

Dynamics Report Manager

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rockton
SOFTWARE

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Rockton Software Dynamics Report Manager

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Introduction

Rockton Software is pleased to bring award-winning Dynamics Report Manager to the Microsoft Dynamics GP community. Dynamics Report Manager is a powerful and easy way to integrate SQL Server Reporting Services and Crystal Reports with Microsoft Dynamics GP, Small Business Manager and Small Business Financials. For purposes of this document, all of these products will be referred to as Dynamics GP. Unless specifically noted, Small Business Manager and Small Business Financials instructions are the same as Dynamics GP.

SQL Server Reporting Services (SRS) and Crystal Reports are recognized as the standard business-reporting tools across the globe because of their high-powered, easy-to-use interfaces, enabling companies to produce professional reports that can be distributed in almost every electronic media format available.

While Crystal Reports ships with standard Microsoft Dynamics GP products, end users must often launch a Crystal report through an outside means. With Dynamics Report Manager, Crystal reports can be launched directly from the Dynamics GP interface. Dynamics Report Manager also solves the problem of multiple printer destinations by allowing any report to be sent to any network printer as a global or user-level setting.

With SQL Server Reporting Services, Microsoft has introduced a new and powerful competitor to Crystal Reports, at a far better pricing model. Dynamics Report Manager also launches SQL Server Reporting Services reports, allowing your organization to choose one or both of these powerful tools for your reporting needs.

Dynamics Report Manager also uses new techniques that integrate with *any* third-party product that is installed with Dynamics GP software—all without the need for costly cross-dictionary patches or add-ons.

Dynamics Report Manager's capabilities include:

- Printing reports to the screen, direct to a printer, or to a web browser.
- Pulling information from Dynamics GP or third-party windows and passing them as parameters to a Crystal or SRS report.
- Launching reports from any Dynamics GP window – including *any* third-party product window.
- Grouping sets of reports to launch together in an easy-to-use interface.
- Defining report destinations by user.
- Scheduling

What's in This Manual

This manual contains the basic instructions needed for the installation and use of Rockton Software's Dynamics Report Manager. You will find instructions for:

- Dynamics Report Manager Installation
- Navigating the Options
- Setting up the System
- Printer Maintenance
- Report Maintenance
- Launching Reports and Setting Report Parameters
- Printing Reports
- Lookup Maintenance

If you do not find the information you need in the following documentation, please contact Rockton Software (see page 8).

Symbols and Conventions

To help you use this documentation more effectively, we have included the following symbols to highlight important information:



This symbol points out suggestions and important notes that assist you in installing and using Dynamics Report Manager.



The warning symbol alerts you to situations in which you should proceed with caution. Notes highlighted with a warning symbol relate to information that affects your entire system—please read carefully!

- Keyboard keys, specific buttons, file names and menu paths are shown in bold print, such as the **Move Right** button, the **OK** key or the **setup.exe** program.

- Window titles and captions are shown in quotes, such as the "Maintenance" window.

Customer Technical Support

Technical support from Rockton Software is simple. With an active maintenance agreement, support is unlimited and available to Resellers and Customers alike. We can communicate via telephone, fax, email, web conference, or other means if possible. Beyond FAQs and product manuals available on our website, we prefer for all customers to utilize their Reseller for support, as it is usually most efficient and the customer's Reseller is more familiar with all third party products on site and the specifics of the customer's needs. However, we will also provide direct support as requested. Without an active maintenance agreement, no technical support is offered.

As always, user input into improving this product, constructive feedback or technical ideas are always appreciated and highly encouraged. At Rockton, we want to hear your input. So drop us a line whenever you feel like it.

You can reach us by contacting technical support from Rockton Software by phone at (877) 476-2586 or e-mail support@rocktonsoftware.com. You can also visit www.rocktonsoftware.com for more information on Rockton products, including a Frequently Asked Questions section.

Enjoy!

System Requirements

The system requirements for installing and using Dynamics Report Manager follow those of Microsoft Dynamics GP. The following table lists the specific hardware and software requirements that pertain to Dynamics Report Manager:

Server Operating System	One of the following: X64 • Microsoft Windows Server 2016 Essentials, Standard, or Datacenter Edition • Microsoft Windows Server 2012 Essentials, Standard, or Datacenter Edition • Microsoft Windows Server 2012 R2 Essentials, Standard, or Datacenter Edition
Client Operating System	One of the following: • Microsoft Windows 10 Professional or Enterprise Editions • Microsoft Windows 8 or 8.1 Professional, Ultimate, or Enterprise Editions • Microsoft Windows 7 Professional, Ultimate, or Enterprise Editions
Available hard disk space	5 MB in the Dynamics GP install folder; 5 MB in the DYNAMICS database
Minimum available RAM	2 GB (more recommended)
Microsoft SQL Server	One of the following: • SQL Server 2016 Enterprise, Standard or Express Editions • SQL Server 2014 Enterprise, Standard or Express Editions
Microsoft Dynamics GP	One of the following: • Version 2018
Adobe Acrobat Reader	Adobe XI, X, 9.0, 8.0, 7.0, or 6.0

Installation

Please read these instructions in their entirety before installing this software.

Workstation Installation Instructions

1. Extract **all of the files and folders** in the zip file you downloaded to a folder where you can access it from all workstations that you are going to install.
2. From each computer on which you wish to install Dynamics Report Manager, run the Dynamics Report Manager setup file (**DRMSetup.exe)** and choose *Run as administrator*.

   It is recommended that you are not running any other Windows programs when installing this program
3. Select the folder where Dynamics GP is installed.

   Important! *Install Dynamics Report Manager to the same directory where Dynamics GP is installed. If the default directory on the Dynamics Report Manager Installation Wizard window is not the same as the Dynamics GP installation directory, modify the default directory.*
   If you enter this incorrectly, Dynamics Report Manager will not function!
4. Click the Install button. This will copy **DRM.cnk** and any other files as appropriate. It will also install any other components that are necessary to run Dynamics Report Manager. On some installations, you may have to reboot your system.
5. Verify that the Status shows "Installed Successfully." for each item listed. Then click the Exit button on the setup window.
6. Include the new chunk file code into Dynamics GP by launching Dynamics GP. Be sure to right-click the Dynamics GP icon, choose More, then choose *Run as administrator*.

   The following message may appear: "New code must be included in the DYNAMICS.SET dictionary. Do you wish to include new code now?" Click **Yes**.

   This process will modify your DYNAMICS.SET file to include information relating to Dynamics Report Manager, and the **DRM.cnk** file will create a **DRM.DIC** file.
7. You will be prompted to exit GP. Log out of GP and log back in.

You should now exit Dynamics GP to complete the installation process for each workstation. If this is the first workstation in your network on which you are installing Dynamics Report Manager, continue with the following section.

First Workstation Instructions

If this is the first workstation on which you are installing, complete the following steps.

You will need to complete these steps only once for your system. You do not need to perform these steps in each company.

1. First, complete steps 1 thru 6 from the previous section.
2. Log in as any User that has sufficient SQL Server rights to be able to create Tables. This user must either be in the 'sysadmin' fixed server role or the 'db_owner' role for the DYNAMICS database.

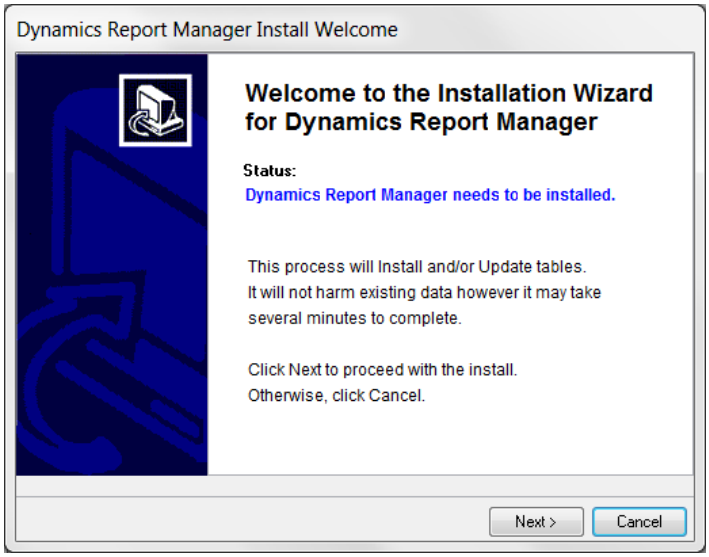
   If this is a new installation of Auditor (not an upgrade from a previous build or version), you will need to log in as a User that is in the POWERUSER Security Role. This is because the AUDITOR ADMIN role has not yet been created.

3. Log into any company. Since Dynamics Report Manager maintains data at the system level, it is only necessary to install in one company. If you have not received a product registration file, we recommend that you log into the Dynamics GP lesson company.

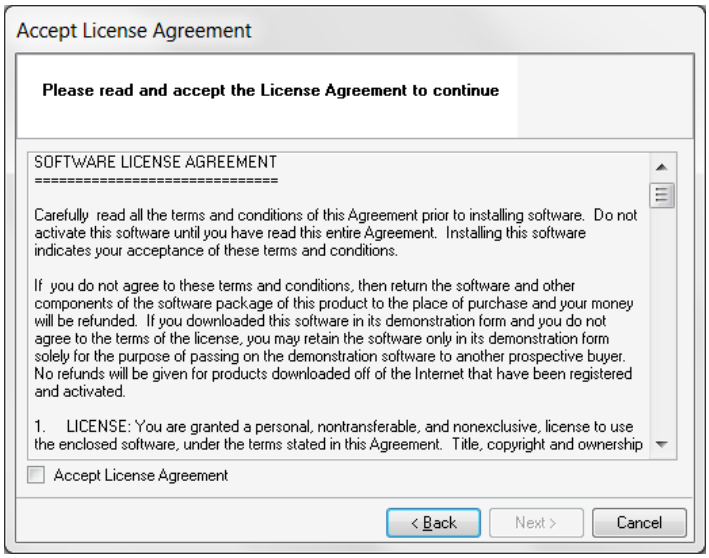


If you are evaluating the software and do not yet have a registration key, this product will only work in the Dynamics GP lesson company. To obtain a registration key, contact Rockton Software or your authorized reseller.

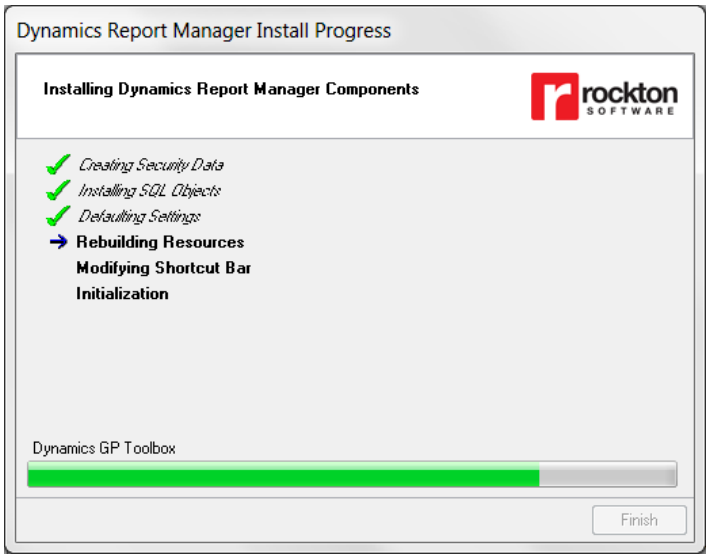
4. Next, the Dynamics Report Manager Install Welcome window opens. Note the status. This indicates if you will be installing from scratch or upgrading from an earlier build.



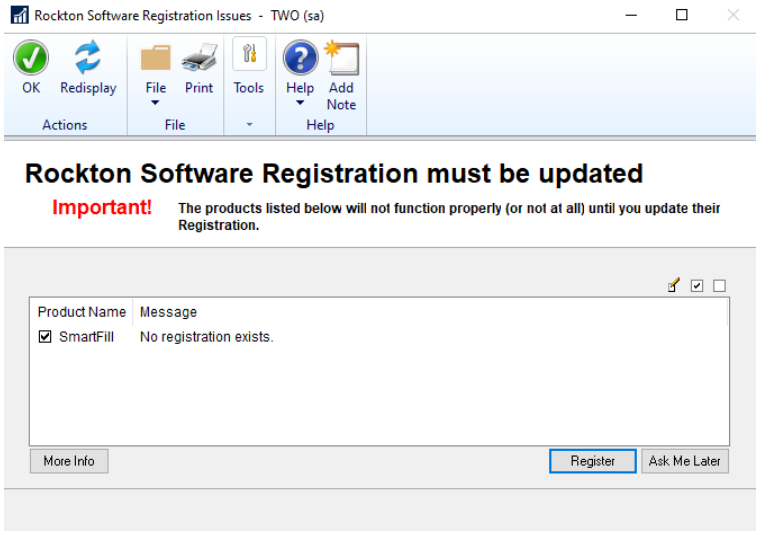
5. Click the Next button to review the License Agreement.



6. Mark the **Accept License Agreement** check box, then click the Next button to launch the Install Progress dialog. You may see some informational messages as the installation continues. Take note of these and click OK or respond to them as necessary.



7. When the installation has completed, press the Finish button. The Dynamics Report Manager Install Status window will open. Take note of any messages on the Install Status window and click OK.
8. If you have not previously registered your software, the following window will open:



This will show any Rockton products not currently registered. If you wish, you can click the Register button to have your registration loaded automatically.

To register the product manually, choose Registration on the Dynamics Report Manager Setup window to open the Dynamics Report Manager Registration window. Click Import Registration and import the registration file you received previously.

For subscription products that are registered, a periodic check is done to verify their registrations are valid. Administrators may see a progress dialog when logging in during this check while non-admin. users will not. We recommend an administrator log in periodically to verify your subscription status for each product. If issues are found during the process, you will see a message relating to the issue.

9. Log out of Dynamics GP and log back in.

Verify the Installation

Test at least one Report and one Batch Report (if you are using them) using different user types (POWERUSER, DRM Administrator, regular user, etc., as appropriate) in a company other than Fabrikam.

This completes the installation process for the first workstation.

Removing Dynamics Report Manager

These steps will completely remove Dynamics Report Manager from workstation and server:

1. Log in to Dynamics GP as any User that is either in the 'sysadmin' fixed server role or the 'db_owner' role for the DYNAMICS database.
2. Open the Dynamics Report Manager Setup window and select the Uninstall Tab. Then select the Complete Uninstall task to completely uninstall from the server, or select Workstation Uninstall to simply remove it from the current workstation.
3. Click OK on the message to close Dynamics GP.
4. Delete the following files from the Dynamics GP install folder (you may not find all of them):

DRM.DIC	Dynamics Report Manager Manual.pdf	Rockton Report Engine.exe
DRM.VBA	Rockton Report Engine.pdf	RocktonSoftware.dll
DRM.cnk	DRM Changes.txt	PdfSharp-WPF.dll
DRM API.pdf	DRM_RocktonLicenseAgreement.txt	SQL Report Viewer 2008.exe
RegAsm.exe	RegisterAssembly.bat	CItoDRMConversionScripts.sql

5. Delete the following files from the Dynamics GP Data folder (you may not find all of them):

FRMS5014.DIC	RPTS5014.DIC

6. If you chose Complete Uninstall in step 2, then log on to Dynamics GP as a User that has access to the Security windows. Remove the DRM ADMIN Security Role and the ADMIN_DRM_01 Security Task.

Manually uninstalling

The following steps can also be used to manually remove Dynamics Report Manager:

Manually uninstalling from a Workstation

Perform this process on each workstation where you want to remove Dynamics Report Manager.

1. Edit the Dynamics.set file (located in the Dynamics GP installation directory) to remove the Dynamics Report Manager entries. There are three steps to this:
   a. The first line in the file should be a number. Subtract 1 from this number.
   b. Remove these two lines:
      5014
      Dynamics Report Manager
   c. The bottom part of the file contains several path names. Remove the ones that reference the following dictionaries: DRM.DIC, FRMS5014.DIC and RPTS5014.DIC.
2. Delete the following files from the Dynamics GP install folder (you may not find all of them):

DRM.DIC	Dynamics Report Manager Manual.pdf	Rockton Report Engine.exe
DRM.VBA	Rockton Report Engine.pdf	RocktonSoftware.dll
DRM.cnk	DRM Changes.txt	PdfSharp-WPF.dll
DRM API.pdf	DRM_RocktonLicenseAgreement.txt	SQL Report Viewer 2008.exe
RegAsm.exe	RegisterAssembly.bat	CItoDRMConversionScripts.sql

3. Delete the following files from the Dynamics GP Data folder (you may not find all of them):

FRMS5014.DIC	RPTS5014.DIC

Manually uninstalling from the Server

Perform this process to completely remove Dynamics Report Manager from the system.

1. Open SQL Enterprise Manager.
2. Drop all tables in the DYNAMICS database that are named DRMxx, (xx is the table number).
3. Drop all stored procedures in the DYNAMICS database whose names start with zDP_DRMxxYYY (where xx is the table number and YYY is one of 36 possible suffixes).
4. Perform step 6, above, to remove Security Tasks and Roles.

Navigation

A Dynamics Report Manager menu is added to the Reports, Setup and Utilities menus in Dynamics GP. You will be able to access most of Dynamics Report Manager's functionality from these menus.

However, you may find it more convenient to use the Dynamics Report Manager Toolbar for day-to-day usage. The toolbar includes these four buttons:

- Dynamics Report Manager Setup menu
-  Dynamics Report Manager Explorer
-  Scheduled Report Monitor
-  Floating Toolbar Palette.



Limited Users in Dynamics GP will typically only be able to use Inquiry and Reporting functionality. There may also be cases where other types of windows may also be available to a Limited User because they are necessary to perform the basic functionality of this product.

Adding a Limited User to this product's ADMIN security role may result in some Administrator functions becoming visible for that user. Accessing these functions will typically result in a message indicating that the user does not have security privileges to the window that performs that function.

Backup and Restore

All Dynamics Report Manager data is stored in the DYNAMICS database. Therefore, performing the process normally used to backup this database should also backup all Dynamics Report Manager data. Similarly, restoring this database will restore Dynamics Report Manager data as well.



All data in Dynamics Report Manager is stored at the system level.

Setup Overview

The most common steps for setting up Dynamics Report Manager include:

- System Settings Setup
- Printer Maintenance
- Report Maintenance
- Launch Point Maintenance
- (optional) Lookup Maintenance

System Administrators

Certain users of this software will have the ability to perform functions that the average user cannot. These functions may include but are not limited to installation, setup, and configuration of advanced features. We will refer to these users as “System Administrators”. This may also be abbreviated to Administrators, or just Admins.

In Dynamics Report Manager an Administrator is defined as any user that is in either the DRM ADMIN or POWERUSER Security Role.

About Dynamics Report Manager window

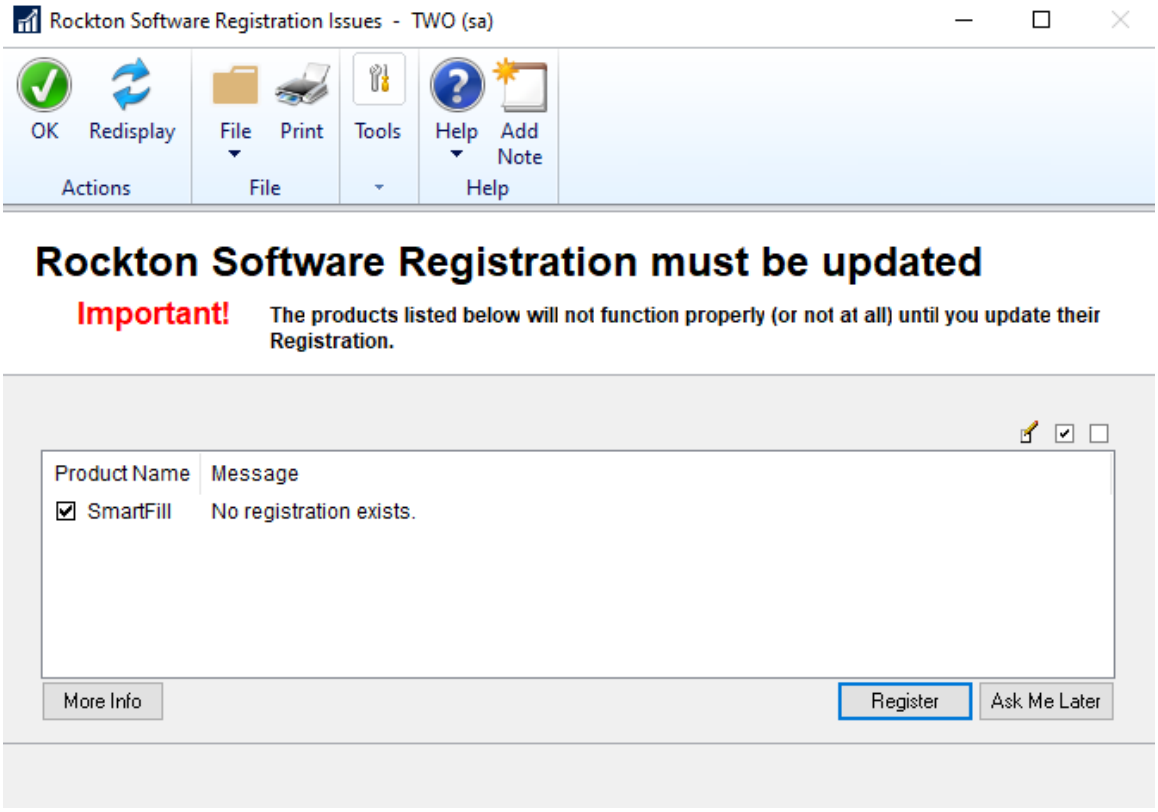


You can get to this window by first going to Help > About Microsoft Dynamics GP… From the Additional menu, choose About Dynamics Report Manager.

Description

The About Dynamics Report Manager window shows the version of Dynamics Report Manager that you have loaded, along with the phone number to use to contact Rockton Software, and a link to our website. In addition, it also provides a convenient means of navigating to the Dynamics Report Manager Registration window.

Rockton Registration Issues window



This window opens automatically if any Rockton products are not properly registered:

- when you exit the Dynamics GP Registration window.
- when a System Administrator logs in.
- after completing the Installation Wizard.

Description

Whenever you close the Dynamics GP Registration window, the registration for all Rockton products that you have installed will be verified. If any are found to be invalid (for instance, because the User Count or Site Name has changed since the last time the Rockton registrations were updated), then this window will open automatically. The box at the bottom of the window will list each Rockton product that requires new registration.

You can attempt a new registration for the products listed. If you do not have a valid registration for any of the products listed, in most cases you will be given a temporary registration that will expire in 30 days.

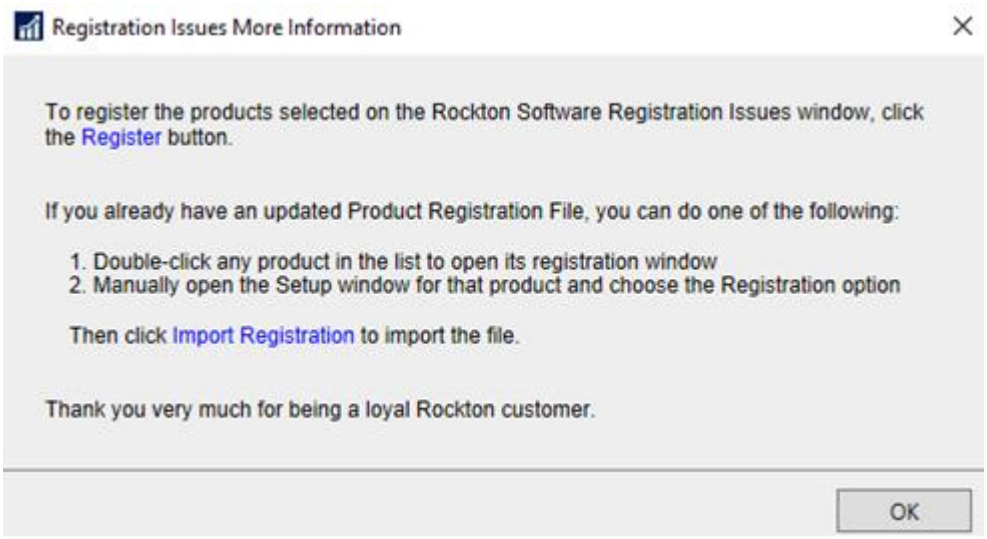
To retrieve your registration information, simply mark the check box for each product that requires new registration, and then click the Register button. This will automatically attempt to register each product selected. If registration cannot be obtained, you will see a message that indicates there was a problem. You can click the text in the Message column to see additional information on resolving the issue. After a request has been sent to register, an icon appears to the left of the Product Name that will show the results for the registration attempt. You can click the icon to get more information related to the results of the request.

You may also import the product registration file that may have been provided to you from the Rockton Sales team by double-clicking the product in the list above or clicking the Edit icon. This will open the Registration window for that product. From there, click the Import Registration button and import the file.

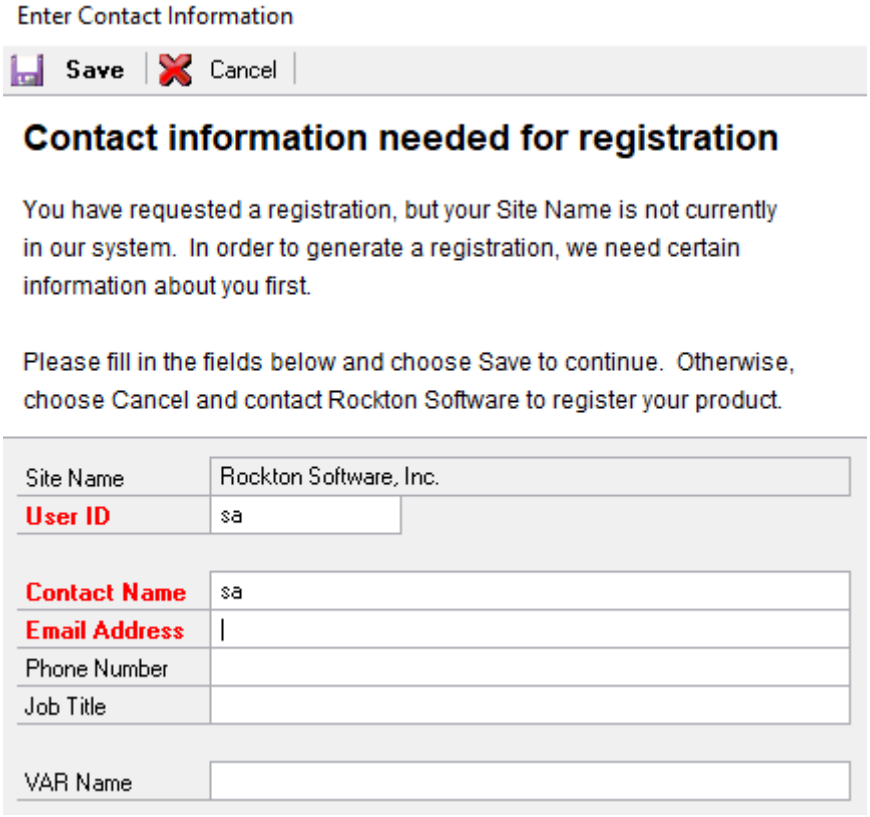
If you are using a subscription product, a subscription check is run periodically to validate the current registration. Administrator users will see a progress dialog when this request is made and will see messages if there is an issue with the registration. Non-administrator users will not see this progress so we recommend an administrator log in to Dynamics GP periodically to validate registrations for Rockton products. If information has changed regarding Site Name, User count, or Dynamics GP version, the registration will become invalid and you will need to contact Rockton Software for further assistance. If you're using a non-subscription product, your registration will continue to be verified and open the Rockton Software Registration Issue window when an issue is found.

If you plan to resolve the registration issue at another time, you can click Ask Me Later to be prompted with this window later. The options are Next Login or Tomorrow.

You can click the More Info button for steps on how to register the product.



