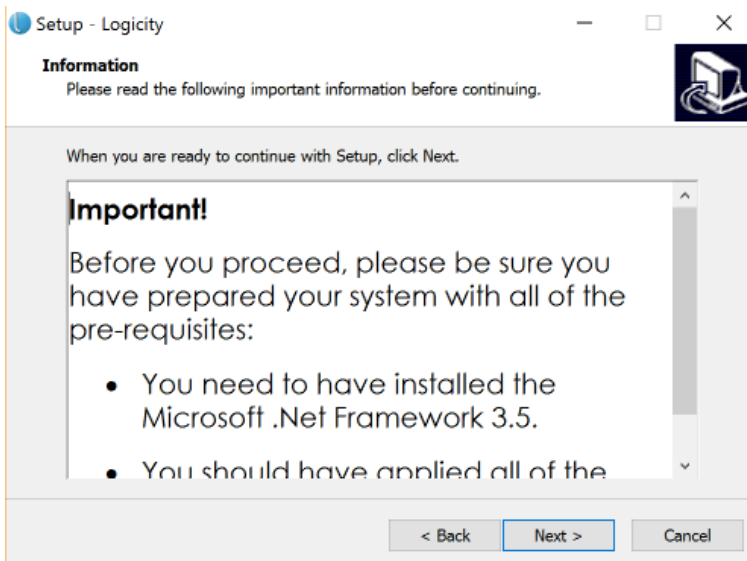
Next, let's go through the steps to install the Logicity software.

- 1) Double-click the installation file to start the install process

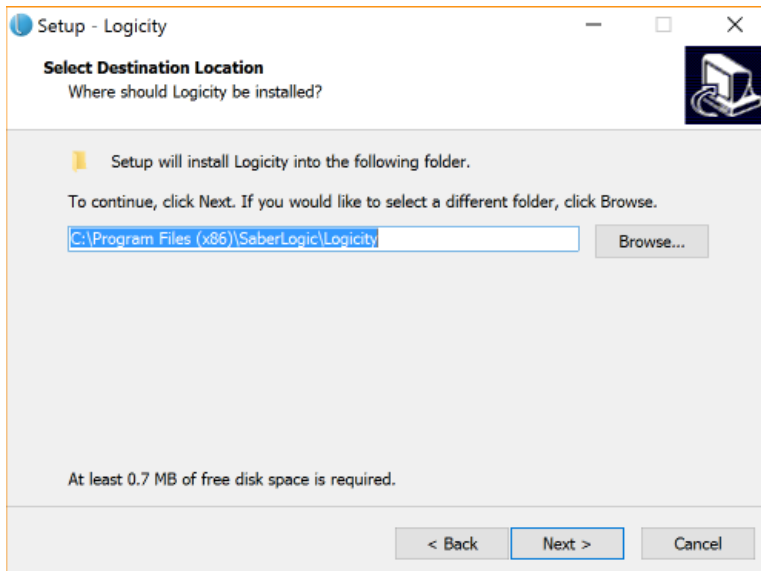
- 2) License Agreement – Please read the Logicity EULA and click “I accept the agreement” and then NEXT in order to continue the installation.



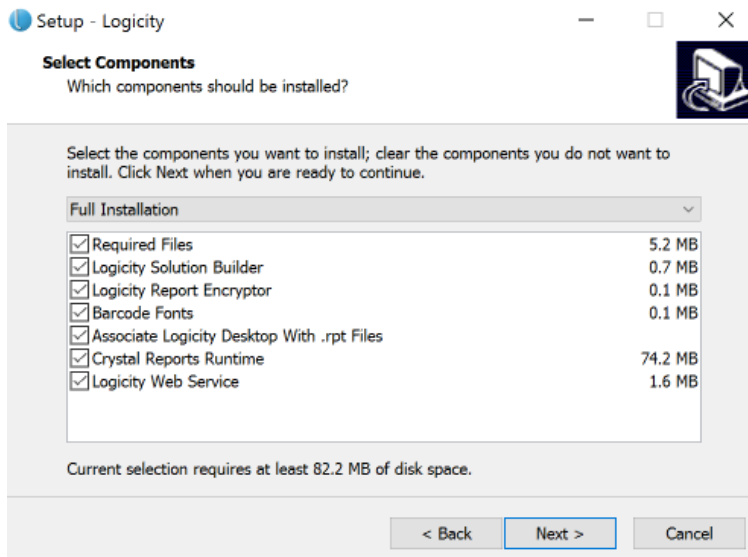
- 3) Important Information – Please review the pre-requisite software that should be installed on your system, including Microsoft .Net Framework 3.5 or better and all updates to Microsoft Internet Explorer. Click NEXT to continue.



- 4) Select an Installation Folder – Accept the suggested default installation location or browse to a new one.

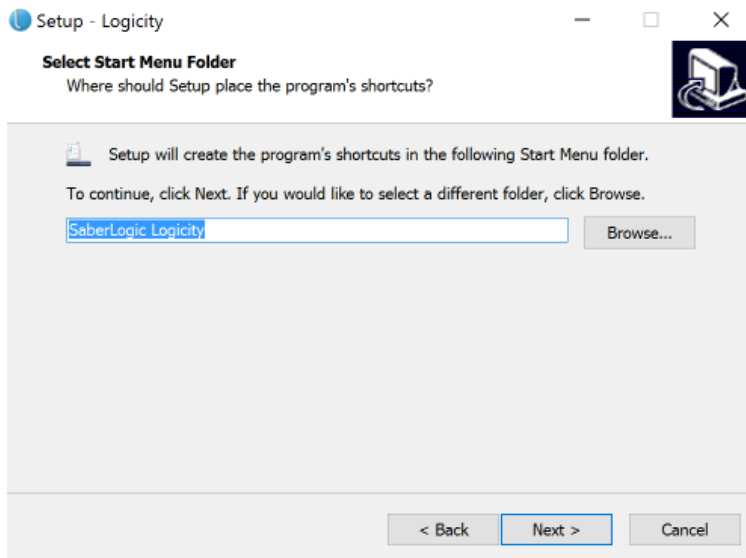


- 5) Select Components to Install – Check the components that you wish to install. Click NEXT to continue.

