CHAPTER 9: REPORT SCHEDULER

Training Objectives

Actively participating during this chapter helps you learn:

- Basic information you should know before using Report Scheduler
- The steps to complete before publishing reports
- How to use Report Scheduler to publish reports
- How to remove published reports from the catalog

Introduction

The Report Scheduler provides flexible, secure scheduling and publishing of Report Writer reports. Report Scheduler is installed automatically when Microsoft Dynamics™ GP is installed. Report Scheduler is easy to set up and use and requires little ongoing maintenance after initial setup.

For additional information on using Report Scheduler, consult the printable manuals or the online Help in the application.

Report Scheduler Setup Checklist

Report Scheduler setup can be summarized into five basic steps:

- ❑ 1. Define where to publish reports. This is done in the Report Scheduler Setup window.
- ❑ 2. (Optional) Original Report Names may be modified using the Report Names window.
- ❑ 3. Select the required report options and a select a frequency defining how often they are published. This is done in the Report Schedule window.
- ❑ 4. Determine who is able to publish the scheduled reports. Publishers are defined in the Report Publishers window.
- ❑ 5. (Optional) Deleting catalog information allows you to manage information about published reports. Report Catalog information may be deleted using the Report Catalog Maintenance window.

Features and Benefits

Report Scheduler is designed to give an in-depth understanding of how to schedule and publish any report or report option available in Report Writer on a recurring basis. With Report Scheduler you can accomplish the following tasks.

Create Report Schedules

Add or change schedules when a Report Writer report is published. Establishing a report schedule enables you to define the following for reports:

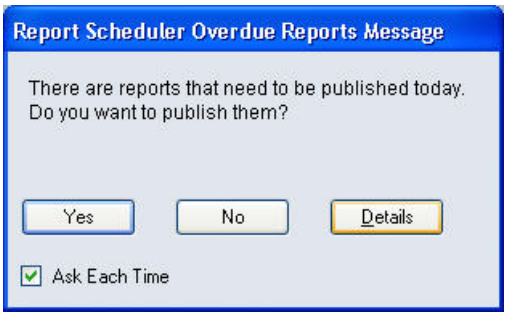
- Publish Frequency
- Version of the Report to Keep
- Publish Location

Maintain Report Publishers

All users in Microsoft Dynamics GP can be set up as Report Publishers. By default the user who creates a schedule is assigned as the publisher of that report. Other users may also be assigned as publishers of reports. Microsoft Dynamics GP can be set up to trigger the user with a reminder message each time he or she logs in if reports are overdue for publishing.

Publish Reports

Publishing reports may be done either manually from the Report Schedule window or automatically when the user logs into Microsoft Dynamics GP. You receive the following message when entering Microsoft Dynamics GP:



Modify Report Names

Due to the similarity of many report names in Microsoft Dynamics GP, the Report Names window allows you to change the name of a report, as it appears in Report Scheduler. The Report Name defaults to the original name of the report, but may be changed as long as the new name does not already exist. Blank names are not allowed.

Microsoft Official Training Materials for Microsoft Dynamics ™
Your use of this content is subject to your current services agreement

Report Scheduler Overview

Report Scheduler primarily works with Microsoft Dynamics GP report options and also reports that have been created using the Report Writer. Before using Report Scheduler, you should have an understanding of the menus, windows, and buttons used to perform the key functions of this module. This chapter focuses on providing an understanding of the setup involved and how reports can be published using Report Scheduler.

Report Scheduler Buttons

The following buttons are used in Report Scheduler:

Button	Button Description
	Applies the publish frequency and location settings to the report options selected.
	Publishes the report options selected.
	Selecting the print icon is the same as selecting **Print** from the **File** menu. A report destination dialog appears. The printed report contains a listing of all the report options and their settings in the Report Schedule table.
	The folder icon allows you to define a default UNC path. All reports are published to this location.

Understanding Report Options

A report option is standard functionality within Microsoft Dynamics GP and refers to the ability to save criteria about a report, such as ranges and sorting options. These report options can be reused when regenerating the same report.

Report options store a reports destination. For reports created with Report Writer, you save criteria about a report using the Restrictions window within Report Writer. Since Report Scheduler works with report options, you need to consider restrictions, or lack thereof, a report option has when publishing it.

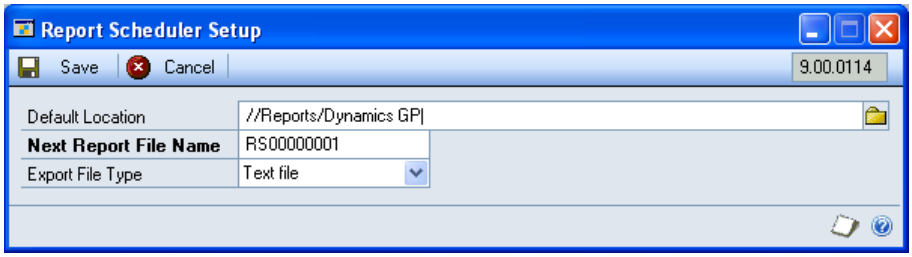
The people who have access to the report should be taken into account when defining a report option. If they only see certain ranges of data, you should create a report option for each grouping, with the appropriate restrictions for each group. For example, a single sales commission report could be created for all salespeople, but it would need to be published to individuals. A separate report option achieves this.

Report Scheduler Setup

Report Scheduler Setup Checklist, Step 1

TOOLS→ROUTINES→COMPANY→REPORT SETUP

The Reports Scheduler Setup window is used to define default settings that Report Scheduler uses when publishing a report.



