



How to Execute and Save Crystal Reports in Hyperspace

APeX Version 2019

UCSF-BCHO Enterprise EHR Reporting Team

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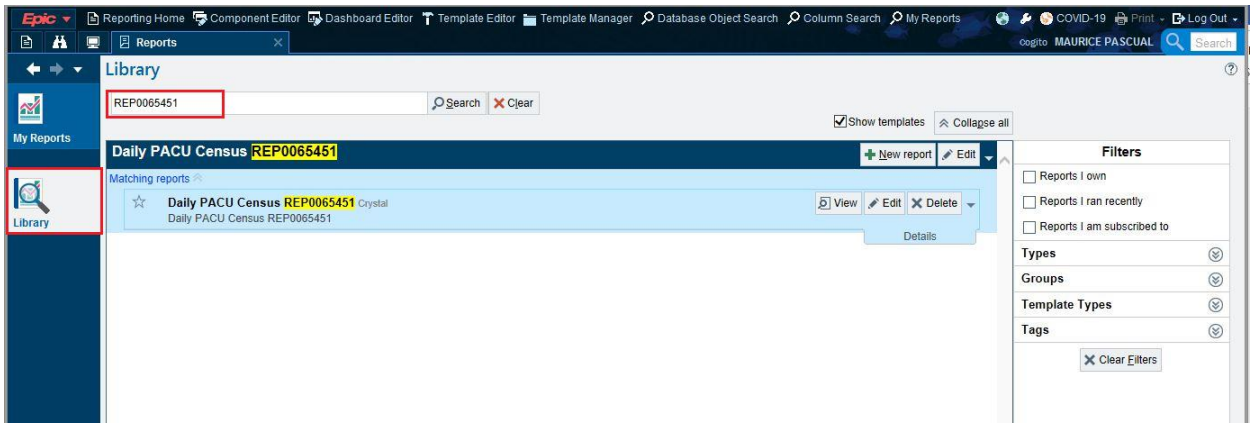
Executing the Report with Your Own Parameters

This section demonstrates how to modify report parameters, then save and execute the new report. To find your report first:

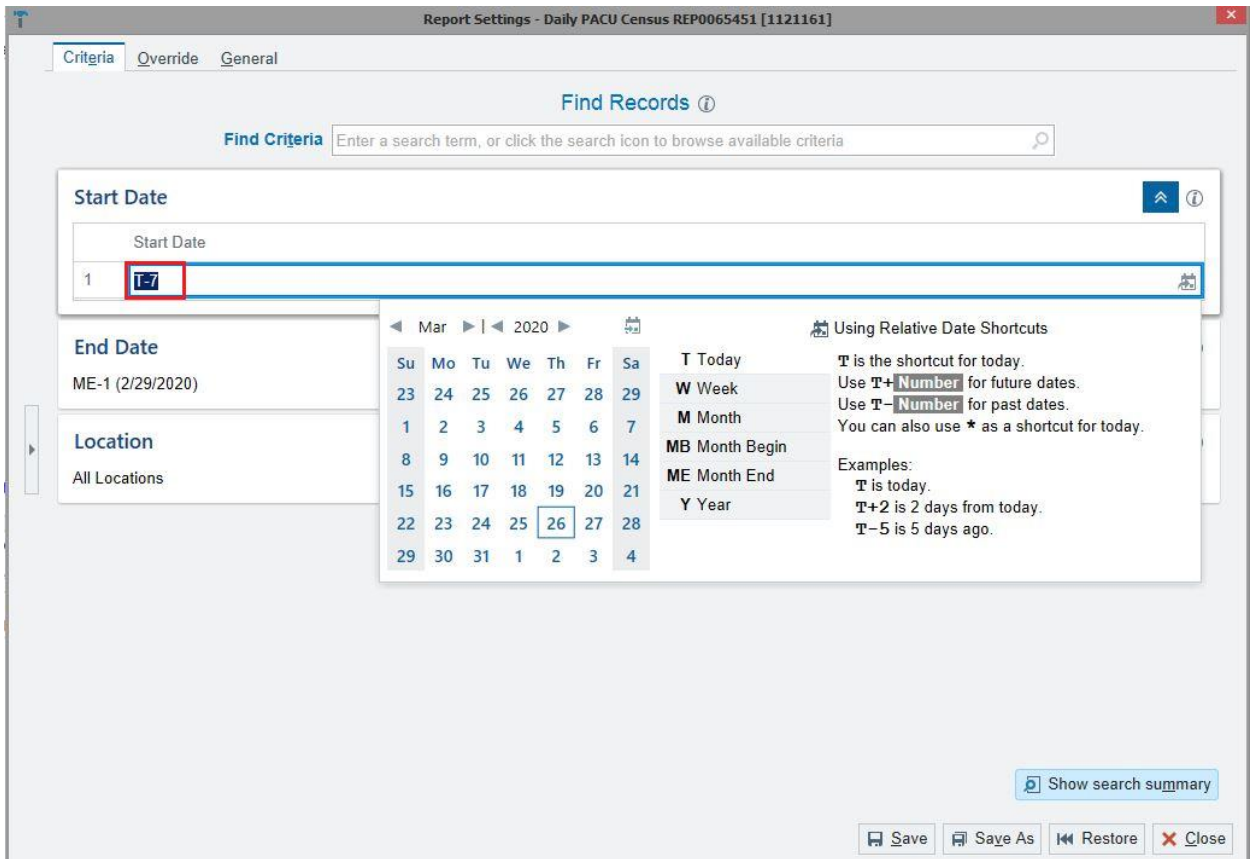
1. Select Epic Menu -> Reports -> My Reports