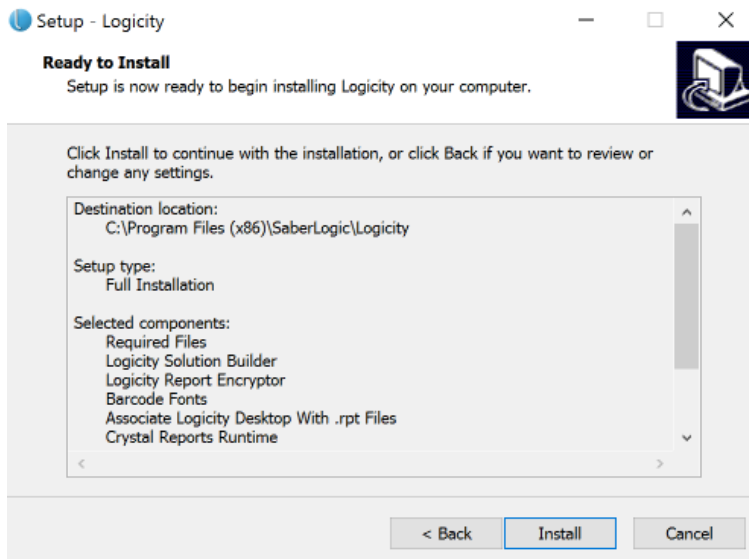


NOTE: It is critical that you be aware of incompatibilities between Logicity and systems that have the developer version of Crystal Reports. If you have Crystal Reports installed on this system, please de-select "Crystal Reports Runtime" from the list of components to install.

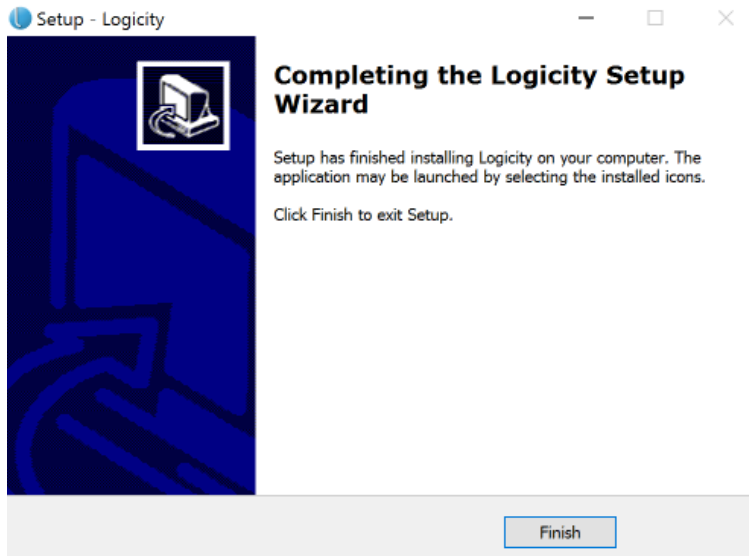
- 6) Select Start Menu Folder – Enter a custom folder name for Logicity or accept the suggested name. Click NEXT to continue.



- 7) Ready to Install - The installer will ask you to confirm that you want to install Logicity by clicking INSTALL.



- 8) Installation Complete – Once the installation has finished, click the FINISH button to complete the installation process.



Professional Registration

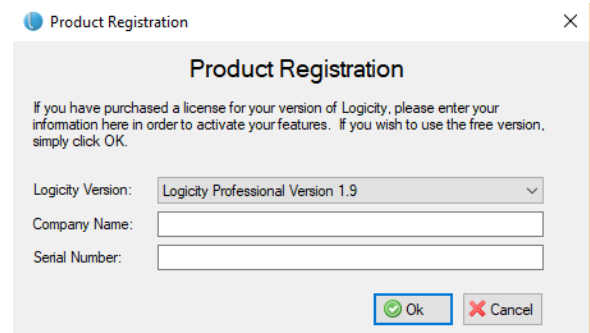
After purchasing Logicity Professional, users receive an e-mail with a registration code. This product code can be used to unlock the Professional features.

- 1) From the start menu, select the "Register Logicity" choice under the "SaberLogic Logicity" folder. A product registration screen will



appear which will be used to enter the license code which unlocks all of the Logicity Professional features.

- 2) From the first drop-down box, select the Logicity version that you are registering. Next, enter the company name exactly as it appears in the registration e-mail. Finally, enter the serial number exactly as it appears in the registration e-mail. If the

A screenshot of a 'Product Registration' dialog box. The title bar says 'Product Registration' with a close button. The main title is 'Product Registration'. Below the title is a paragraph of instructions: 'If you have purchased a license for your version of Logicity, please enter your information here in order to activate your features. If you wish to use the free version, simply click OK.' There are three input fields: 'Logicity Version:' with a dropdown menu showing 'Logicity Professional Version 1.9', 'Company Name:' with a text box, and 'Serial Number:' with a text box. At the bottom right are two buttons: 'Ok' with a green checkmark icon and 'Cancel' with a red X icon.

company name and serial number are correct, a small green check mark will appear to the right of the serial number field, indicating that it is valid.

- 3) Click the OK button to complete the registration process.

Understanding Logicity Components

Logicity Desktop

Logicity desktop is the main application used to view Crystal Reports. It contains some functional Logicity buttons, the SAP Crystal Reports viewer controls, and the main report canvas.

The screenshot shows the Logicity Desktop application window titled 'Main Report'. The report content is as follows:

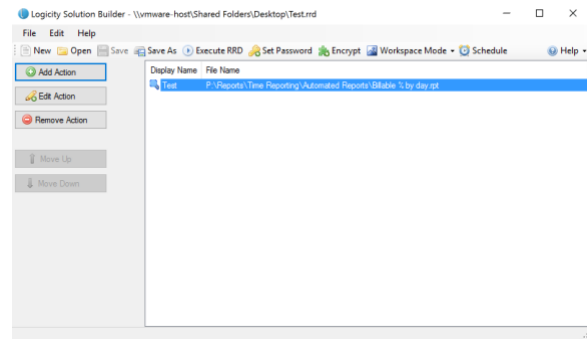
Hourly Employee Time Card For 6/12/2016 - 6/18/2016

Date	Total Hours	Lunch	Idle	Indirect	Billable	Pay
Devin Ellis						
6/13/2016	3.68	100%	0.00	0%	3.68	100%
6/14/2016	3.52	100%	0.00	0%	3.52	100%
6/17/2016	3.15	100%	0.00	0%	3.15	100%
Total	10.35	100%	0.00	0%	10.35	100%
SC-Jonathan Alexander						
6/14/2016	2.78	100%	0.00	0%	2.78	100%
6/15/2016	2.10	100%	0.00	0%	2.10	100%
6/16/2016	5.50	100%	0.00	0%	5.50	100%
Total	10.47	100%	0.00	0%	10.47	100%
SC-Sean Craft						
6/16/2016	39.33	100%	0.00	0%	39.33	100%
Total	39.33	100%	0.00	0%	39.33	100%
Grand Total	60.15	100%	0.00	0%	60.15	100%

At the bottom of the report, it says: 'Printed on 6/17/2016 at 1:48 PM' and 'Page 1 of 1'. The status bar at the bottom of the application window shows 'Current Page No.: 1', 'Total Page No.: 1', and 'Zoom Factor: Whole Page'.