Selecting a Default Location

Report Scheduler requires that all users must publish reports to the same location. As it is possible for users to map different drive letters to the same location, a Universal Naming Convention (UNC) path is required. It must start with the name of the computer. Select a location that the users publishing reports have write access to.

NOTE: *UNC provides a common method for accessing files on a network without using a mapped drive letter. A typical UNC path appears as //server/volume/path/name. Server is the name of the network server where the files reside. Volume is the name of the volume on that server. Path is the name of the directory/subdirectories leading to the file. Filename refers to the name of the file where the report is saved.*

The default location can be typed directly into the Report Scheduler Setup window. The default location can be selected by clicking on the folder icon at the end of the default location line. This opens the Select Pathname window, which allows you to select the default location folder to publish reports to in My Network Places. Before selecting the Default Location, create a new Report Scheduler folder on the server where you plan to save reports.

Specifying the Next Report File Name

The **Next Report File Name** field works in a similar manner to document number. This field is incremented every time a report option is published that needs a Report File Name. It is used for report options that do not have a file name stored as part of the report option. This file name is also used if you select to keep prior versions of a published report.

NOTE: *By defining the Next Report File Name, you are also determining the number of Report File Names available. For example, if you enter BDR001 as the Next Report File Name, only 999 unique report file names are available.*

Microsoft Official Training Materials for Microsoft Dynamics ™
Your use of this content is subject to your current services agreement

To Set Up the Report Scheduler Setup Window:

1. Open the Reports Scheduler Setup window. (TOOLS→ROUTINES→COMPANY→REPORT SETUP)
2. Select a UNC path for the Default Location to publish the report to by clicking the folder icon, which allows you to locate the server/folder you publish reports to in My Network Places.
3. Enter the Next Report File Name used when a report is published.
4. Select the Export File Type for your report. If your workstation has Adobe PDF Writer installed, a selection for this format is offered. This setting is used for report options that do not have a report type saved as part of the report option. The default is Text.

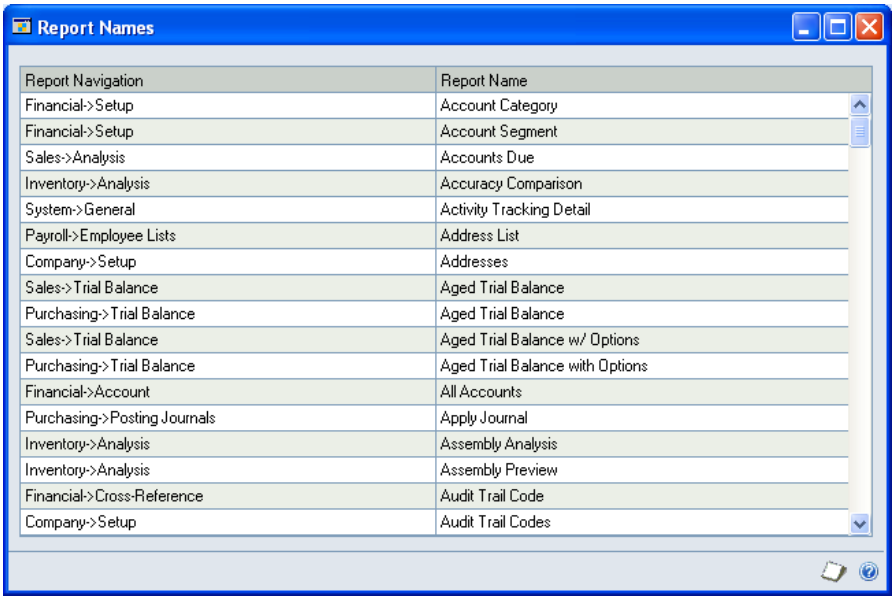
NOTE: *Report Scheduler allows the default setting to be set to an Adobe Acrobat PDF File, even if there are some workstations that do not have PDF Writer installed. If the report option is not set to print to a file, and the default export type is set to PDF. If the workstation does not have PDF Writer installed, the report is published as text.*

Report Names

Report Scheduler Setup Checklist, Step 2

TOOLS→ROUTINES→COMPANY→REPORT NAMES

The Report Names window allows you to change the name of a report as it appears in Report Scheduler. It is important to be able to change report names in Report Scheduler, as some reports in the application have the same name.



Report Navigation	Report Name
Financial->Setup	Account Category
Financial->Setup	Account Segment
Sales->Analysis	Accounts Due
Inventory->Analysis	Accuracy Comparison
System->General	Activity Tracking Detail
Payroll->Employee Lists	Address List
Company->Setup	Addresses
Sales->Trial Balance	Aged Trial Balance
Purchasing->Trial Balance	Aged Trial Balance
Sales->Trial Balance	Aged Trial Balance w/ Options
Purchasing->Trial Balance	Aged Trial Balance with Options
Financial->Account	All Accounts
Purchasing->Posting Journals	Apply Journal
Inventory->Analysis	Assembly Analysis
Inventory->Analysis	Assembly Preview
Financial->Cross-Reference	Audit Trail Code
Company->Setup	Audit Trail Codes

For example, an Aged Trial Balance report appears in both Receivables and Payables. To distinguish between reports more easily, this window can be used to change the report names to Receivables Aged Trial Balance and Payables Aged Trial Balance.

