Infor M3 Report Manager User Guide

Release 10.1.x

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Contents

About this guide

Use this guide as a reference at your site. This guide does not teach you about data stream files. This guide shows you how to use the administrative and user functions of Infor M3 Report Manager to generate reports in Infor Smart Office and Infor M3 H5/Infor Ming.leTM.

Intended audience

This guide is for the administrators and users who generate and distribute M3 reports through Smart Office or H5.

Prerequisite knowledge

To fully understand the information presented in this guide, you should first be familiar with these products:

- M3 Business Engine
- Smart Office
- H5

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal.

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Infor M3 Report Manager overview

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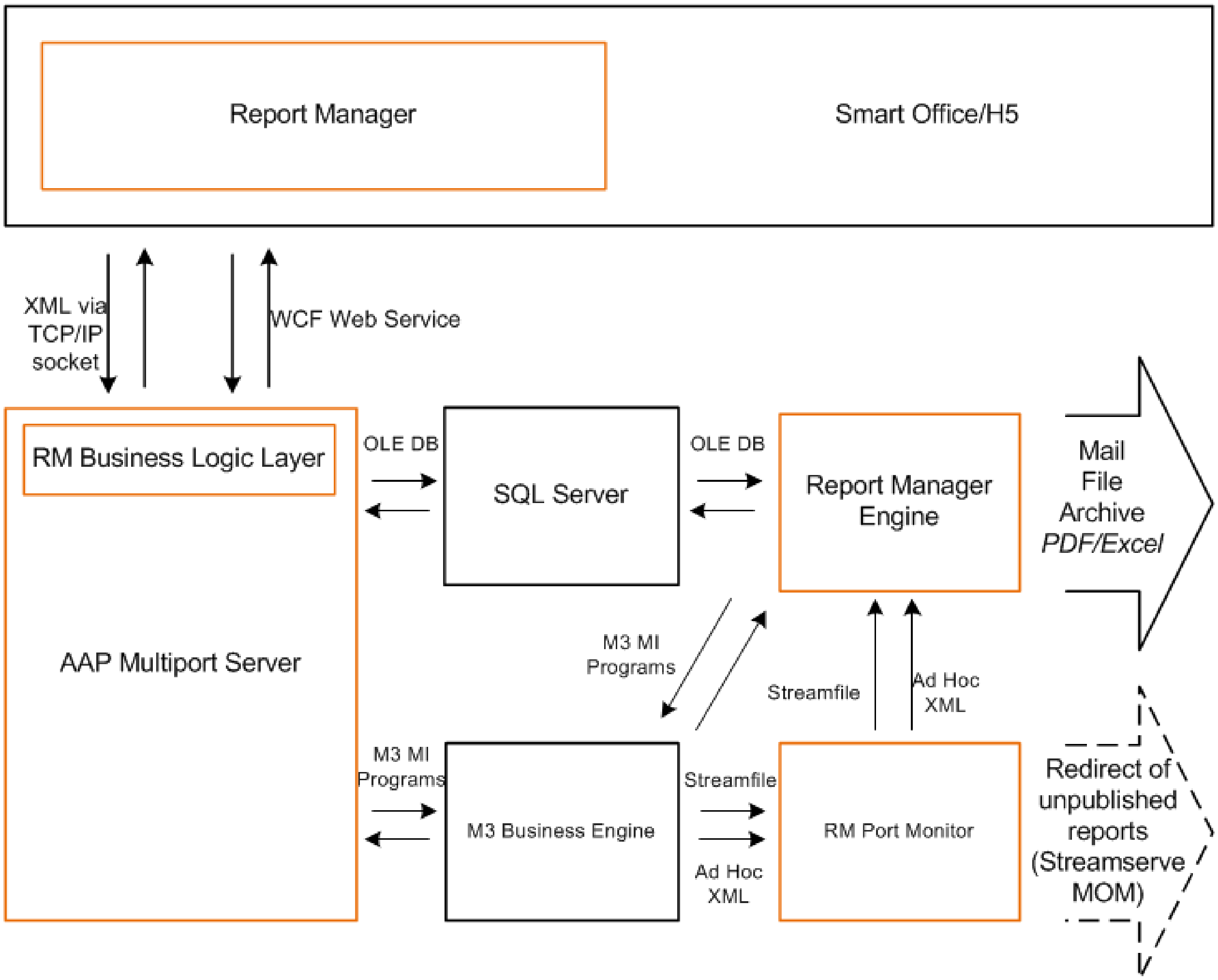
Infor M3 Report Manager is an add-on module built for M3 Business Engine (M3 BE). Report Manager transforms M3 BE data stream files and M3 Ad Hoc into dynamically configured reports. Use Report Manager to generate PDF and Excel files, which can be distributed through email and to the Report Manager Client.

There are approximately 800 standard M3 reports that are preloaded into Report Manager. The reports can be configured and tailored using the preloaded configuration as a base. Report Manager provides a framework for finding, generating, viewing, extending, exporting, and distributing M3 reports in both Infor Smart Office and Infor M3 H5/Infor Ming.leTM.