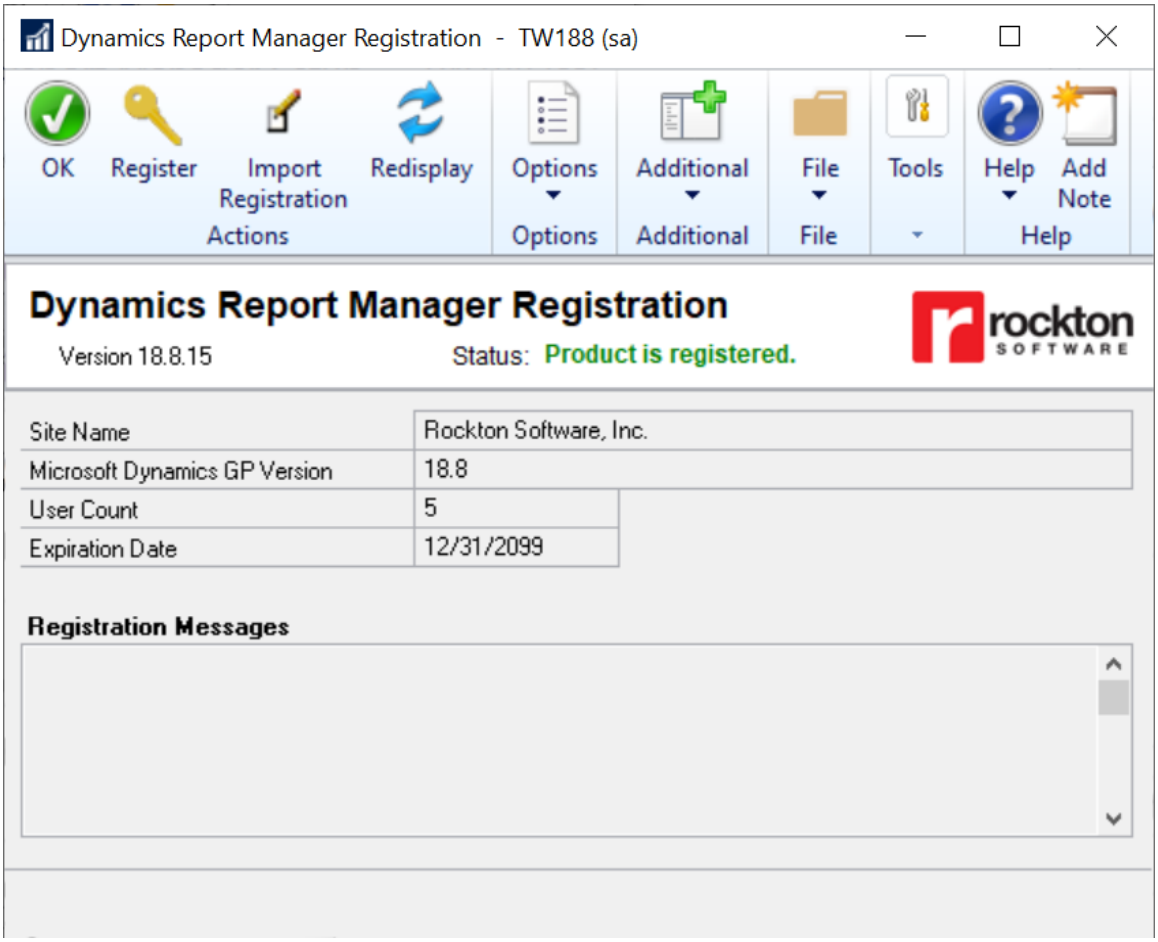
Enter Contact Information window



Description

This window opens automatically when a request is made for registration and your Site Name does not exist in our system. You can enter the information and click Save or you can contact Rockton Software directly to register your product.

Dynamics Report Manager Registration window



You can get to this window in one of four ways:

- From the Navigation Pane.
- Go to Help > About Microsoft Dynamics GP… and from the Additional menu, Additional > About Dynamics Report Manager. Then click the Register button.
- Log on as a User in the DRM ADMIN Security Role or the POWERUSER Security Role and go to Microsoft Dynamics GP > Tools > Setup > Dynamics Report Manager > Dynamics Report Manager Setup. Then click the Registration task.
- From the Rockton Registration Issues window, double-click a product in the list.
- Click the Administration navigation button to open the Administration Area Page. Then select Dynamics Report Manager Setup from the Dynamics Report Manager sub menu. From the drop-down, choose Registration and choose the Process button.

Description

The Dynamics Report Manager Registration window is where you can automatically register your product or manually import the product registration file.

You can tell from the Status field whether the product is registered or if there is an issue with the registration.

Status	Values
No registration exists	Registration request has not been made due to new product install or product has been unregistered.
Product is registered	Product was registered successfully.
Registration is expired	Existing registration has expired. For example, a trial registration expires after 30 days.
Registration is invalid	Registration information does not match information in Dynamics GP. Typically, this is due to Site Name, User Count, or Dynamics GP version not matching.

To automatically register the product, click the Register button and a request will be made to check for valid a registration. If found, the window is populated with the necessary information and the Status is set to Product is Registered. If a valid registration is not found, then you will receive more information as to the status of the registration.

If you need to manually import the product registration, click the Import Registration button. Select the XML file you received previously from Rockton Sales. If the file is valid, the Status field will show Product is Registered. If the file is not valid, the Status will show Registration is invalid or Registration is expired.

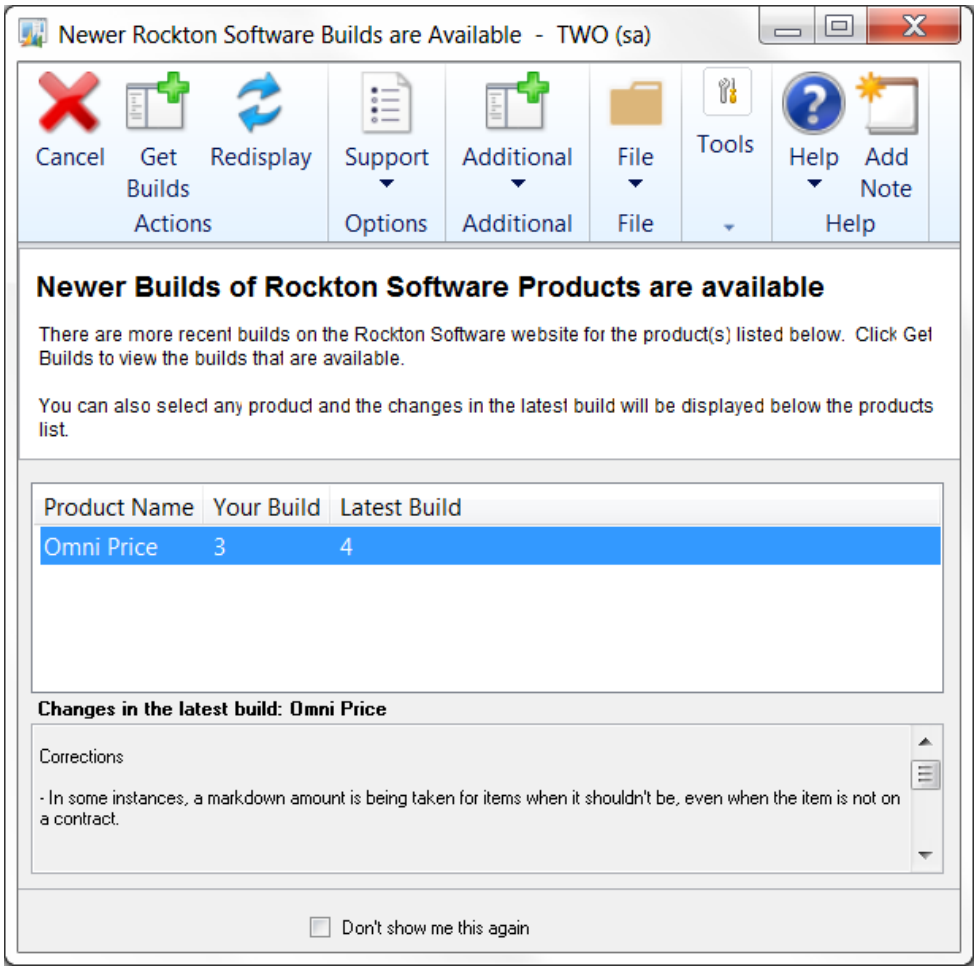
If the Site Name, Microsoft Dynamics GP Version, or user Count does not match the current Dynamics GP values, a warning indicator (⚠) will appear next to the corresponding field. If the registration has expired, you will see a warning indicator next to the Expiration Date field.

The Registration Messages box will provide additional information regarding the registration information that was obtained from the request or from the import.

Should you need to Unregister the product for any reason, click the Options button and then click Unregister product. This will automatically remove the registration information from the window.

If you hare having issues with registering the product, contact Rockton Software to verify that your Site Name, User Count and Dynamics GP version have not changed since your last registration.

Newer Rockton Builds are Available window



This window opens automatically when a System Administrator logs in if any Rockton products are found to have newer builds available for download on www.rocktonsoftware.com.

Description

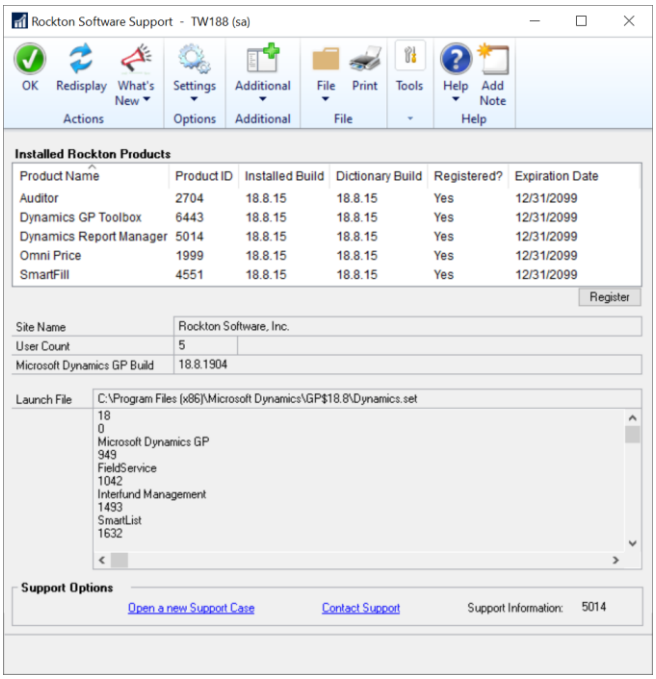
Whenever an Administrator logs in, the system will check to see if any of the installed Rockton products have updates available on the Rockton Software website. If all products are up-to-date, then this window will not open. Otherwise, the products that have updates available will be listed here.

You will see the build that you currently have installed, as well as the Latest Build available on our website. If you select any of the products listed, you will see the changes for that build in the box at the bottom of the window.

If you want to download any of the latest builds, click the Get Builds button and your Internet browser will open to the Downloads page on our website. Here you will see all of the latest builds for each of our products and each version of Dynamics GP for which they are available. If you don't want to download at this time, click the Cancel button.

If you don't want to be notified of new builds any more, mark the "Don't show me this again" check box and you won't be notified of a new build again until the next time you install a Rockton product.

Rockton Software Support window



This window can be opened by clicking the Help icon ( ) and then choosing Rockton Software Support from the drop-list.

Description

This window will mostly be used by Rockton Support to get some high-level information about your system to assist in troubleshooting problems. You may also find some of the information presented here to be useful in your own troubleshooting.

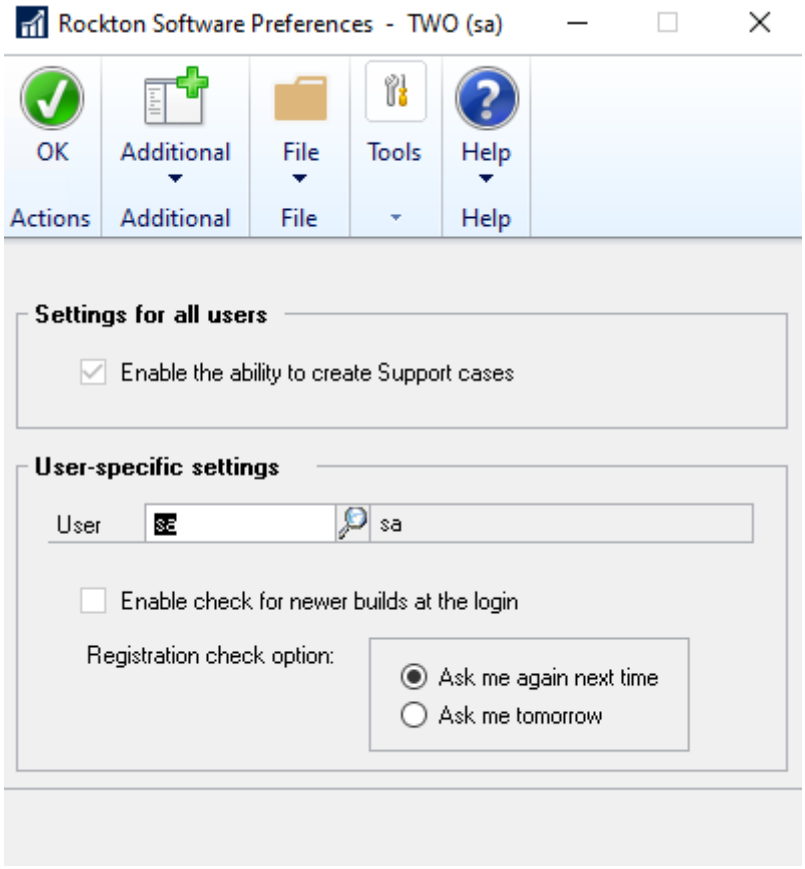
Clicking the What's New button will drop-down a list of the Rockton products that you currently have installed which also have What's New documents available. From this list, you can choose the product for which you want to see a list of new features in this build.

The Installed Rockton Products section will show you your registration information. The Installed Build displays the version in the setup table. The Dictionary Build displays the version installed on the workstation. You can also see if the product is registered and when the registration is set to expire.

If a product shows as not registered, select that product and then click the Register button to automatically attempt to register your products. If no registration exists, contact Rockton Software to resolve your registration issue.

Another important feature of the Rockton Software Support window is the Support Options section at the bottom of the window. You can create a support case by clicking the **Open a new Support Case** link. This will open a browser window that will take you to the Rockton Software Partner Portal, where you can enter details of your problem. Or, if you wish to speak to someone in support first, or do your own research about your situation, you can click the **Contact Support** link and your Internet browser will be opened to our Technical Support page. Here, you will find various options for support including Manuals, FAQs, How-To Videos, Support contact information as well as other options. You can also see the Controlling Product in the **Support Information** field. This information can be helpful to support when troubleshooting.

Rockton Software Preferences window



This window can be opened by clicking the Help icon (), choosing Rockton Software Support from the drop-list, and then clicking Settings and choosing Rockton Software Preferences.

Description

This window is used to assign specific preferences for Rockton Software products. Settings here will apply to all Rockton products you have installed. The window is broken into settings that apply to all users and settings that apply to specific users.

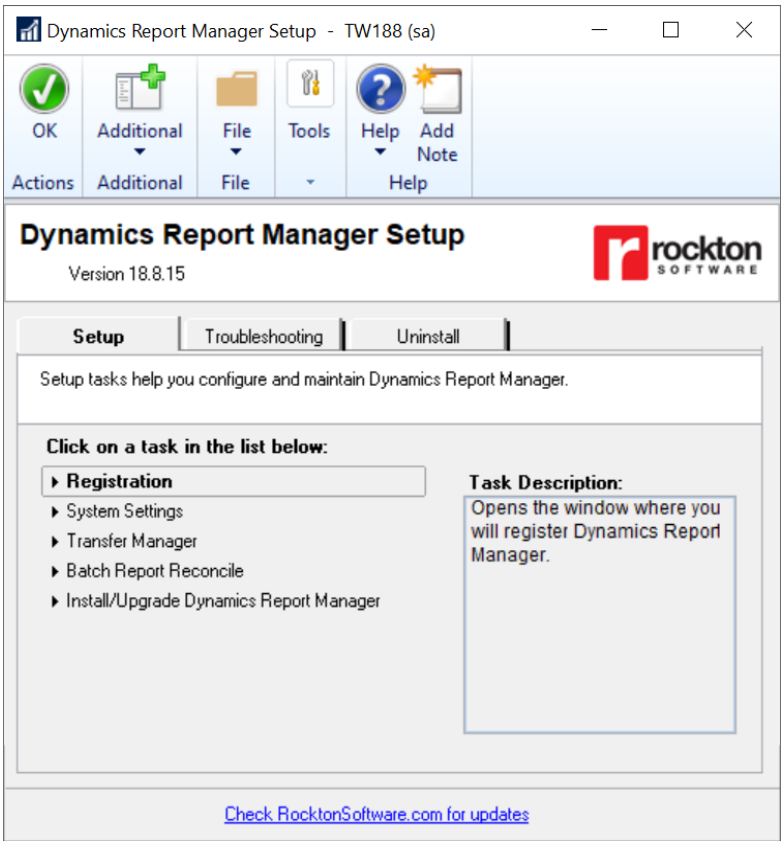
When the Enable the ability to create Support cases check box is marked, users can create a support case from the Rockton Software Support window. When this option is enabled, a hyperlink to Open a new Support Case is available in the Rockton Software Support window.

In the User-specific settings section, you can select a User and then mark the Enable check for newer builds at login. When marked and a user who is an administrator logs in, Rockton will check for any newer builds of the products installed. If the option is unmarked, no checks are made. It is recommended this option be marked for at least on Admin. user.

The Registration check option allows you to choose whether to ask next time or ask tomorrow when looking for registration.

Dynamics Report Manager Setup window

The Dynamics Report Manager Setup window allows you to perform miscellaneous setup and maintenance tasks.



You can get to this window in one of two ways:

- Go to Microsoft Dynamics GP > Tools > Setup > Dynamics Report Manager > Dynamics Report Manager Setup.
- Click the Administration navigation button to open the Administration Area Page. Then select Dynamics Report Manager Setup from the Dynamics Report Manager sub menu.

Description

The Dynamics Report Manager Setup window gives you access to all of the tasks you will need to configure and maintain the system. It contains three tabs:

- Setup
- Troubleshooting
- Uninstall

You can see a brief description of each task by moving your cursor over any of the tasks in the list. To select a task, simply click on the task name.

Clicking the “Check RocktonSoftware.com for updates” link will take you to the Downloads web page for this product. Here you can verify that you are installing the latest build.

The tasks available for each tab are described in the following tables:

Setup tab

Setup tasks help you configure and maintain Dynamics Report Manager.

Task	Description
Registration	Opens the window where you will enter a registration key.
System Settings	Opens the Dynamics Report Manager System Settings window. This is where you can configure various options for DRM.
Transfer Manager	Allows you to import or export Report, Batch Report and Launch Point definitions.
Batch Report Reconcile	Ensures the data integrity of all Batch Reports that you have defined.
Install/Upgrade Dynamics Report Manager	Installs the software, or upgrades it from a previous version. This may take several minutes. It will also set table permissions to all users in the system database. You can perform this task multiple times without causing any problems. **Note:** You must be logged in as a User that is in the 'sysadmin' fixed server role or the 'db_owner' role for the DYNAMICS.

Troubleshooting tab

These tasks are for troubleshooting only. You may be asked to use them by Rockton Support.

Task	Description
Fix Toolbars	When upgrading from an older build of DRM, you may find that the Toolbars no longer show up. This option should correct that problem. **Note:** You should not normally need to use this option because it is run automatically during the Install/Upgrade process.
Fix Shortcut Bar Launch Points	Shortcut Bar Launch Points imported on the Transfer Manager window may not show up on the Shortcut Bar if the file used to import was created on an earlier build of Dynamics Report Manager. This option should make those shortcuts show up again.
Show Toolbar Floating Palette	This will bring the Toolbar Floating Palette to a visible location on the window in cases where you have either a) moved it off the screen accidentally, or b) changed your display resolution to where the previously saved co-ordinates for the window are no longer within the bounds of the new display resolution.
Rebuild Resources	This option should be used after you have added a new product or removed a product from your Microsoft Dynamics GP system.
Re-add Security Data	Adds Security Roles and Tasks for DRM, if they have been deleted. **Note:** you must be logged in a User that has access to run the Install/Upgrade option (as described above) or a User that has Security access to both the Security Role Setup and Security Task Setup windows in order to use this option.
Move to First Position	Moves DRM to the first position in the launch file after Dynamics GP.
Remove from Launch File	Removes Dynamics Report Manager from the launch file.
Rebuild Menus	Rebuilds menu navigation by first removing all menus from the Menu Master table. To complete the process you must log in again to see the rebuilt menus.
Enable or Disable Script Logging	Enables script logging, beginning with the next time you log into Dynamics GP from this workstation.
Diagnostics Mode	This option may gather diagnostics, create log files, open the Code window or other things that may be helpful to Rockton Support.

Uninstall tab

These tasks can be used to uninstall DRM from the system or just from this workstation.

Task	Description
Workstation Uninstall	Removes Dynamics Report Manager from the launch file. Also removes settings from the Defaults file.
Complete Uninstall	Dynamics Report Manager tables will be removed from the database(s) and the product will be removed from the launch file.

System Settings window

You can get to this window in one of these ways:

- Go to Microsoft Dynamics GP > Tools > Setup > Dynamics Report Manager > System Settings.
- From the Dynamics Report Manager Setup widow, choose the System Settings task.
- Click the Administration navigation button to open the Administration Area Page. Then, from the Setup area, select System Settings from the Dynamics Report Manager submenu.

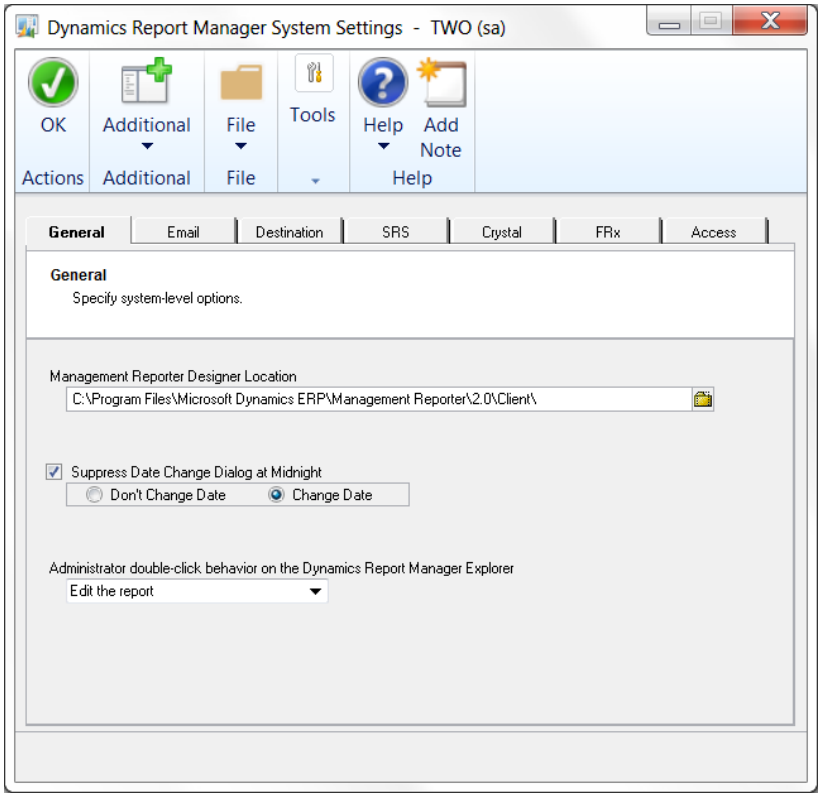
Description

The System Settings window allows you to set system-level setup options needed to configure Dynamics Report Manager. You can also specify default settings for most reports in the system.

The settings are grouped by function on the various tabs on this window. Each of the settings on these tabs is described in the following sections. Some of these settings are required for certain functions to work properly, therefore it is recommended that you review each tab's settings before creating any Reports or Launch Points.

When adding a new Report, the default settings entered here are used initially. However, they can be modified before the Report is saved. This is a huge time saver when thoughtfully used with a large number of reports.

General tab



Management Reporter Designer Location

This must be entered if you are using Management Reporter reports with Dynamics Report Manager. Here you will specify the full path to the ReportDesigner.exe file. Typically, it is:

C:\Program Files\Microsoft Dynamics ERP\Management Reporter\2.0\Client\ReportDesigner.exe.

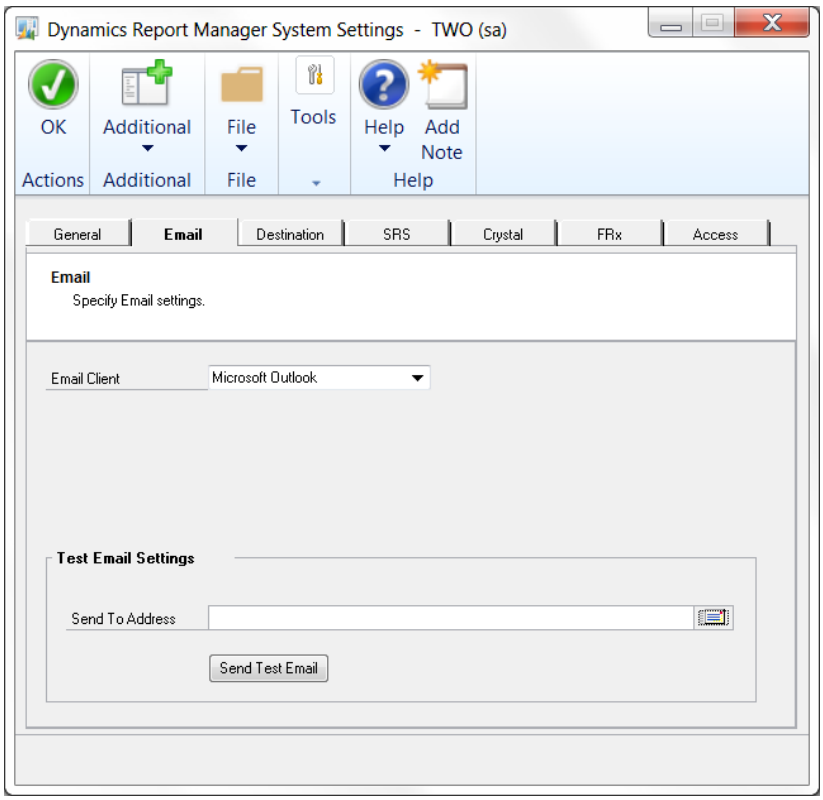
Suppress Date Change Dialog at Midnight

This setting allows you to tell the system how to respond when Dynamics GP prompts to change the User Date at Midnight. This prompt can interrupt scheduled reports that run overnight. Selecting this option will cause the prompt to not appear and therefore not interrupt any Dynamics Report Manager processes.

Administrator double-click behavior on the Dynamics Report Manager Explorer

This setting is used only for Administrators. By default, when you double-click a report in the Reports List, that report will be queued to the Print List. However, for Administrators, you have the option of making the double-click option edit the report definition instead.

Email tab



Email Client

You can choose Microsoft Outlook, Microsoft Dynamics CRM or SMTP. Other settings will be shown based on the Email Client that you choose here.