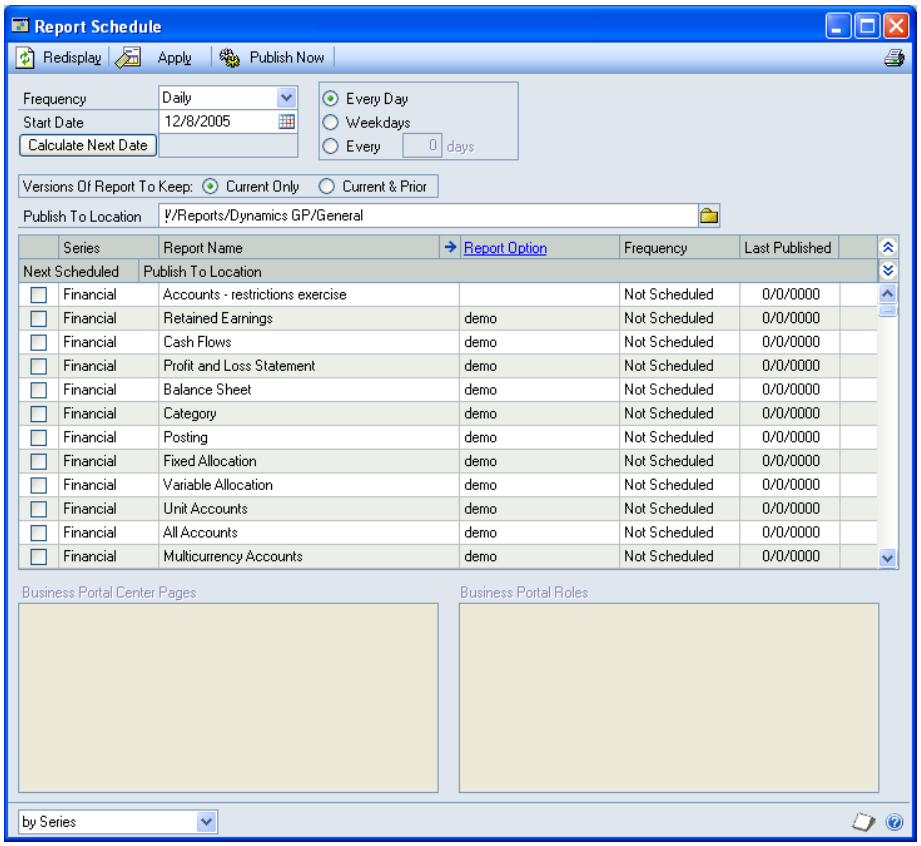
Because of the similarity of many report names, it is important to know the location of the available reports. The Report Navigation column in the scrolling window outlines the location of each report. This column is not editable. The Report Name column defaults to the original name of the report. You can change it to another name as long as the name is unique.

Report Schedule

Report Scheduler Setup Checklist, Step 3

TOOLS→ROUTINES→COMPANY→REPORT SCHEDULE

The Report Schedule window allows you to define which reports to publish, frequency of publication, and the location they will be published.



Use the Report Schedule window to add or change when a Report Writer report is to be published. The Publish Frequency, Version of Report To Keep, and Publish Location options selected on the top portion of the screen affect the selected reports when clicking **Apply**.

Microsoft Official Training Materials for Microsoft Dynamics ™
Your use of this content is subject to your current services agreement

Selecting a Publish Frequency determines when to publish selected reports. The options selected are controlled by the **Start Date**. This field defaults to the current system date.

After the frequency options have been selected, check whether the report is set to publish on the desired date by clicking the **Calculate Next Date** button. Once the Frequency options are correct, determine which version of reports to keep. The choices available are as follows:

- **Current Only** – Removes prior versions of the report's output.
- **Current and Prior** – Removes prior versions of the report output. This causes the report file to be saved with the value in the Next Report File Name on the Report Scheduler Setup window.

Selecting the Publish Frequency

Select the Frequency you want to publish a report. These options are only available if the Frequency selected is something other than Not Scheduled. This field defaults to Daily. The available options are listed in the table in the following table:

Field	Value
Not Scheduled	Selecting this hides most of the publishing frequency fields in the top portion of the window. It also sets the selected reports' frequency to Not Scheduled. Report Options that have a frequency of Not Scheduled do not display on the Report Scheduler Publisher window.
Daily	Selecting this displays further scheduling options. You can select Everyday, Every Weekday, or Every certain number of days. Selecting Everyday means the report is due for publishing every day, including Saturday and Sunday. Every Weekday means the report is due for publishing Monday through Friday only. Every certain number of days allows you to enter a number indicating the number of days between publishing, starting on the Start Date.
Weekly	Allows the option of either publishing Every Week or Every certain number of weeks. It also displays a series of check boxes to select the day or days of the week desired.
Monthly	Select to publish on a specific number day of the month or a specific day of the week of a specific week of the month. Regardless, you can select which month or months to publish the report. If you select a specific day of the month, and enter a value of 29, 30, or 31, and any of the months selected do not have that many days in them, the report prints on the last day of the month for that month.

Your use of this content is subject to your current services agreement

Frequency Example – Daily

Using September 1 as the **Start Date**, the selected report options print every day from September 1 onward where the Frequency Daily option is selected combined with the Every Day option. If the Daily Frequency option is combined with the Weekdays option, the report is scheduled to print Monday to Friday. If September 1 falls on a weekend, this would not be included as a scheduled date.

A report option may have been last published on the 10th of September with a Daily Frequency option and an increment of 5 in the Every x days box. This report option's next scheduled publishing date would be September 15. If someone manually published the report on the 12th, then the next due date would be the 17th.

NOTE: *When selecting the Daily Frequency, the Every ? Days option must have a number greater than zero. The maximum number allowed in this field is 999.*

Frequency Example – Weekly

Selecting the option of Weekly combined with the Day of the Week option enables the check boxes for each week day to be active. Select at least one of these boxes.

