

REPORT GENERATION AGENT

(A PRODUCT BY GLOBAL SOFTWARE, INC.)

AUTOMATION FOR CRYSTAL REPORTS®

Report Generation Agent (RGA) adds report productions and delivery automation for Crystal Reports®. Based on a schedule or conditions that exist in a database, RGA will automatically update existing Crystal reports or generate new reports and deliver them to the appropriate people via email, FTP or LAN printer.

The same report can be scheduled to run multiple times with different parameters, formats, frequency and destinations. Build a query using the wizard interface or paste SQL statements. Based on database values and WorkWise® criteria, RGA can automatically populate parameter values and send reports to an email address stored in a database or Microsoft® Outlook. RGA can also “burst” report groups to different recipients.

General Uses for RGA Include:

- Schedule reports to run at a specific date and time, or frequency
- Schedule reports to run when defined conditions exist in a database
- Save Crystal reports to many file formats, including Microsoft® Word, rich text, Excel®, HTML, PDF, Text, CSV, XML, etc.
- Deliver reports via email, send to local/network directory and send to an FTP site or a LAN printer
- Automate time consuming report compilation and delivery tasks
- Alleviate dependence on key individuals for reporting related tasks
- Automatically deliver reports when and where they are needed
- Use database event, and schedule-based report production and refresh functions to run and deliver reports at off-peak times
- Update HR forms and deliver as necessary

Monitor, Alert
and Automate...

Report Parameter	Value
{?DECIMALS}	2
{?SALESPERSON}	{ARSAP.CODESLSP}
{?YR}	2010
{?PR}	6

REPORT GENERATION AGENT FEATURES & BENEFITS

Functionality of RGA

RGA will allow users to browse to a Crystal report. If there are parameters in the report, those will display in a grid in the RGA. In the grid, the user can set the parameters to hard coded values, or use insert fields to put a database field from a WorkWise query, into the parameter. Sub steps can then be added to the RGA step to define a delivery mechanism for the report. The output report location will be passed to the substeps.

Reports can be written to use the data returned by a Query Agent or Database Monitor Agent, instead of having the report access the data directly. In this case, we use the Use Report Data Source option, in which a report is written using a TTX file, which contains the data definitions from the query results.

The actual data from the Database Monitor Agent is passed into the report, offering better performance than using the Crystal data source. Crystal would need to run its own query for each record. This provides the ability to pass grouped data, similar to the Email Agent function, enabling RGA to perform functions such as "get all new Vendors by Department".

RGA supports Crystal Developer 8.5, 9 and 10.

Invoicing Example

When new invoices are entered into the system, the invoice details are automatically passed in the Crystal report, which will then generate an invoice and save the report as a PDF file. The PDF invoice is then automatically emails to the customer, copying the A/R department. This sort of automation can be performed for POs, various statements, internal forms and endless reports.

Human Resources Example

In most companies, each new hire requires around 20 documents or actions to be completed involving multiple people and departments. Each employee termination generates a similar number of actions. WorkWise automatically delivers all the required forms, and notifies the appropriate people to perform their appointed tasks, eliminating hours of work. Using the table below, it is easy to see the resources saved with WorkWise.

Number of Employees	1000
Annual Turnover Rate	12%
# Employees 'Turned'	120
# Transactions per Turn (avg)	20
Total transactions	2400
Avg cost per Transaction	\$16
Annual Transaction Cost	\$38,400

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and personnel
"in the know"*

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