Logicity Solution Builder

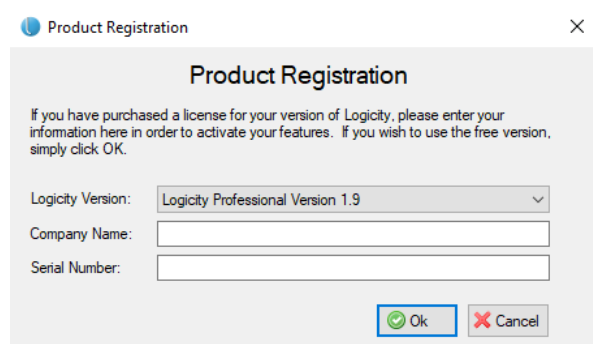
The Logicity Solution Builder component is used to create Logicity solution files. These solution files are like recipes, in that you can specifically define how you want to schedule the delivery of reports to a user's screen, to disk, a printer, or even by e-mail. You can also pre-fill information (report parameters or database logins) when running a report so that the user is not prompted. You can also chain together multiple reports into a single shortcut. Solutions can then be scheduled using the Windows task scheduler.



The Professional version of Logicity provides additional functionality. You have the ability to password protect Crystal Reports, the ability to encrypt a Logicity Solution file (to hide database login information), the ability to log report access, to create virtual workspaces for reports (see Logicity Workspace) and even the ability to add files other than Crystal Reports, to your solution files.

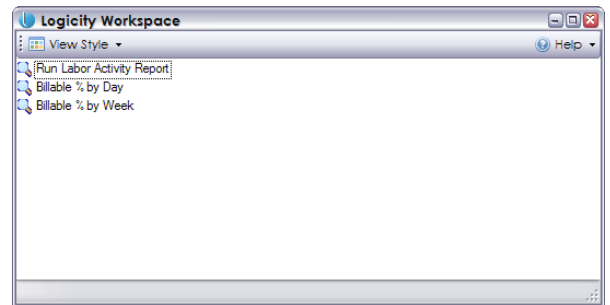
Logicity Product Registration

After purchasing Logicity Professional, users receive an e-mail with a registration code. This product registration screen will be used to enter the license code which unlocks all of the Logicity Professional features.



Logicity Workspace (Pro Feature)

Logicity Workspace is a component that provides a user with a simple, clean, organized workspace to view and execute any available Crystal Reports from a single screen.



Logicity RESTful Web Services (Pro Feature)

Logicity RESTful Web Services allows Logicity to be executed by an outside program. When installed, you can pass RRD lines as POST methods to <http://localhost:3580/rrdLine> (hostname and port defined in the config file) and it should reply with success/failure information as each is processed. Save, Email, and Print actions are supported.

Export Format Options (Pro Feature)

The "Export Format Options" in the start menu opens a text file with all of the export option parameters. Logicity utilizes this to set options when executing reports with Solution Builder.

Logicity Report Encryptor (Pro Feature)

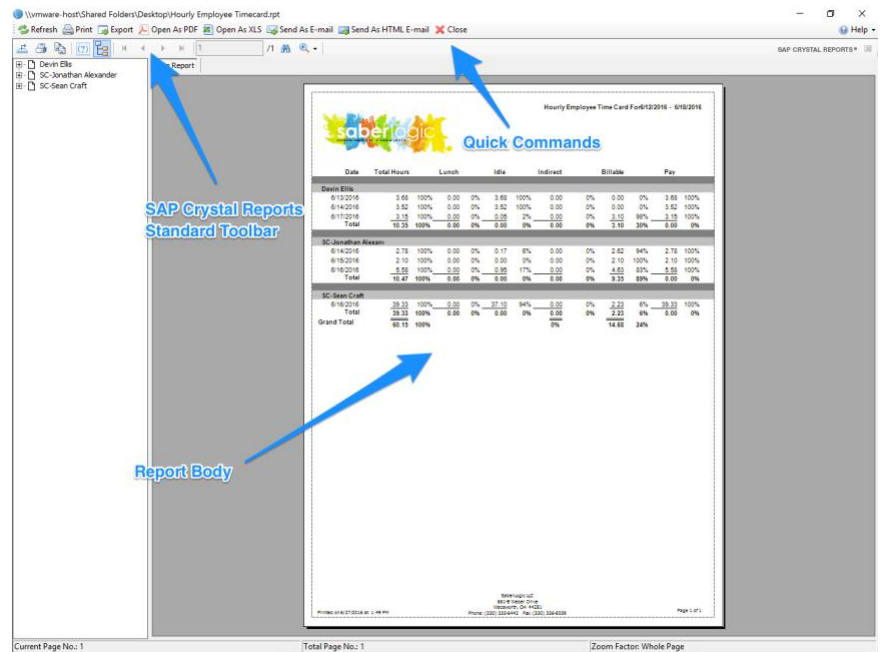
The Report Encryptor allows you to encrypt a Crystal Reports file so that it can only be run with Logicity and not opened or altered in Crystal Reports.



Logicity Desktop

Overview

Upon installation, Logicity will register so as to be able to open RPT files directly by clicking on them. To run a Crystal Report file directly, simply double-click on the RPT file. Logicity Desktop will open and the report will run. The user will be prompted to complete any required parameters or database login information.



Screen Layout

QUICK COMMANDS

The following are buttons that are available on the Logicity Desktop's quick command toolbar:

- REFRESH – Click this button to refresh the report with current data or different parameters.
- PRINT
- EXPORT – You are presented with a dialog box to name the file, select a location and an available file type.
- **OPEN AS PDF (Pro Feature) – Allows for 1-click export as a PDF file.**

- ***Open as XLS (Pro Feature) – Allows for 1-click export as an XLS file.***
- ***SEND AS EMAIL (Pro Feature) – Allows you to send an email with the report attached.***
- ***SEND AS HTML EMAIL (Pro Feature) – Allow you to send an HTML email with the report data included in the body of the email.***
- CLOSE – Closes the Logicity viewer window.

SAP Crystal Reports Viewer Standard Toolbar

The standard SAP Crystal Reports viewer toolbar is also visible and functional. It contains the following controls:

- Export Report
- Print
- Copy
- Parameter Panel / Group Tree on/off
- Page navigation buttons
- Search
- Zoom

Report Body

The main portion of the screen is dedicated to displaying the report.

Ads (free version)

The free version of Logicity is supported by ads that appear in the right portion of the screen.