If you select Monday and Wednesday, the report is published the next Monday or Wednesday, whichever comes first. If this option is scheduled to publish on Mondays and Wednesdays, and for some reason it is not published on Monday, when the user logs in on Tuesday, this report option is listed as past due. If the publisher does not log in on Tuesday and instead logs in on Wednesday, the report option is published, but only once. The Monday publishing is skipped.

If Every x number of Weeks is selected, select which day or days of the week the report is to be published. If the report was last published on September 4, 2007, and is set to publish every two weeks, the next time it is due to be published is September 18, 2007.

Frequency Example – Monthly

If you select the Monthly Frequency option combined with Day option where you type in which day of the month to publish a report, you must also select at least one month.

If a report option has been selected to be published on the 15th of the months March, June, September, December, and it was published manually on the 1st of September, it is considered due for publishing on September 15th.

Selecting the Monthly Frequency allows you to select which day of which week of which month(s) to publish a report. This allows you to define a report option to be published the first Monday of each month, regardless of the number of day it is.

Microsoft Official Training Materials for Microsoft Dynamics ™
Your use of this content is subject to your current services agreement

If a report option is set up to publish on the First Monday of the months March, June, September, December, and is published manually on August 25th, it is considered due for publishing on September 2nd.

NOTE: *You can select any value between one and 31 in the Day option when the Frequency is set to Monthly. If you type day 31 as the day you want a report published, and the month you have selected does not have 31 days, it is scheduled for the end of that month. Selecting zero is not a valid option.*

Start Date

This field is used to control when a report is first scheduled to be published. If today is June 1, and you schedule a report option to be published every weekday with a Start Date of January 1, that report option does not show up as due until January 1.

Calculate Next Date

This field is used to calculate the next date the report is to be published based on the frequency options and the start date entered for the report. Use this button to verify that the report is published on the desired date.

Publish To Location

This defaults to the value from the Report Scheduler Setup window. Use the lookup button to select a different location. The location selected has to be a UNC path.

To publish reports, ensure the user has write access to the folder selected in Publish To Location. If the selected folder is not available, an error message displays. This asks if you want to view the associated error log created when the report would not publish to the selected location.

Apply

Clicking this applies the publish frequency and location settings to the report options selected. After completing this process, the window refreshes with report options displaying their updated status. The current user is added as a publisher of the report, and a dialog appears asking if you want the new schedule settings to apply to all publishers. Selecting **Yes** changes the settings. Selecting **No** means that reports that have more than one publisher retain their original settings. All report options are clear, and the scrolling window redisplays.

Publish Now

Clicking this publishes the report options selected. After all reports have been queued, the window redisplays with none of the reports selected. The **Last published date** and **Location** fields are updated. Report options that were selected, that have a publish frequency of Not Published are published, and retain their Not Published frequency. Their **Last published date** and **Location** fields, however, are updated.

Your use of this content is subject to your current services agreement

The publish frequency settings are ignored, except for the Version To Keep, and the Location To Publish. These are used to determine the name and location of the report output. All report options are clear, and the scrolling window redisplays.

Business Portal Center Pages

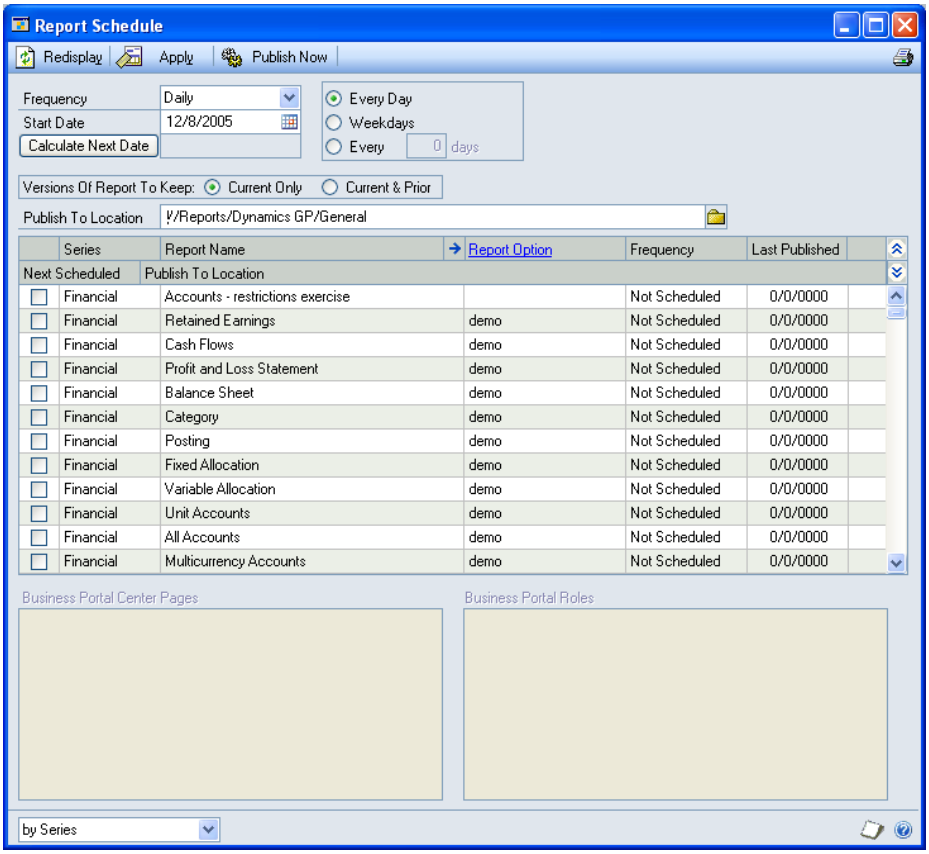
If you have Business Portal, select the Business Portal center pages that have access to the selected reports.