2. Search Library by REP# (recommended) or by Name

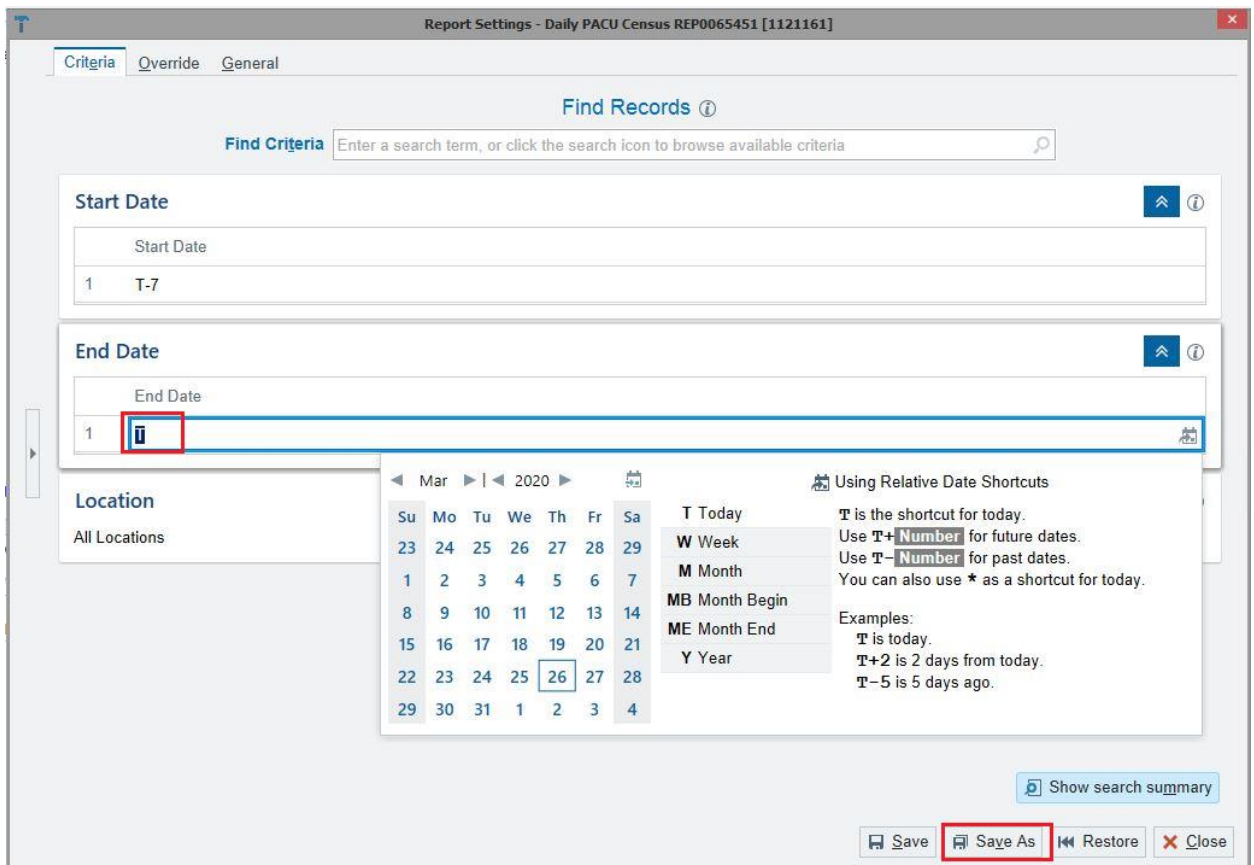
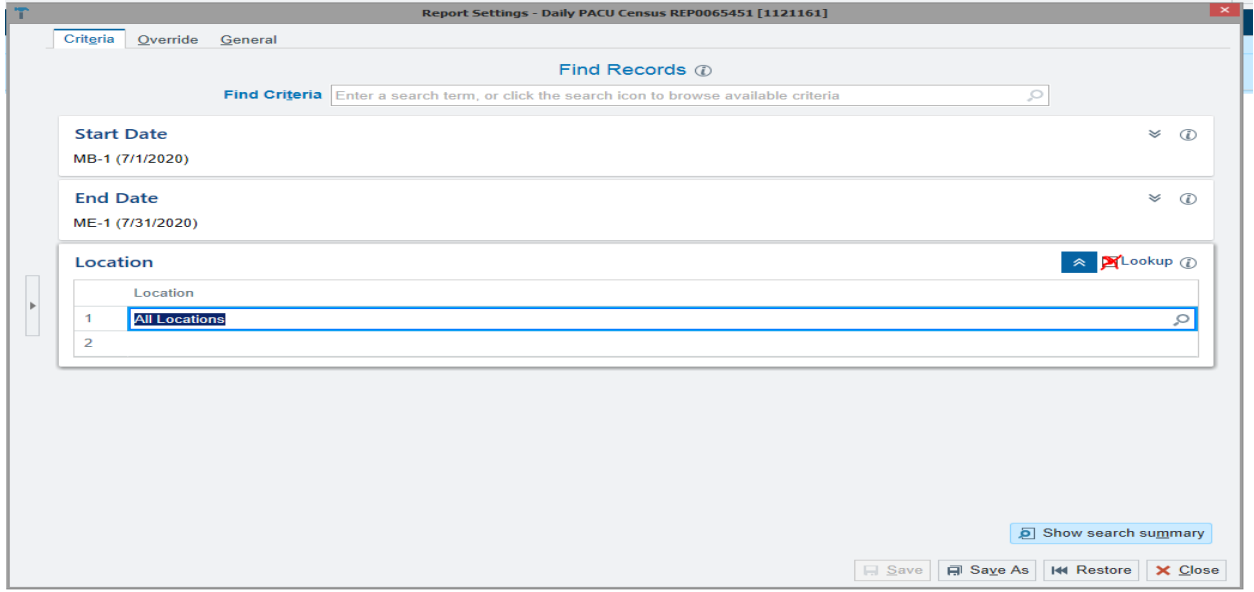


1. **Click on the New Report button** and the Report Settings window will appear. Select the parameter you would like to edit by clicking in that section. In this example, we will edit the Start Date and End Date for the report. Click on the Start Date section, then highlight the existing start date that you would like to change. In this example, we are changing the start date from MB-1 (month begin minus one month) to T-7 (today minus seven days). Type in T-7 for the Start Date.

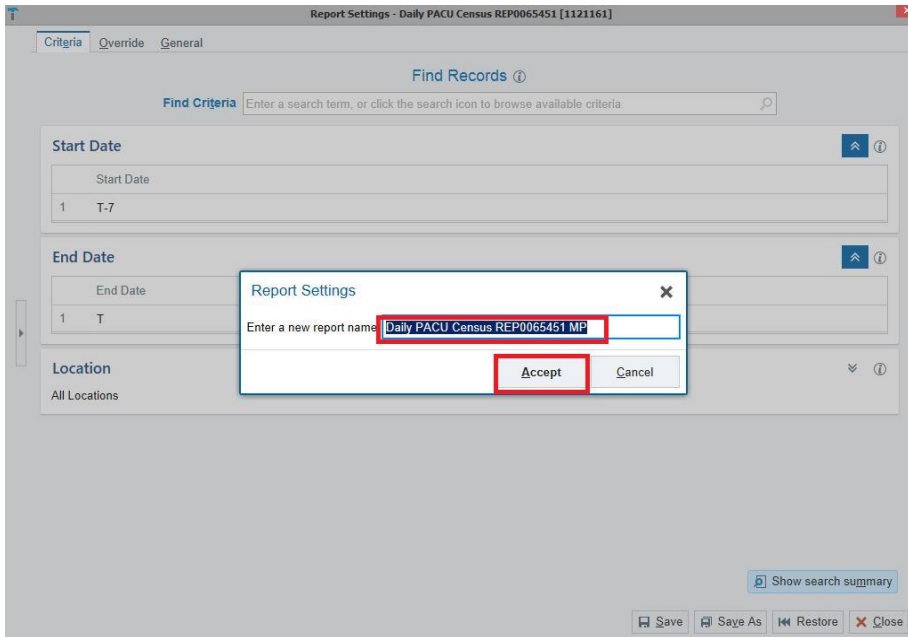


2. Click on the End Date section. Highlight the End Date you would like to change.
3. To change a parameter that indicates All Locations, or All Departments click on that parameter and it will show a drop down box. In order to actually look up values for that

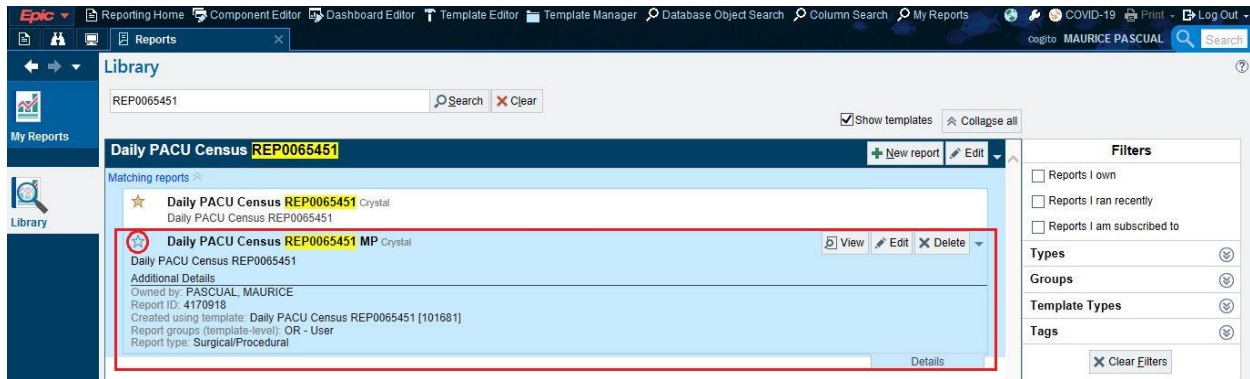
parameter, you need to **check the Look up** box on the right hand side, the magnifying glass in the drop down box then becomes active and you can search for your specific location or department.



4. When you are done changing parameters, select **Save As**.
5. Type in a new name for the report. In the example below, I added "MP" to the end of the existing report name to create a new one. Click Accept.