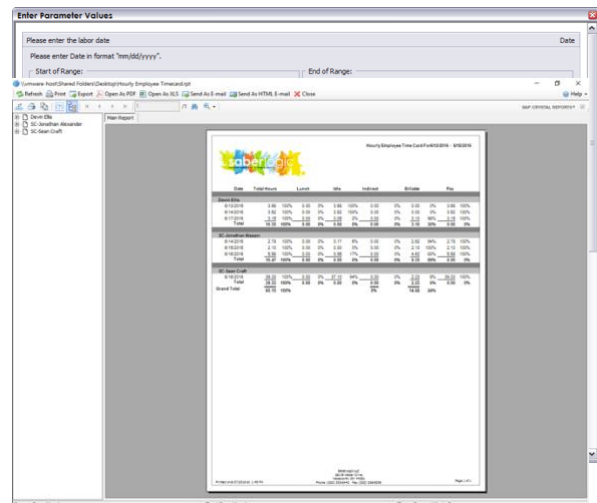
Screen Controls (Pro Feature)

The Logicity Desktop screen appears the same for both the free and professional versions. In the Professional version, you have the ability to lock-down or remove buttons from the tool bar or remove the group tree from the Solution Builder. The tools and buttons that are for Professional users only are also activated.

Viewing a Crystal Report

1) Double Click an RPT file to open Logicity Desktop. Or, open the Logicity Desktop application from the Start Menu. You will first be prompted to navigate to the report. Click open.

2) If the report contains parameters, or if a database login is required, the user will be prompted for this information. Complete the required information and then click the OK button.



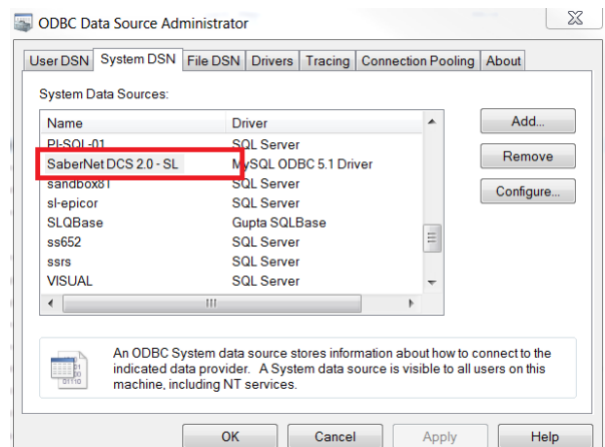
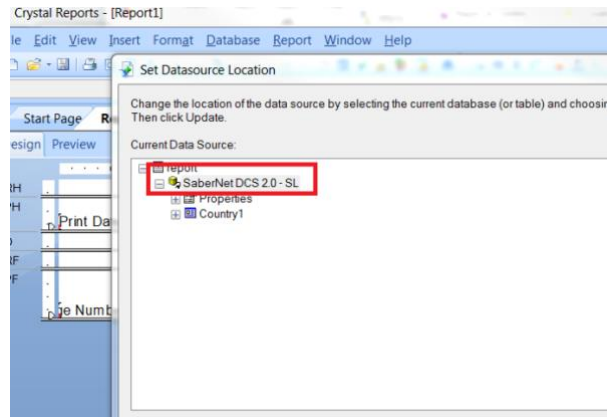
3) Logicity Desktop will display the Crystal Report on the screen.

Troubleshooting

The following are some common issues and things to check for:

- Check to ensure a 32 bit ODBC has been setup. The 32-bit version of the Odbcad32.exe file is located in the %systemdrive%\Windows\SysWoW64 folder. If you are running this on a 64-bit system, make sure you follow the path above and not do not go to the control panel for this.

- Your ODBC data source name must exactly match the data source name saved in the Crystal Report. You will need to have a full version of Crystal Reports to check this in a report.



- If you have a report causing issues, check to see if other reports are having this same issue as well. That will tell you if is something specific to the report or to your Logicity set-up.

Logicity Solution Builder

Overview

When a user wants more flexibility, automation and more efficiency when running Crystal Reports, then the user should use Logicity Solution Builder instead of simply opening the Crystal Report directly. By using Logicity Solution Builder, a user can pre-fill data and report parameters, can select various ways to run a Crystal Report (view, e-mail, print, save), and can schedule the reports to run automatically. When the Professional features are unlocked, users can also password protect Crystal Reports, encrypt the solution file (to hide database login information), and can group reports into a convenient workspace.

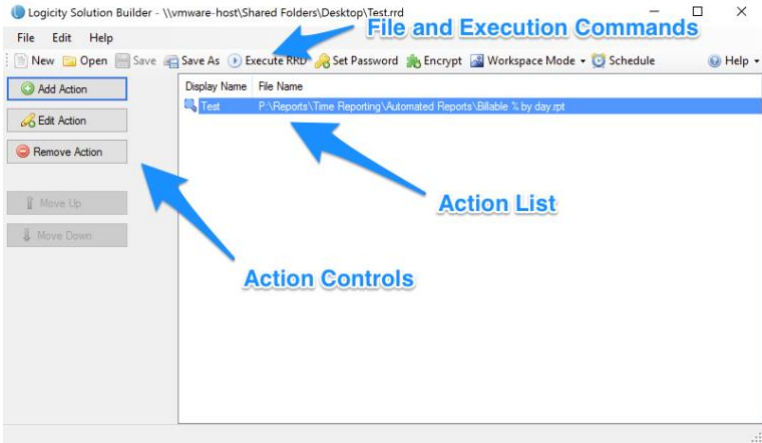
Screen Layout

There are three main areas of the screen.

File & Execution Commands

Underneath the menus are a row of buttons for performing file functions (new, open, save, save as) and setting methods of execution (execute RRD, schedule).

- New – Create a new RRD solution file.



- Open – Open an existing RRD solution file.
- Save – Save the current RRD solution file.
- Execute RRD – Initiates the execution of each line of the RRD solution file.
- Schedule – Schedules the execution of the RRD in Windows task scheduler.
- ***Set Password (Pro Feature) – Allows you to set a password that the user must enter before running the RRD solution file. The solution file is also encrypted.***
- ***Encrypt (Pro Feature) - Allows you to encrypt the RRD file so that database login information cannot be viewed.***
- ***Workspace Mode (Pro Feature) - A toggle on/off that determines how the RRD solution file is run by Logicity Desktop. If Workspace Mode is turned on, the solution file will be opened in the Logicity Workspace, which presents all of the actions in the solution and allows the user to execute them individually.***

Action Controls

Along the left side of the screen are buttons for controlling solution actions. These include adding a new action, editing an existing action, removing an existing action, or re-ordering actions.

Action List

The primary area of the window displays a list of all of the actions in this solution. Each line represents a single action and they are displayed in the order they will be executed.