Business Portal Roles

If you have Business Portal, select the roles that have access to the selected reports.

Understanding the Scrolling Window

The Report Schedule scrolling window displays the options selected for each individual report.



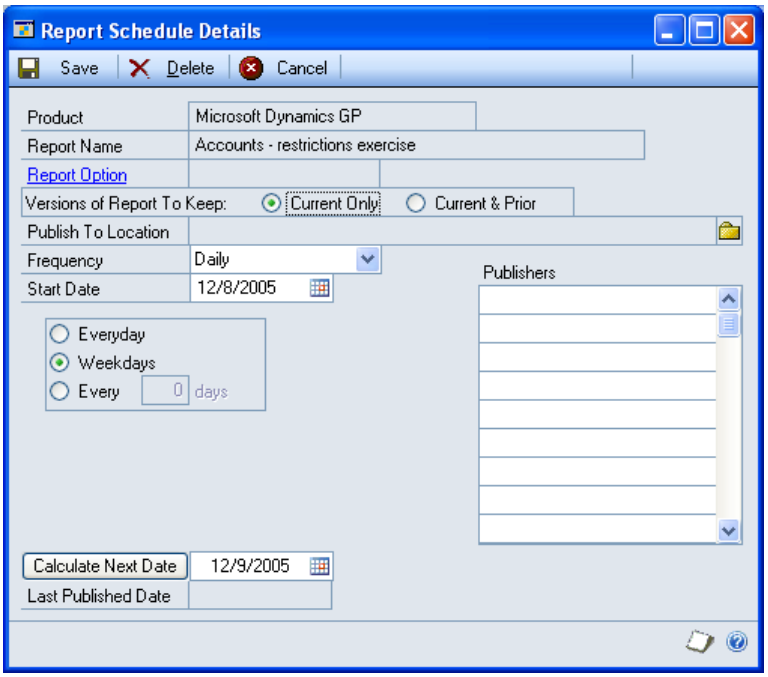
Report Name

The Report Name column is the name of the report. This defaults to the name Microsoft Dynamics GP provides, unless it was changed via the Report Names window.

Microsoft Official Training Materials for Microsoft Dynamics ™
Your use of this content is subject to your current services agreement

Expansion Button

Clicking the expansion button located on the scrolling window to the right of the Report Name, opens the Report Schedule Detail Window. This gives detailed schedule information about the selected report option.



NOTE: *The Report Option Detail Window opens for the last report option selected on the scrolling window. Most of the fields located on this window are also available on the Report Schedule window.*

Report Option

This column is the name of the report option. If the report is a custom report created in Report Writer this field is empty. Clicking the Report Option prompt opens the appropriate report option window for that report, and displays the settings for the option. Use this to verify that the report option has the appropriate criteria for publishing to your intended audience.

Publish Frequency

This column indicates the publishing frequency for the report option. Clicking the expansion button opens the Report Schedule Details window. This displays detailed information about how the report option has been setup to be published. The Last Published column displays the date the report option was last published.

Next Scheduled

This column displays the date the report option is next scheduled to be published.

Publish To Location

This column displays the location the report was last published to. View the scrolling window sorted by Series, Report Name, Report Option, Last Published Date, or Next Published Date by selecting from the drop-down menu in the bottom. Fields on the scrolling window are automatically sorted when an option is selected from the down list. Sorting does not affect the selected items or the schedule settings.

Print

Selecting this prints a report showing all the report options schedule settings and its publishers.

To Set up a Report Schedule:

1. Open the Report Schedule window.
   (TOOLS→ROUTINES→COMPANY→REPORT SCHEDULE)
2. Check the box next to the report(s) you want to schedule in the scrolling window.
3. Select how often to publish the reports. Options include daily, weekly, or monthly. The default for all reports is Not Published.
4. To check whether the frequency options selected are correct, click **Calculate Next Date**. The selected reports publish on this date.
5. Select whether to keep only current versions of the report or current and prior.
6. Leave the **Publish To Location** with the default path unless you want to publish reports to a new location.
7. The options selected on the Report Schedule window only affect the selected reports after clicking the **Assign** button.
8. Click the **Publish Now** button to view the reports or wait until the scheduled date

---

NOTE: *When a user clicks either the **Apply** button or the **Publish Now** button, they are automatically added as a publisher for the reports. If at a future time, another user comes to this window and clicks either **Apply** or **Publish Now**, they will be added as an additional publisher of the report options.*

---

9. The **Apply** button applies the publish frequency, version of report to keep, and publish location setting from the top portion of the window to the report options selected. **The Publish Now** button publishes all the selected reports to the location specified in the **Publish To Location** field.

Microsoft Official Training Materials for Microsoft Dynamics ™
Your use of this content is subject to your current services agreement

Lab 9.1 – Setting up a Report Schedule

Company: Fabrikam, Inc.

Scenario: Every Monday morning your boss likes to receive a copy of the most recent Receivables Management Historical Aged Trial Balance. Create a report schedule that will run this report automatically. This exercise assumes that general Report Scheduler setup has already been completed.

Challenge Yourself!

1. Create a new report option for the RM Historical Aged Trial Balance called Weekly.
2. Ensure the report always prints as of the Current Date.
3. Verify that the Destination for the report is File and the file name is "Weekly Trial Balance." Select a File Format.
4. Create the Report Schedule for the report.
5. Publish the report immediately.