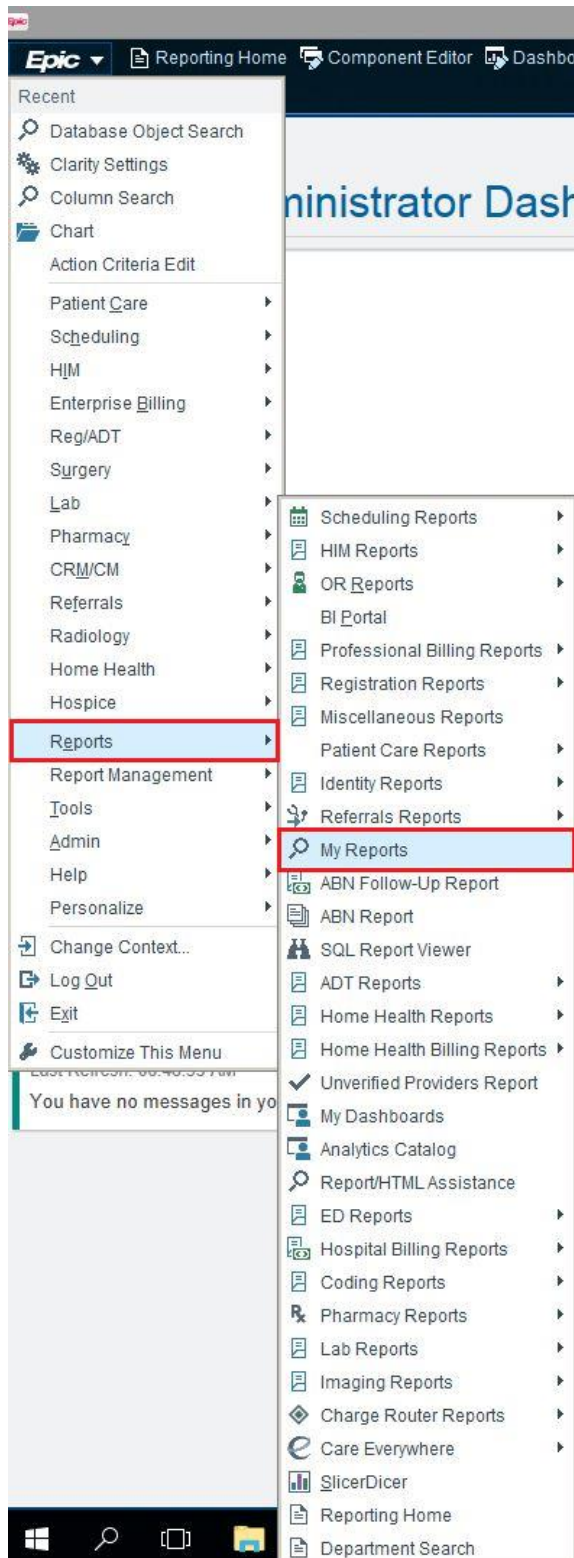
The new report appears in your Library. You can now add that report to your Favorites and run the report as described in the next section, [Subscribing to and Running Published Reports](#).



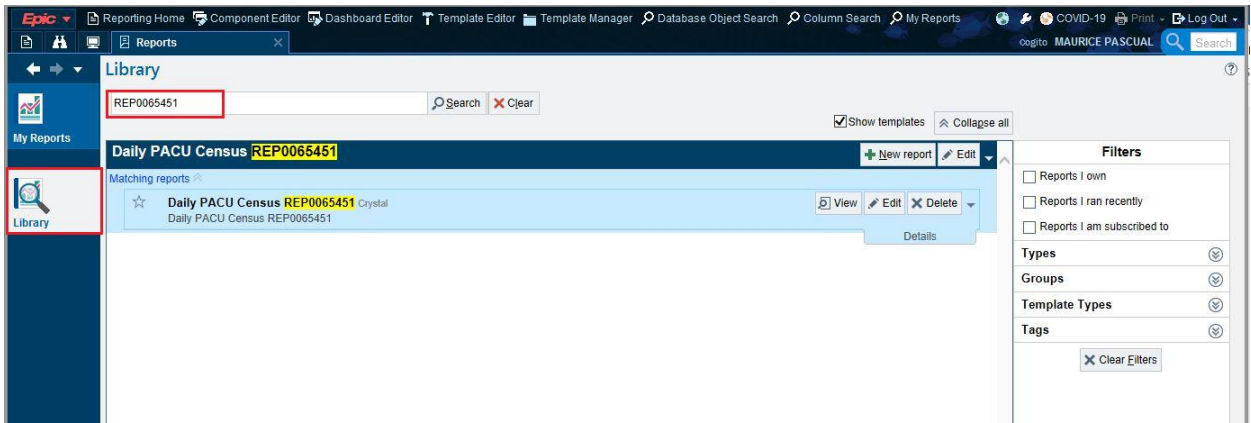
Subscribing to and Running Published Reports

This section describes how to subscribe to and run a report that has been published in APeX.

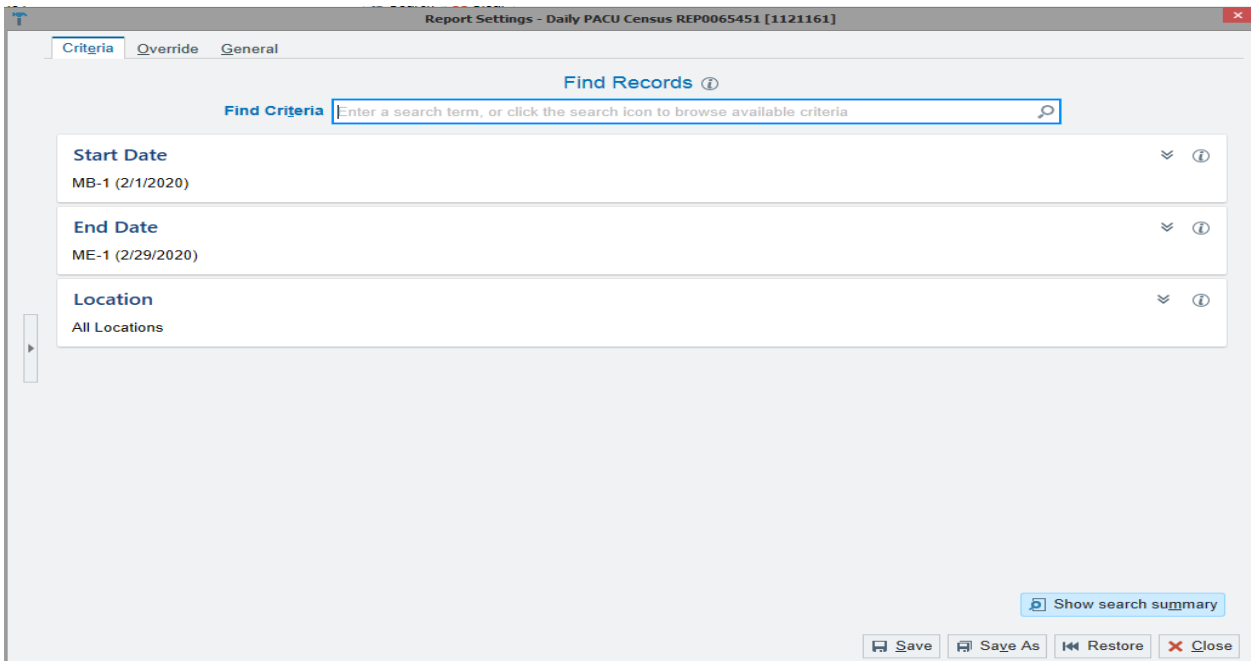
3. Select Epic Menu -> Reports -> My Reports



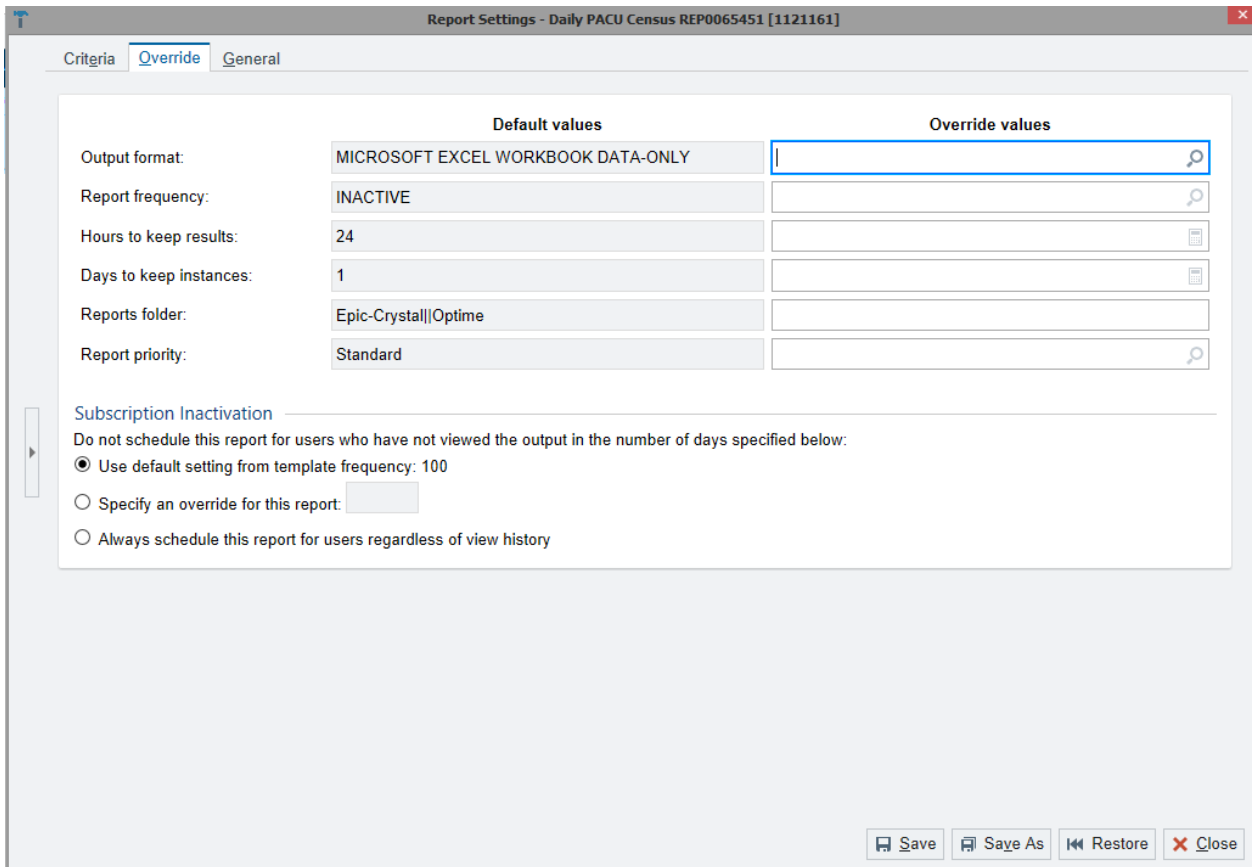
4. Search Library by REP# (recommended) or by Name