- Each action line contains the following information:
- An icon that represents the way that the action will be executed (view, e-mail, print, save)
- The name of the action
- The file path & name

Creating a New RRD Solution File

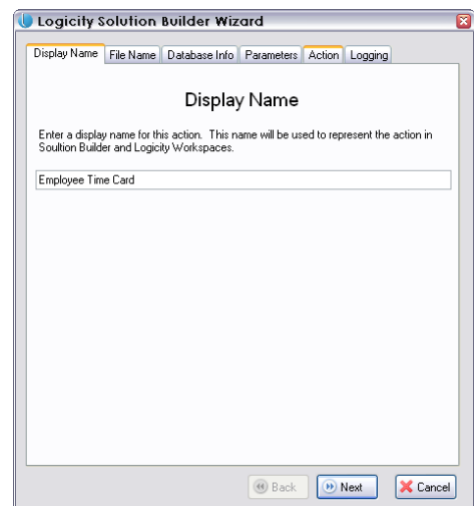
The Logicity Solution Builder Wizard walks a user through the process of creating or editing an action. The wizard is executed when the user clicks the ADD ACTION button or the EDIT ACTION button.

Step 1 - Action Name

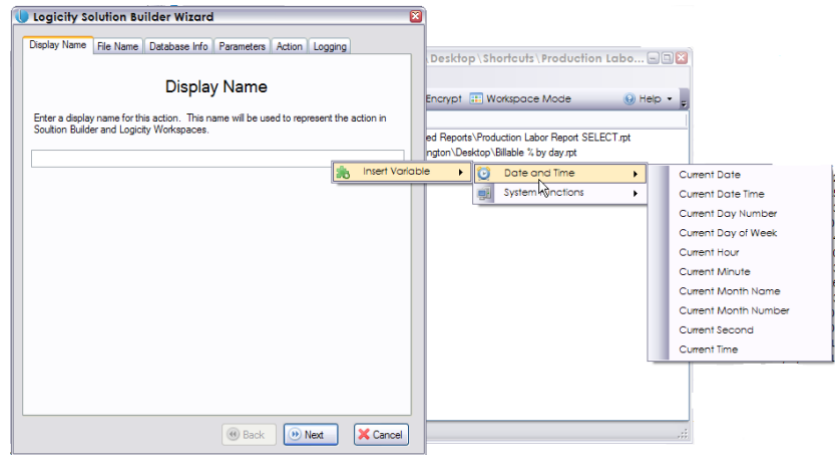
The first step in creating/editing an action is to provide a display name. This is how the action will be identified in the list of actions in the main window of Logicity Solution Builder.

PRO FEATURE - In the professional version, you can right-click in this field to add a variable.

- After entering a name, click the NEXT button.



- If you wish to cancel your work, click the CANCEL button.



Step 2 - File Name

The second step is to select the file that you want to execute. Click the BROWSE button to go to the location of the report file you wish to use.

- After browsing to the file, click the NEXT button.
- If you wish to return to the previous screen, click the BACK button.
- If you wish to cancel your work, click the CANCEL button.



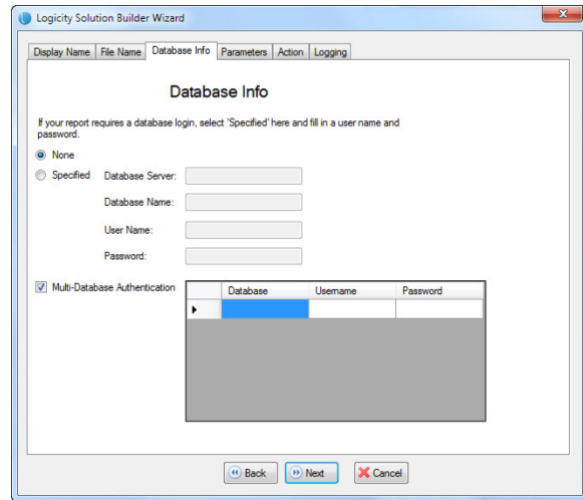
PRO FEATURE - In the free version of Logicity, you may only create an action for a Crystal Report. In the Professional Version, you may select another file type (such as a Microsoft Office document, batch file, etc.) to create an action from.

Step 3 – Database Info

If your report requires a database login, select “Specified” here and fill in a username and password. If no login is required, simply select “None”.

PRO FEATURE - If your report utilizes data from multiple sources, you may need to authenticate against multiple databases.

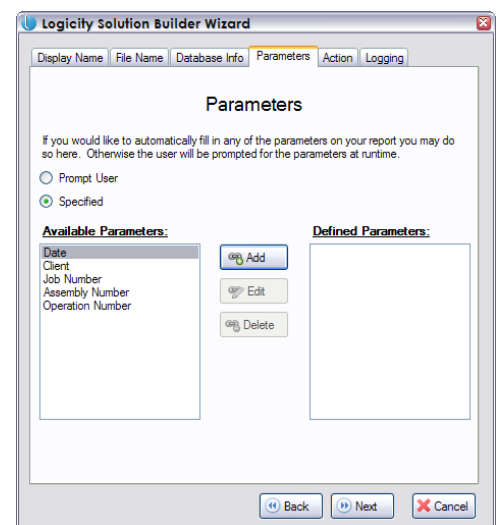
Simply check the "Multi-Database Authentication" check box and Logicity will scan the report for data sources and provide boxes for the user name and password to be entered.



- After making your selection, click the NEXT button.
- If you wish to return to the previous screen, click the BACK button.
- If you wish to cancel your work, click the CANCEL button.

Step 4 – Parameters

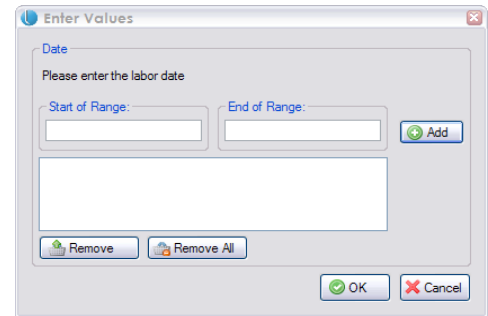
If you would like to automatically fill in any of the parameters on your report, you may do so here. Otherwise, the user will be prompted for the parameters at runtime.



When you click "Specified", Logicity will search the report and list the parameters that are available. Simply select the parameter you wish to pre-fill information for and click the ADD button. A pop-up window will appear that asks you to specify the data for the parameter. Enter the parameter and then click the ADD button. When all parameters have been entered, simply click the OK button to save them.

PRO FEATURE – Professional users can right-click on a field and insert a variable.

- After specifying all desired parameters, click the NEXT button.
- If you wish to return to the previous screen, click the BACK button.
- If you wish to cancel your work, click the CANCEL button.



Step 5 – Action

Select what action you would like to perform with the report. You can select to view, e-mail, print, or save.