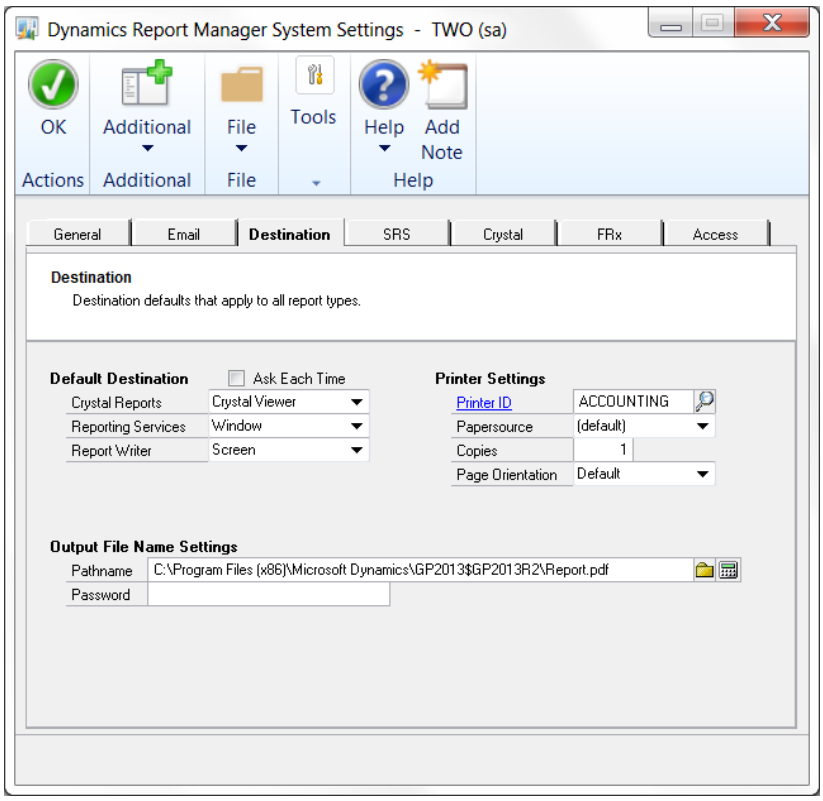


If you select Microsoft Outlook for Email Client, then you must have Outlook installed and open on each workstation where DRM is to send emails.
If you select SMTP for your Email Client, then the username and password specified here must have permission to send email through the SMTP Server.

Test Email Settings

Once you have entered the settings for the selected Email Client, you can select an email address to which to send a test email to confirm that everything is correct.

Destination tab



Default Destination

Most reports should be printed to screen or the appropriate viewer unless set up for a specific application. A different default Destination can be specified for Crystal Reports, SRS Reports and Report Writer reports because each of these report types has a different set of Destinations.

Printer Settings

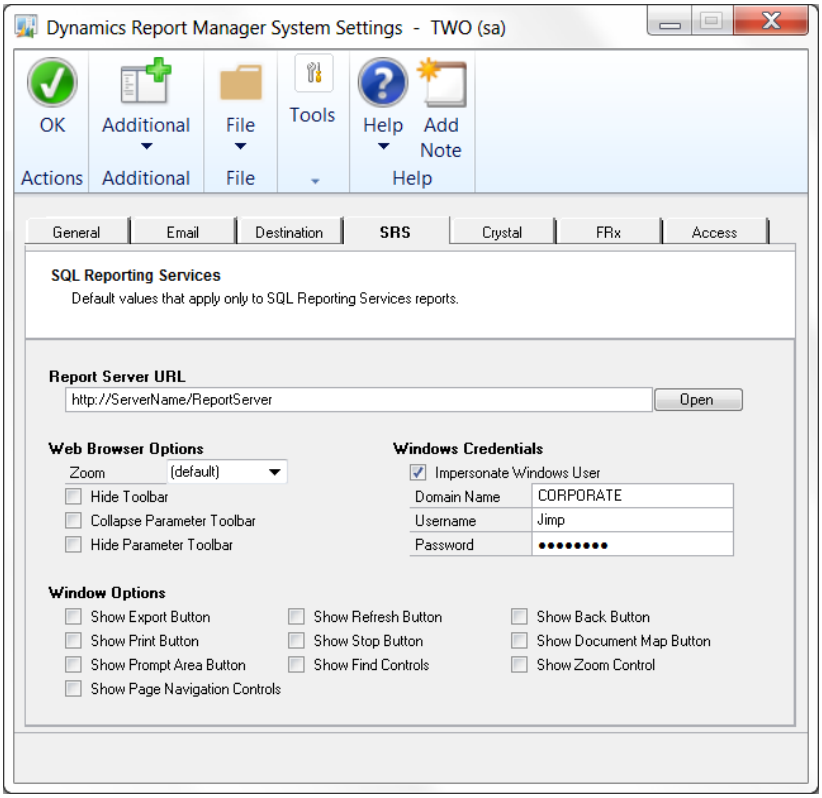
Most report types have the ability to print to a printer. However, some Printer settings will only apply to certain report types. For instance, for Report Writer reports, the Papersource, Copies and Page Orientation are not used.

Output File Name Settings

The Pathname will be defaulted whenever a Destination is selected that outputs to a file.

A Password can optionally be assigned to the output file when the file is of type PDF. If this feature is used then any user attempting to open this PDF file will be prompted to enter the password entered here. This is useful when emailing sensitive documents such as pay stubs.

SRS tab



Report Server URL

The Report Server URL needs to be entered in the following format:

http://ServerName/ReportServer

Your Report Server name can be determined by going to Start > Programs > Configuration Tools > Reporting Services Configuration. Once you have the correct name entered, you can click the Open button to verify that it looks correct. This button should open a web browser pointing to the location of your reports server.

Web Browser Options

Web Browser options are defaulted when you choose Web Browser for the Destination.

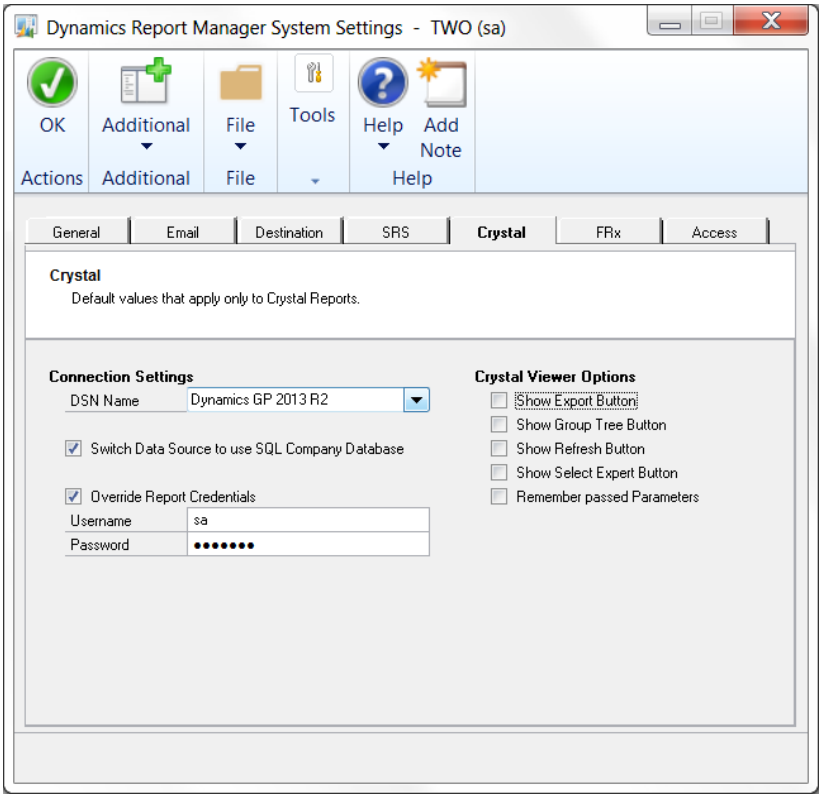
Windows Credentials

Checking the Impersonate Windows User box allows you to set up one Windows user to use for all SRS reports across the enterprise. Many sites use a single Windows user to connect to their data, and by entering it here it will not need to be set up on each report.

Window Options

Window options are defaulted when you choose Window for the Destination.

Crystal tab



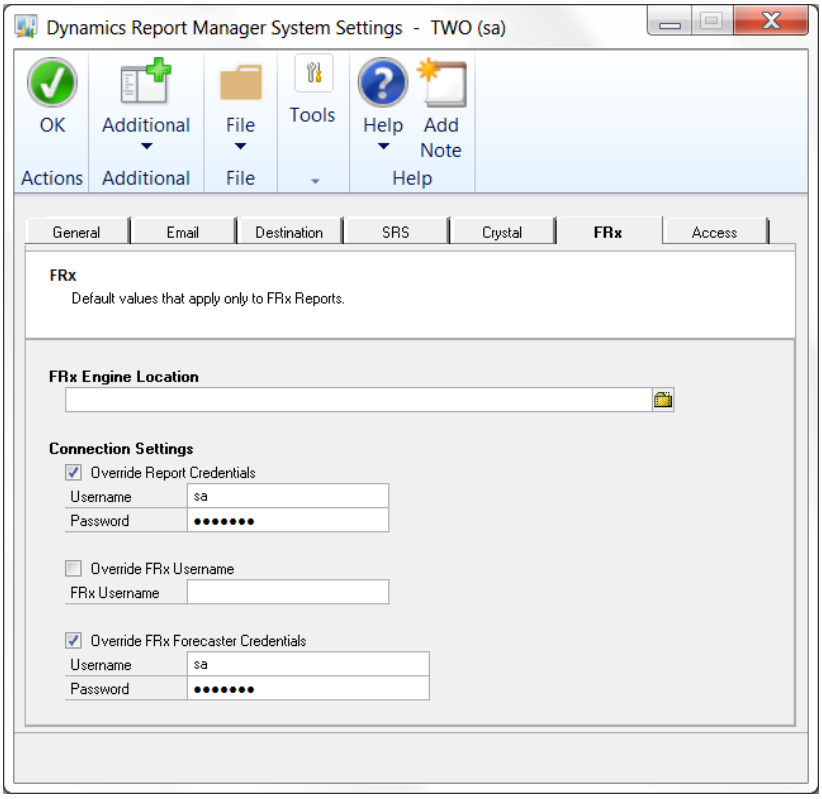
Connection Settings

Connection Settings allow you to set up one set of connection information to use for all Crystal reports across the enterprise. Most sites use a single SQL user to connect to their data, and by entering it here it will not need to be set up on each report.

Crystal Viewer Options

Crystal Viewer Options let you choose which features you want whenever the Crystal Viewer is used to display report output.

FRx tab



FRx Engine Location

This is the full path to the frxa32.exe file. This is typically C:\Program Files\FRx Software\FRx 6.7\frxa32.exe.

Connection Settings

Connection Settings allow you to set up one set of connection information to use for all FRx reports across the enterprise. Most sites use a single SQL user to connect to their data, and by entering it here it will not need to be set up on each report.

Override Report Credentials

Specify the database login. This is required only if GL or database security is needed to access the company.

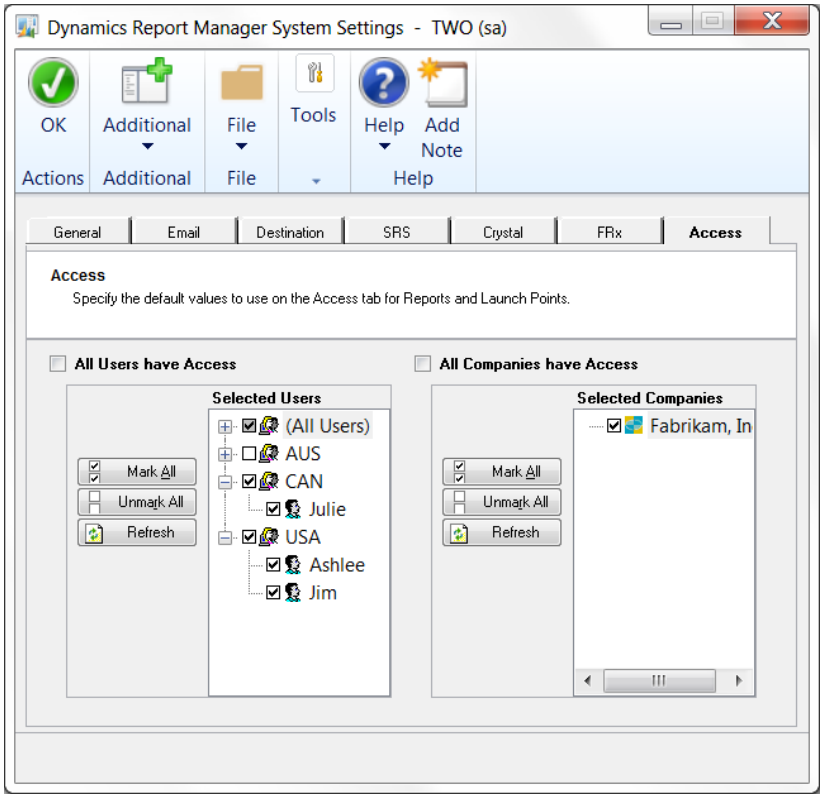
Override FRx Username

Check this box to use the FRx Username, which is required only if FRx Security is enabled.

Override FRx Forecaster Credentials

Specify the FRx login. This is required only if the report also includes FRx Forecaster data.

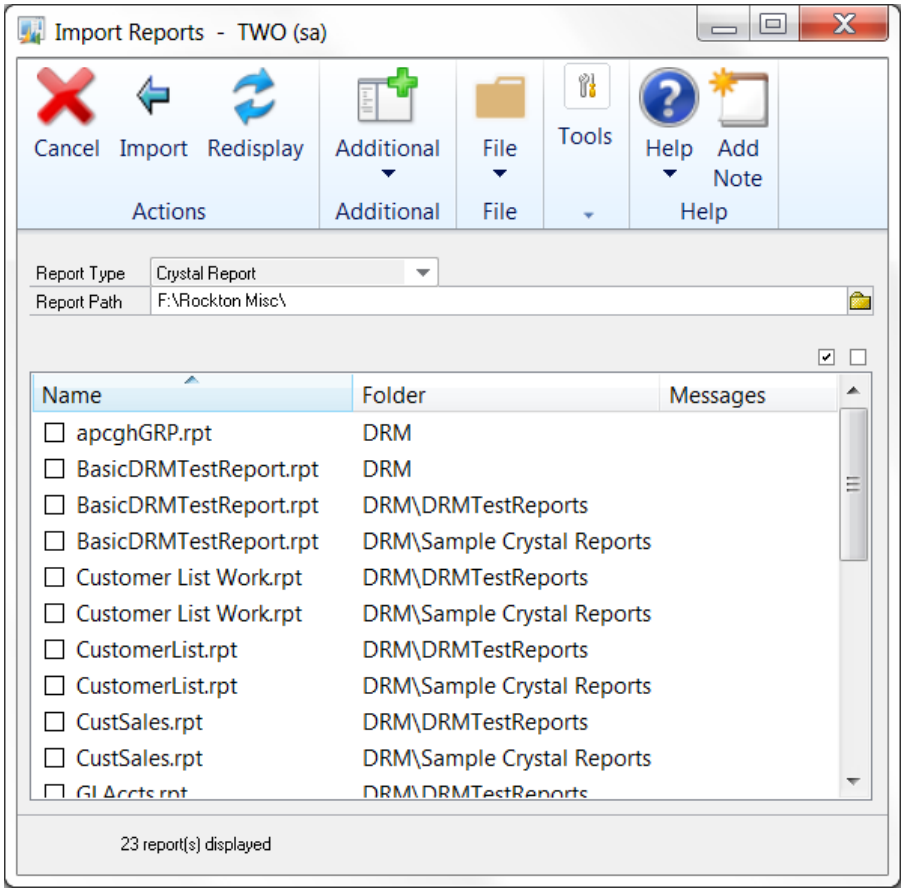
Access tab



All Users/Companies Have Access

These options allow you to pick and choose which users or companies have access to a report. These settings are copied to the report during setup and are not used after creation.

Import Reports window



You can get to this window by going to Microsoft Dynamics GP > Tools > Utilities > Dynamics Report Manager > Import Reports.

Description

This window will allow you to quickly set up a large number of Crystal and SQL Server Reporting Services reports without having to enter them individually in DRM. The information for the Report Maintenance window (described later in this document) comes from the report itself and the default values on the Global Report Defaults window.

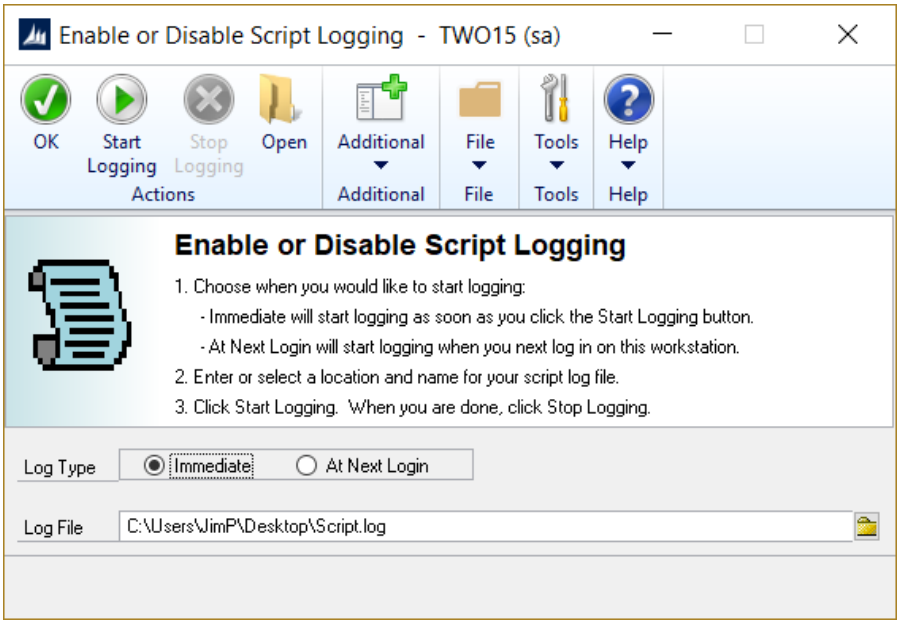
To import reports, first select the Report Type from the drop-down. If you have entered a SQL Report Server Virtual Directory on the System Settings window, then the Report Type drop-down will allow you to choose either Crystal Report or SQL Server Reporting Services. If you have not, Crystal Report will be the only option.

To import Crystal Reports, click the Report Path lookup button to select the path where your Crystal Reports are located. The list of reports in this location will then be displayed in the list box on the Import Reports window. If you choose SQL Server Reporting Services, then the system will automatically look in the SQL Report Server Virtual Directory and fill the list box with the reports in this location.

Select the reports that you wish to create in DRM and click the Import button. You will now be able to see these reports on the Dynamics Report Manager Explorer window and you can change any of the settings that have defaulted in.

Enable or Disable Script Logging window

Rockton Software Support may request that you use this window to help troubleshoot an issue.



You can get to this window by going to Microsoft Dynamics GP > Tools > Setup > Auditor > Auditor Setup. Then, from the Troubleshooting tab, choose Enable or Disable Script Logging.

Description

The Enable or Disable Script Logging window lets you create a special log file called a “script log”. This may be requested by Rockton Software Support if the case you have reported is a tricky one.

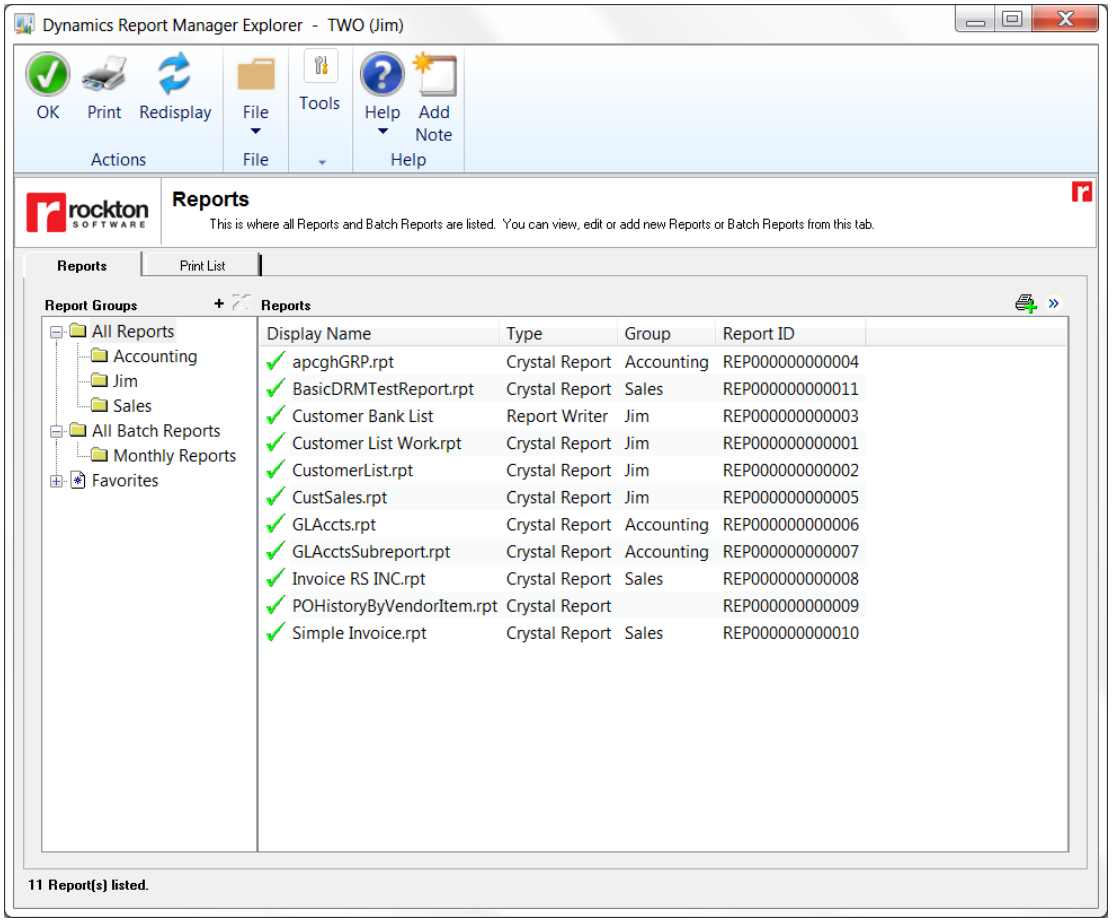
In the past, you would add the line “ScriptDebugger=TRUE” to your Dex.ini file, then log in to GP and use the Debug menu to create a script log. When you were done logging, you would need to set the ScriptDebugger setting to FALSE to suppress the Debug menu. This window lets you perform this task without needed to update the Dex.ini.

When you open the window, you may be asked to restart Dynamics GP. This will happen if the ScriptLogEnhanced Dex.ini setting is not present or is not set to TRUE. The window will add the setting for you, but it will require a restart of Dynamics GP.

You will usually be given detailed instructions for how to use this window by a Support representative, but the general process will be similar to the following:

1. This window requires that You may be prompted to add
2. Select either Immediate or At Next Login for Log Type.
3. Enter or select the name and location of the log file that you are going to create.
4. Perform whatever steps are necessary in Dynamics GP to get to a point immediately before you want to start capturing information in the log file.
5. Click the Start Logging button on this window.
6. Perform the steps that you want to log.
7. Click the Stop Logging button on this window.
8. Click the Open button to view the log file or email it to Rockton Software Support.

Dynamics Report Manager Explorer window



Description

The Dynamics Report Manager Explorer is the primary window for both managing and launching reports. Dynamics Report Manager Administrators will have some additional options available to them, and these will be described later in this document.

The Report Groups tree contains three nodes: All Reports, All Batch Reports and Favorites. The All Reports and All Batch Reports nodes can be expanded to show the groups that have been set up in the system. Favorites are defined by each user so they can specify their own groupings. Click the Add Favorite Folder button (+) at the upper-right of the Report Groups tree to add a new Favorite folder.

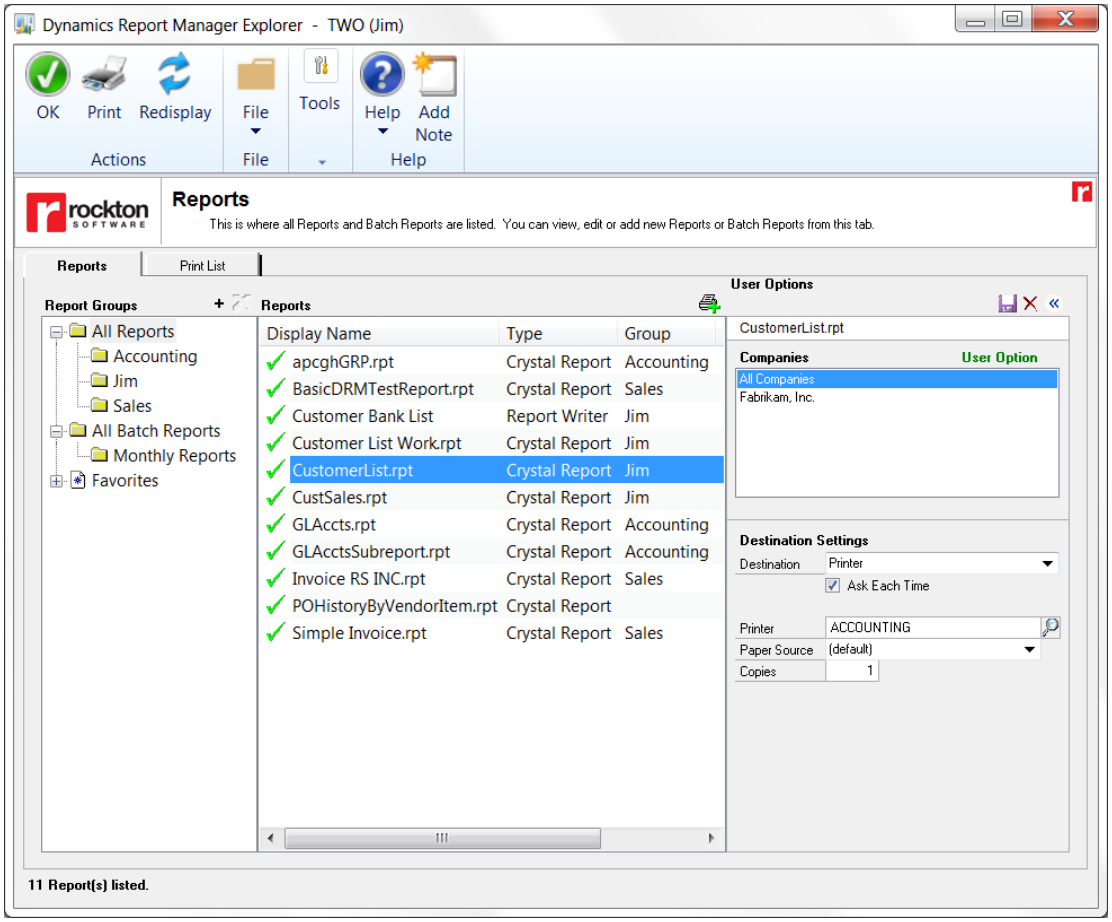
Reports tab

The Reports tab (see image above) lists all the reports for which the current user has access. You can run a report or reports by selecting them in the list and then clicking the Print button. Or, you can just add them to the Print List to run when you are ready. The Print List is described in the Print List tab section, later in this document.

There are two ways to queue a report to the Print List: 1) select reports in the Reports list and then click the Queue Report(s) to Print List button (); or 2) double-click a report in the Reports list (note that this may work differently for an Administrator).