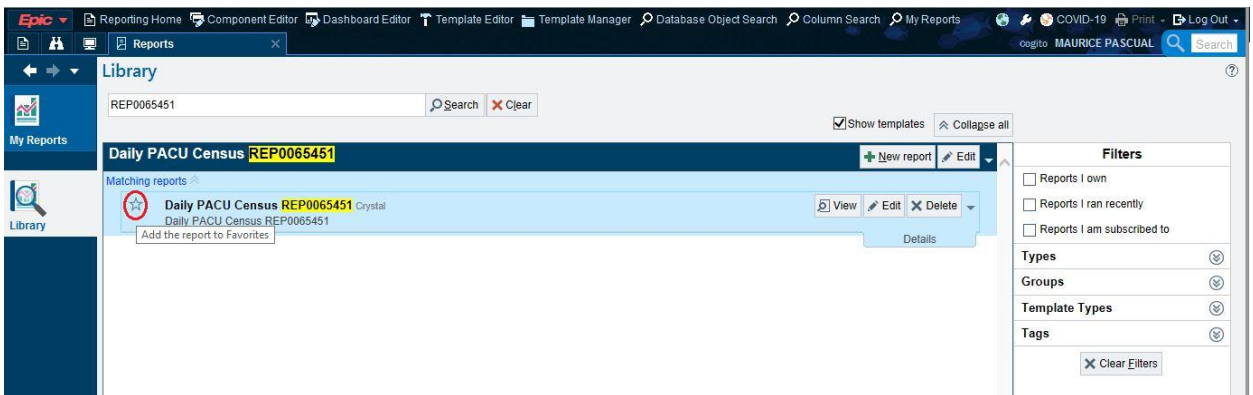
You can select Edit to see the properties of the report, such as report parameters in the Criteria tab



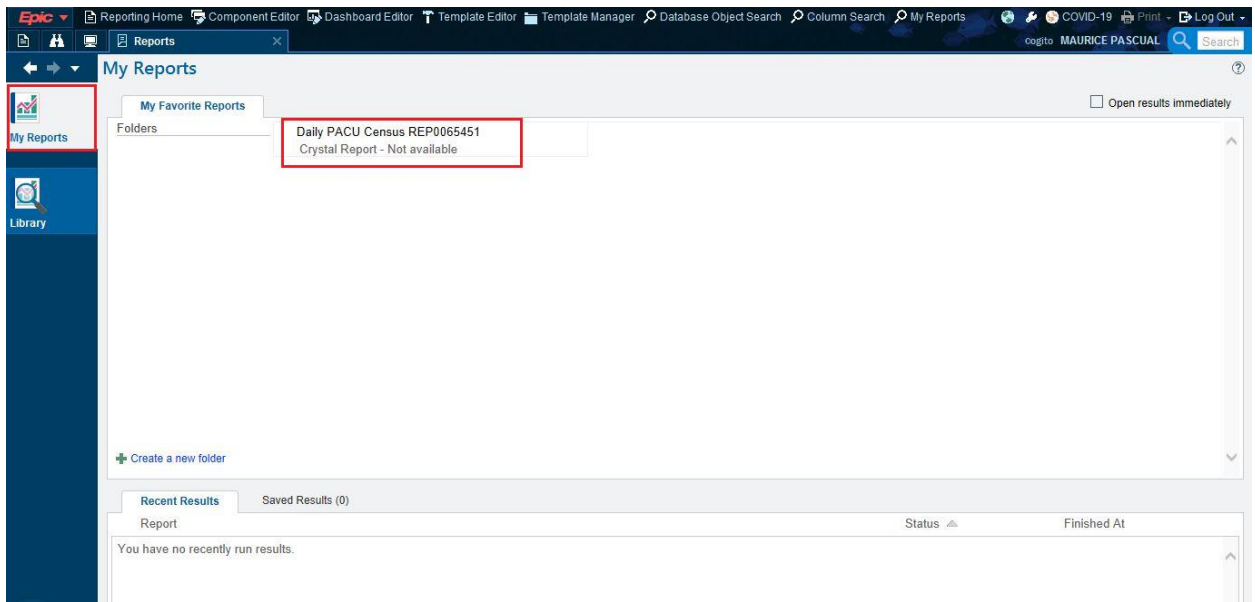
or Output Format, Report Frequency, Hours to keep results, etc. in the Override tab. If a Report frequency is set to Daily, Weekly, or Monthly, the report will run on that schedule once subscribed.



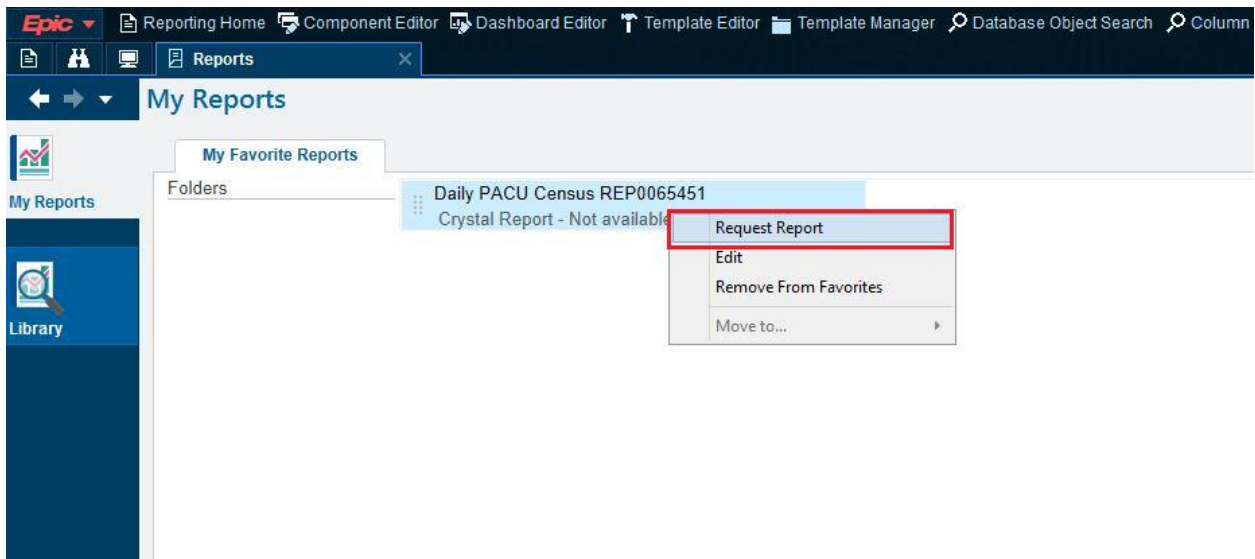
5. Click on the star to add the report to your Favorites.