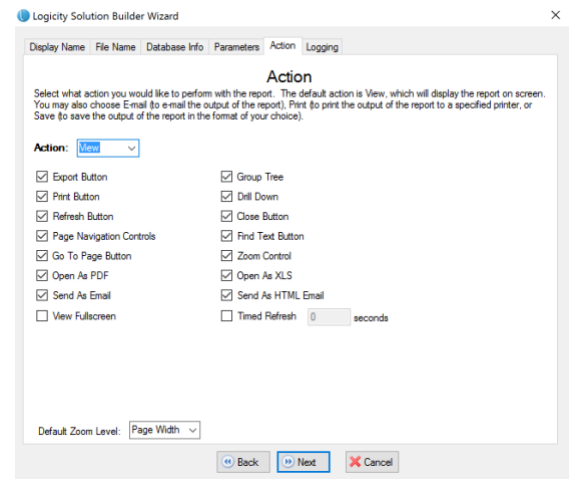
View Action

The default action is view, which will simply display the report on the screen.

PRO FEATURE - In the Professional version, admins can lock-down various screen controls when viewing a Crystal Report.

The following screen controls can be hidden from users:

- Export Button
- Print Button
- Refresh Button
- Page Navigation Controls
- Go To Page Button
- Open as PDF
- Send As Email
- View Full screen
- Group Tree
- Drill Down
- Close Button
- Find Text Button
- Zoom Control
- Open as XLS
- Send as HTML Email
- Timed Refresh XX seconds
- The default zoom level can also be set in Logicity Professional.



e-Mail Action

This choice e-mails the output of the report to recipients. The user specifies the server information, the "From" address, the "To" addresses, the subject line, attachment format, and the body of the e-mail.

This screen has the following info:

- SMTP server information, port
- Authenticate to the server
- Ability to use SSL
- "From" address, "To" address, CC, and BCC addresses, separated by commas
- Subject line
- Filename
- Body of the email
- Attachment format
- Receive read receipts
- Suppress the email action if no records exist in the report
- Encrypt attachments with a password

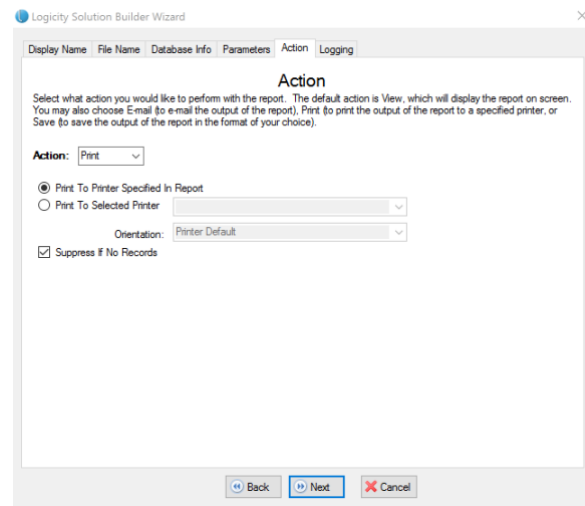
The screenshot shows the 'Action' configuration screen in the Logicity Solution Builder Wizard. The window title is 'Logicity Solution Builder Wizard' and it has a close button (X) in the top right corner. The screen is divided into several sections:

- Navigation:** 'Display Name', 'File Name', 'Database Info', 'Parameters', 'Action' (selected), and 'Logging' tabs.
- Action Selection:** A dropdown menu labeled 'Action:' with 'Email' selected. Below it, a small text box explains: 'Select what action you would like to perform with the report. The default action is View, which will display the report on screen. You may also choose E-mail (to e-mail the output of the report), Print (to print the output of the report to a specified printer, or Save (to save the output of the report in the format of your choice)).'
- SMTP Server Information:** Fields for 'SMTP Server:', 'Port:' (set to 25), 'Authentication' (checkbox), 'Use SSL' (checkbox), 'User Name:', and 'Password:'.
- Recipient Information:** Fields for 'From Address:', 'To:', 'CC:', and 'BCC:'.
- Content:** Fields for 'Subject:', 'File Name:', and 'Body:' (with a scrollable text area).
- Attachment Format:** A dropdown menu set to 'Adobe Acrobat (PDF)'.
- Advanced Options:** 'Request Read Receipt' (checkbox), 'Suppress if No Records' (checkbox, checked), 'Encrypt Attachment' (checkbox), 'Password:' field, and 'Confirm Password:' field.
- Navigation Buttons:** 'Back', 'Next', and 'Cancel' buttons at the bottom.

Print Action

This choice allows the user to select to print to the report default printer, or to another selected printer.

- Print to the printer specified in the report itself
- Print to a selected printer
- Suppress printing if the report has no records.

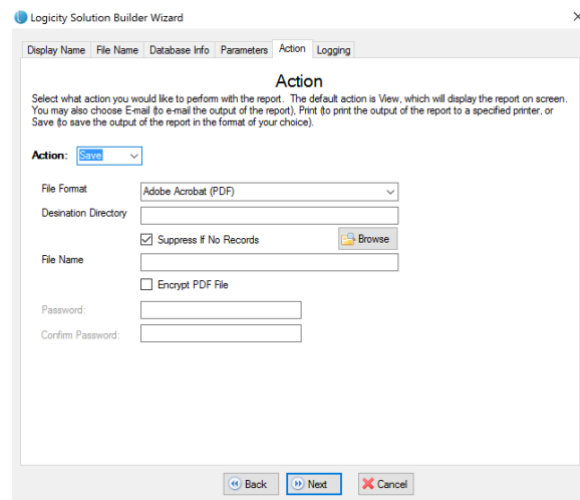


Save Action

This choice allows the user to select the file format to save as, the destination directory, and the file name.

This screen allows you to:

- Select a file format
- A destination directory – browse to the location
- Checkbox to suppress the save command if no records exist
- Enter a file name



- **PRO FEATURE – You can right click and add variables to the filename to change the filename based on things like date and time.**
- **PRO FEATURE - Ability to encrypt the file with a password**

NOTE: Only one report action can be specified per action-line of the solution. To run the same report multiple ways, simply add another action to the solution using the same Crystal Report.

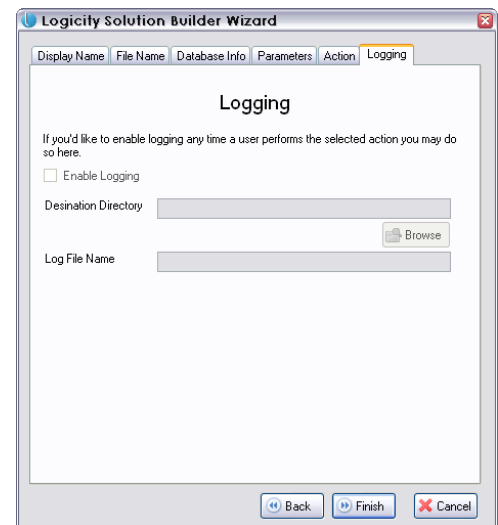
- After specifying all desired parameters, click the NEXT button.
- If you wish to return to the previous screen, click the BACK button.
- If you wish to cancel your work, click the CANCEL button.