Your use of this content is subject to your current services agreement

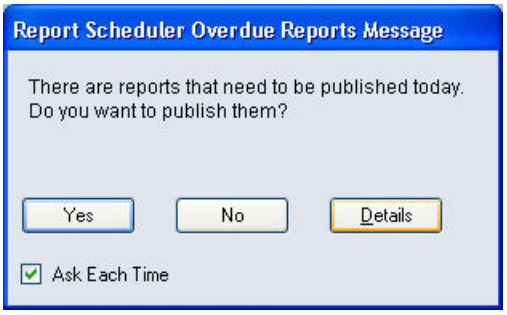
Lab 9.1 – Setting Up a Report Schedule

Company: Fabrikam, Inc.

Scenario: Every Monday morning your boss likes to receive a copy of the most recent Receivables Management Historical Aged Trial Balance. Create a report schedule that will run this report automatically. This exercise assumes that general Report Scheduler setup has already been completed.

Need a Little Help?

1. Open the Receivables Trial Balance Reports window.
2. Create a new report option for the Historical Aged Trial Balance called Weekly.
3. Select **Current Date** as the Print/Age As of selection.
4. Change the Destination for the report to File. Select the location of the file and enter "Weekly Trial Balance" as the File Name. Select a File Format.
5. Save the report option.
6. Open the Report Schedule window.
7. Select a Frequency of Weekly, occurring on a Monday.
8. Select the check box beside the Weekly Report Option for the Sales Historical Aged Trial Balance.
9. Click the **Publish now** button to generate the report immediately. If you click the **Apply** button, the Frequency is established and you will be prompted, at login, with the following message to publish the report at the scheduled time.



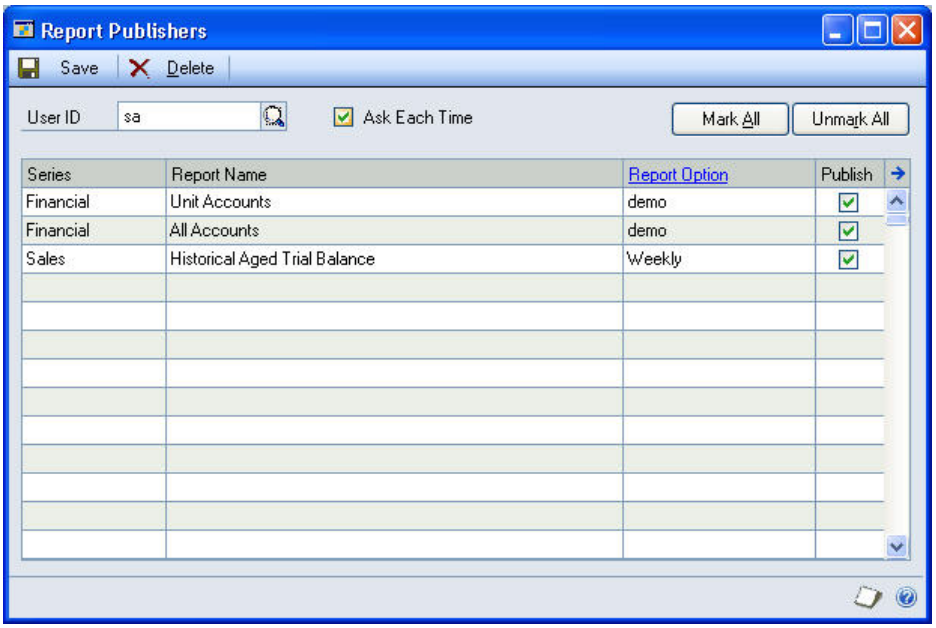
Microsoft Official Training Materials for Microsoft Dynamics ™
Your use of this content is subject to your current services agreement

Report Publishers

Report Scheduler Setup Checklist, Step 4

TOOLS→ROUTINES→COMPANY→REPORT PUBLISHERS

The Report Publishers window is used to define which users can publish which reports. Multiple users can be defined to publish a report. This ensures that if a user is unavailable when the report option needs to be published, another user can publish it. It is also a secure way of ensuring users only see the reports they are entitled to view.



User ID

The Report Publishers window accesses all the Users set up in Microsoft Dynamics GP. These can be viewed by clicking the lookup button next to the **User ID** field.

Enter a **User ID** field or select a user to set up as a publisher from the lookup options. The scrolling window fills with all the report options that have a publish frequency other than Not Published, as defined in the Report Schedule window. If the user selected has already been set up as a publisher, the scrolling window displays all current settings. It is possible to set up a new user in this window by selecting the lookup button and clicking New. The User Setup window appears.

When a user logs into Microsoft Dynamics GP, any reports they have been set up to publish that are overdue trigger a reminder message. This message states that there are reports overdue for publishing.

Whether or not the user wants to view this reminder message is driven by the **Ask Each Time** field. This field is checked by default. If this option is not selected, the dialog does not appear, and any reports the user has set up to publish that are overdue are published automatically.

NOTE: *If more than one user has been selected to publish a report, the first user to log in is the one to publish the report. Any other users set up to publish the report do not trigger the report to be published as it no longer has a publishing status of overdue.*

When setting up a user to publish reports, the **Mark All** button enables the user to publish all the reports in the scrolling window. The Unmark All option removes publishing rights for all reports for the selected user.

Publish

The Publish column in the scrolling window is where you indicate whether the user selected can publish the report or not. Clicking the expansion button opens the Report Schedule Details window. This displays detailed information about how the report option has been set up to be published.