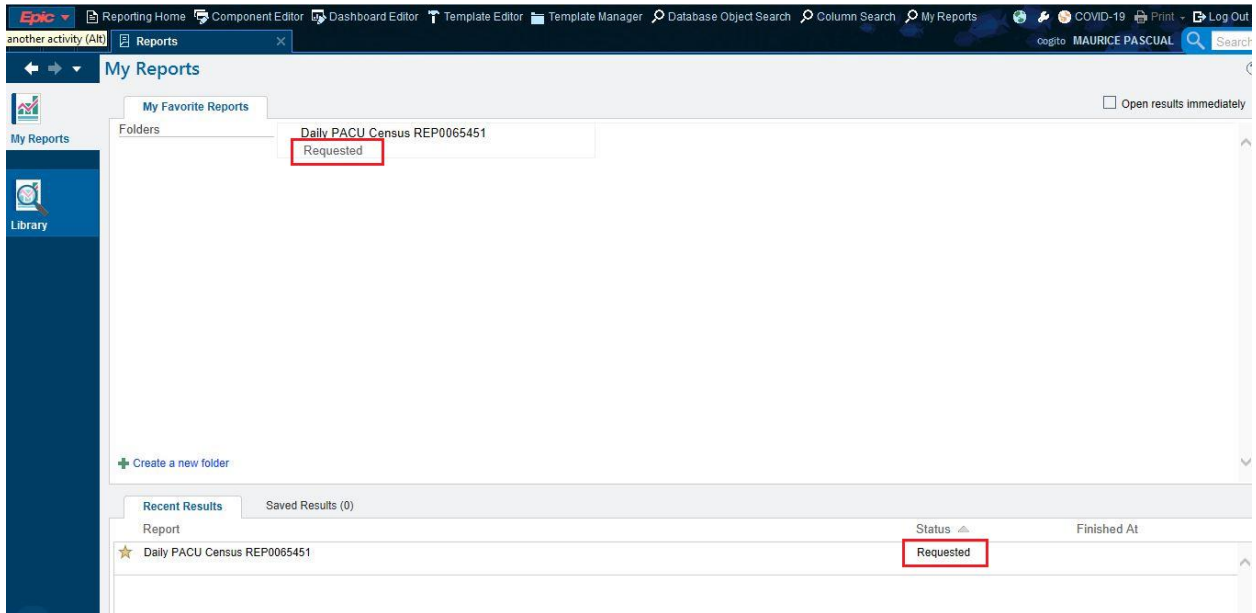
6. Click on My Reports, and you will see the report that has just been added.



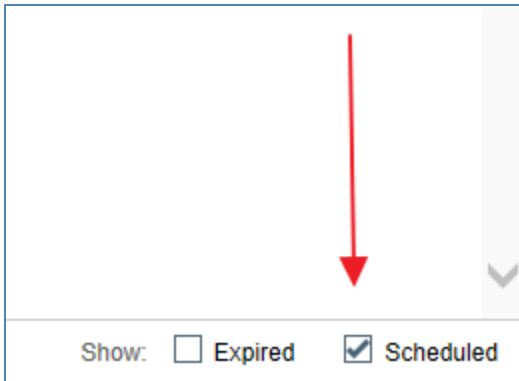
7. Right click the report, and select Request Report.



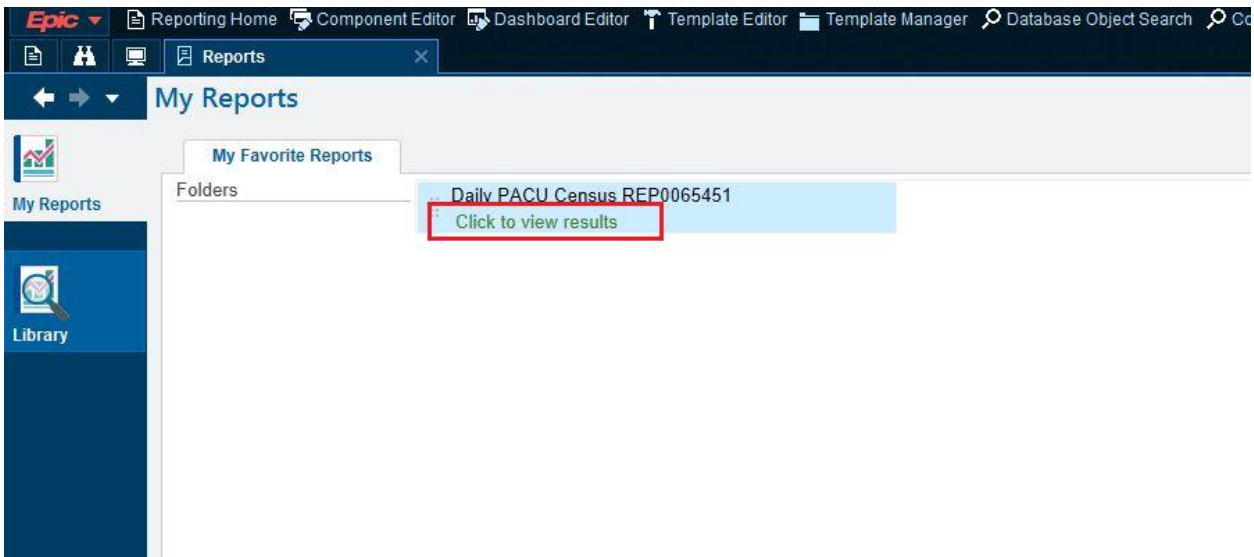
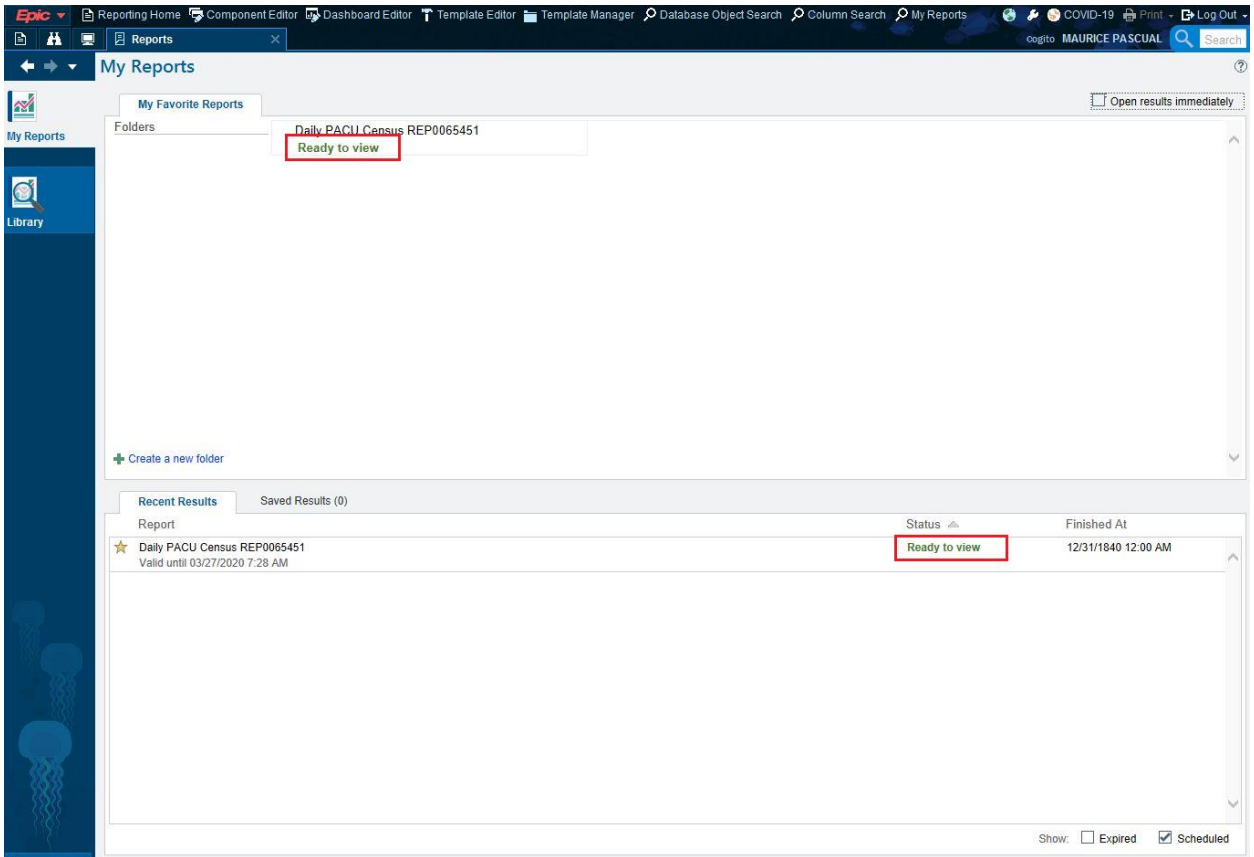
The status of the requested report will appear below the report title and in the Recent Results section below the My Favorite Reports section. Other reports that have been requested or recently viewed will also appear in this section.