Step 6 – Logging (Pro Feature)

If you want to enable logging so that Logicity logs when a user performs the selected action, simply check the box, browse to a destination directory, and enter a log file name. The logging tracks the date & time report was run, the Crystal Report filename, the user name, and the computer name.

Users can right click on a field and insert a variable.

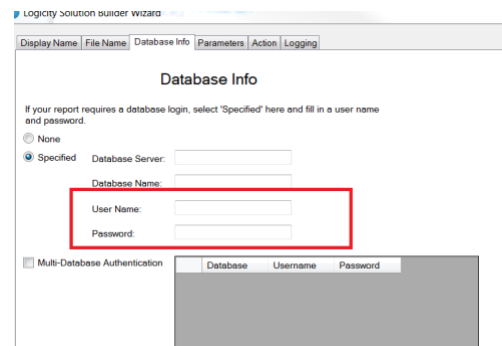
- To complete the process, click the FINISH button.
- If you wish to return to the previous screen, click the BACK button.
- If you wish to cancel your work, click the CANCEL button.



Troubleshooting

View Actions

- If you are having issues running a report in Solution Builder, try opening the report using Logicity Desktop (double clicking .rpt file) and verify that the report itself runs properly in Logicity.
- If you have more than one report available, check to see if any other reports are having this same issue.
- If you are not using an OLE connection try only filling out "User Name" and "Password".



Email Actions

- If you are having issues running a report in Solution Builder, try opening the report using Logicity Desktop (double clicking .rpt file) and verify that the report itself runs properly in Logicity.
- If you have more than one report available, check to see if any other reports are having this same issue.
- If your email server requires SSL, please make sure you have a Logicity Professional license as this is a Pro only feature.
- The parameter tab in the solution builder must have any parameters specified if parameters exist in the report.
- If the Schedule button in Solution builder is greyed out, make sure you save the solution file first. The scheduling option becomes active after the solution file has been saved initially.

Tutorials - Using Logicity Solution Builder

The following are short tutorials for getting up to speed on several common report viewing processes.

Viewing a Report

- 1) Open Logicity Solution Builder.
- 2) Click the NEW button. This starts the process of creating a new solution.
- 3) Click the ADD ACTION button. This starts the Logicity Solution Builder Wizard.
- 4) Logicity Solution Builder Wizard
 - a) Display Name Screen - Enter a "Display Name" & click the NEXT button.
 - b) File Name Screen - Click the BROWSE button and find the Crystal Report you want to run. Click the NEXT button
 - c) Database Info Screen – If there is a database login, enter that information. Click NEXT button to continue.
 - d) Parameters Screen – If there are parameters on this report, check "Specified" and then select the parameters that you want to be automatically entered. When ready to continue, click the NEXT button.
 - e) Action Screen
 - i) Free Version - Select VIEW from the drop-down screen. Click the NEXT button.
 - ii) Professional Version – Select VIEW from the drop-down menu. Uncheck any controls that you do not want to be active on Logicity Desktop. Click the NEXT button.
 - f) Logging Screen
 - i) Free Version – Click the FINISH button.

ii) Professional Version – If you want to log user activity, check the “Enable Logging” box and complete the rest of the required information. Click the FINISH button.

5) Click the SAVE button and enter a filename.

MANUAL - Double click the RRD file in order to run the solution and view the report.

SCHEDULED - If you want to schedule the report to run automatically, click the SCHEDULE button. This will open the Schedule Solution window. Select the frequency from the drop-down list and then select the time and day you want the task to start.

E-Mailing a Report

- 1) Open Logicity Solution Builder.
- 2) Click the NEW button. This starts the process of creating a new solution.
- 3) Click the ADD ACTION button. This starts the Logicity Solution Builder Wizard.
- 4) Logicity Solution Builder Wizard
 - a) Display Name Screen - Enter a "Display Name" & click the NEXT button.
 - b) File Name Screen - Click the BROWSE button and find the Crystal Report you want to run. Click the NEXT button
 - c) Database Info Screen – If there is a database login, enter that information. Click NEXT button to continue.
 - d) Parameters Screen – If there are parameter on this report, check "Specified" and then select the parameters that you want to automatically entered. When ready to continue, click the NEXT button.
 - e) Action Screen - Select E-MAIL from the drop-down screen. Complete all of the e-mail configuration fields, including the "From", "Recipients", "Subject", "Attachment Type", and "Body" fields. Click the NEXT button.
 - f) Logging Screen
 - i) Free Version – Click the FINISH button.
 - ii) Professional Version – If you want to log user activity, check the "Enable Logging" box and complete the rest of the required information. Click the FINISH button.
- 5) Click the SAVE button and enter a filename.

MANUAL - Double click the RRD file in order to run the solution and e-mail the report.

SCHEDULED - If you want to schedule the report to run automatically, click the SCHEDULE button. This will open the Schedule Solution window. Select the frequency from the drop-down list and then select the time and day you want the task to start.

NOTE: All e-mail addresses should be separated by commas, with no spaces.

TIP: If you want the display name instead of the e-mail address to show up for the "E-mail From" address, you can do something like the following:

Reports <yourname@yourcompany.com >

When it arrives through the e-mail client, it will just say it is from 'Reports'.

Print a Report

- 1) Open Logicity Solution Builder.
- 2) Click the NEW button. This starts the process of creating a new solution.
- 3) Click the ADD ACTION button. This starts the Logicity Solution Builder Wizard.
- 4) Logicity Solution Builder Wizard
 - a) Display Name Screen - Enter a "Display Name" & click the NEXT button.
 - b) File Name Screen - Click the BROWSE button and find the Crystal Report you want to run. Click the NEXT button
 - c) Database Info Screen – If there is a database login, enter that information. Click NEXT button to continue.
 - d) Parameters Screen – If there are parameter on this report, check "Specified" and then select the parameters that you want to automatically entered. When ready to continue, click the NEXT button.
 - e) Action Screen - Select PRINT from the drop-down screen. Click to select to print to the printer specified in the report, or to another printer. Click the NEXT button.
 - f) Logging Screen
 - i) Free Version – Click the FINISH button.
 - ii) Professional Version – If you want to log user activity, check the "Enable Logging" box and complete the rest of the required information. Click the FINISH button.
- 5) Click the SAVE button and enter a filename.

MANUAL - Double click the RRD file in order to run the solution and print the report.

SCHEDULED - If you want to schedule the report to run automatically, click the SCHEDULE button. This will open the Schedule Solution window. Select the frequency from the drop-down list and then select the time and day you want the task to start.

