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GENESYS™

Crystal Reports Import Utility

Technical Reference

Abstract

This document describes how to import a Crystal Report Template (RPT) and how to configure it, to allow the report to run in Interaction Reporter in IC Business Manager.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/pureconnect.

For copyright and trademark information, see https://help.genesys.com/pureconnect/desktop/copyright_and_trademark_information.htm.

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About the Crystal Reports Import Utility

The Crystal Reports Import Utility allows you to import a Crystal Report Template (RPT) and to configure it to run in Interaction Reporter in IC Business Manager.

Download and install the Crystal Report Utility

First, download the Crystal Reports Import Utility from:

https://my.inin.com/products/cic/Pages/Utilities-Downloads.aspx

And run the Crystal Report Import Utility setup wizard to install the Crystal Reports Import Utility.

Requirements

Software requirements

CIC 2015 R2 or later

Additional requirements

In Interaction Administrator, the following security permissions must be configured for you:

- Security right: Interaction Report Administrator
- Access control right: Interaction Reporter Reports *[All]

Prerequisites

The following are prerequisites for importing a Crystal Reports .rpt file.

Create the source rpt file

Be sure the .rpt file is complete before you configure the report for use with CIC. For example, make sure that the .rpt file contains all of the necessary report parameters.

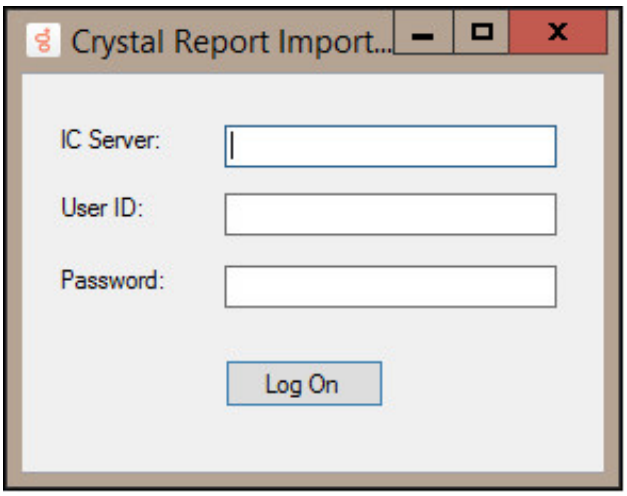
Be sure a data source is specified in the .rpt file. If a data source is not set for the .rpt file, the file cannot load in Interaction Reporter, which results in a run time error.

Set up Interaction Administrator

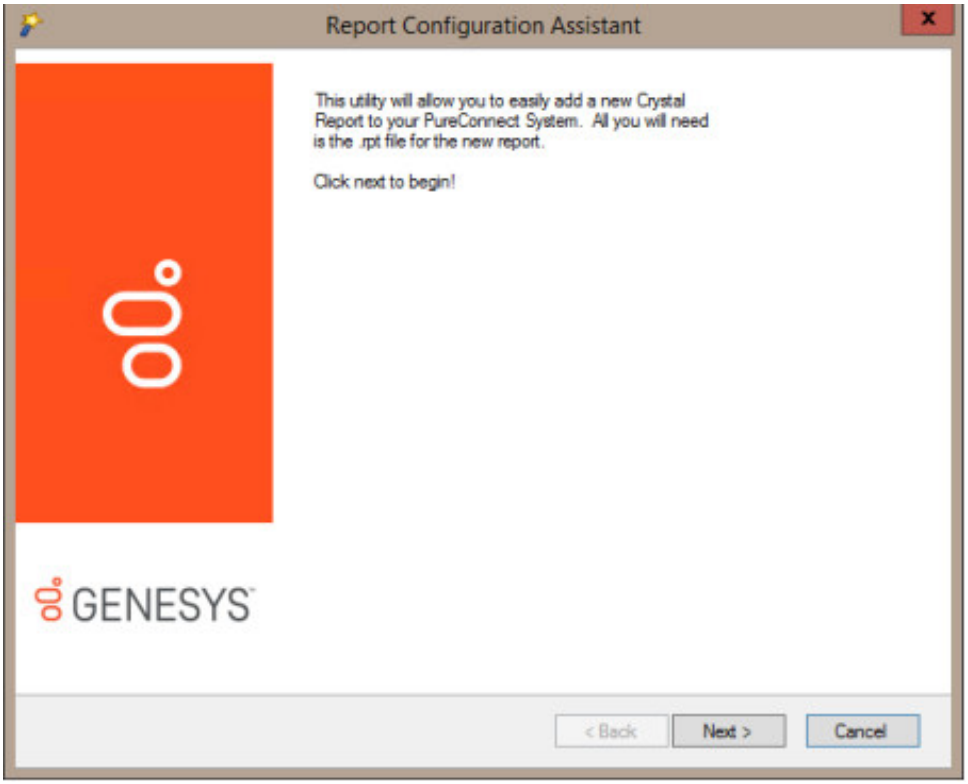
Report categories are defined in Interaction Administrator. If you need more categories for organizing your reports, see your Interaction Administrator before you run the Crystal Reports Import Utility.