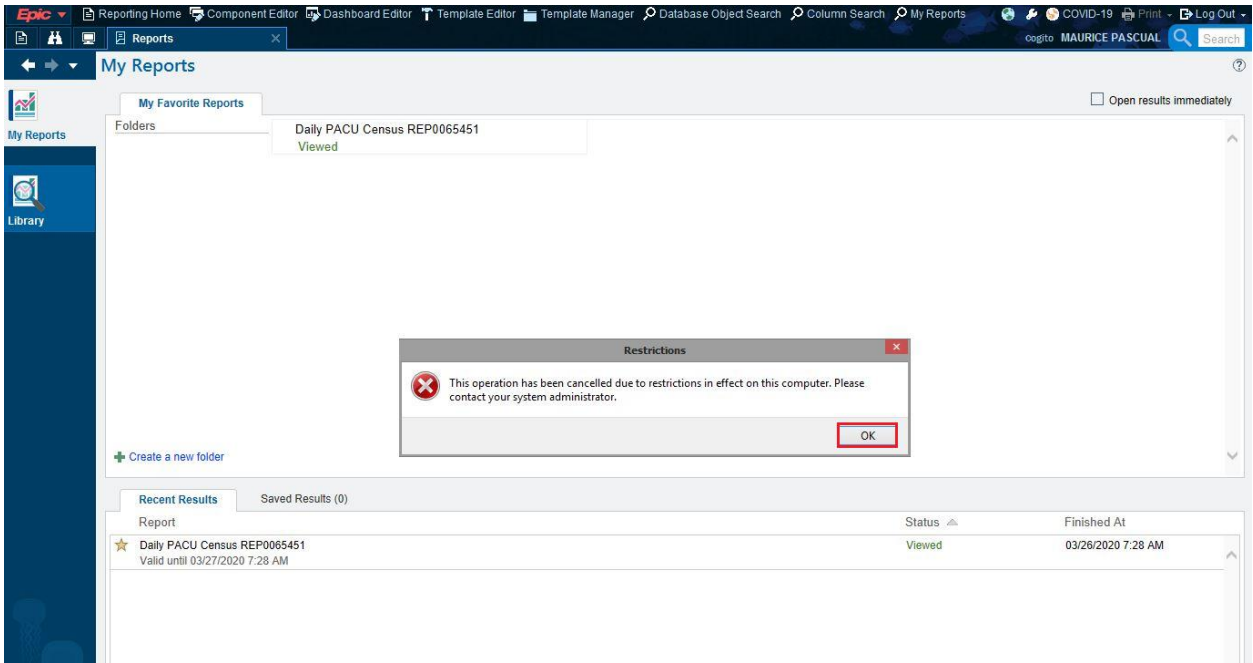
Clicking the “scheduled” checkbox will show you when the status changes from “Requested” to “Scheduled”. Otherwise, the report will disappear momentarily until it stops running.



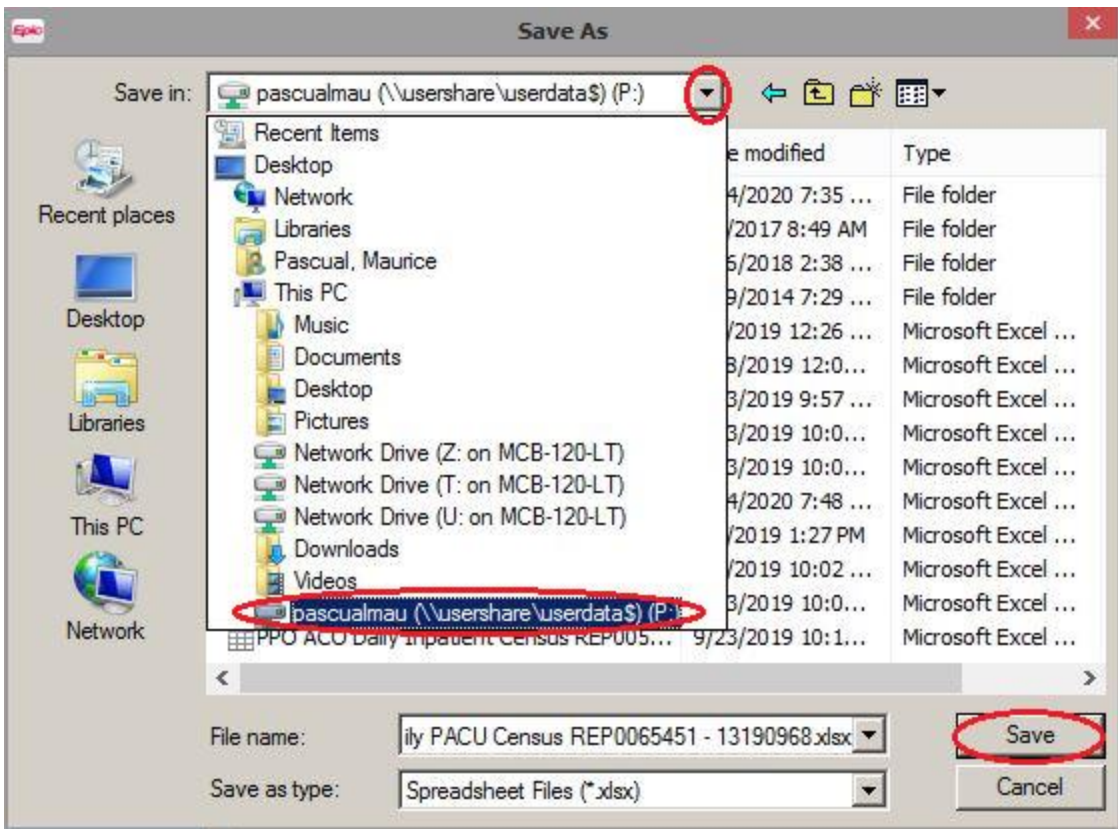
8. When the report has finished running, the status of the report will appear as Ready to View. When you hover above the status, Click to view results will appear. Click this status (in either the My Favorite Reports or Recent Results section).



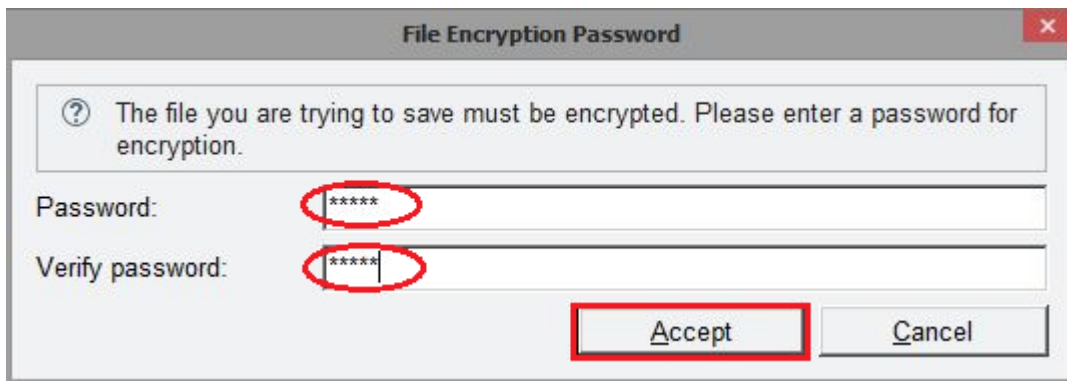
9. If this Restrictions alert appears, click OK to cancel the alert.