Save a Report

- 1) Open Logicity Solution Builder.
- 2) Click the NEW button. This starts the process of creating a new solution.
- 3) Click the ADD ACTION button. This starts the Logicity Solution Builder Wizard.
- 4) Logicity Solution Builder Wizard
 - a) Display Name Screen - Enter a "Display Name" & click the NEXT button.
 - b) File Name Screen - Click the BROWSE button and find the Crystal Report you want to run. Click the NEXT button
 - c) Database Info Screen – If there is a database login, enter that information. Click NEXT button to continue.
 - d) Parameters Screen – If there are parameter on this report, check "Specified" and then select the parameters that you want to automatically entered. When ready to continue, click the NEXT button.
 - e) Action Screen - Select SAVE from the drop-down screen. Select the file format from the drop-down menu, enter a destination directory, and enter a filename. If you are using the Professional version and if you do not want to overwrite the file each time it runs, right click in the "File Name" screen to add a variable that will be used in the filename. Click the NEXT button.
 - f) Logging Screen
 - i) Free Version – Click the FINISH button.
 - ii) Professional Version – If you want to log user activity, check the "Enable Logging" box and complete the rest of the required information. Click the FINISH button.
- 5) Click the SAVE button and enter a filename.

MANUAL - Double click the RRD file in order to run the solution and save the report.

SCHEDULED - If you want to schedule the report to run automatically, click the SCHEDULE button. This will open the Schedule Solution window. Select the frequency from the drop-down list and then select the time and day you want the task to start.

Scheduling Reports

Logicity can be used to automate reports by scheduling them to run at regular intervals. In order to do this, Logicity integrates with Windows Task Scheduler.

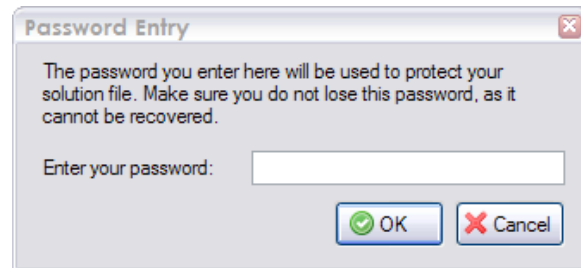
- 1) To schedule a solution, open the solution file in Logicity Solution Builder.
- 2) Click the SCHEDULE button to open the Logicity Schedule Solution screen.
- 3) Select the frequency with which you want to run the solution.
- 4) Complete the other information based on the frequency interval.
- 5) Enter a user name and password for access to Windows Task Scheduler.
- 6) Click OK.
- 7) Click the SAVE button.

***NOTE:** The entire Logicity solution file (RRD) is what is scheduled to run, not the individual actions within a solution.*

Password Protecting Reports (Pro Feature)

Logicity solution files can be set-up to require a password before the solution/report can be executed.

- 1) Open the solution with Logicity Solution Builder.
- 2) Click the SET PASSWORD button. This opens a "Password Entry" screen.
- 3) Enter a password. Click the OK button.
- 4) Click the SAVE button.



NOTE: The password entered here will be used to protect your solution file. Make sure you do not lose this password, as it cannot be recovered.

NOTE: In addition to password protecting the RRD file, it will also be encrypted in order to hide the credentials.

Encrypting Solution Files (Pro Feature)

Logicity solution files can be encrypted in order to hide database login information.

- 1) Open the solution with Logicity Solution Builder.
- 2) Click the ENCRYPT button. This is a toggle on/off.
- 3) Click the OK button.
- 4) Click the SAVE button.

Logicity Workspace (Pro Feature)

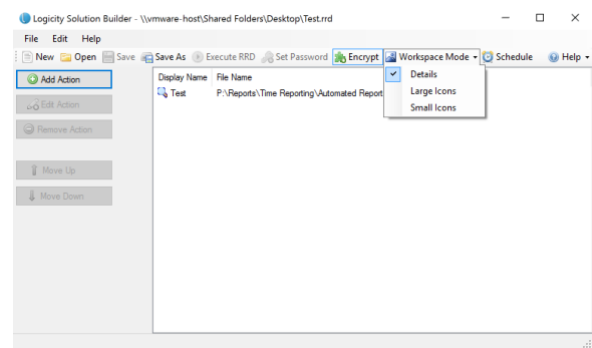
Overview

Logicity Workspace Mode is a convenient way to organize and run Crystal Reports. Instead of having a separate shortcut to each available Crystal Report on a user's desktop, a single solution file can be created that includes each available report. When the "Workspace Mode" is toggled to ON in the solution file, Logicity Workspace will open the solution file when executed instead of Logicity Desktop. This allows the user to run any of the Crystal Reports (or other files) individually, as needed. This allows administrators to set-up a single, clean interface for users with pre-defined ways of viewing or executing the report.

Using Logicity Workspace

Step 1 – Edit Solution File with Logicity Solution Builder

Open the solution file in Logicity Solution Builder. Click the "Workspace Mode" button in the top tool bar. The button will highlight, indicating that it has been toggled to ON.

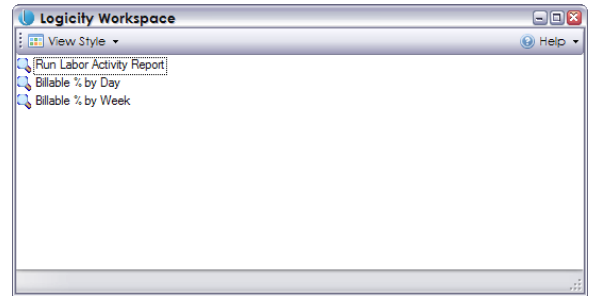


Step 2 – Save

Save the solution by clicking the SAVE button.

Step 3 – Open the Solution File in Logicity Workspace

Next, double-click the solution file. Whereas the solution would have opened and executed the solution in Logicity Desktop, the solution now opens in Logicity Workspace.



Step 4 – Execute an Action in the Workspace

To run one of the reports on the workspace, the user can simply double-click the action.

Options & Notes

Workspace allows users to display the actions in several different styles: large icons, small icons, and list view.

The reports/files in the Workspace View are listed in the same order that they were built in using Logicity Solution Builder.

Glossary

Action – An action is a single reporting execution within a solution. For example, if you have three reports that need to get e-mailed to a group every Monday morning, each of these reports would be a single action within a single solution.

RPT File – This is the default file type for a Crystal Reports file.

RRD File – Report Runtime Definition. This is the file type for a Logicity Solution file.

Solution – A solution is a single, or group of reporting actions that are executed sequentially. For example, if you have three reports that need to get e-mailed to a group every Monday morning, these three reports would be entered into a single solution.

Workspace – Workspace is a convenient way to organize and run Crystal Reports. Instead of having a separate shortcut to each available Crystal Report on a user's desktop, a single solution file can be created that includes each available report.

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