



## **Crystal Enterprise 8.5/9 ePortfolio** *Outline*

1. **Crystal Enterprise Overview**
  - Web-based
  - Report scheduling and distribution
  - APS as central core of Enterprise
  - ePortfolio defined
2. **Connecting to ePortfolio**
  - Crystal/Enterprise URL
  - Guest account
  - Logging on and off
  - Security model
3. **Folders, Objects, and Instances**
  - ePortfolio hierarchy
  - Navigating folders and subfolders
  - Objects and instances defined
  - Viewing reports – on demand or instance
  - Setting ePortfolio preferences
4. **Controlling, Printing, and Exporting Reports**
  - Supplying parameters and database credentials
  - Navigating the report viewers
  - Exporting and e-mailing reports
  - Printing reports on your local printer
5. **Scheduling Reports**
  - Scheduling options
6. **Organizing ePortfolio**
  - The Favorites view
  - Creating folders
  - Copying and moving folders and reports
  - Creating shortcuts to reports