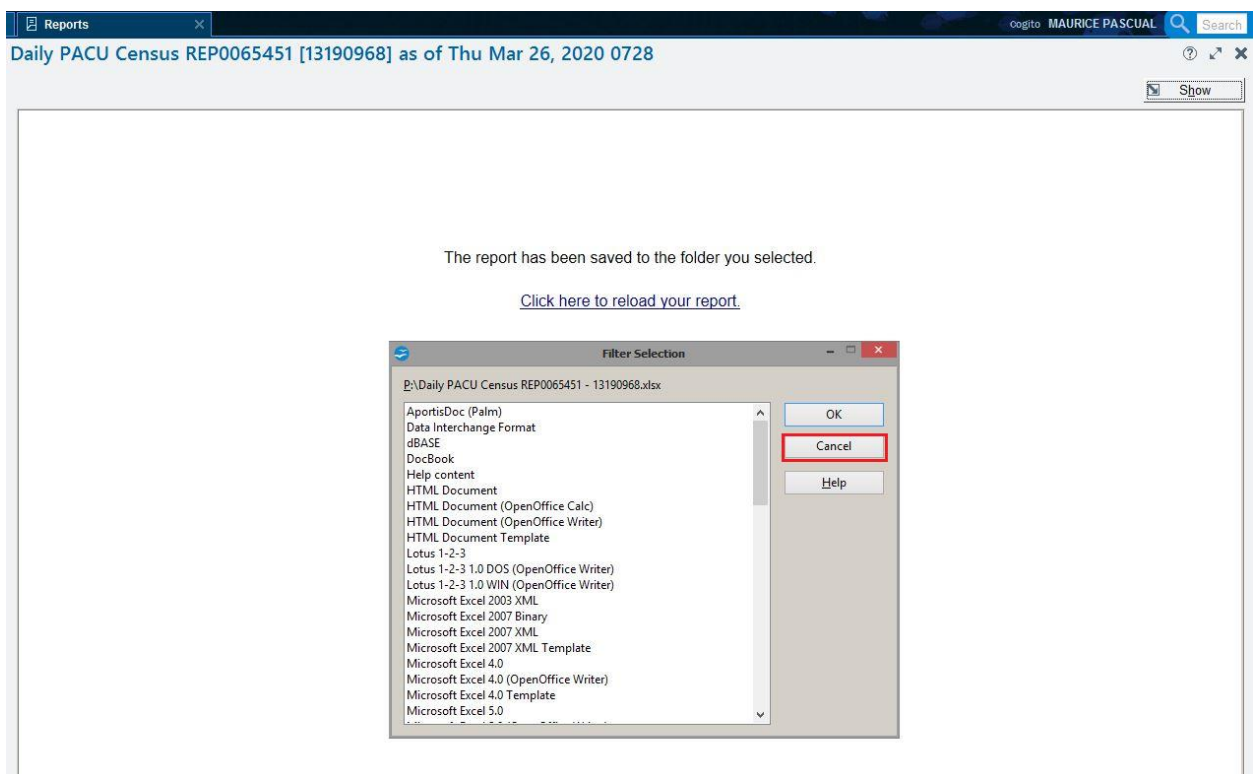
10. The Save As dialog will appear. Click the drop-down button in the Save in field. Select your P: drive or other network drive that you can access through Explorer (Finder in Mac). Then, click Save. (Note: Saving anywhere else will not make the report available to you)




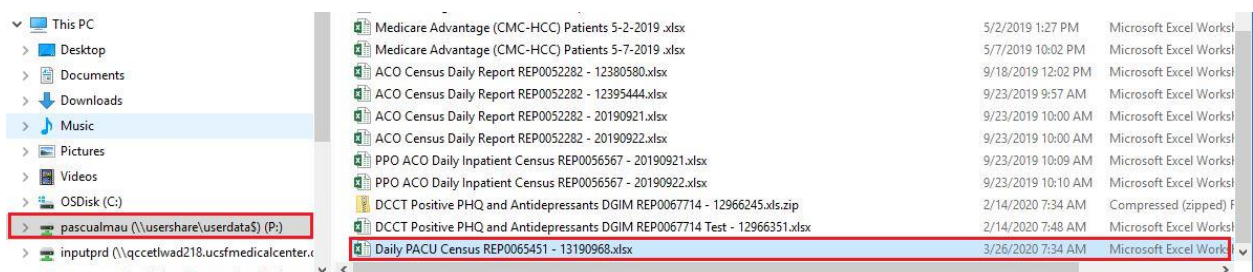
11. You will be prompted to enter a password to encrypt the file. Enter a password you can remember in the Password field. Re-type the password in the Verify password field. Click Accept.



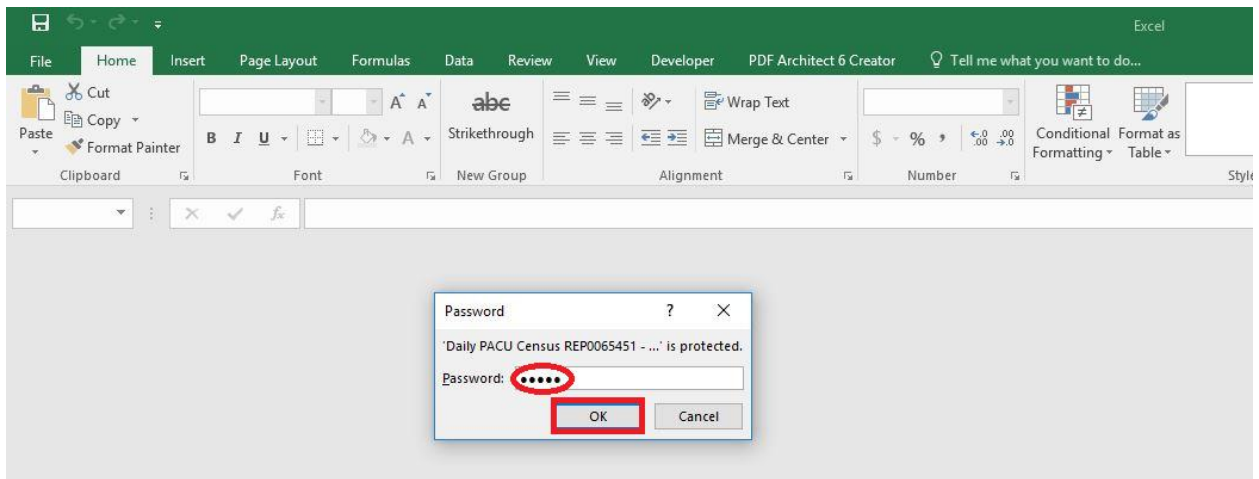
12. If you receive this Filter Selection window, click Cancel.



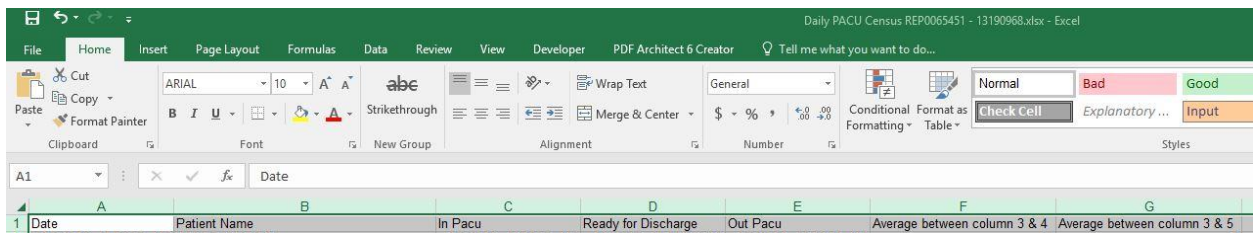
13. Open Windows Explorer  (or Finder on Mac). Navigate to the network drive you saved the file to and find the file. Double-click the file.



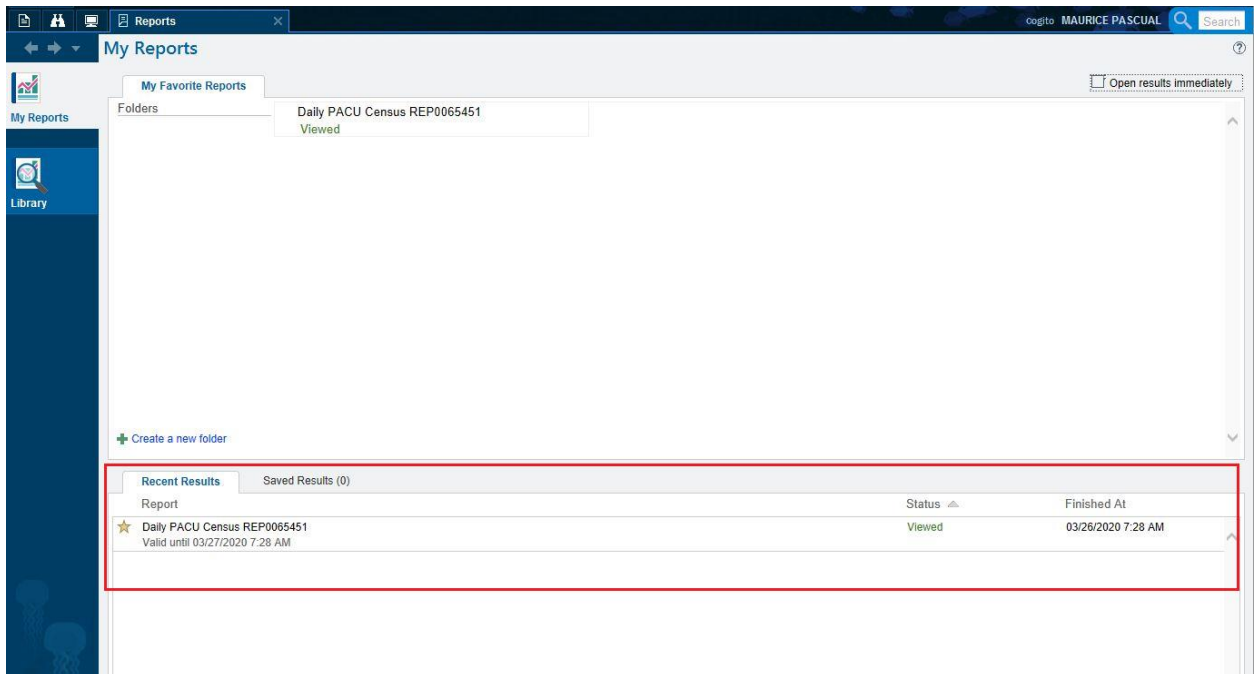
14. You will be prompted by Excel to enter the password you entered in step 9. Enter the password and click OK.