Run the Crystal Reports Import Utility

1. Run the CrystalReportImportUtility.exe file.
   The **Crystal Report Import Utility** dialog box appears.

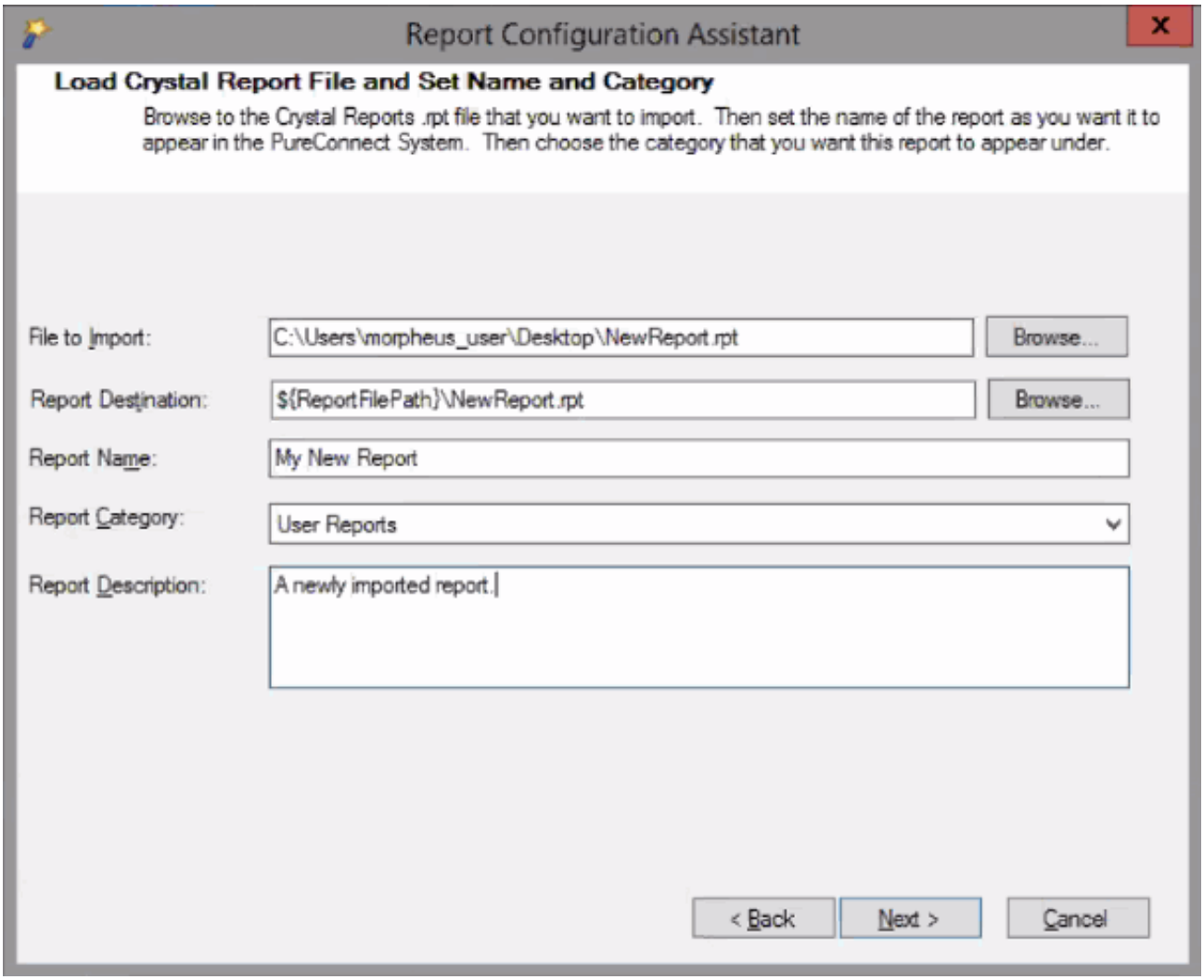


2. In the **IC Server** box, type the address of your CIC server.
3. In the **User ID** box, type your CIC user ID.
4. In the **Password** box, type your CIC password.
5. Click **Begin**.
   The **Report Configuration Assistant** dialog box appears.



6. Click **Next**.