To Set Up Report Publishers:

1. Open the Report Publishers window.
   (TOOLS→ROUTINES→COMPANY→REPORT PUBLISHERS)
2. Enter the User ID or select the user from the lookup button.
3. In the publish column, check the boxes next to the reports you want the user to publish, or click **Mark All** to select all reports.
4. View the Report Options for a given report by highlighting the check box and clicking the underlined Report Options link.
5. A report option is selected when a dotted outline surrounds the check box in the publish column. To view the Report Options for this report, click on the underlined Report Options column heading.
6. View the Report Schedule Details window by highlighting a report option and selecting the expansion button in the top right of the scrolling window.
7. Unselect the **Ask Each Time** check box if you want overdue scheduled reports to print automatically when the selected user logs in.
8. Click **Save** to keep all changes made to the window. Clicking **Delete** removes all publishing options for the user.
9. Closing the window without saving retains any report options you have selected or cleared since opening the window.

Microsoft Official Training Materials for Microsoft Dynamics ™
Your use of this content is subject to your current services agreement

Lab 9.2 – Adding a Publisher

Company: Fabrikam, Inc.

Scenario: You are about to leave for vacation and need to assign your report publishing duties to another user during your absence. Assign your weekly Receivables Management Historical Aged Trial Balance to LESSONUSER2.

Challenge Yourself!

Assign the weekly RM Historical Aged Trial Balance to LESSONUSER2.

Lab 9.2 – Adding a Publisher

Company: Fabrikam, Inc.

Scenario: You are about to leave for vacation and need to assign your report publishing duties to another user during your absence. Assign your weekly Receivables Management Historical Aged Trial Balance to LESSONUSER2.

Need a Little Help?

1. Open the Report Publishers window.
2. Select LESSONUSER2 using the lookup button for **User ID**.
3. Select the **Publish** check box for the RM Historical Aged Trial Balance.

Microsoft Official Training Materials for Microsoft Dynamics ™
Your use of this content is subject to your current services agreement

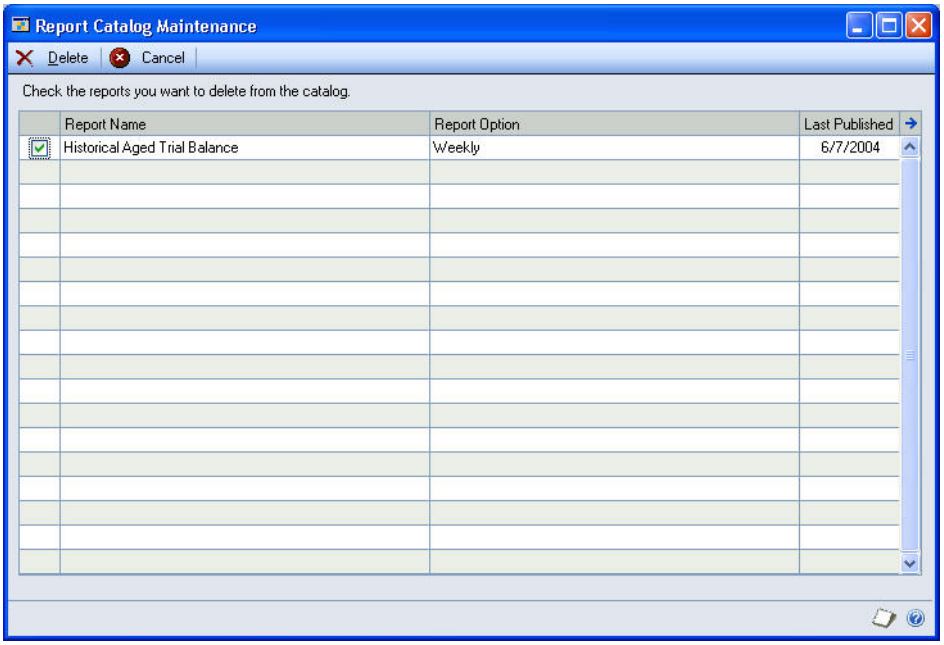
Report Catalog Maintenance

Report Scheduler Setup Checklist, Step 5

TOOLS→ROUTINES→COMPANY→REPORT CATALOG MAINT.

Report Scheduler is designed to publish reports automatically with very little user intervention. However, there are certain procedures that may need to occur from time to time such as:

- Creating new report schedules
- Editing a report schedule
- Viewing report schedules with their related published reports
- Deleting report catalog information



After you begin publishing reports, information relating to this process is recorded. The Report Catalog Maintenance window allows you to manage this process by deleting entries from the Report Catalog.

It is important to manage report information created using Report Scheduler to ensure unwanted information is not using memory unnecessarily. This is particularly important if you have selected to keep current and prior version of a report in the Report Schedule window.

Opening the Report Catalog maintenance window allows you to view all records from the Report Catalog table relating to published reports. Checking the box next to a report name and clicking **Delete** results in the entry being removed from the catalog along with the associated output file.

NOTE: *The output file is located in the folder selected as the Default Location on the Report Scheduler Setup window. Deleting entries on the Catalog Maintenance window removes the output files from this folder.*

After removing an entry from the Report Catalog Maintenance window, a dialog box may appear. This occurs if the report option in the schedule that generated the catalog entry is set to something other than Not Scheduled. This dialog asks whether you also want to remove the schedule for the selected report.

Selecting **Yes** removes the report option and resets the publishing frequency to Not Scheduled. The last published date and time, and the published to location fields are cleared. All publishers for the report are also removed.

Selecting **No** when asked whether you want to delete the schedule for the selected report option results in the schedule and the list of publishers remaining unchanged. If the report option has a frequency of Not Scheduled, then no dialog appears, and everything remains unchanged.