15. You now can view the report in Excel and work on the spreadsheet as needed.



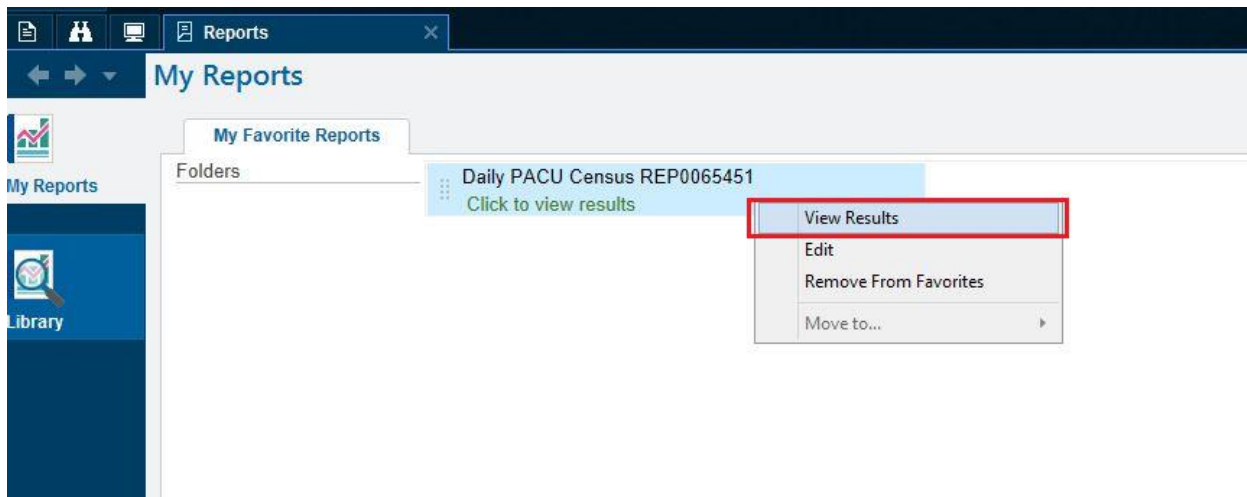
If you need to re-save the results, you can return to APeX and the Recent Results section in My Reports. Then, click on the report that just ran and return to step 7.



Viewing Previous Report Runs

This section demonstrates how to view a report that was previously executed.

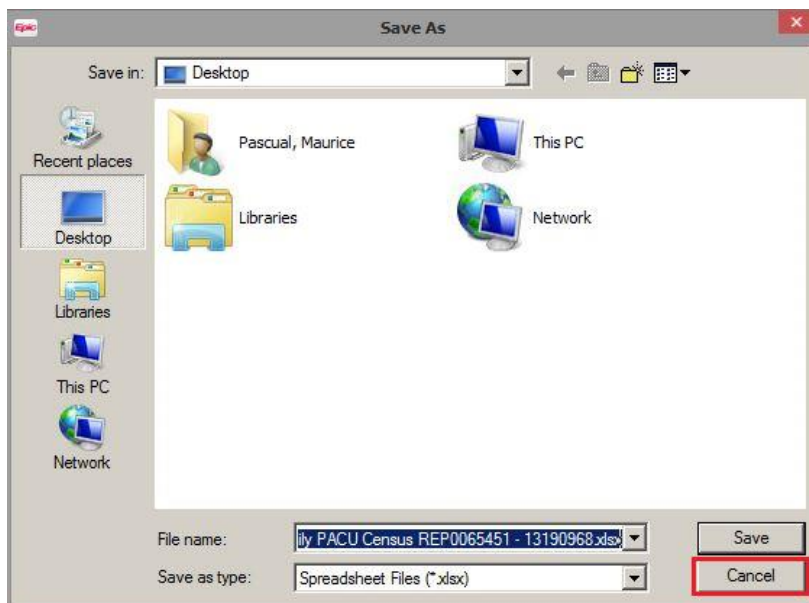
1. From My Favorite Reports in My Reports, right-click on the report whose previous results you would like to view. Select View Results. Alternatively, you can choose the report from previous runs in the Recent Results section.



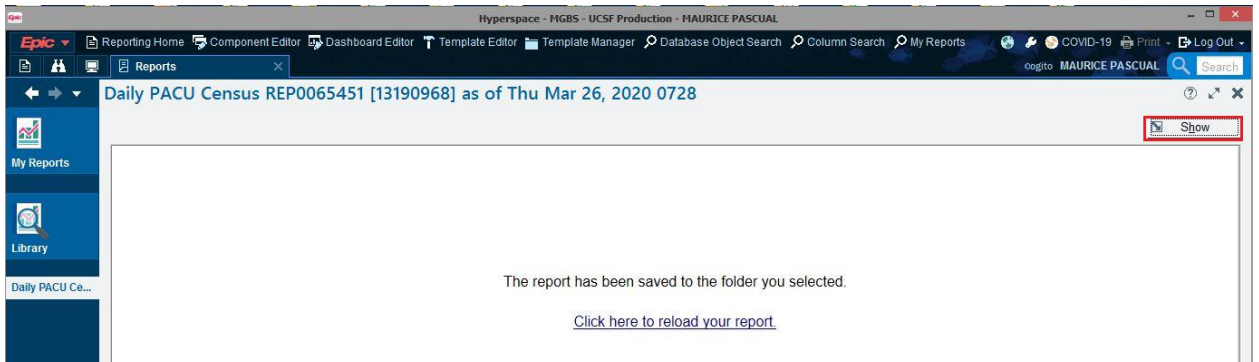
2. If the Restrictions dialog appears, click OK.



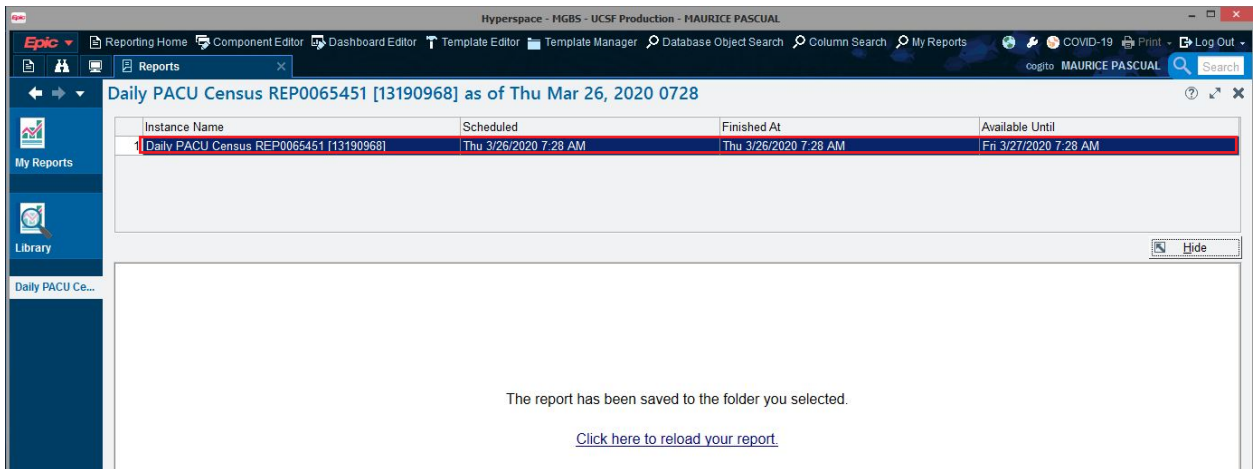
3. If the Save As dialog appears, click Cancel.



4. Click on the Show button.



5. Previous runs of the report will appear (multiple rows if it was run more than once). Click on the run that you would like to view and follow the steps to re-save the report.



APeX will keep as many instances (runs) as designated in the report's settings under the Override tab in the Days to keep instances field.