Options Pane

From the Reports tab, you can see and change Destination options for the selected report. Click the Show Options Pane button (») and the Options Pane will be displayed:



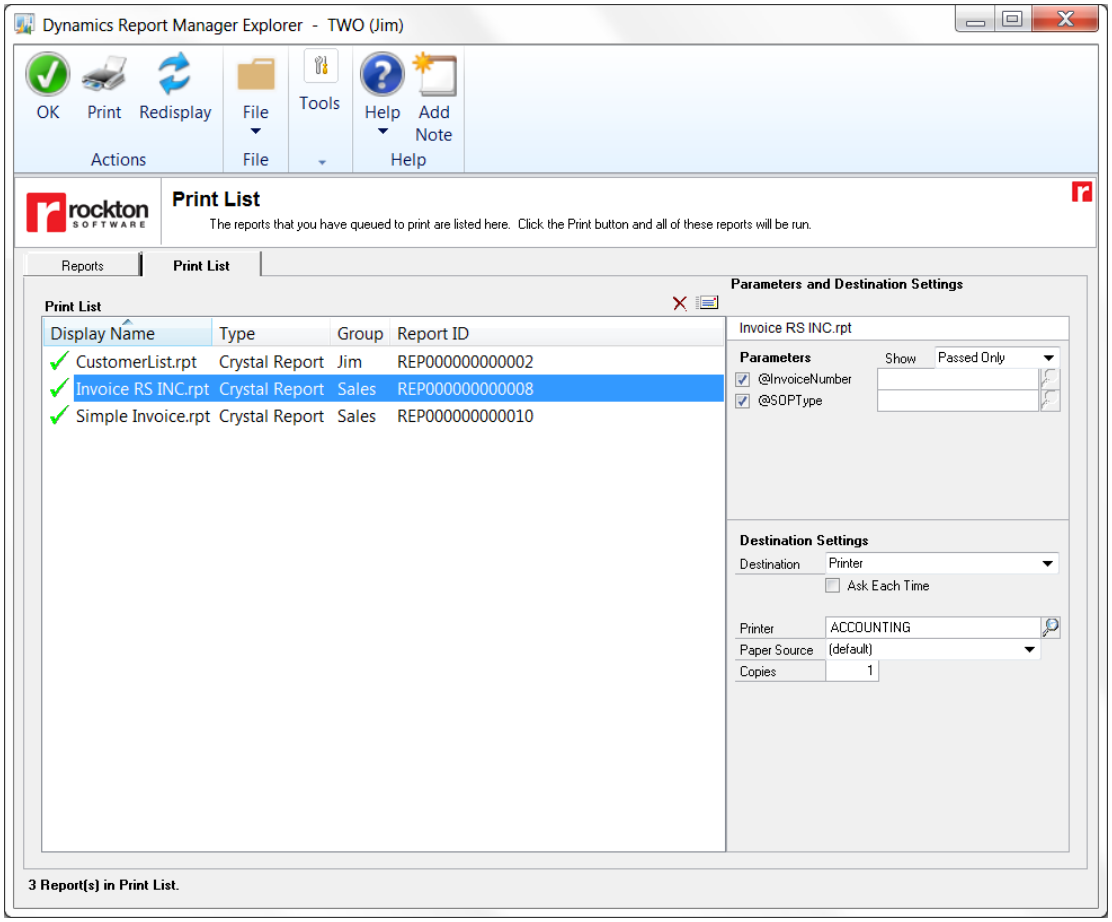
On the Options Pane you will see either the Destination settings that are saved on the selected report, or if a User Option is saved for that report, then you will see that User Option's Destination settings. In the image above, you can see that we are viewing the User Option because it says, "User Option" in green above the Companies list.

Furthermore, this User Option applies to all companies since All Companies is selected in the Companies list. You can also save a separate User Option for each individual company listed.

If no User Option exists for the selected company, then you will see "Default Settings" to the upper-right of the Companies list.

The Destination settings listed in the Options Pane can be thought of as the typical, or default settings that are used when you queue a report to the Print List. However, if you want to use a different destination for a particular report run, you can change these settings in the Print List. This will change the destination for just that one run of the report. It will not change the default settings. To change the default settings, you would need to either change them here in the Options Pane and save it as a new User Option, or you would need to update the Destination tab on the report itself.

Print List tab



The Print List is a list of reports that you have selected to be run when you click the Print button at the top of the Dynamics Report Manager Explorer window. As described previously, you can queue reports to the Print List from the Reports tab by one of these methods:

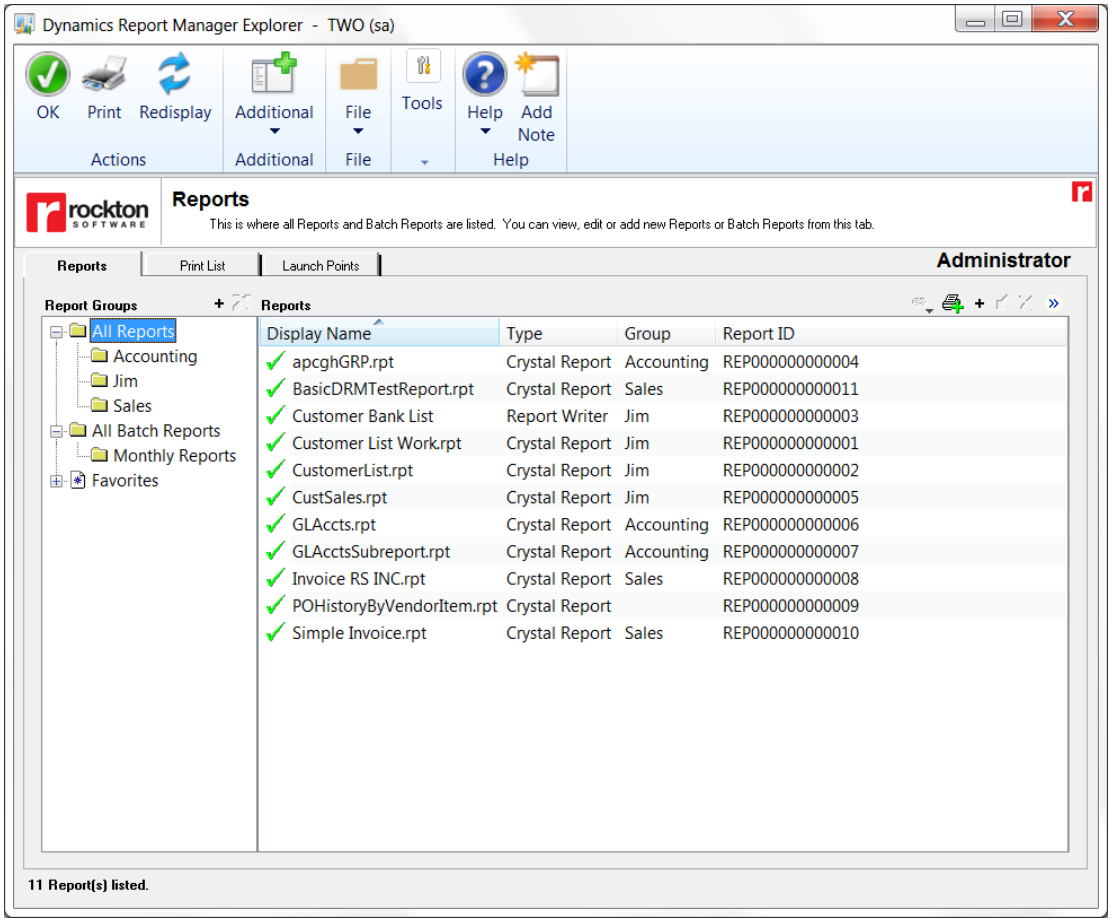
- Select a report or a group of reports in the Reports list and then click the Queue Report(s) to Print List button ( ).
- Double-click on a report in the Reports list (this may work differently for an Administrator).

Selecting a report in the Print List allows the user to specify parameters and the destination for just that run of the report. You can show all parameters defined for a report, or just the ones that have the “Pass this Parameter” option marked. This is done by changing the Show drop-down at the upper-right of the parameters list.

Parameters can be specified by either entering a value in the parameter field, or by using the lookup button ( ) for that parameter. Note that if you have six or more parameters displayed, they will be displayed in a list that will allow scrolling to all the parameters, but it will not allow entering values directly. In this case, you will need to double-click an individual parameter to enter its value.

When all settings are correct for the list of reports in the Print List, pressing the Print button will run all of the reports in the list and send them to their respective destinations.

Administrator Options



When you are logged in as an Administrator, the Dynamics Report Manager Explorer window will have some additional options, which will be described in detail below. In addition, you will see the word **Administrator** in the upper right of the Dynamics Report Manager Explorer window. All of the functionality that has been previously described is available to Administrators. However, there is some additional functionality as well.

Administrators can create, view, and edit Reports, Batch Reports and Launch Points from this window. Add (+), Edit () and Delete (✕) buttons are provided at the upper-right of the Reports or Launch Points list to perform these actions.

The Show Links button () will be available when you have selected a Report or Launch Point in the list that has some association to another object. Clicking this button will show you a list of the other objects that are associated with the one that you have selected. For instance, a particular Report may be run by a Launch Point. A Batch Report would not only run a Report, but it also may be run by a Launch Point.

Launch Points tab

The Launch Point tab is where Administrators can view, edit and delete Launch Points. The buttons on this tab work similarly to the ones already described on the Reports tab.

Report Maintenance window

Description

Report Maintenance is where individual reports are set up. You can specify a report's type, its display information, parameters, destination, and access from this window.



See Appendix C: Setting Up Report Writer Reports for a detailed example of creating a Report Writer report that prints from within Dynamics Report Manager.

The top section of the Report Maintenance window shows general information about the report, such as the report type, the system-generated Report ID and fields that define the physical location of the report. What you see here depends upon the report type:

SQL Reporting Services reports

Physical Location

This will be prefilled with the Report Server URL from the SRS tab of the System Settings window. It is shown here merely as a reference.

Technical Name

Specify the report name and any subfolder (if needed) so that the Physical Location concatenated with the Technical Name will be the complete file name and path for the report. Or, if your SRS reports are on a SharePoint Server, then enter the entire URL for the report, starting with http:// or https://.

Crystal reports

Technical Name

This would contain the full path to the report and would also include the .rpt extension. You can use the Lookup button to select a report from a file dialog box.

Report Writer reports

Product & Series

Select the Product and Series to which the report belongs from the drop-downs.

Report

The name of the report as you would see it in Report Writer.

Management Reporter reports

Report or Group

Select Report or Report Group from the drop-down. This determines whether you will enter a Report Definition Name or Report Group Name in the Report field.

Report

This is the Report Definition Name of the Management Reporter report. It will only show if you selected Report in the Report or Group drop-down.

Report Group

This is the Report Group Name of the Management Reporter Report. It will only show if you selected Report Group in the Report or Group drop-down.

FRx reports

Catalog ID & Company Code

Enter the Catalog ID and Company Code of the report as defined in FRx.

Microsoft Word Documents

Technical Name

This is the full path to the Word document file.

Microsoft Excel Documents

Technical Name

This is the full path to the Excel document file.

The middle section contains descriptive information about the report.

Display Name

This is what the User will see whenever a report is referenced throughout the system.

Description

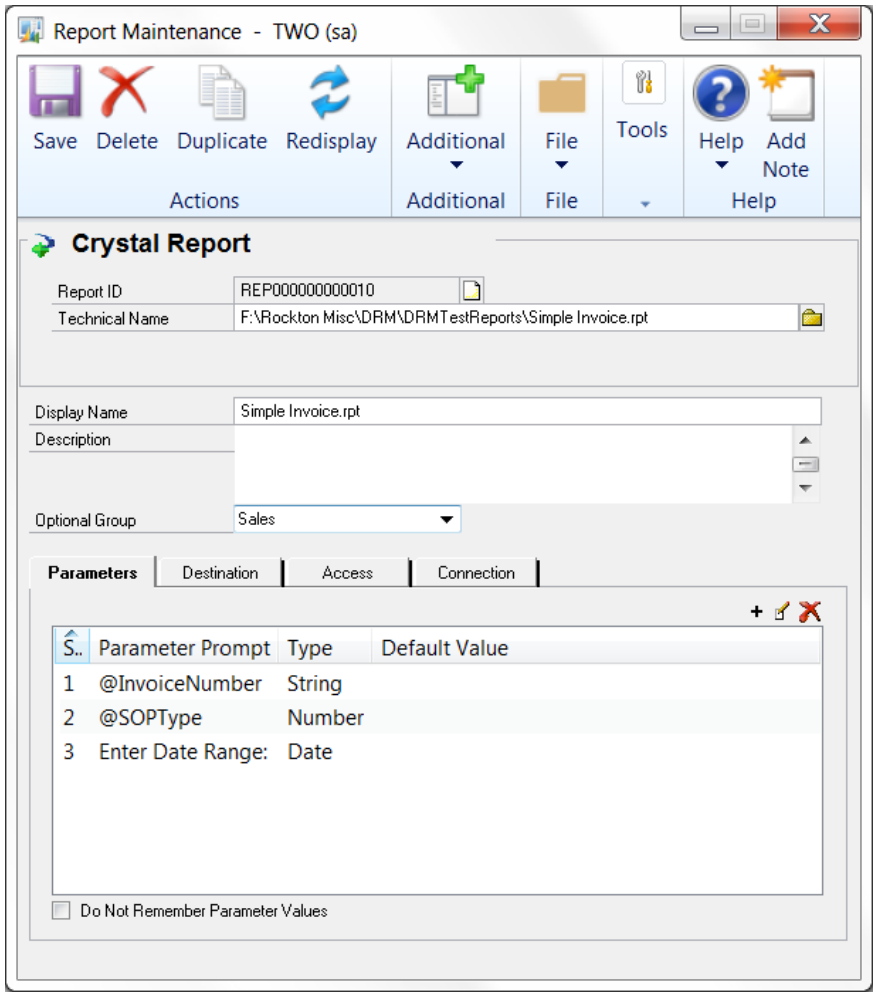
This is an optional, longer description of the report. It is for reference only.

Group

An optional label you can give reports to help group them into smaller and similar collections. Groups help organize reports in the Dynamics Report Manager Explorer window.

Each of the tabs available in the bottom section will be described in detail in the following sections. Note that not all report types have all tabs.

Parameters tab



The Parameters tab allows you to view and enter Report Parameters. If you click the Add Parameter button (+), you will be asked if you want to import the parameters from the report itself, or add them manually.

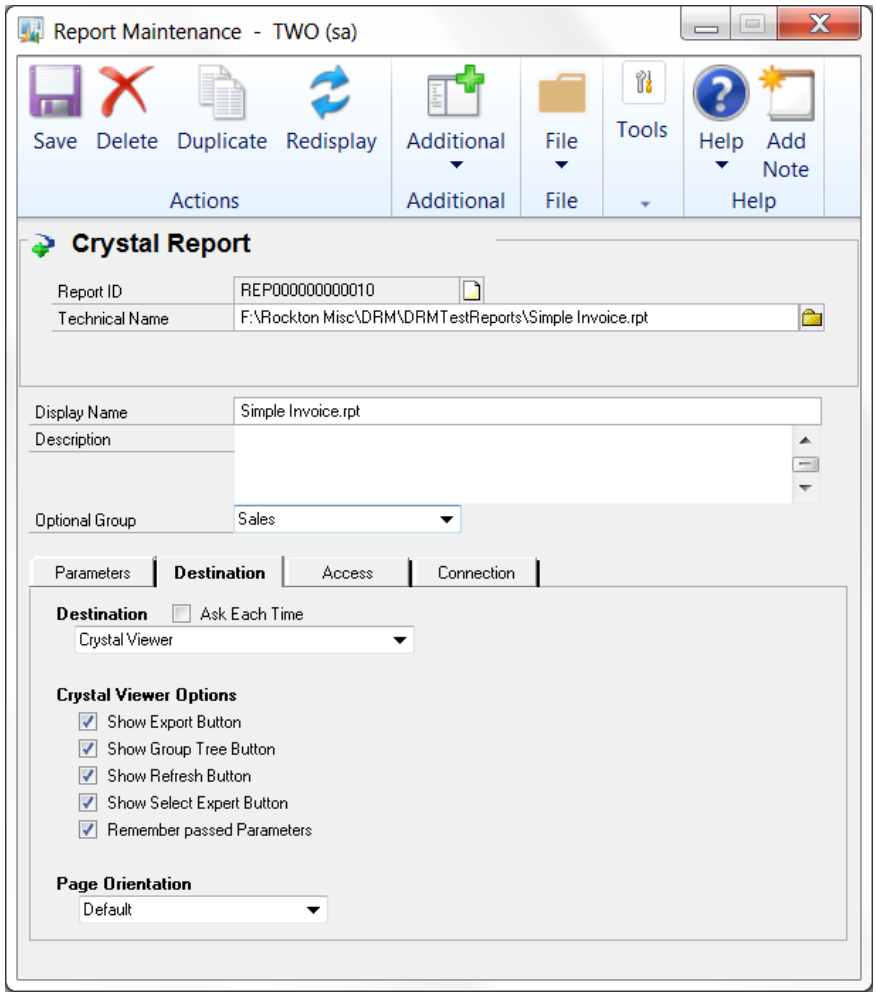
- Choose Import and the Import Parameters window will open, listing all of the parameters defined on this report. Click Import on this window to replace your current parameters with the ones listed on the Import Parameter window.
- Choose Manual and the Parameter Maintenance window, described later in this document, will open. Here you can enter details for the new parameter.

You can enter or view details about a particular parameter by double-clicking the parameter in the list, or by selecting a parameter and clicking the Edit Parameter button (). This will open the Parameter Maintenance window. Similarly, you can delete a parameter by using the Delete Parameter button ().

Do Not Remember Parameter Values

Normally, when you run a report that contains parameters in Dynamics Report Manager, whatever values you entered for the parameters are saved so they can be presented as default values the next time you run the report. If you check this box, then these values will not be saved for the next time.

Destination tab



The Destination tab allows you to set up the default destination, and the default settings that go with the selected Destination. You will see different Destinations in the drop-down depending on the type of report you are viewing. Also, different settings will appear depending upon which Destination is chosen in the drop-down.

Ask Each Time

Forces a final parameter entry and destination dialog box to display to the user when they run a report. This gives greater flexibility to the users when launching reports.

Printer ID

If the *Printer ID* is blank when printing, then the default printer saved with the report will be used.

Optional Settings for FRx Reports

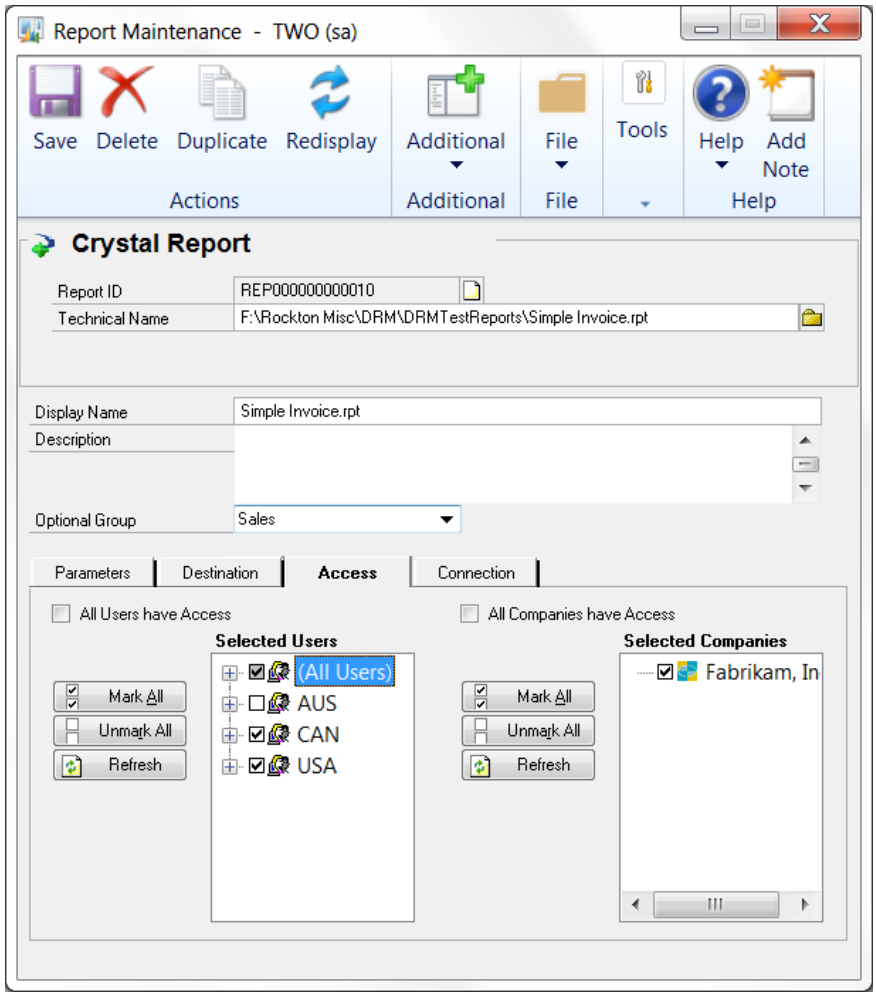
Rebuild FRx GL Indexes

Specify if the GL Index should be rebuilt. The default value is False.

Do Not Process Chained Reports

Specify if chained reports should not be processed. The default value is False.

Access tab



The Access tab allows the administrator to set security for this report to specified users and companies. Users appear up to twice in the Selected Users list, once under *(All Users)* and then again if they are in a class.



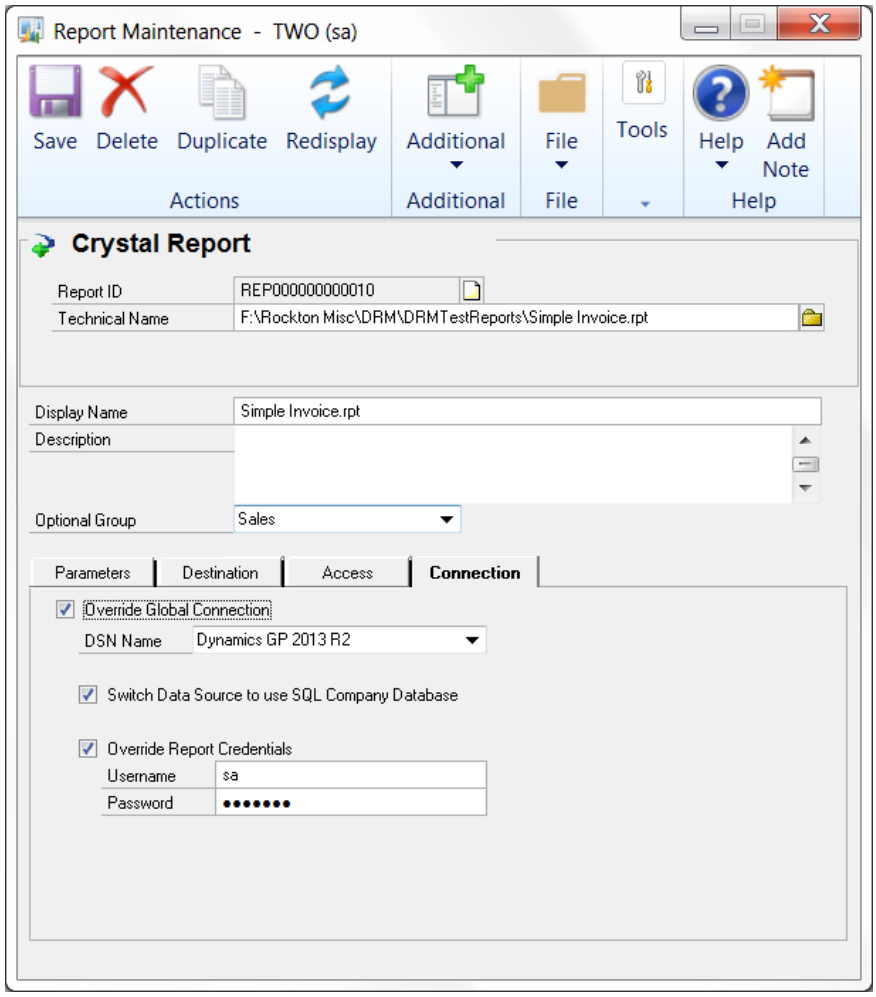
The class grouping is for convenience only. Security is still granted or denied at a per-user level. Therefore, if a user is added to the system later while a given report has access for a given class, that specific user will not have access to a given report until the Administrator grants access.

Of course, choosing "All Users have Access" eliminates this issue and will always allow all users access to the report, including new system users added later.

The Company list behaves similarly. Only users specified on the left that are logged into marked companies on the right will have access to print this report.

These settings will all default from the Access tab of the Dynamics Report Manager System Settings window when a new report is created.

Connection tab



The Connection tab is specific to SRS, Crystal and FRx reports. The fields you will see on this tab depend upon the report type of the report you are viewing.

Connection settings for SQL Server Reporting Services Reports

Checking the *Impersonate Windows User* check box allows you to set the *Domain Name, Username,* and *Password* to use for permissions when running the SRS Report. If you do not check *Impersonate Windows User*, then the user currently logged into Windows will be used for permissions.

Connection settings for Crystal Reports

By default, Crystal reports use the settings on the Crystal tab of the System Settings window. However, each report can have its own connection properties set here by checking the *Override Global Connection* check box.

You can specify an alternate *DSN Name*, which will override the ODBC connection saved in the report. If you do not specify this value, the ODBC connection last saved in the Crystal report will be used. It is critical for connectivity and launching of this report that the ODBC connection used for the report is set up on each workstation that

launches it. It is generally good practice to use the Dynamics GP ODBC connection or to create a specific connection for Crystal reports.

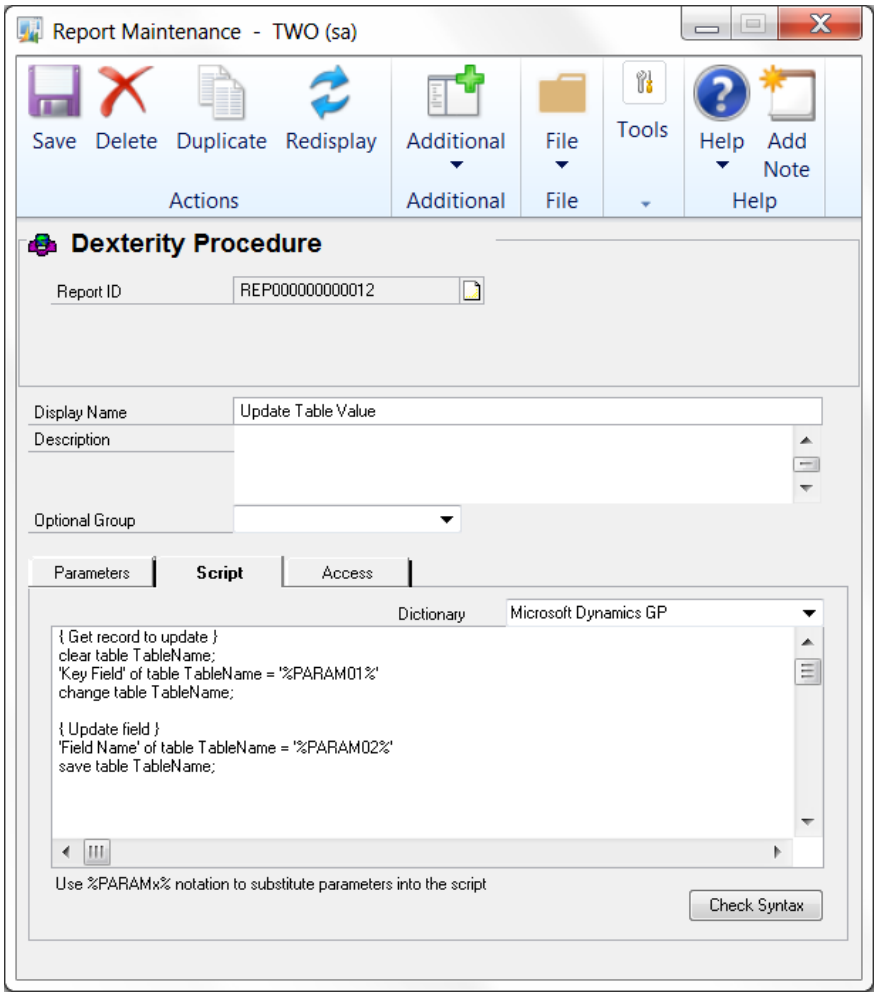
The *Switch Data Source to use SQL Company Database* option allows the report to be modified at runtime to point to data in the Dynamics GP company database. ALL tables, views, and stored procedures in the report will be redirected to the company database. Subreports will also be redirected to the company database if this option is chosen. If you are running a report that has data from the company and system database, it may be best to write a view or stored procedure to consolidate your data into one location in the company database. Contact Rockton for suggestions on how to make this work.