To Delete Report Catalog Information:

1. Open the Report Catalog Maintenance window. (TOOLS→ROUTINES→COMPANY→REPORT CATALOG MAINT)
2. Check the box or boxes next to the information you want to remove and click **Delete**.
3. A dialog box appears if the information deleted has an associated report schedule other than Not Scheduled.
4. To also remove the schedule information on the Report Schedule window for the report option that created the Report Catalog entry, click **Yes**. This removes the report option and resets the publishing frequency to Not Scheduled. It also clears the last published date and time and the published to location fields.

NOTE: *A dialog box only appears after deleting an entry in the Report Catalog Maintenance window if the associated report option has a publishing frequency other than Not Published.*

5. Selecting **No** leaves the report schedule and list of publishers unchanged.

Microsoft Official Training Materials for Microsoft Dynamics ™
Your use of this content is subject to your current services agreement

Lab 9.3 – Deleting Report Catalog Information

Company: Fabrikam, Inc.

Scenario: You would like to start over with the Report Schedule for the Receivables Management Historical Aged Trial Balance. Before editing the Report Schedule, you know that you should remove the existing Report Catalog information.

Challenge Yourself!

Delete the catalog entry for the Receivables Management Historical Aged Trial Balance.

Lab 9.3 – Deleting Report Catalog Information

Company: Fabrikam, Inc.

Scenario: You would like to start over with the Report Schedule for the Receivables Management Historical Aged Trial Balance. Before editing the Report Schedule, you know that you should remove the existing Report Catalog information.

Need a Little Help?

1. Open the Report Catalog Maintenance window.
2. Delete the Historical Aged Trial Balance.

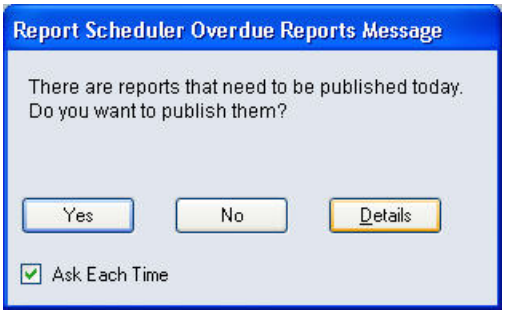
Microsoft Official Training Materials for Microsoft Dynamics ™
Your use of this content is subject to your current services agreement

Publishing Reports

Report Scheduler features enable you to publish reports automatically at the exact time and frequency desired. Scheduling reports is done in the Report Schedule window.

Publishing reports can be done either manually from the Report Schedule window or automatically when the user logs into Microsoft Dynamics GP.

When a user logs into Microsoft Dynamics GP, Report Scheduler views the information displayed on the Report Publishers window to determine which reports the user has been set up to publish. If it finds one report that is either due that day or is past its due publishing date, it displays the Reports Scheduler Overdue Reports Message dialog window as shown below.



All the report options that the user sets up to publish that are either due that day or overdue are published by selecting **Yes**. These reports are published in the background, allowing the user to continue with their normal work.

If the user clicks **No**, then the reports are not published, and they remain overdue.

NOTE: *A user can publish a report at any time by navigating to* TOOLS→ROUTINES→COMPANY→REPORT SCHEDULE *and by clicking* ***Publish Now****. Any reports that have been checked in the scrolling window are published.*

If the user does not select the **Ask Each Time** check box, this dialog does not appear the next time the user logs in. If there are reports to be published by this user that are due or overdue, the next time the user logs in, they are automatically published.

If later the user decides that they do not want reports to be automatically published, he or she can go to the Report Publishers window, enter the user ID, and select the **Ask Each Time** check box.

To Publish a Scheduled Report:

1. Log into Microsoft Dynamics GP.
2. A dialog window opens if there are any reports scheduled due or overdue to be published. Click **Yes** to publish the reports. Selecting **No** means the reports remain overdue and the dialog box reappears the next time you log into Microsoft Dynamics GP.

NOTE: *As some computers may never be logged out, a check is made at 12:01 am every 24 hours. If the computer is still logged on at that time, Report Scheduler checks if any reports are due that day and follows the publishing process as described in this section.*

3. Clicking **Details** opens the Report Schedule window. All report options that are overdue are selected. This way the user can see what reports are due or overdue. If the list is correct, the user can click **Publish Now**, and the reports are published the same as if they had clicked **Yes**. The user can also select additional reports, clear reports, or make any other changes they want to the window.

Troubleshooting

Errors During Publishing

There are a number of common circumstances that could cause an error when generating reports. As Report Scheduler supports the printing of custom reports, each user requires the necessary report dictionaries for publishing to occur. If the report to be published does not exist in the report dictionary on the computer publishing the reports, or the publisher does not have the product installed, an error log is created. The Last Published Date on the Report Schedule window are not updated.

If the publisher does not have access to the Default Location for the selected reports due to such issues as network permissions, an error is written to the Error Log table.

If the publisher does not have access to print all the reports a report option prints, an error log is written and the report is not published. The Report Catalog window is not updated.

Any errors created during publishing can be viewed by clicking **Yes** on the Error Log dialog window.

Microsoft Official Training Materials for Microsoft Dynamics ™
Your use of this content is subject to your current services agreement

Conclusion

Report Scheduler

Some key points to remember from this chapter include:

- Report Scheduler allows to flexibly schedule the publishing of reports in Report Writer and Microsoft Dynamics GP.
- Report Scheduler requires little ongoing maintenance.
- Schedule reports using the Report Schedule window.
- Reminders are made to publish reports that are due or overdue.

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

_____

_____

_____

_____

2.

_____

_____

_____

_____

3.

_____

_____

_____

_____

Microsoft Official Training Materials for Microsoft Dynamics ™
Your use of this content is subject to your current services agreement