   The **Load Crystal 2013 file and Set Name and Category** dialog is displayed.

Complete the Load Crystal Report Files and Set Name and Category page

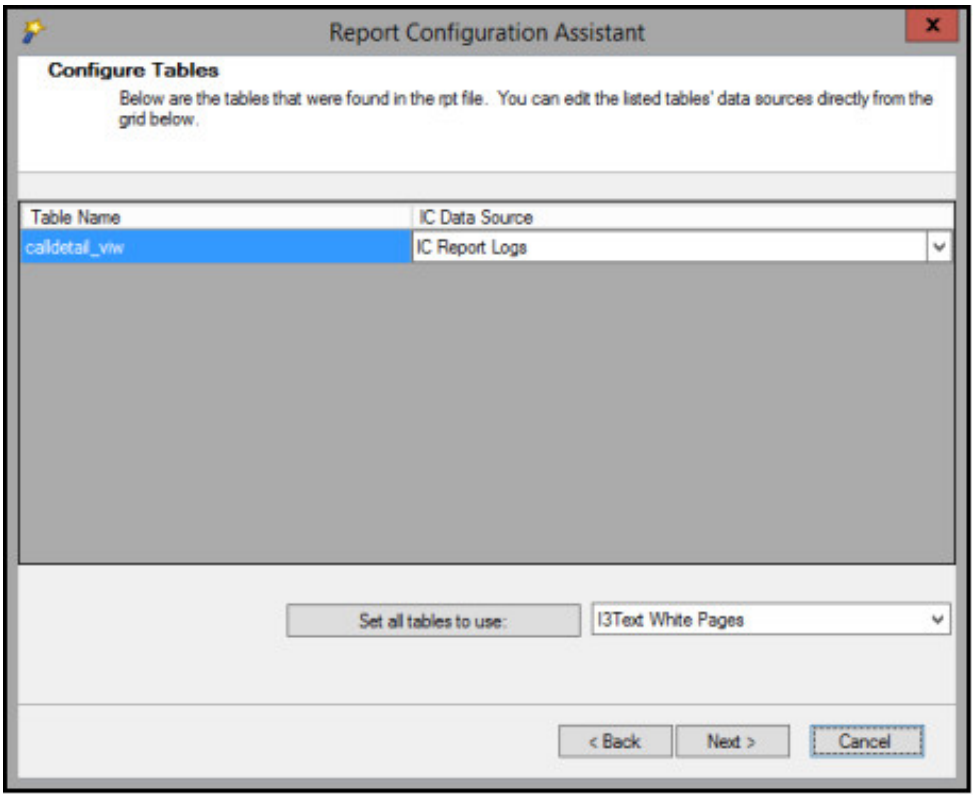


1. To complete the **File to Import** box, click **Browse** and select the Crystal Report (.rpt) file.
   By default, the **Browse** button takes you to the location where all of the Crystal Report .rpt files are stored.
2. To complete the **Report Destination** box, click **Browse** and select the location where CIC finds the report.