Checking the *Override Report Credentials* check box allows you to set the *Username* and *Password* for the Crystal Report to connect to the SQL database at runtime. If it is not specified, then the last saved username in the report will be used, with a blank password. Crystal does not save passwords in its reports, so if you have a username with a blank password last saved with a report, it will run if that username has no password in SQL. Most sites require this value to be set. It is common practice to set up a user named “Crystal” in the SQL database and grant it access to the DYNGRP group. This user would then be used for the purposes of managing Crystal reporting.

Connection settings for FRx Reports

In this case you will specify a Windows user (and optionally a Domain) to use to run the report.

Script tab



The Script tab is specific to Report Writer and Dexterity Procedure reports. The fields you will see on this tab depend upon the report type of the report you are viewing.

Script for Report Writer Reports

This is where you specify the report restrictions, sorting or legends for the Report Writer report that you are going to run. These specifications are done in Dexterity SanScript format.

Script for Dexterity Procedure Reports

Here you will specify Dexterity SanScript code that you want to execute, and the dictionary in whose context you want it to run. Once you have entered your code you can verify it by clicking the Check Syntax button.



This is an advanced feature. It is recommended that you use this feature with extreme caution.

Batch Report Maintenance window

Description

A Batch Report allows you to run a report multiple times against each item in a list of data items that you specify. You can also automatically email these reports to the email addresses that are appropriate for each of these items. In this way, Batch Reports are similar to the Mail Merge feature in Microsoft Word.



When first creating Batch Reports, we recommend that you use the Batch Report Wizard instead of starting with the Batch Report Maintenance window. The wizard will guide you through all of the steps necessary to create a basic Batch Report.

If you need more complexity than what was available the wizard, you at least now have a starting point that you can modify in the Batch Report Maintenance window.

Appendix A: Setting Up Batch Reports shows how to use the Batch Report Wizard to create a Batch Report that emails SOP Invoices.

The top section of the Batch Report Maintenance window shows the system-generated Batch Report ID and the Report that will be run by this Batch Report.

The middle section contains descriptive information about the Batch Report.

Display Name

This is what the User sees wherever this Batch Report appears throughout the system.

Description

This is an optional, longer description of the Batch Report. It is for reference only.

Optional Group

An optional label you can give Batch Reports to help group them into smaller and similar collections. Groups help organize Batch Reports in the Dynamics Report Manager Explorer window.

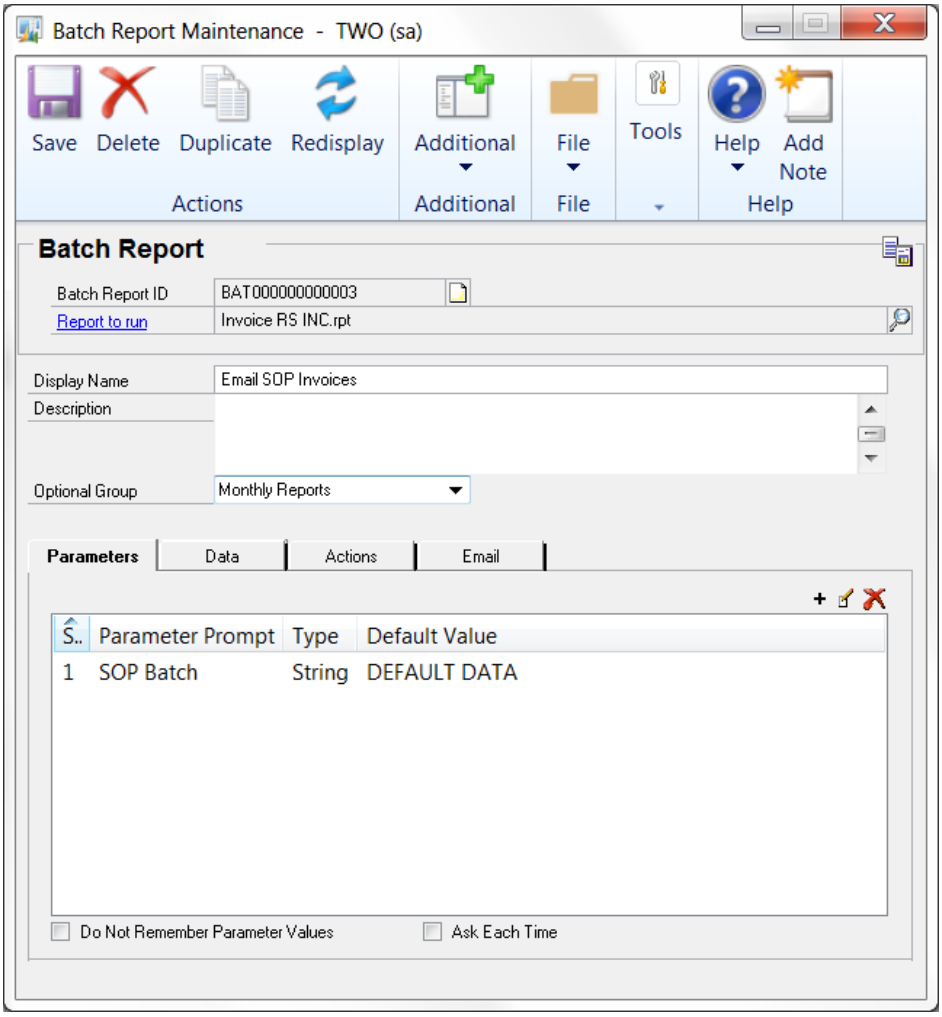
The tabs in the bottom section will be described in detail in the following sections.

Example

Suppose you want to email invoices to all Customers in a certain Batch. You can set up a Batch Report that takes the Batch Number as an input parameter and then gathers a list of all of the Customers on the transactions that are in this Batch, along with their email addresses. We will refer to this list of items as the ***data list***.

As part of the Batch Report, you would specify to run your Invoice report, which would take a Customer Number as a parameter. This report would then be run as many times as there are Customers in the data list, creating a PDF file for each report. These PDFs would then be sent to their corresponding addresses as email attachments.

Parameters tab



The Parameters tab is used to optionally define any parameters to pass to the Batch Report. This is often used to limit the number of records that will appear in the data list.

Click the Add Parameter button (+) to add a new parameter to the Batch Report. You can enter or view details about a particular parameter by double-clicking the parameter in the list, or by selecting a parameter and clicking the Edit Parameter button ( ). This will open the Parameter Maintenance window. Similarly, you can delete a parameter by using the Delete Parameter button ( ).

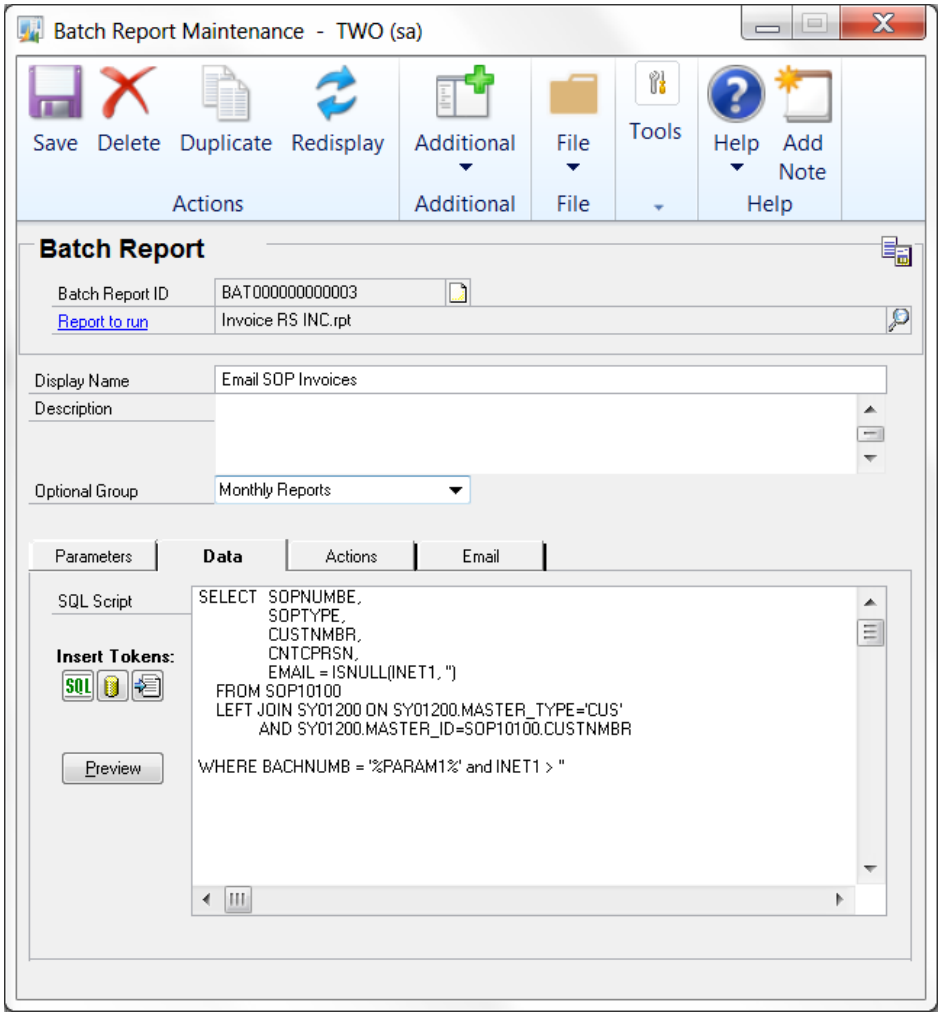
Do Not Remember Parameter Values

Normally, when you run a report that contains parameters in Dynamics Report Manager, whatever values you entered for the parameters are saved so they can be presented as default values the next time you run the report. If you check this box, then these values will not be saved for the next time.

Ask Each Time

This will cause the Launch Report window to be presented each time this report is run. This allows you to select the Destination for this report (for Batch Reports, it will always be Batch Report Viewer), enter parameter values, and specify additional email options.

Data tab



The Data tab is where you define the ***data list***. This is the list of items against which you want the report to be run. You do this by entering a SQL Script that will return the items in the list. Generally, this will be in the form of a SELECT statement on one main table, and possibly one or more JOINs to secondary tables.

When you first create a Batch Report, the SQL Script field will contain the following template SELECT statement to assist you in writing this SQL code:

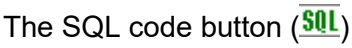
```
SELECT ReportParam1, ReportParam2, EmailAddress
        FROM Table1
        JOIN Table2 ON Table1.KeyFIeld1 = Table2.KeyField2
        WHERE SomeField1 = '%PARAM1%' AND SomeField2 = '%PARAM2%'
```

In this template, the main table is Table1 and Table2 is a secondary that is JOINed to the main table. ReportParam1 and ReportParam2 are columns from either of these tables that will be passed as parameters into the report that will be run. EmailAddress is a column from one of the tables that contains the email address for each item in the data list. The WHERE clause is used to limit the data list by using the parameter values that were defined on the Parameters tab (discussed in the previous section).

Note that this is just an example that shows the main parts of the SQL SELECT statement. Any SQL statements that give you the list of data that you need will be sufficient.

Insert Tokens

These three buttons assist you in creating your SQL Script. To use them, first place your cursor in the SQL Script field in the location where you would like to insert a token. Then click the desired token button and choose the appropriate item from its drop-list.

The SQL code button () will insert the template code into the SQL Script field. This button has four options in its drop-list: SELECT clause, FROM clause, JOIN clause and WHERE clause, each one corresponding to one of the four clauses in the template SQL SELECT statement discussed above.

The Database Object button () allows you to select a database name, table name or field name from a list and insert it into the SQL Script. The three items in the drop-list for this button (Database, Table and FIeld) correspond to these options.

The Parameter button () inserts a %PARAMx% token into the script, as you can see in the template WHERE clause. These tokens will be evaluated to the values supplied to the Batch Report's parameters' when the Batch Report is run. The button will only be available if there are parameters defined for the Batch Report. The drop-list will contain one item for each of the parameters defined on the Batch Report's Parameters tab.

Preview button

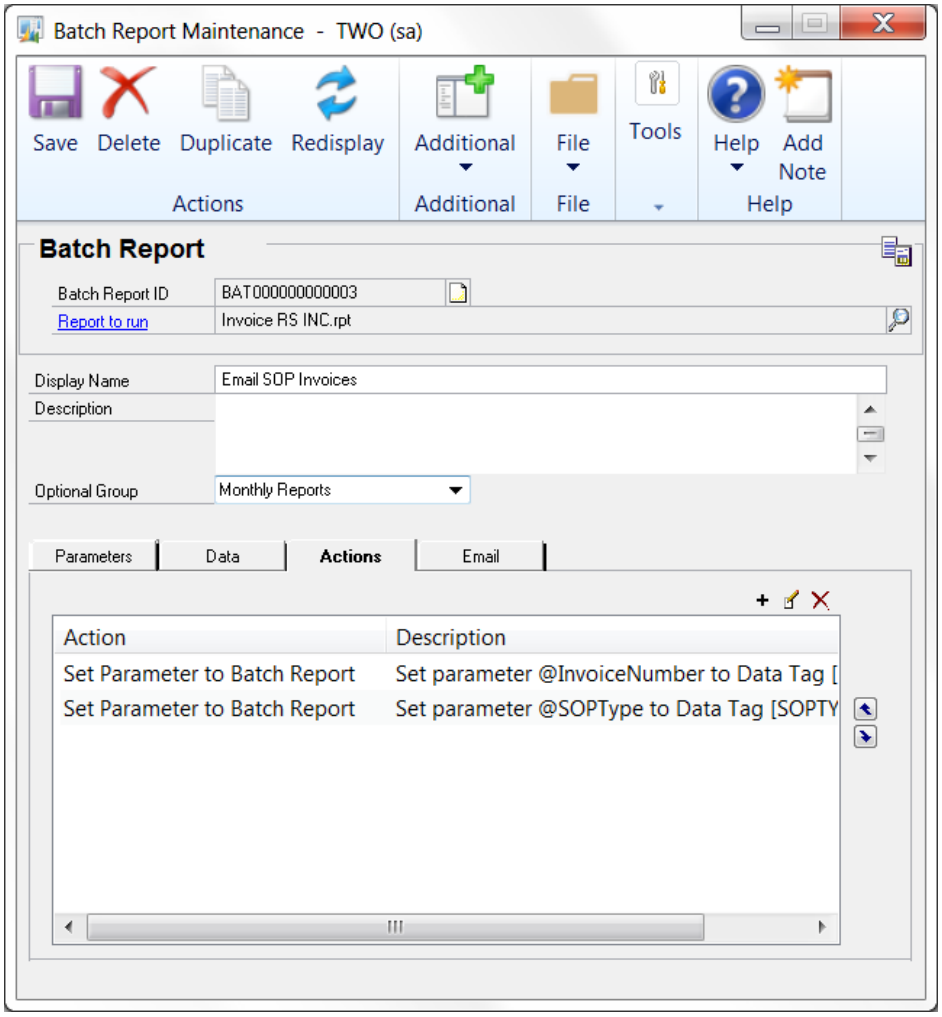
You can execute your SQL statements by clicking the Preview button. This will run the SQL Script and display the items in the data list. A Close button at the lower-left of the data list will take you back to the normal view for the Data tab.



When previewing your SQL Script, any %PARAMx% tokens that you have in your SQL Script will be replaced with their corresponding default values. If you have not defined a default value for a parameter, then the %PARAMx% token will be removed entirely (i.e., replaced with a null string) before the SQL Script is run. The likely result is that no data will be displayed in the Preview.

To remedy this, simply edit each parameter on the Parameters tab and supply a default value that you know is contained in your data. Once you are satisfied with your SQL statements, you can then remove these default values from each Parameter.

Actions tab



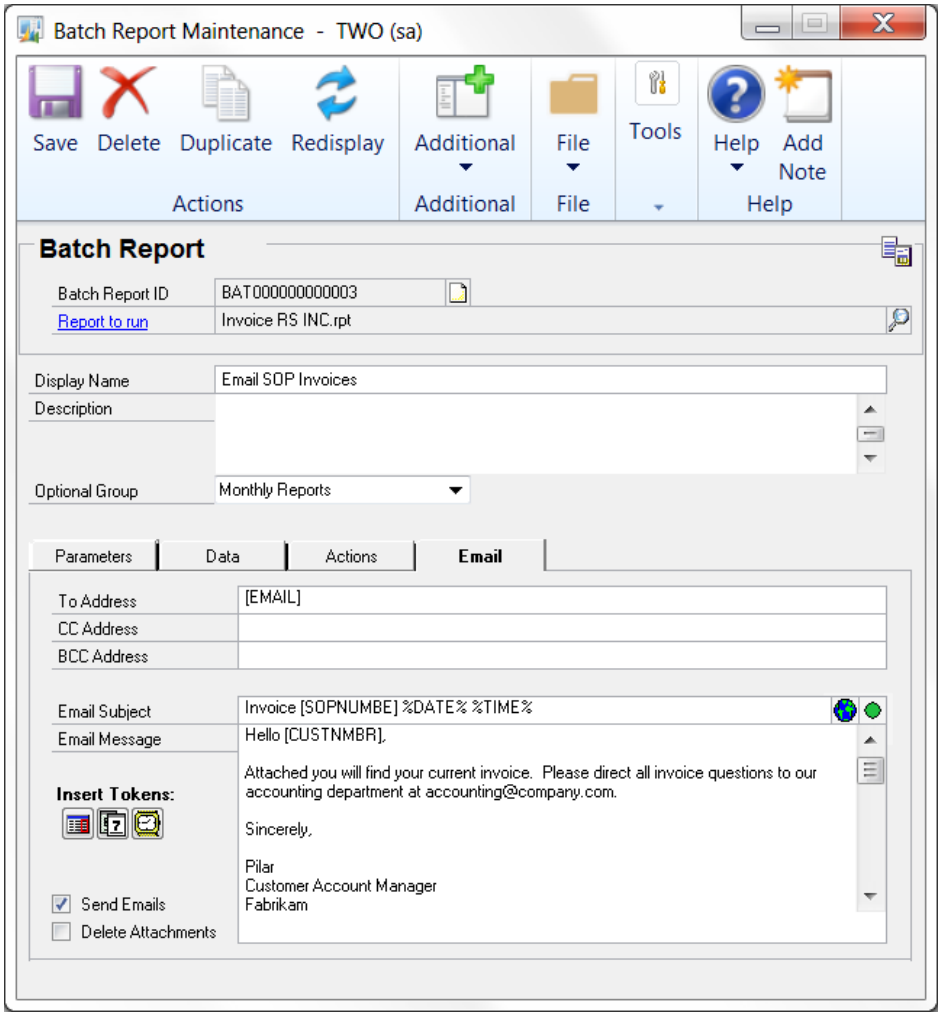
The Actions tab on a Batch Report allows you to set parameters on a report to a value in the data list. These values are indicated by *data tags*, which are typically the column name of the value in the results set, enclosed in square brackets. For instance, a Customer Number column might have a data tag of **[CUSTNMBR]**.

Click the Add Custom Action button (+) to add an Action to a Launch Point. This will open the Edit Custom Action window, which is described in detail later in this document, To change the settings for an existing Action, either double-click the action in the list or select that Action and then click the Edit Custom Action button (). Similarly, clicking the Delete Custom Action button () will delete an Action.

The Edit Custom Action window is the same one used when entering Actions on Launch Points. However, there are only a limited number of actions available to Batch Reports.

Custom Actions are performed in the order that they appear in this list. Therefore, you may wish to change the order of the actions that are listed. You can do this by selecting the Action that you want to move and clicking the Move Custom Action Up () or Move Custom Action Down () buttons. This will move the selected Action up or down one line.

Email tab



The Email tab is where you can optionally setup an email that will be sent along with each report that is created. If you do not want to send an email, simply leave the three email address fields (To, CC and BCC) blank. When the Batch Report is run, PDF files will be created for each instance of the report that is run against the data list.

To email each instance of the report, supply a valid email address in at least one of the email address fields. You can also specify multiple addresses, separated by semi-colons. The address can be hard-coded, or you can specify a data tag and the email address will be taken from the corresponding column in the data list. For instance, in the screen shot above, the To Address will come from the fifth column of the data list shown previously in this document in the Data tab screen shot.

You can also enter a Subject and Message for the email. Anything can be entered in these fields, including data tags and %DATE% and %TIME% tokens. Data tags will be replaced with the corresponding values from the data list, and %DATE% and %TIME% tokens will be replaced with the current date and time, respectively.

By clicking the Email Format button to the right of the Email Subject field, you can format the email message as Text ( ) or HTML ( ). You can also choose the message Priority via the Email Priority button. You can choose High ( ), Normal ( ), or Low ( ).

If you are using Microsoft Outlook, then you will see a check box in the lower-left labeled, “Send Emails”. If this box is not checked, then any emails produced by this Batch Report will be in your Drafts folder, but not sent. If the box is checked, then the emails will be sent as they are generated.

Checking the Delete Attachments check box causes Dynamics Report Manager to remove the physical report output files from the operating system once the emails are sent. If you want to retain these report files, then uncheck this box.

Insert Tokens

These buttons help you set up your email. To use them, move your cursor to any email field in the spot where you would like to insert a token. Then click the desired button.

The Column from Data List button () will insert a data tag into the email address, subject or message. This data tag will be evaluated to the value of the corresponding column of the data list. The drop-list for this button will show each of the columns in the data list.

The Current Date button () will insert a %DATE% token; the Current Time button () will insert a %TIME% token. These will be substituted with the current date and time, respectively, at the time the Batch Report is run.

Launch Point Maintenance window

Description

Launch Point Maintenance is where reports or groups of reports are assigned a method of running them. There are several different ways to do this, and depending on the type of Launch Point you specify, the setup options may vary.



When first creating Launch Points, we recommend that you use the Launch Point Wizard instead of starting with the Launch Point Maintenance window. The wizard will guide you through all of the steps necessary to create a basic Launch Point.

If you need more complexity than what was available the wizard, you at least now have a starting point that you can modify in the Launch Point Maintenance window.

Appendix B: Setting Up Launch Points shows how to use the Launch Point Wizard to email SOP Invoices from the Printer icon on the Sales Batches window.

The top section of the Launch Point Maintenance window shows the Launch Point type and the system-generated Launch Point ID. In addition there is an Enabled checkbox that lets you enable or disable a given Launch Point.

There are several different Launch Point types, as described in the following table:

Launch Point	Description
Window Additional Menu	This provides an item under the Additional menu for any window in Dynamics GP or any 3rd party product.
Toolbar Floating Palette	The floating palette is a context-sensitive pick list which can be accessed from the Dynamics Report Manager toolbar. This palette can be "pinned down" so it is always visible, and will remember its last screen position the next time it is opened. This palette provides a list of reports that is relative to the window you are currently have open.
Window Field or Button	This provides a trigger point, usually from a button on a window, for which to launch a report. The Print button on a window is a common example, but you can launch a report from any button or when a user enters a value or interacts with just about any field on a window.
Shortcut Bar	Allows reports to be launched from the Shortcut Bar.
Replace Report Writer Report	When a Report Writer report is launched, you can "replace" it with your own version of the report. HOWEVER, the existing Dynamics GP report will still run. Most reports in Dynamics GP can be configured to print directly to file, so if you set up the old report to print to file without intervention, the result would be a seamless new report to replace it.
Scheduled Launch	Schedule your reports to launch when you want them, and keep a running calendar of when the next time a given report will launch.
Home Page	This option adds items to the My Reports list on the Dynamics GP Home Page. It allows you to specify multiple reports to run by selecting a single item in the My Reports list.

Name

This is what the User sees wherever this Launch Point appears throughout the system.

Description

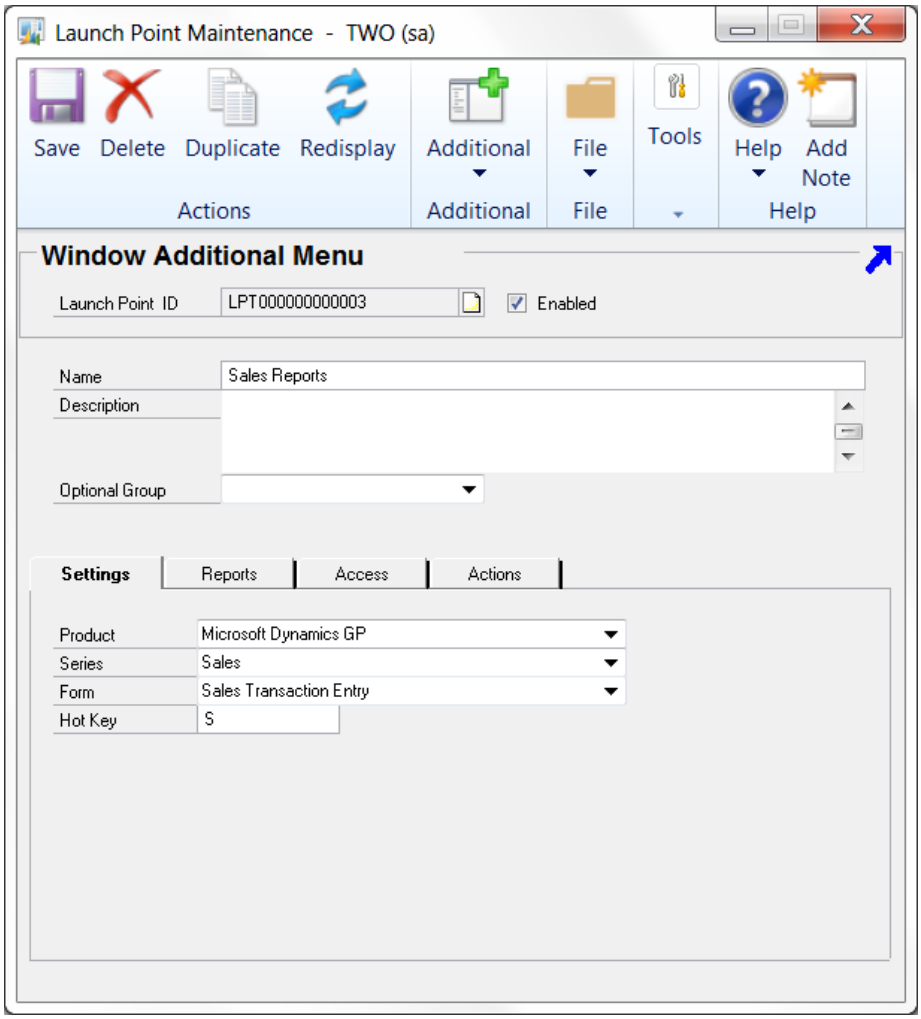
This is an optional, longer description of the Launch Point. It is for reference only.

Optional Group

An optional label on Launch Points that groups them into smaller and similar collections. Groups help organize Launch Points in the Dynamics Report Manager Explorer window.