   Note:
   The **Report Destination** box automatically inserts the ${ReportFilePath}\ parameter before the destination that you select. **Do not delete or replace this parameter.**

3. In the **Report Name** box, type a meaningful name for the report.
4. In the **Report Category** list, select the appropriate category. Categories are configured in Interaction Administrator. For more information, see your CIC administrator.
5. In the **Report Description** box, type a brief explanation of the purpose of the report.
6. Click **Next**.
   The **Configure Tables** dialog is displayed.

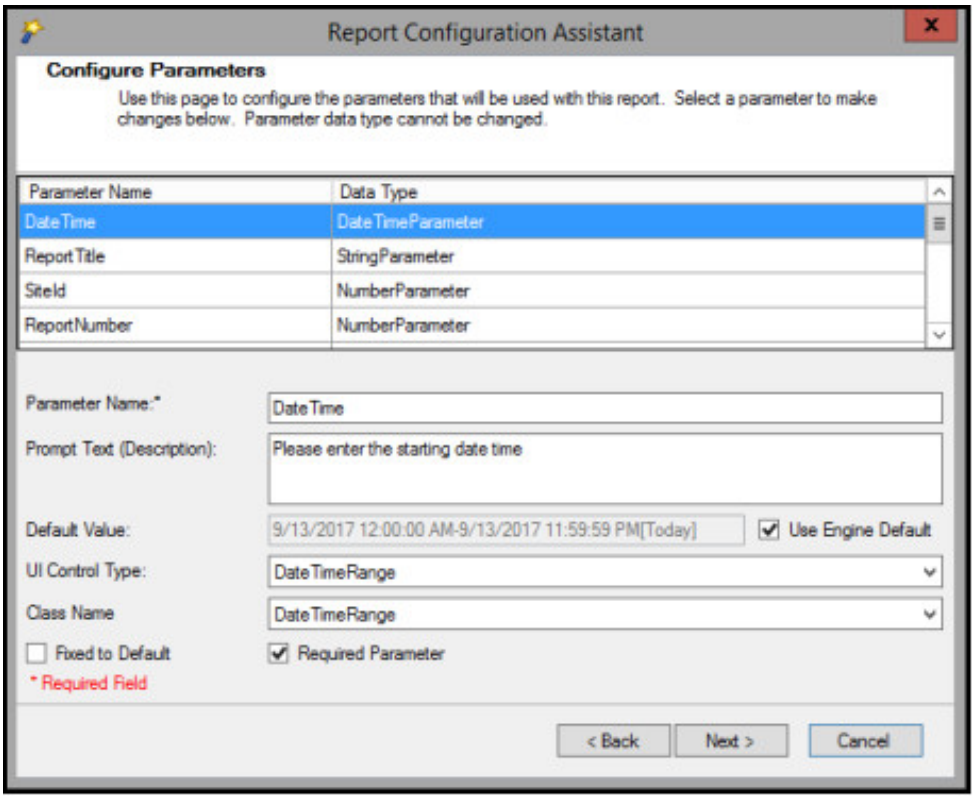
Configure tables



1. Do one of the following:
   - If your report uses multiple tables and you want to use a specific data source for each one, in the **IC Data Source** list, select the data source that you want to use.
   - If you want all the tables in your report to use the same data source, in the **Set all tables to use** list, select the data source.
2. Click **Next**.
   The **Configure Parameters** dialog is displayed.