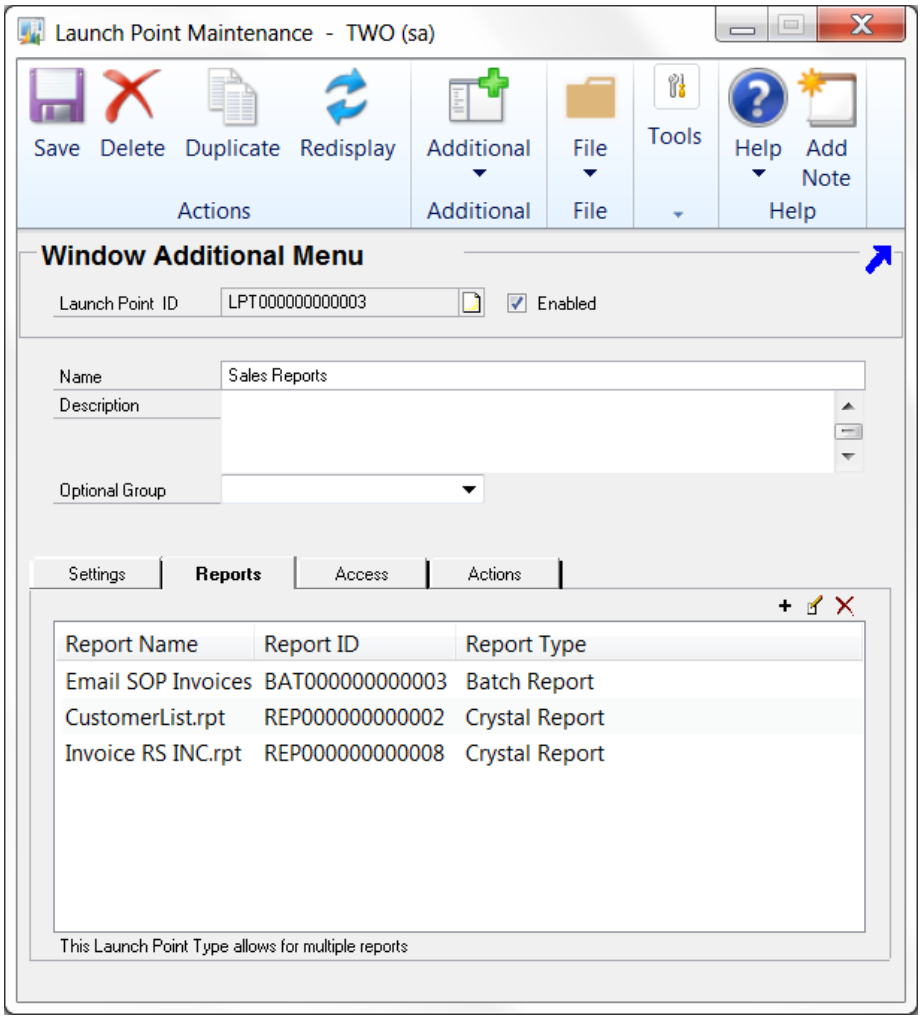
The tabs at the bottom of the window will be described in detail in the following sections.

Settings Tab



The Settings Tab is where actions specific to the Launch Point type are selected.

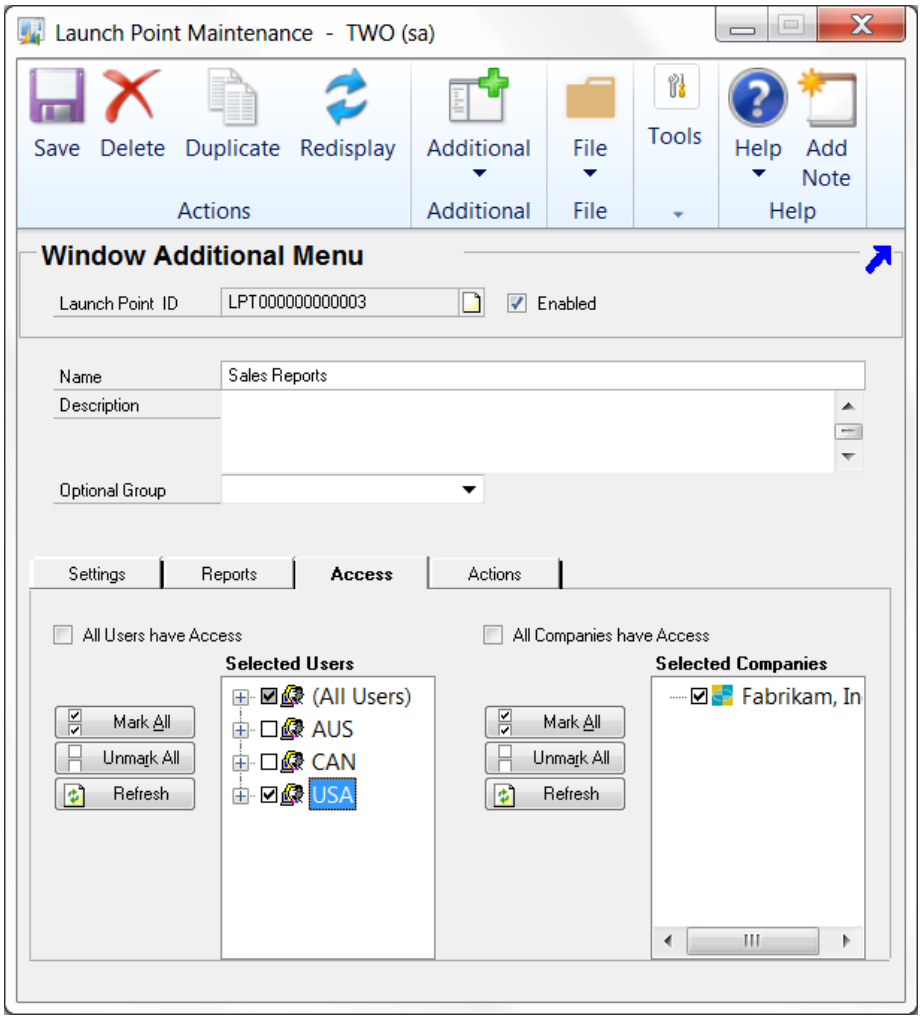
Reports Tab



The Reports Tab allows you to specify the reports that print when this Launch Point is activated. Most Launch Points allow for multiple reports, but it will be noted in the lower portion of the window when only one report can be specified.

When more than one report is specified, you must set up Custom Actions to tell Dynamics Report Manager to launch all reports at once or to launch them individually. These will be discussed later in the Actions tab section.

Access Tab

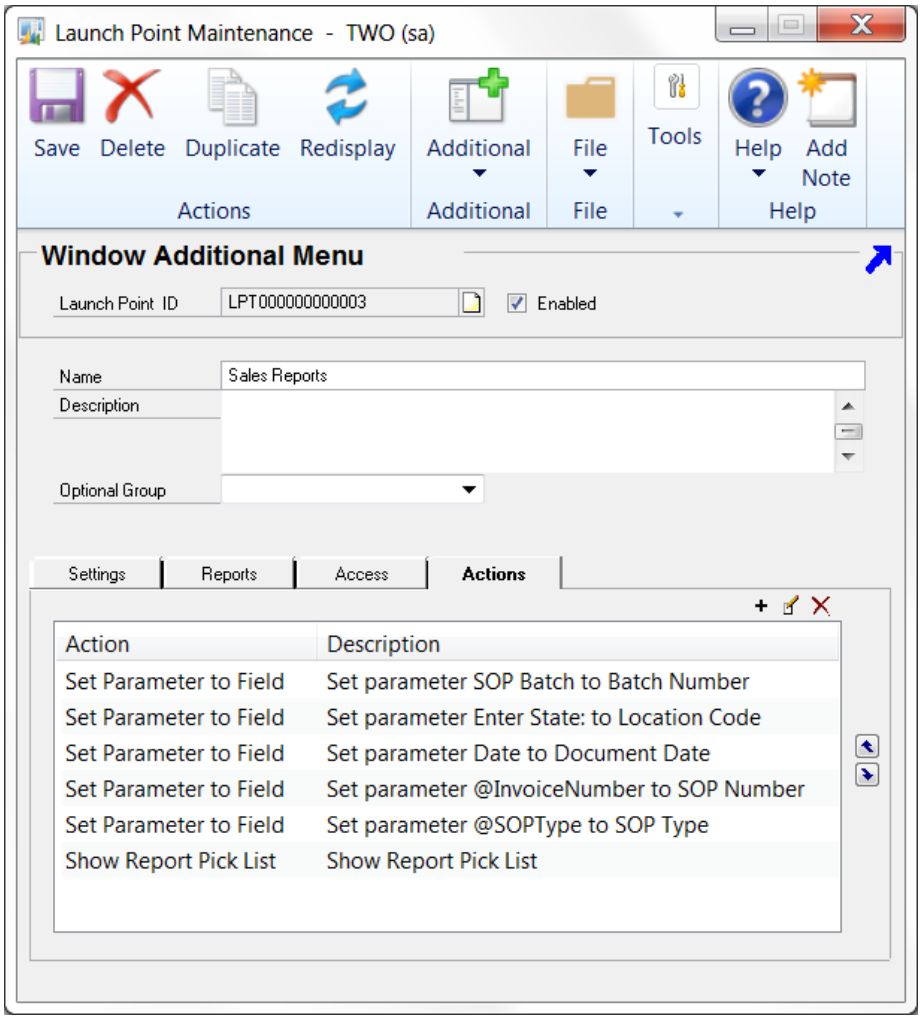


The Access Tab allows the Administrator to set security for this Launch Point to specified users and companies. Users appear up to twice in the Selected Users list, once under *(All Users)* and then again if they are in a class. The class grouping is for convenience only; security is still granted or denied at a per-user level. Therefore, if a user is added to the system later while a given Launch Point has access for a given class, that specific user will not have access to a given report until the Administrator grants access. Of course, choosing *All Users have Access* eliminates this issue and will always allow all users access to the Launch Point, including new system users added later.

The Company list behaves similarly. Only users specified on the left that are logged into marked companies on the right will have access to this Launch Point.

By default, *All Users have Access* and *All Companies have Access* will be checked.

Actions Tab

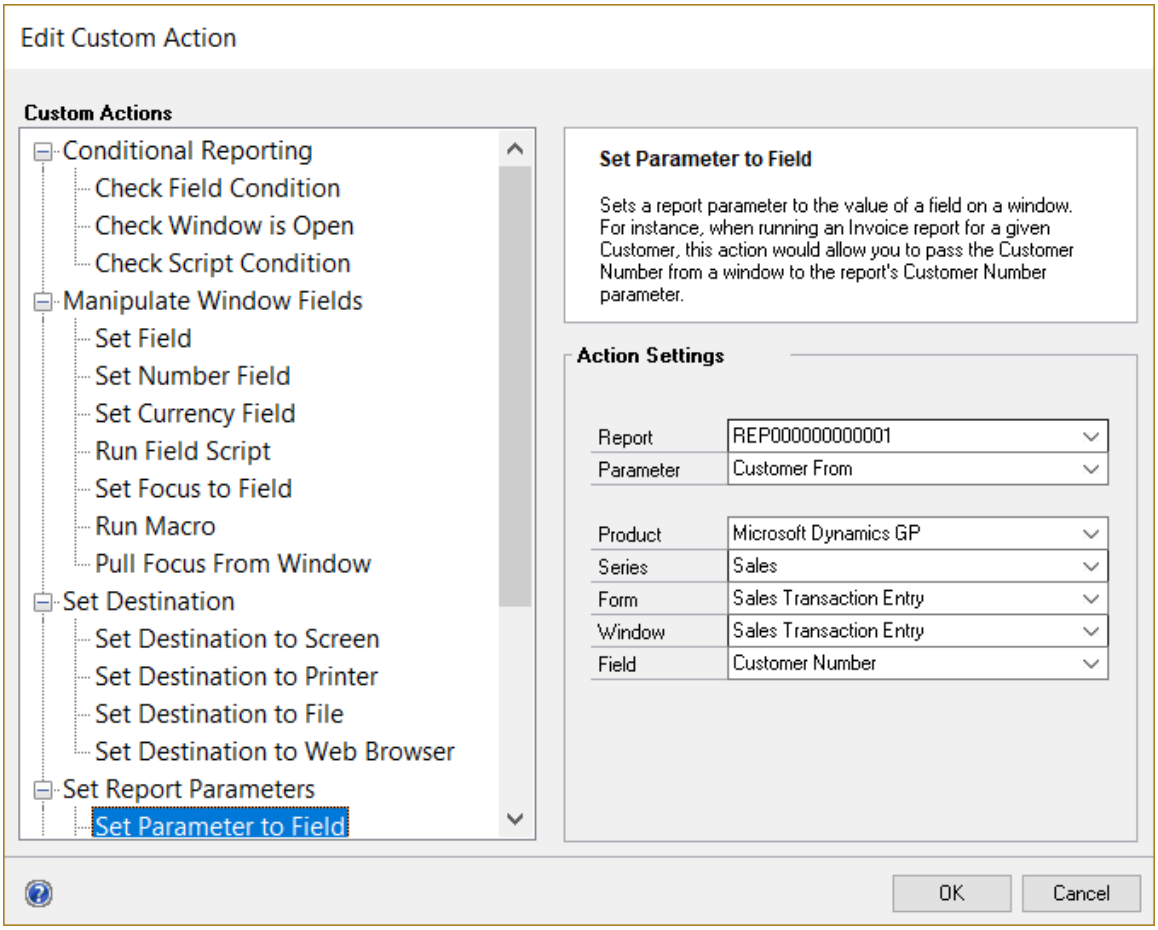


The Actions tab allows you to specify logic and a sequence of events when you launch your reports. Custom actions allow you to launch a pick list, set parameters of reports, and also change values on window fields and run processes in Dynamics GP. These are very powerful features in Dynamics Report Manager. Using Custom Actions you can often avoid costly customizations for reporting.

Click the Add Custom Action button (+) to add an Action to a Launch Point. This will open the Edit Custom Action window, which is described in detail later in this document, To change the settings for an existing Action, either double-click the action in the list or select that Action and then click the Edit Custom Action button (). Similarly, clicking the Delete Custom Action button () will delete an Action.

Custom Actions are performed in the order that they appear in this list. Therefore, you may wish to change the order of the actions that are listed. You can do this by selecting the Action that you want to move and clicking the Move Custom Action Up () or Move Custom Action Down () buttons. This will move the selected Action up or down one line.

Edit Custom Action window



The Edit Custom Action window is used to specify the settings for a given Custom Action. The Action description and options shown are based on the Action selected in the Custom Actions tree.

All of the Custom Actions available are described in the following tables.

Conditional Reporting Actions

These actions allow you determine whether or not the Launch Point should run based on criteria that you specify. Alternatively, you can display a message based on these criteria.

Custom Action	Description
Check Field Condition	Allows conditional report launching based on a field value. For instance, you may only want to launch an Invoice Report from the Sales Order Transaction screen if the Document Type is “Invoice”.
Check Window is Open	Allows conditional report launching based on a window being open or closed. This is useful to make sure that if you are intercepting Dynamics GP logic that certain windows are behaving properly in your launch point circumstance.
Check Script Condition	Allows conditional report launching based on a Dexterity script. Contact your reseller or Rockton Software support for assistance in using this action.

Actions that Manipulate Window Fields

These actions are used to interact with fields on an open window. For instance, you can set the value of a window field, or press a button.

Custom Action	Description
Set Field	The opposite of Set Parameter, this sets a value of a field on a window to whatever you wish it to be. You can either specify a Value for the field, or you can set the field to the value of a report parameter. This is often used along with the Run Field Script.
Set Number Field	Similar to the Set Field action, this also sets a value of a field on a window. However, you must use this action when the field whose value you are setting is a numeric field.
Set Currency Field	Similar to the Set Field action, this also sets a value of a field on a window. However, you must use this action when the field whose value you are setting is a currency field.
Run Field Script	This will run a field change script on a field on a specified window. It is often used with Set Field to change data on a screen. It can also run a change script for a Button on a window, such as a Cancel button which will close a given window.
Set Focus to Field	Sets focus (i.e. moves the cursor position) to a field on a window.
Insert Before/After Breakpoint	This option is used exclusively with the Attach Type (on the Settings tab) of "Before and After original script". Its purpose is to allow actions to happen both before the Dynamics GP processing of that button occurs as well as after. A classic example is a Print button on a transaction window. Often the Print button will "save" the document and clear the screen. So DRM needs to capture parameters BEFORE the processing of the button is executed and the screen gets cleared, but run the report AFTER the GP processes are run so that the database gets updated.
Stop Running Scripts	This is used on a Field or Button Launch Point type to allow you to cancel any scripts that would run when you enter a value in the specified field or click on the specified button in GP. For example, if you want to run a report off the email button on the Sales Transaction Entry window. Without this action, the email would be sent twice, once from GP and once from DRM.
Run Macro	This allows you to specify a location for a GP macro file to be run at a certain point in executing the launch point. For example, you can use Run Macro to click a button during the process of launching a report.
Pull Focus From Window	This can be used in uncommon situations when you need to be sure that the current focus is pulled off a window to force some action to take place. For instance, let’s look at the Sales Transaction Entry window, which contains a list area where you enter transaction lines. Typically, you would tab off the last field on the line you are on to process whatever changes you made to that line. Within a DRM Launch Point, pulling focus is sometimes necessary to ensure that this line processing will be completed. This is not guaranteed by merely using the Set Focus to Field action.

Set Destination Actions

These actions determine where the report output will go. Depending upon the report type, you can send the output to the screen, to a printer, to a file or to a web browser.

Custom Action	Description
Set Destination to Screen	Causes the report to display to the screen.
Set Destination to Printer	Causes the report to be sent to the printer.
Set Destination to File	Causes the report to be saved to a file on your hard drive or network.
Set Destination to Web Browser	Causes the report to be opened in a web browser.

Set Report Parameters Actions

These actions set the values of the report's parameters.

Custom Action	Description
Set Parameter to Field	Sets a parameter on a report to a field value on a screen. This allows you to print reports with parameters that reflect data relevant to what screen you are viewing when the report is launched. For instance, if you print an Invoice you can specify the Invoice Number parameter in the report to be set to the value on the Invoice Entry window.
Set Range Parameter Low	Allows you to set the 'from' value for a range parameter on a report to a field value on a screen.
Set Range Parameter High	Allows you to set the 'to' value for a range parameter on a report to a field value on a screen.
Set Parameter to Value	Allows you to set a parameter on a report to any value you wish.

Launch Reports Actions

These actions run the report or reports that you have attached to the Launch Point. You can also open a Pick List to allow the User to select from the reports attached to this Launch Point.

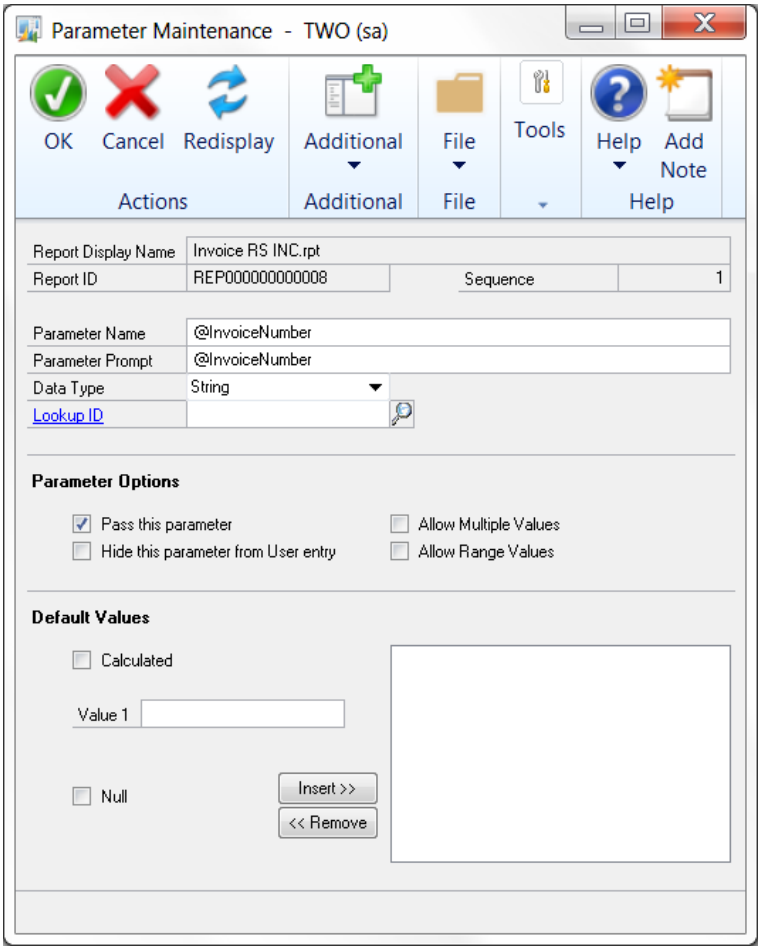
Custom Action	Description
Show Report Pick List	Instead of launching all reports specified in this Launch Point, you can display a pick list of several reports, which will allow the user the option to choose which reports at that moment to print. This is useful for a situation like Sales Processing, where a pick list from the Print Button will display reports of Invoice, Pick List, and Pack List, and the user can choose one or more to print.
Launch All Reports	Once other custom actions are completed (like setting parameters or other logic) you may want to then launch all reports. This command is offered to make sure the sequence of events is correct.
Launch Specific Reports	You can also launch specific reports that have been specified in a certain order based on the flow you wish to achieve.

Actions specific to Batch Reports

These actions are used only for Batch Reports.

Custom Action	Description
Set Parameter to Batch Report	Allows you to set the value of a report parameter to a column that is part of the data source input to a Batch Report.
Check Column Condition	Allows conditional report launching based on the value of a result column of the SQL Script in a Batch Report's Data tab. For instance, you may only want to launch an instance of a report if a Customer is in a specific Customer Class. Using this Action allows you to use one Batch Report definition to launch several different versions of a report.

Parameter Maintenance window



You can get to this window by double-clicking a parameter in the Report Maintenance or Batch Report Maintenance windows. You can also select a parameter in the list and click the Edit Parameter button ( ) to the upper-right of the parameter list on those windows.

Description

Parameter Maintenance is where you enter characteristics about each parameter on a Report or Batch Report. This can include the parameter name that the user sees, the parameter's data type, the lookup associated with the parameter and any default values.

The Report Display Name and Report ID refer to the report to which this parameter belongs. Since parameters are passed to reports by name, the Sequence is only shown for informational and troubleshooting purposes.

Parameter Name

The name of the parameter as it is defined on the report. This must match the parameter name exactly for SQL Server Reporting Services. It can but need not match for other report types.

Parameter Prompt

The Parameter Prompt is a friendly title to help users know what to enter for the parameter.

Data Type

The parameter‘s datatype, which drives how it behaves and how its default values are collected. It must match the parameter’s datatype in the report.

Convert to DateTime

This setting forces either a Date or Time parameter to a combined DateTime parameter. The default date portion for a converted Time parameter is Jan 1, 1900. The default time portion for a converted Date parameter is midnight.

Lookup ID

The optional Lookup ID assists users when enter parameter values. For instance, if the parameter is designed to collect a Customer Number, use the CUSTOMER lookup. Users can use lookups inside of Dynamics GP to enter correct values. Dynamics Report Manager comes with over 20 pre-defined common lookups, or you can define your own.

Parameter Options

Pass this parameter

Checking this box will pass this parameter to the report.

Hide this parameter from User entry

Checking this box will cause this parameter to be unavailable to User entry when this report is run.

Allow Multiple Values

Check this box if more than one value can be specified for the parameter. The parameter in Crystal and SRS must also support this feature.

Allow Range Values

Used only in Crystal, this allows for specifying a range in a single parameter. In general, it is often more useful to divide a range parameter into two parameters for ease-of-use.

Default Values

The Default Values section allows you to enter default values that will initialize each time a report is run. It is not necessary to specify defaults. You can enter calculated values, range values if appropriate, or NULL if needed. Enter the value or values in the Value field(s) and press the Insert >> button to enter them in the list. To delete a value select the value in the list and press the << Remove button.

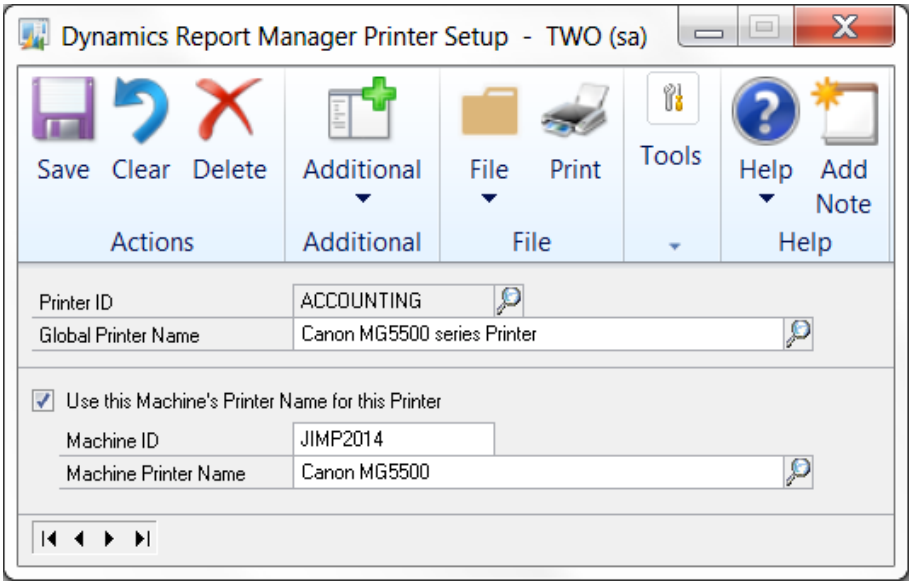
Each time the report is run from within Dynamics GP, Dynamics Report Manager will always use the default value you set up here. Only specify default values if they will not often change.



If you leave the default values blank, each time a user runs the report, Dynamics Report Manager will “remember” the last used values for that user and initialize the report with those values. This is often more useful for most users during parameter entry.

Any parameter values can be changed when the report is run. It is often most useful to only specify default values when the default values are the most common choice and do not change often when the report is run.

Dynamics Report Manager Printer Setup window



Description

Dynamics Report Manager allows for unlimited network printers to be defined.

Printer ID

The Printer ID is used *only* throughout Dynamics Report Manager and does not reflect the naming convention of a printer set up on a user workstation. The Printer ID must be unique.



It is useful to supply names to printers based on their function or location, using all caps. For instance, ACCOUNTING, WAREHOUSE, and SHIPPING, are all reasonable Printer IDs. Since the Printer ID is what a user sees when printing, it is useful to use names that your staff can easily associate specific printers with.

Global Printer Name

1. Use the **Lookup** button to open the Print Setup window.
2. Select the name of the printer you wish to define and press the **OK** button. The name of the printer will display in this field. It is editable for advanced users.
3. The printer name specified by the workstation through the above selection process is important. When a report is printed, Dynamics Report Manager resolves the printer destination by an exact name match with listed printers installed on a machine.



You can change the paper size and orientation of a Crystal report on the Destination tab of the Report Maintenance window. The Global Report Defaults default in when creating a new report, but the report definition itself is what drives these settings.

For some older Windows operating systems, printer names can be set up and changed in the printing control panel. For these machines, it is recommended that all workstations have their printers set up with the same name. This allows for proper name resolution from all workstations without creating machine-specific settings.

For some Windows operating systems, the printer name is not modifiable. For these cases, check the box **Use This Machine's Printer Name for this Printer**.



This process must be run at each physical workstation in order to be set up properly.

Machine ID

The Machine ID uniquely identifies each workstation computer. On a Windows network, the network computer name is an excellent choice as the Machine ID. This allows resolution of a Printer ID to this machine, regardless of which user is logged in.

Machine Printer Name

1. To setup the Machine Printer Name, use the **Lookup** button to look up available printers on this machine.
2. Once selecting a printer, you may notice the name is different from the Global Printer Name.

Here is an example of when the Machine Printer option is useful: say Bob has a local printer installed at his workstation that everyone on the network can access. The Global Printer Name will be the most common name that everyone uses, such as "Network1\BOB\HP4Printer." While at Bob's machine, the printer name may be defined in his Control Panel settings as "HP4Printer." In this case, set up a Printer ID of "BOB" and set the Global Printer Name to the more common name. At Bob's machine, select the checkbox, put "BOB" as the Machine ID and "HP4Printer" as the Machine Printer Name.



The Machine Printer Name does not have to resolve to the same printer as specified in the Global Printer Name.