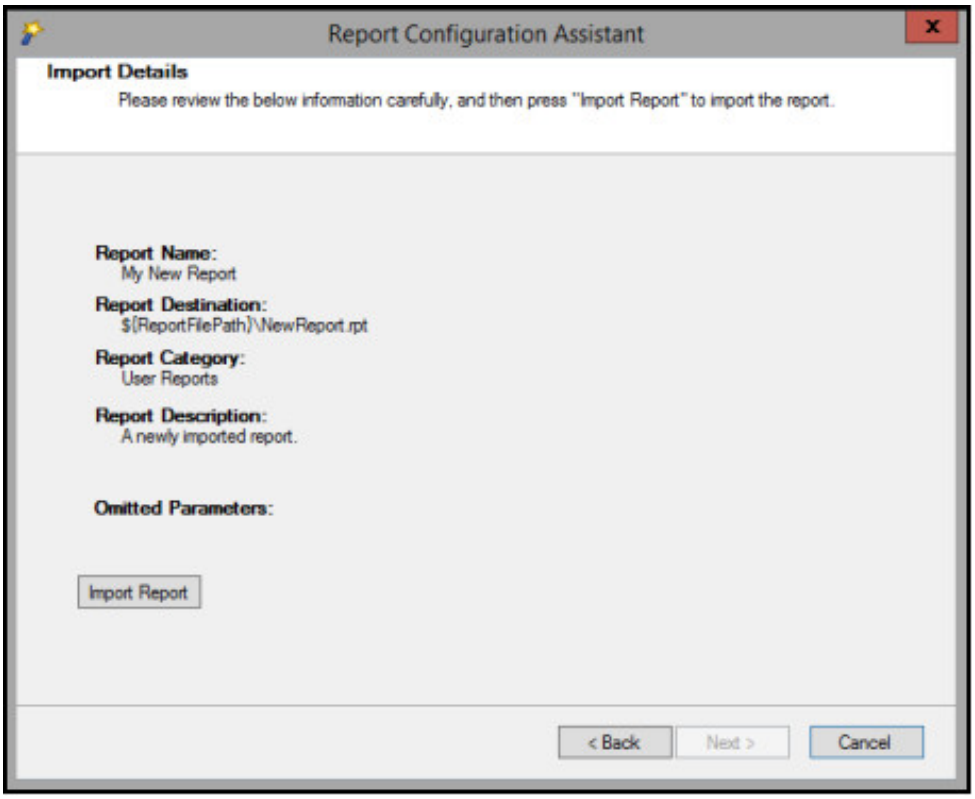
Configure parameters

Report parameters are defined in the .rpt file. On this page of the Crystal Reports Import Utility, you configure the report parameters that are defined in the .rpt file. You cannot create new parameters or delete existing parameters here. If you need to make those types of changes, make them in the .rpt file first.



1. In the list, select the first parameter that you want to configure.
2. In the **Parameter Name** box, type the name of the report as you would like it to appear in IC Business Manager.
3. In the **Prompt Text(Description)** box, type a meaningful prompt value.
   In the **Default Value** box, type the default value that is used if the user does not supply any other value.
4. In the **UI Control Type** list, select the type of control that the user uses to select the value for the parameter.
   For example, in the .rpt file, the control type is set to a simple numeric field. However, you want to change that to be a **NumericUpDown** control instead.
5. Do you want to hard code the value for the parameter? If yes, select the **Fixed to Default** check box. The parameter does not appear in the form that the user uses to run the report.
6. To make this parameter a required parameter, select the **Required Parameter** check box. The report does not run unless the user supplies a value for this parameter.
7. Click **Next**.
   The **Import Details** dialog is displayed.

Confirm the import details



1. Verify that you have configured the import correctly.
2. Click **Import Report**.
3. After the import completes, click **Next** to finish.

Test the report

You have successfully configured the .rpt report. It is a good idea to test the report before you release it for general use.

For complete information on how to run reports, see *Interaction Report Help*, which you can access from the **Help** menu in IC Business Manager. For more information about reports in general, see *PureConnect Reporting Technical Reference.* in the PureConnect Documentation Library.

Tips for testing reports

- Be sure to run the report with parameters that returns a non-empty data set.
- If possible, run the report from Crystal Designer and then run it again from within IC Business Manager. You should get identical results, if the source data remains the same.

Change log

The following changes have been made to this *Crystal Reports Import Utility Technical Reference* , since Customer Interaction Center 2015 R1 product availability.

Date	Changes
03-September-2015	Document created.
12-November-2015	Added the location of the Crystal Report Utility download.
31-January-2016	Updated the title and all references to the Crystal Reports Import Utility.
12-September-2017	Updated for Genesys rebranding
12-September-2017	Updated screen captures for running Crystal Reports Import Utility
13-September-2017	Additional rebranding updates and general edits
08-February-2018	Updates for HTML5 project conversion