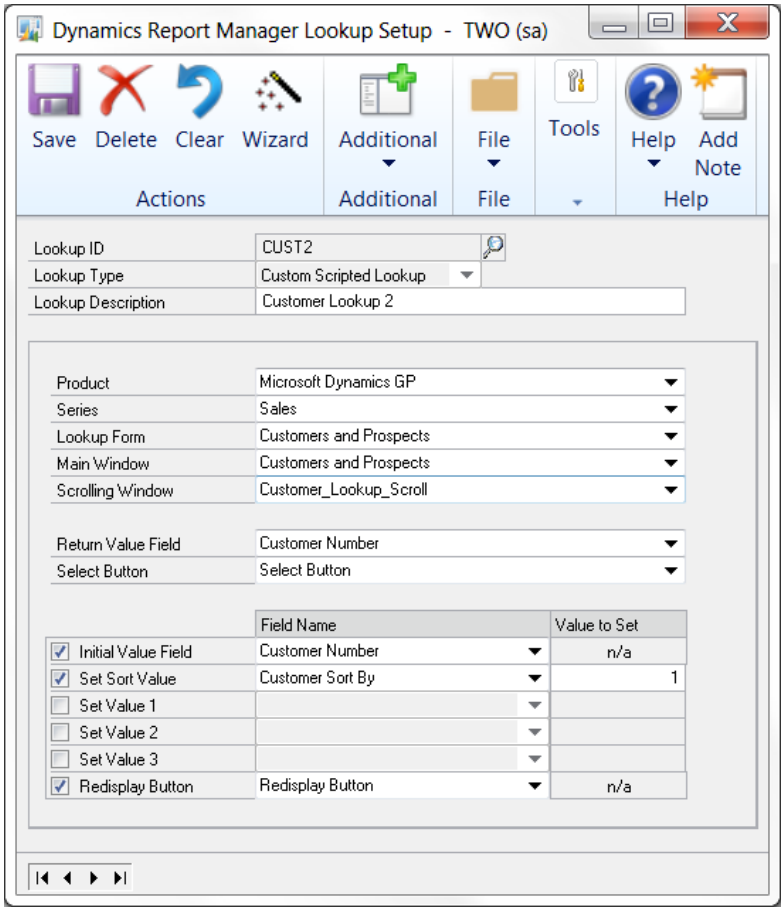
Dynamics Report Manager Lookup Setup window

Dynamics Report Manager has many pre-built lookups for common objects in Dynamics GP, including Customers, Vendors, and Accounts. You can specify your own custom lookups to further enhance the usability of Dynamics Report Manager.

There are four types of Lookups:

- **Custom Scripted Lookup –** allows for access to common standard lookup windows in any dictionary.
- **Static Lookup –** allows you to enter a fixed list of values, such as days of the week or document types. It is intended for lists of data that do not change.
- **Table Lookup –** allows you to specify a Dynamics GP or 3rd party table and will perform a dynamic data lookup each time against that table.
- **SQL Lookup –** allows you to specify a SQL statement that will perform a dynamic data lookup.

Custom Scripted Lookup



Dynamics GP allows extensive use of lookups to facilitate data entry. The Custom Scripted Lookup allows you to access any Dexterity-based lookup in the Dynamics dictionary, or in any 3rd Party dictionary.

You can set up a Custom Scripted Lookup by clicking the Wizard button, or by manually entering the values necessary for that lookup.



Lookups can be challenging to set up. For this reason, we highly recommend that you first try using the Wizard button. This will give you a step-by-step process for creating a Custom Scripted Lookup.

If you have tried setting up a lookup and are unsuccessful, contact technical support for assistance. As Dynamics Report Manager evolves, more common third-party product lookups will be included.

Manually Setting Up a Custom Scripted Lookup

Most Dynamics GP applications typically perform the following steps when a user presses a lookup button ():

1. The Lookup Window and Form are opened.
2. An initial value of where to start the lookup list is set (for example, if you are looking up a Customer ID of C45253, you may start the lookup at C4).
3. The sort order drop-down list is set.
4. For some complex lookups, additional values may be set.
5. The Redisplay button is pushed.
6. The lookup window waits for the User to perform an action, such as selecting a line in the lookup's scrolling window.
7. If the user presses the **Select** button, the highlighted value in the scrolling window is returned.



It can be very helpful to use the Inspector tool in Rockton Software's Dynamics GP Toolbox product to find the technical form, window, and field names necessary to set up a Custom Scripted Lookup.

If you do not have this tool available, then you can also use the resource descriptions found in Tools > Resource Descriptions > Windows.

Fill in the following fields to complete a lookup definition:

Lookup ID

A useful name to define the lookup. Some standard IDs are already in use (such as CUSTOMER and VENDOR) and cannot be used. If you attempt to use a reserved Lookup ID, Dynamics Report Manager will prompt you to select a different ID.

Lookup Description

A user-friendly name for the lookup.

Product, Series, Lookup Form, Main Window

Use the drop down lists to specify the Product, Series, Lookup Form and Main window for the lookup form.

Scrolling Window

The scrolling window is often the name of the Main Window appended with *_Scroll*. You can find the name of a scrolling window by using the Window Resource Descriptions window. Often there is only one scrolling window on a lookup, and the list will only populate with scrolling windows.

In the Window Resources Descriptions window, select the product, series, and lookup window. Find an entry in the Window Fields list that starts with *SW:* This is the scrolling window for that form and window. (note that the *SW:* will be omitted on Lookup Setup)

Return Value Field

In most cases this is the same name used in the Initialize Value Field below. This field must be in the scrolling window. It is usually the value you want returned (such as *Customer Number* for a Customer lookup).

Select Button

Use the lookup button to select the Select Button field on the Main Window. In almost all cases, this value will be *Select Button*.

Initialize Value Field (optional)

Check the box and specify the field you would like to receive the initial value from your lookup query. In most cases, this is also the field you want returned (such as *Customer Number* for a Customer lookup).

Set Sort Value (optional)

If you wish to change the default sort value, check this box and enter the name of the field for the Sort By field. It is often called *Sort By* or *(L) Sort By*. You can peruse values using the lookup list. Enter an integer in the Value to Set column to specify which item numerically in the sort list you desire to set.

Set Values 1, 2, and 3 (optional)

On some advanced lookups, other window values need to be initialized in order to function properly. Check the box and enter a field name for the field you wish to initialize. Enter the value in the Value to Set column. The Value to Set is a string. If the string you enter resolves to a numeric data type, a numeric value will be passed. Otherwise, the literal string will be passed.

Redisplay Button (optional)

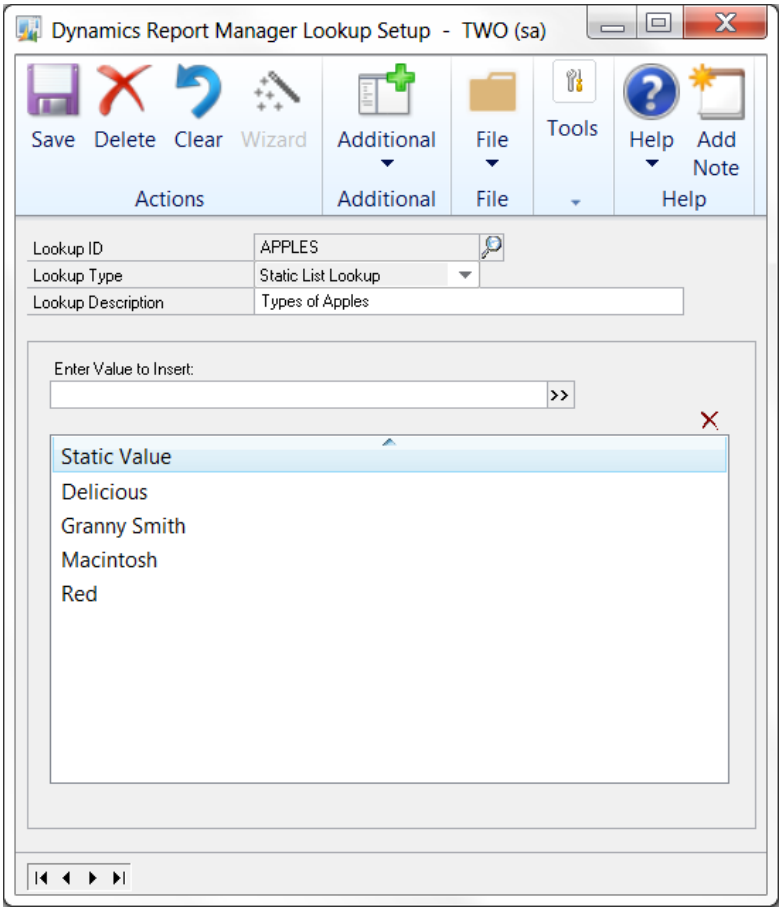
Select the field name for the Redisplay Button. This is almost always *Redisplay Button*.

Once you have defined a Lookup, it is best to test it immediately for proper behavior and usage. To test the lookup, find a report in Report Maintenance with a parameter that will use the lookup. In the Parameter Maintenance window, select this Lookup ID to be used for the parameter. Select the report to print in the Print Reports window, and test the lookup on the parameter that is defined to use this Lookup ID.



It is possible to receive error messages if the lookup is not configured properly. Attempt to decipher the error messages and modify the lookup definition. If you are still unsuccessful at setting up the Lookup, contact support for assistance.

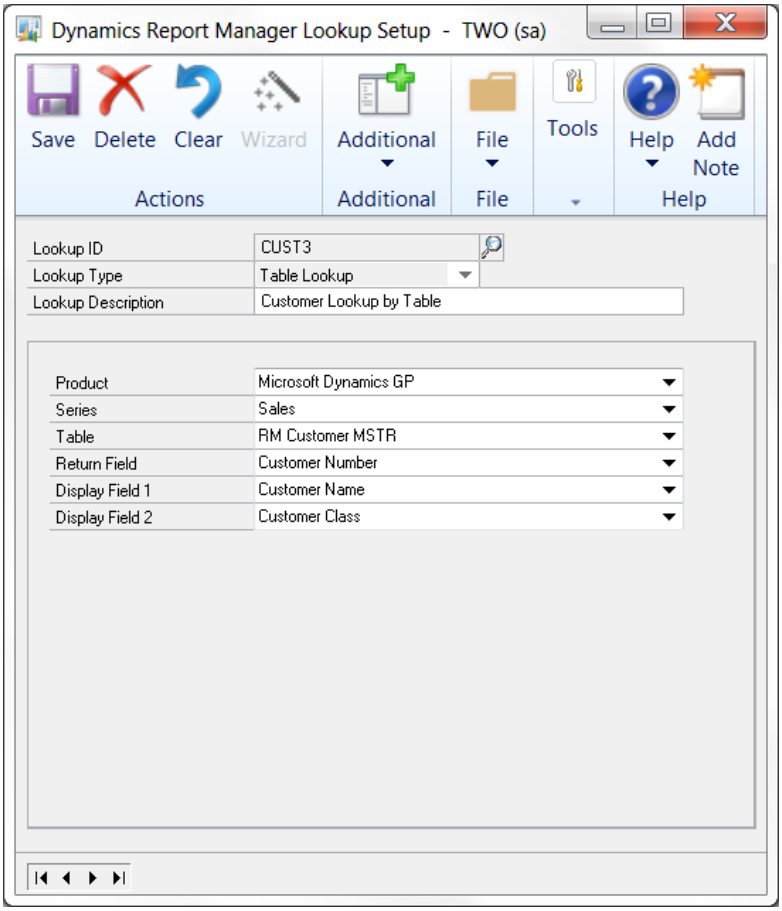
Static Lookup



Static Lookups enable you to create short lists of static values which do not change much over time.

Enter each value in the Insert Value field and press the Insert Static Value button (**>>**). To remove a value from the list, select that value and press the Delete Static Value button (✕).

Table Lookup



To create a lookup from a table, select the Product, Series, and Table which holds the information you seek. The value you wish to look up and return should be specified in the Return Field, and additional display values should be specified in Display Field 1 and Display Field 2.

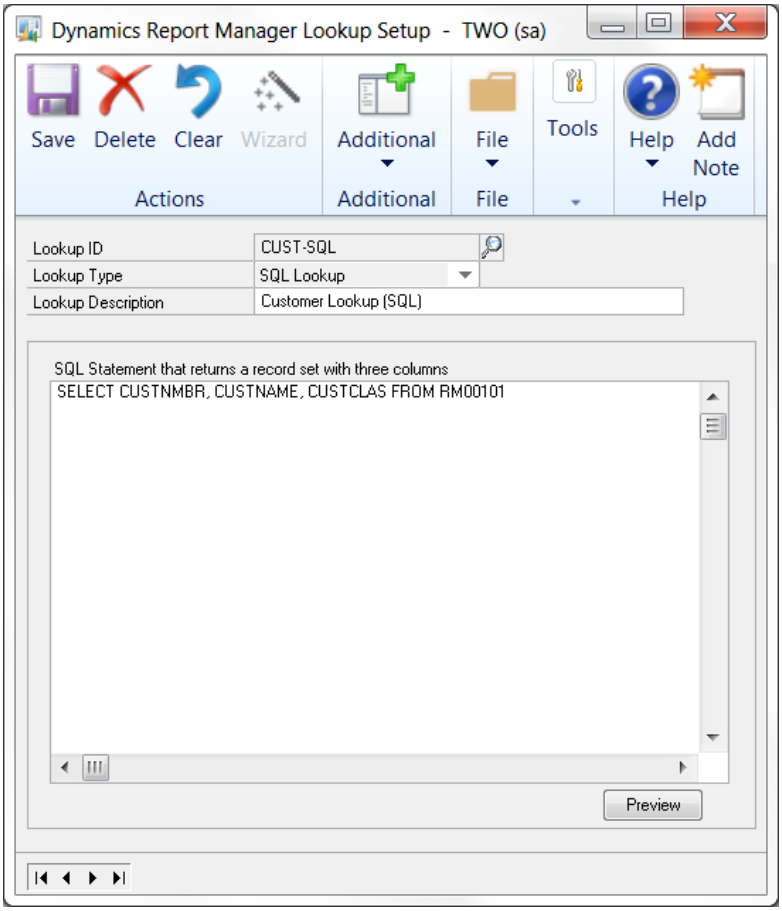
Keep in mind that very large tables may perform slowly during lookups.



It can be very helpful to use the Inspector tool in Rockton Software's Dynamics GP Toolbox product to find the technical form, window, and field names necessary to set up a Table Lookup.

If you do not have this tool available, then you can also use the resource descriptions found in Tools > Resource Descriptions > Windows. This will list technical information about tables in loaded products.

SQL Lookup



You can create a lookup by specifying a SQL query that will return the information that will be displayed in the lookup window. The value you wish to look up and return should be specified as the first column in the results set, and additional display values should be specified in columns 2 and 3.

Keep in mind that very complex queries may perform slowly during lookups.

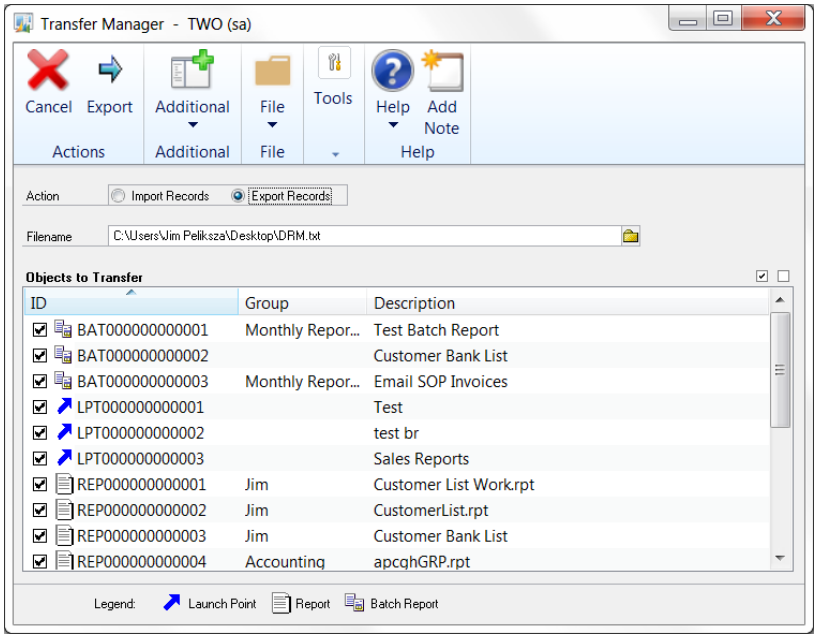


The SQL query specified must contain at least three columns. Only the first three columns of the results set, however, will be displayed in the lookup.



It can be very helpful to use the Inspector tool in Rockton Software's Dynamics GP Toolbox product to find the technical form, window, and field names necessary to set up a Table Lookup.
If you do not have this tool available, then you can also use the resource descriptions found in Tools > Resource Descriptions > Windows. This will list technical information about tables in loaded products.

Transfer Manager window



You can get to this window in one of two ways:

- Go to Microsoft Dynamics GP > Tools > Setup > Dynamics Report Manager > Dynamics Report Manager Setup. From the Setup tab, choose the Transfer Manager task.
- Click the Administration navigation button to open the Administration Area Page. Then select Dynamics Report Manager Setup from the Dynamics Report Manager sub menu. From the Setup tab, choose the Transfer Manager task.

Description

The Transfer Manager window imports and exports Report, Batch Report, and Launch Point setups. It can be used to make a backup copy of setups that you intend to change or delete, for easy retrieval later. You may also be asked to use this window by Rockton Support if we need to recreate a situation that you are seeing at your site.

Export

To export one or more of your setups, follow this procedure:

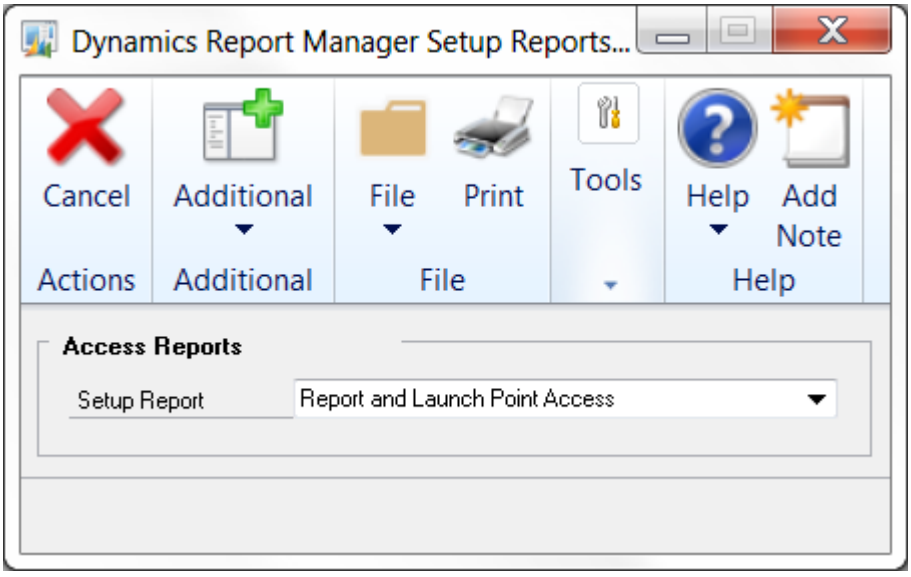
1. Choose Export Records from the Action radio button group.
2. Enter or browse to a path and filename in which to save your settings. The file's name and extension can be anything you like.
3. Once you enter a Filename, you will see all of your Reports, Batch Reports and Launch Points listed. Select as many as you would like to export.
4. Click the Export button. This will create the file you specified in step 2.

Import

To import one or more of your setups, follow this procedure:

1. Choose Import Records from the Action radio button group.
2. Enter or browse to the filename that you have previously exported.
3. The list will now show you all of the Reports, Batch Reports and Launch Points that have been saved in this file. Select as many as you would like to import.
4. Click the Import button.

Dynamics Report Manager Setup Reports window



Description

The Setup Reports window will let you print three different reports to show you which Users and Companies have access to the Reports and Launch Points that you have set up.

Report and Launch Point Access

This report lists, for each Reports and Launch Point, the Company and User access that it has.

Company Access

This report lists, for each Company, the Reports and Launch Points that are accessible to that Company.

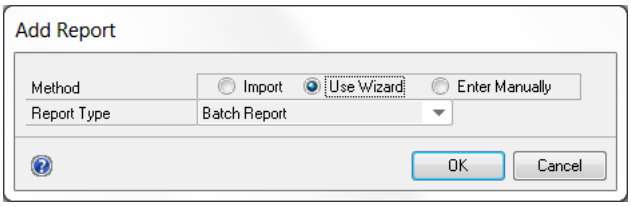
User Access

This report lists, for each User, the Reports and Launch Points that are accessible to that User.

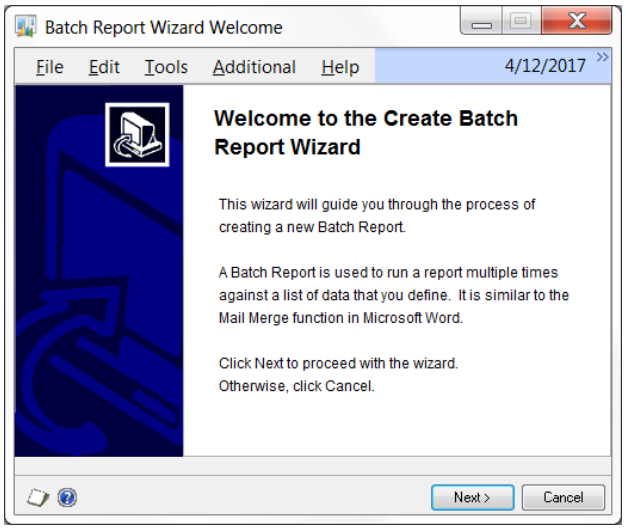
Appendix A: Setting up Batch Reports

Using the details in the Batch Report Maintenance window section above, the following steps outline an example of how to set up a Batch Report to email SOP Invoices.

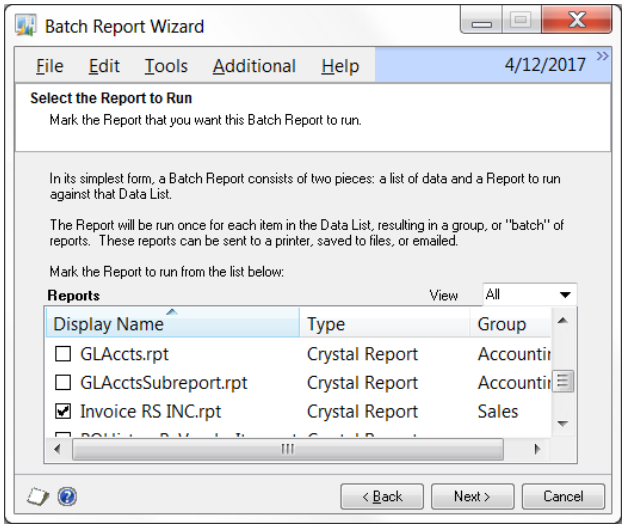
1. On the Dynamics Report Manager Explorer window, click the Reports tab. Then click the Add Report button (✚).
2. On the Add Report window, choose Use Wizard for Method. Then choose Batch Report for Report Type.



3. Click OK to open the Batch Report Wizard Welcome window. Then click Next.

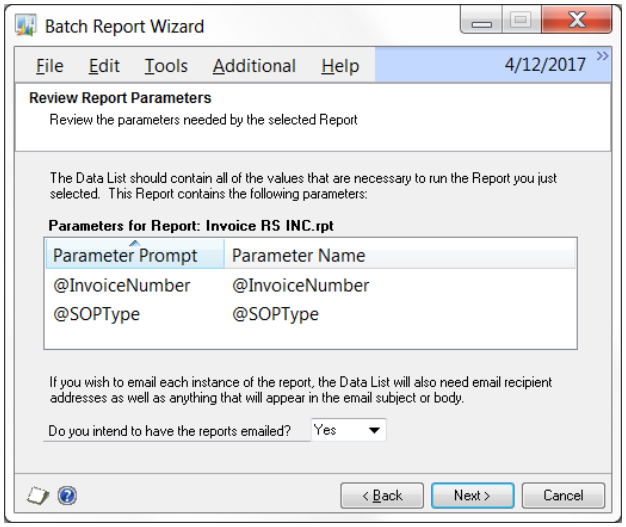


4. Select the report that you want to run. Then click Next.



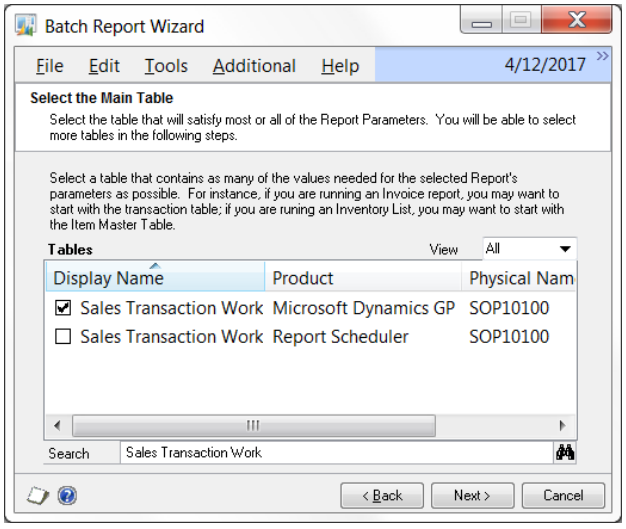
5. On the Review Parameters step, you will see that the report we have selected has two Parameters. Keep these in mind; they will be used in the next couple of steps.

   Also, since we want to ultimately email the output of this report to a group of recipients, we chose Yes in the drop-down at the bottom of the window. Click Next.



6. We now want to select the main table that will be used to gather the **data list** against which the report will be run. As you can see in the instructions on this window, this should be a table that will satisfy most or all of the parameters displayed in the previous step.

   Since we want to run this report against Invoice transactions, we want to select the Sales Transaction Work table. Enter **Sales Transaction Work** in the Search box at the bottom of the window, then click the Find button (🔭).



7. Check the box next to the one for the Microsoft Dynamics GP product. Then click Next.



Don't worry if you can't set all of the report's parameters from the table you selected in this step. You will be able to link in additional tables in the next step.

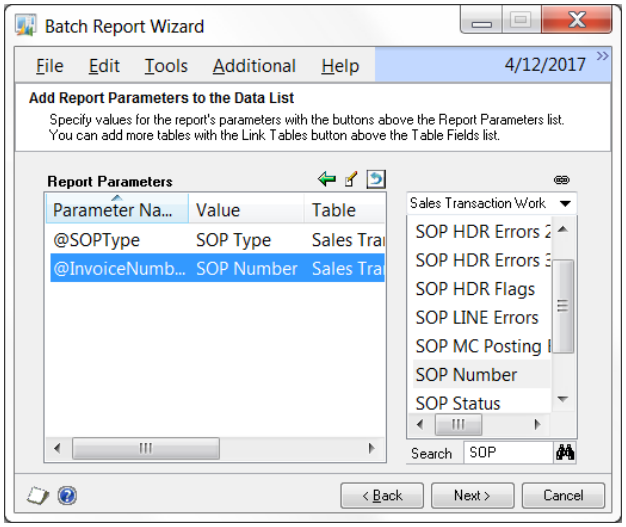
8. We will now assign each of the report's parameters to a value in a table, or to a constant value that you enter. The report's parameters are listed on this window, as are the fields in the table that you selected in the previous step.

   In this example, appropriate values for both report parameters exist in the Sales Transaction Work table. We assign the first parameter as follows:

   - Select the **SOP Type** parameter in the Report Parameters list box.
   - Scroll through the list to find **SOP Type**, and then select that field.
   - Click the Assign table field to Parameter button ( ).

   For the second parameter, we can use a different approach:

   - Select the **Invoice Number** parameter in the Report Parameters list box.
   - Enter **SOP Number** in the Search box below the fields list, then click the Find button ( ).
   - The SOP Number field should now be the only one in the fields list. Select it.
   - Click the Assign table field to Parameter button ( ).





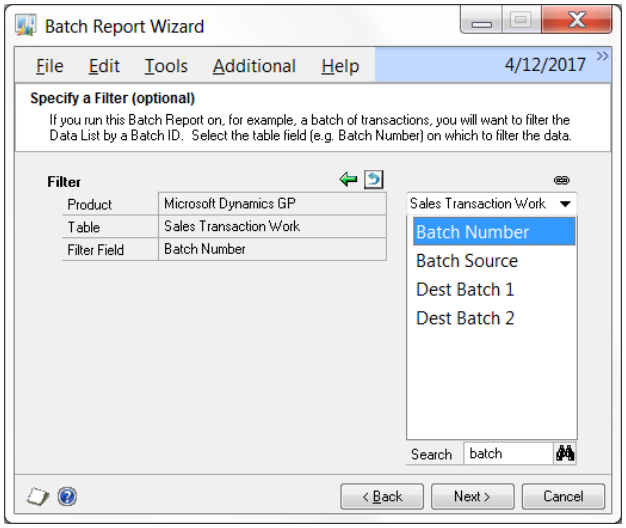
If you need to enter a constant value for a parameter, just select that parameter and click the Enter a value for a parameter button ( ). This will open the Enter Data List Value window, where you can enter any value you wish.



If you need to get parameter values from a table other than the one selected previously, click the Link Tables button ( ).

9. When you are done assigning parameter values, click Next.

10. The next step is where we can specify a Filter for the Batch Report. This Filter is used to narrow down the list of data against which the Invoice with Company Logo report will be run. In this example, we want to use Batch Number as a Filter so that only the transactions in a certain batch will be used to generate reports. Click Next when you are done.

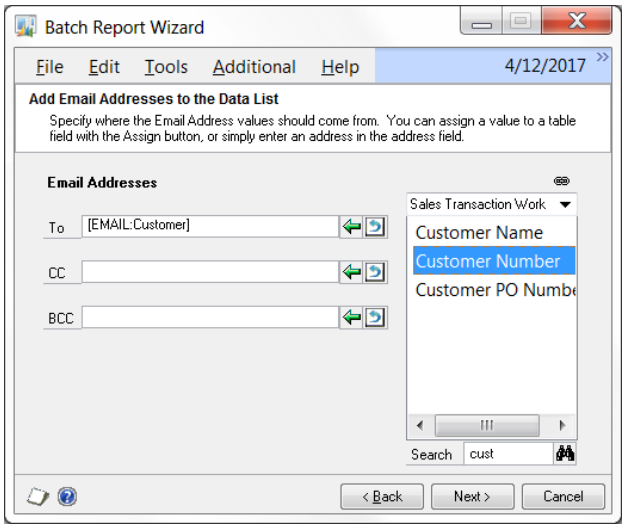




We will use this parameter in Appendix B, where we will create a Launch Point that runs this Batch Report from the Sales Batches window. It will use the Batch Number on that window to limit the data to only the transactions for that Batch.

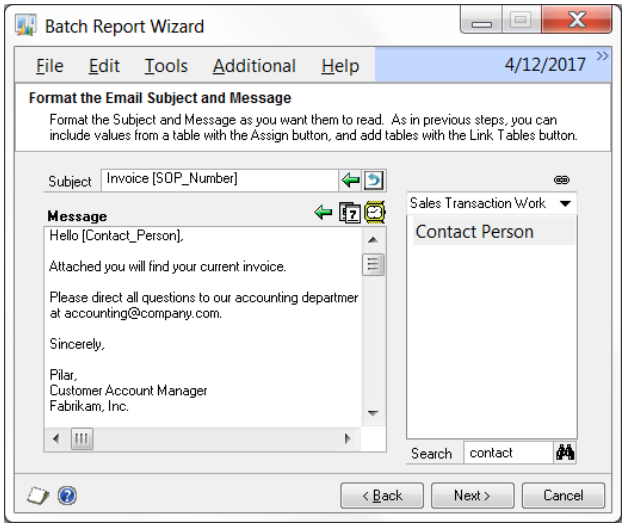
11. Now we will specify where to get the email address to email each report. We want to use the Customer's email address, which for this example we will assume is in the Internet Information window (Cards > Sales > Addresses > Internet Addresses button ( )).

    To assign this email address, select the Customer Number in the list and click the Assign table field to To Address button ( ). Notice that the value that gets put in the To field is **[EMAIL:Customer]**. This indicates that we want the email address stored for the Customer in the Internet Information window. Dynamics Report Manager will automatically look to the correct table to get this information. This will also work for Employees, Items, Salespersons, Vendors and Companies.

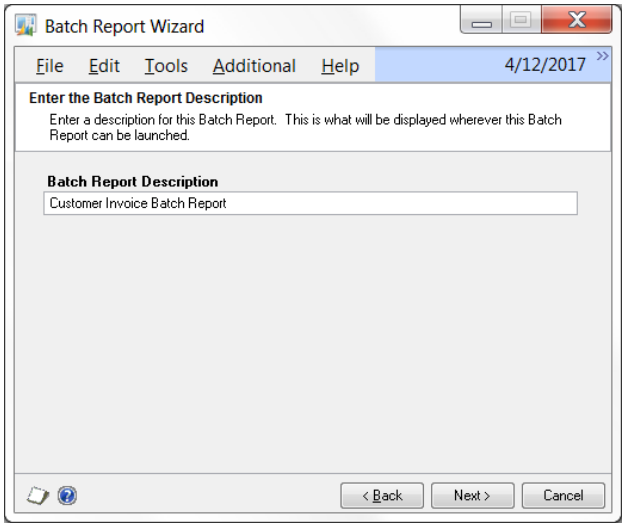


12. Click Next when you are done assigning email addresses.

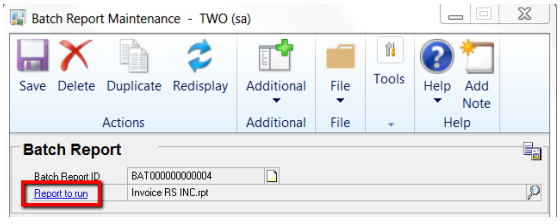
13. Now you can enter the email message's subject and message body. As you can see in the image below, you can even substitute table fields into the subject and message body. In this example, we have used the SOP Number in the subject and the Contact Person in the body.



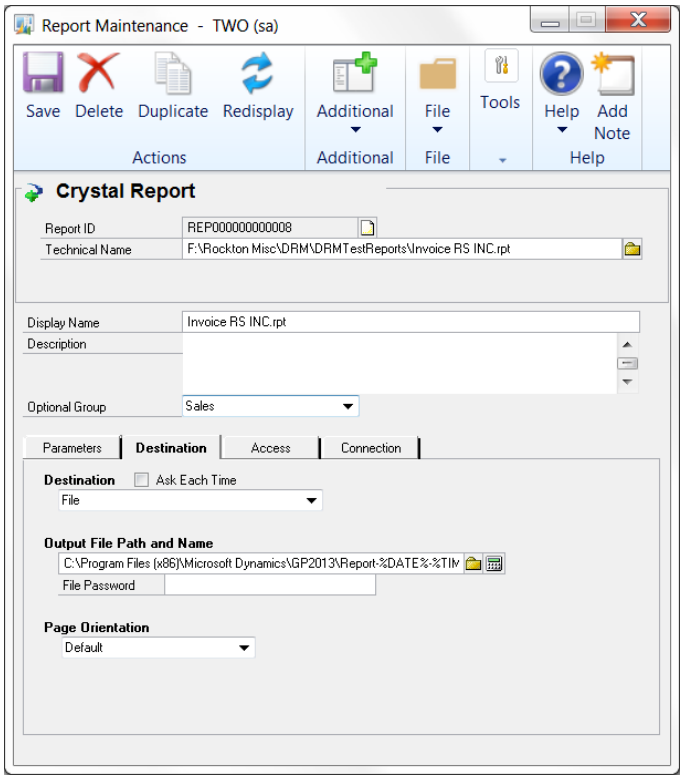
14. Click Next when you are done formatting the subject and message body. This will take you to the last step where you will enter a name and description for this Batch Report.



15. Enter **Customer Invoice Batch Report** and click Next.
16. After reviewing the values you have entered, click Next.
17. Click Finish and the Batch Report Maintenance window will open to allow you to make further changes if you need to. In this case, we want to make one change to the report that is being run by this Batch Report. Click the **Report to run** zoom on the Batch Report Maintenance window and the Report Maintenance window will open for the report you selected in step 4.



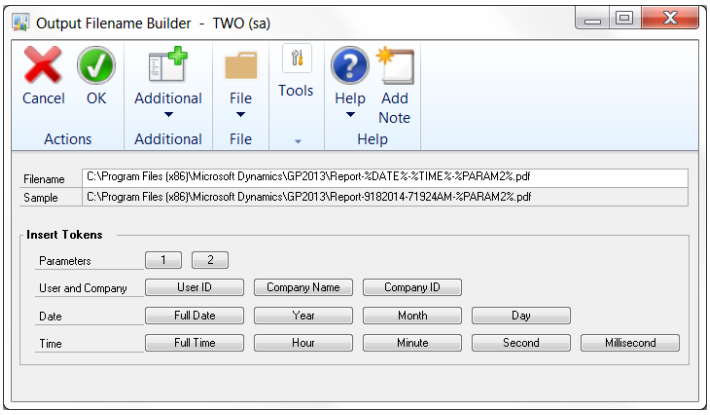
18. Click the Destination tab.
19. Set the Destination of the report to File.



20. Use the Output File Builder button to create a unique Output File Path and Name.



The Output File Path and Name must be unique in order for the email process to be successful.



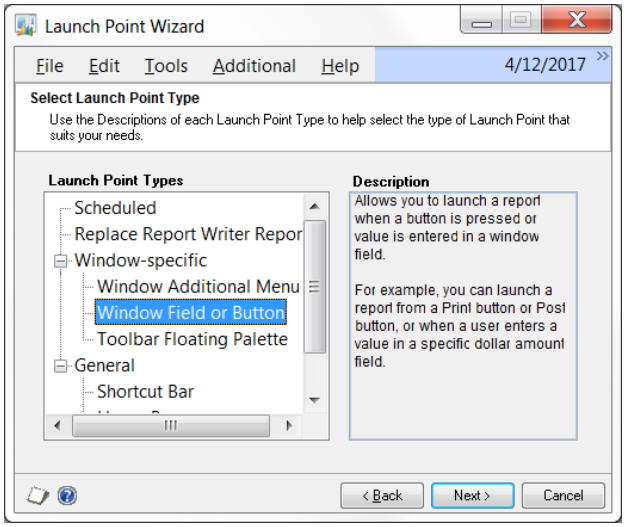
21. Insert tokens, such as date and time, User and Company names, or parameter values, into the file name by clicking the corresponding buttons. When you are done, click OK.
22. Click Save on the Report Maintenance window.

Your Batch Report is now ready to be used. Please continue to Appendix B to see an example of how to set up a Launch Point to run this Batch Report.

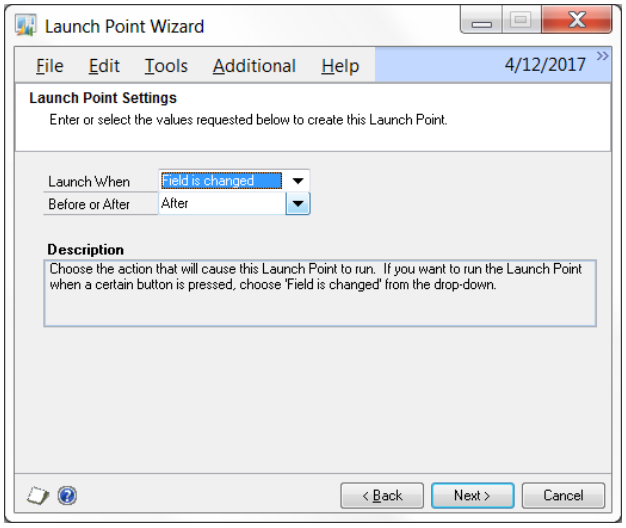
Appendix B: Setting up Launch Points

Using the Batch Report defined in Appendix A, the following is an example of how to automatically email SOP Invoices from the Printer Icon on the Sales Batches window.

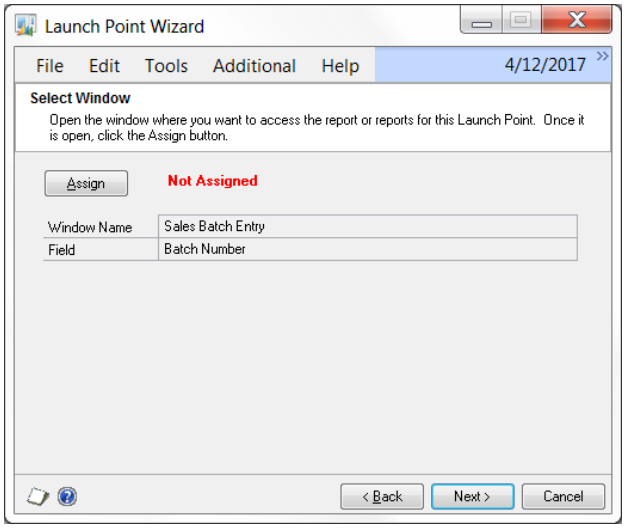
1. On the Dynamics Report Manager Explorer window, click the Launch Point tab, then click the Add Launch Point button (✚).
2. On the Add Launch Point window, choose Use Wizard for Method. Click OK to open the Launch Point Wizard Welcome window. Then click Next.
3. On the Select Launch Point Type step, select Window Field or Button. Then click Next.



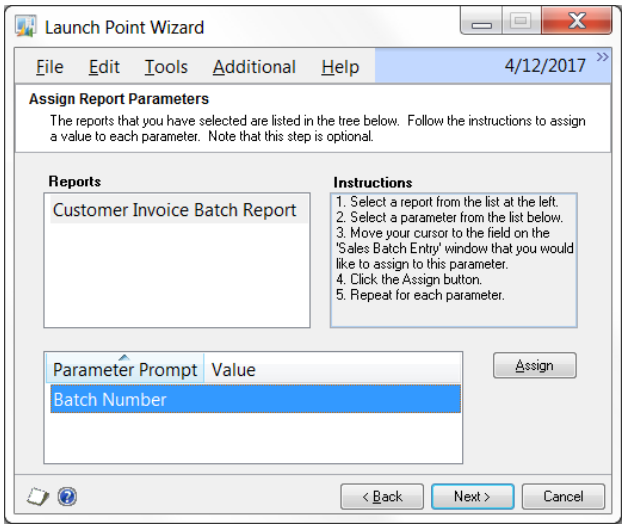
4. On the next step, you will be asked to select the Report or Reports to run. In this case we will choose the Customer Invoice Batch Report created in Appendix A. Then click Next.
5. On the Launch Point Settings step, you will see two drop-downs. Select *Field Changed* for Launch When and *After* for Before or After. Then click Next.



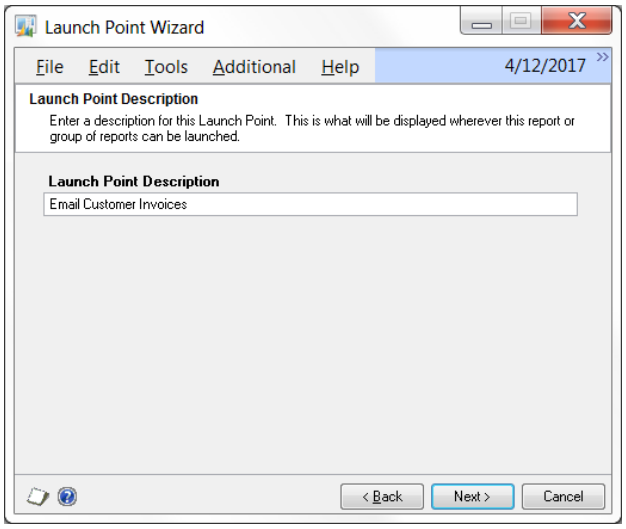
6. We will now specify that we want the Launch Point to be run when the user clicks the Printer icon on the Sales Batch Entry window. As instructed at the top of the Launch Point Wizard window, open the Sales Batches window by going to Transactions > Sales > Sales Batches.
7. You should now see the Window below. Notice that the Window Name is correct, but that Field is set to Batch Number. This is because that is where the cursor is currently positioned.



8. Click on the Printer icon () on the upper-left of the Sales Batch Entry window. You will get a message asking you to enter a Batch ID. We can ignore this message, so click OK.
9. Now, back on the Launch Point Wizard window, you will notice that Field is set to **WindowPrint**. This is what we want because this is the button that we want to use to invoke this Launch Point.
10. Click the Assign button and the text that says "**Not Assigned**" in red will disappear and the selected Window Name and Field will turn **green**. Click Next.
11. We will now assign a value to the Batch Report's one parameter field, the Batch Number. Basically, we will be following the instructions in the box to the right of the Reports list.
12. As you can see, the Customer Invoice Batch Report is listed in the Reports list box. Select this report. You will now see the Batch Number parameter listed in the list at the bottom. Select the Batch Number in the parameters list at the bottom of the window.



13. On the Sales Batch Entry window, move your cursor to the Batch ID field.
14. Back on the Launch Point Wizard window, click the Assign button. If there were more parameters, we would repeat this process. Since there are no other parameters, we are done. Click Next.
15. You can now close the Sales Batch Entry window.
16. Enter **Email Customer Invoices** for the Launch Point description. Click Next.



17. After reviewing the values you have entered, click Next.
18. Click the Finish button and the Launch Point will be created. The Launch Point Maintenance window will open automatically to allow you to make further changes if you need to. In this case we do not, so just click the Save button to close the window.

Your Launch Point has now been successfully created.

To test it, first close the Sales Batch Entry window, if it is still open. Now open it again so that the new Launch Point will be initialized. Enter a Batch Number or select one from the Lookup. Hit the Print button ( ) and the Batch Report set up in Appendix A should run its report on each of the transactions in the Batch you selected, and then email them to the email addresses stored for each transaction's Customer.

Appendix C: Setting up Report Writer Reports

Using the information in the Report Maintenance window section above, the following steps outline an example of how to setup a Report Writer report to print from within Dynamics Report Manager.

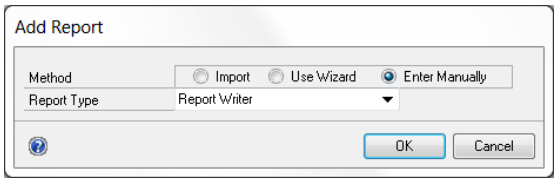
You must have some knowledge of how Report Writer reports are run (for instance, by having Source Code) in order to successfully set up a Report Writer report in the Report Maintenance window.

Report Writer reports that use temp tables will not work when set up as a report in the Report Maintenance window. These reports require program code that will load the data to the temp table before the report is run.

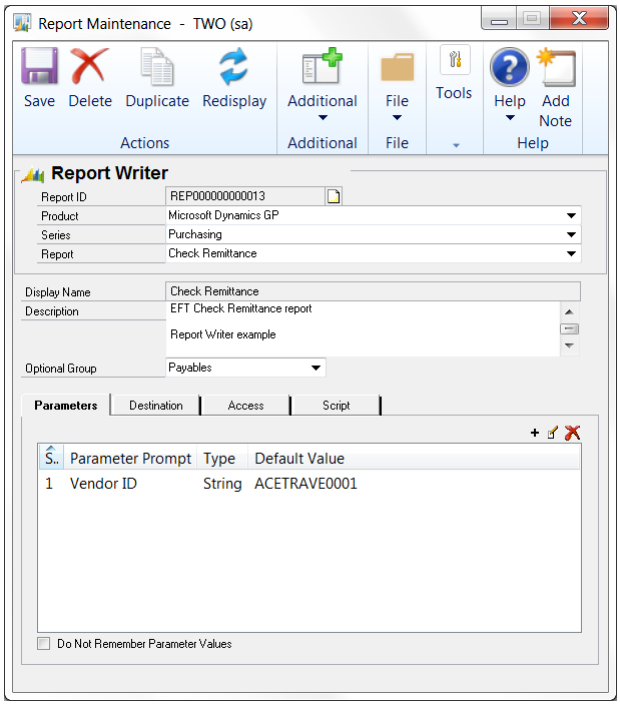
You can determine if a report uses temp tables by opening it in Report Writer and examining each attached table.

To setup up Report Writer Reports

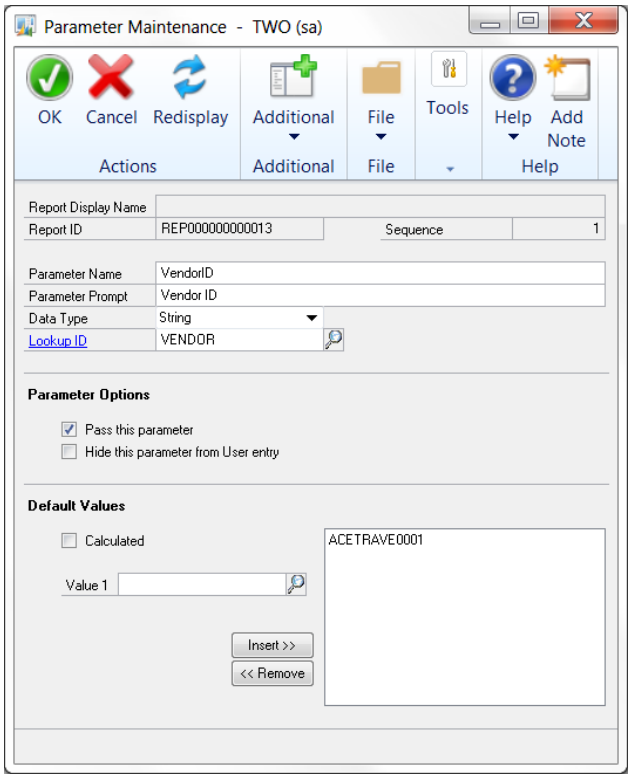
1. On the Reports tab of the Dynamics Report Manager Explorer window, click the Add Report button (✚).
2. On the Add Report window, choose Enter Manually for Method, then choose Report Writer from the Report Type drop-down.



3. Click OK to open the Report Maintenance window.



4. Select the Product, Series and Report name for the specific Report Writer report you would like to set up. In this case it will be the Check Remittance report in the Purchasing series.
5. Optionally enter a Description for the report and a Report Group.
6. On the Parameters tab, click the Add Parameter button (✚). This will open the Parameter Maintenance window.



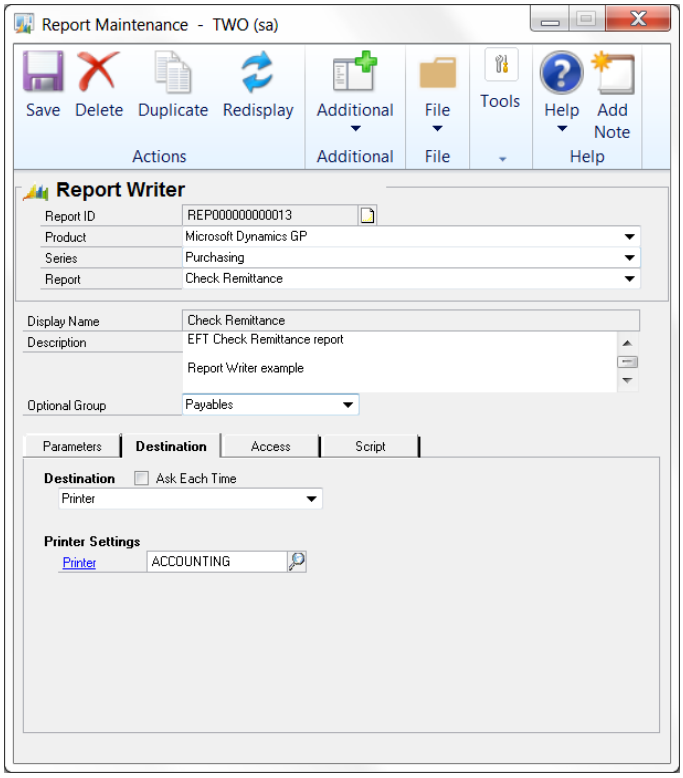
7. Enter a Parameter Name and Parameter Prompt. The Parameter Prompt is the description that the end user will see (e.g. Vendor ID, Batch Number, etc.).
8. You can select a Lookup ID to give the user that is running the report the ability to select parameter values from a lookup. In this case, we will use the lookup ID called VENDOR.



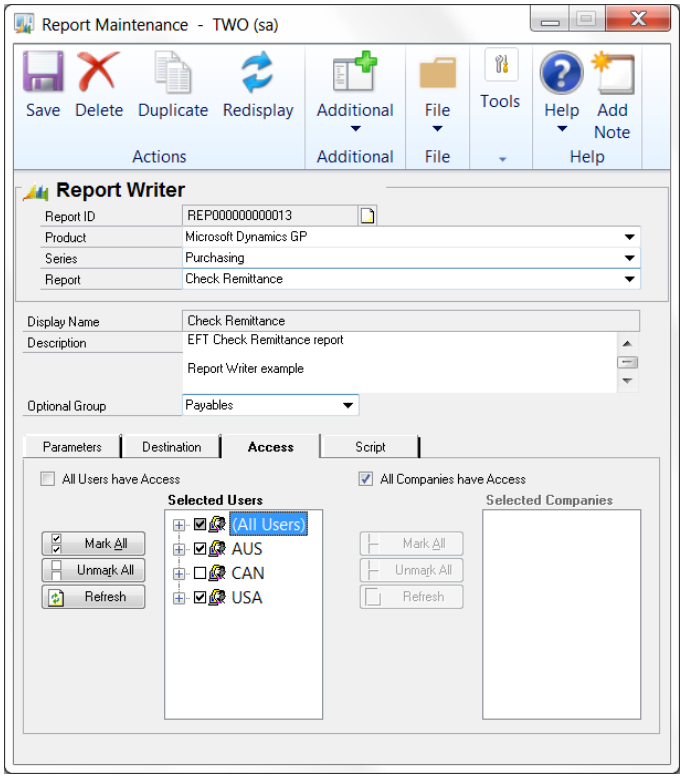
Most of the common lookups are available for you to select here, however you can also create your own if you need to. See the section on the Lookup Maintenance window for more information on creating your own lookups.

9. If you enter a Default Value for a parameter, that value will be used when the report is run, unless the User changes it.
10. Click OK to save the changes you have made to the parameter. Repeat steps 6 through 10 for each parameter needed for the report you selected in step 4.

11. On the Report Maintenance window, click the Destination tab to set a default destination format for the report. You can choose to send the report to a file, to the screen, or to a printer, as in this example.



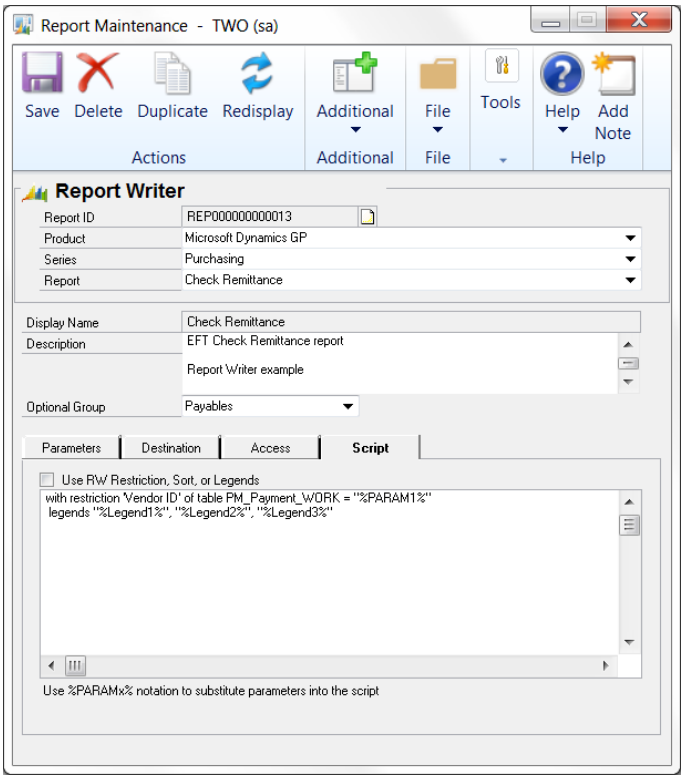
12. The Access tab to grants or restricts report access from within Dynamics Report Manager.



13. Use the Script tab to enter the following Report Writer script to specify which field and table will be used to pass the parameter(s) that were set up in steps 6 through 10.

    This script restricts the report on Vendor ID from the PM Payment Work table. It uses the same legends defined on the EFT Check Remittance report.

    with restriction 'Vendor ID' of table PM_Payment_WORK = "%PARAM1%"
    legends "%Legend1%", "%Legend2%", "%Legend3%"





The script used here must use the Report Writer field and table name format instead of the SQL format. Contact your reseller for more information on how to enter this script.

14. Click Save to save changes and close the Report Maintenance window.