This diagram shows an example of a Report Manager environment:



Report configuration using Report Manager

With Report Manager, you can make these configurations in an M3 BE or an M3 Ad Hoc report:

- Edit and select a report theme
- Modify the date format or the number format of a report output
- Select which fields to show in a report output
- Adjust the width and the column span of a report output
- Edit a field script to combine fields and text, or to specify conditional data
- Make field language modifications for a report file or report layout
- Make field modifications for different report layouts

Only an administrator can make such modifications to a report. A regular end-user can filter, run, and view published or archived reports.

Accessing Report Manager

You can access Report Manager in Smart Office Client or H5 Client.

Accessing Report Manager in Smart Office

1. Access the Smart Office Client.
2. Open the M3 Navigator panel.
3. Expand **Other**.
4. Double-click **Report Manager**.

Accessing Report Manager in H5

1. Access the H5 Client.
2. Access the widget where the Report Manager shortcut is added during post installation.
3. Click the link or the function ID of Report Manager.

Navigation

Report Manager users are classified into two types: administrator and regular end-user.

Administrator view

All configuration functions that an administrator can do to a report are available under the **Administrator** tab. Report Manager starts on the **Administrator** tab if you are classified as an administrator.

Tab	Description
Reports	See the preconfigured reports in two tree views: Standard reports and Report configuration. The reports are categorized in the same way as the regular M3 menu. Statuses are Unpublished, Published, and Published and unsynchronized. A check mark preceding a report name indicates that the report is published.
Themes	Edit a theme to apply to the reports. You can select fonts and colors, and add an image as a logo.
Configuration	Configure how a report looks by selecting a theme and specifying the date and number format for a report. You can create such modifications

Tab	Description
	for a specific company, division, facility, report configuration group, or user name that is connected to the report. Smart Office: Select a subconfiguration from the **Selection** field. H5: All of the subconfigurations, which contain the indexes, are displayed in the window.

End-user view

Report Manager starts on the **Reports** tab if you are classified as a regular end-user.

Tab	Description
Reports	Use the **Context** menu to access these functions: • Filter, run, and view reports • Add reports to the **Favorites** tab • Preview the report sample • Reload the report tree This tab has a Log view where you can view the status of report generation and a Report view where the recently generated reports are listed.
Favorites	Access the reports that a user submitted by using M3 and through Report Manager. The same **Context** menu options that are available under the **Reports** tab are available under the **Favorites** tab. The Log view and the Report view are also available on this tab.
Archive	Filter and access the generated reports on this tab.

Administrator tasks

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A Report Manager administrator can define user roles and configure the reports. After a report is configured, the administrator must publish the report to enable an end user to run the reports and generate a report output in PDF or Excel.

Defining user roles in Report Manager Client

In M3 BE 15.1.2 or a later version, you can create and define the user roles in the M3 program M3 Report User. Open (MNS425). User configuration in MNS425 is connected to the Configuration group of Report Manager Client.

See the *Infor M3 Report Manager Installation Guide*.

In M3 BE 14.1.2 and 15.1.1, you must use the Report Manager Client because MNS425 is not available in versions earlier than M3 13.2.

1. Access Report Manager.
2. On the **Administration** tab, click the **Reports** tab.
3. Access the **Users** subconfiguration area.
4. Double-click a cell to specify information in the User, Level, and Group columns.
5. In the Active column, specify **Yes**.
6. Click **Save**.

Editing a report theme

You can modify the look of a PDF or Excel report output by editing the report theme. Select the color, font, size, and style for the report type and column type. You can assign this report theme to a company, division, or user when you modify a report.

1. On the **Administration** tab, click the **Themes** tab.
2. Double-click a theme name.

3 Optionally, edit the name of the theme and provide a description.
4 Specify the color, font, size, and style for the report header, report text, column heading and column data.

   The changes are displayed on the Preview panel.
5 To upload a logo, click **Upload logo** and select the image. Click **Open**.
6 Click **Save**.

Selecting a theme

1 On the **Administration** tab, click the **Reports** tab.
2 Select **Theme**.
3 Double-click the corresponding cell to specify the company, division, facility, report configuration group, or user name where you want this modification to be applied.
4 Specify a theme.
5 Click **Save**.

Modifying the date format

1 On the **Administration** tab, click the **Reports** tab.
2 Select **Date format**.
3 Double-click the corresponding cell to specify the company, division, facility, report configuration group, or user name where you want this modification to be applied.
4 In the **Input date format** column, specify the format in which dates are presented.
5 Optionally, specify the output date format. Use this option if you require a specific format for the date fields in Excel-generated reports. If you leave this column blank, the output date format follows the default Microsoft Excel format.
6 Click **Save**.

Modifying the number format

1 On the **Administration** tab, click the **Reports** tab.
2 Select **Number format**.
3 Double-click the corresponding cell to specify the company, division, facility, report configuration group, or user name where you want this modification to be applied.

4 To modify the number format for PDF and Excel files, specify this information:

Debit cd.
Specify the debit code character if it is available in the stream file.

Credit cd.
Specify the credit code character if it is available in the stream file.

Thousand sep. in
Specify the stream file input thousand separator.

Decimal sep. in
Specify the stream file input decimal separator.

Output num. format
Optionally, specify an output number format. If you generate the report in PDF and you leave the output number format blank, the PDF shows the number format that is similar to the stream file. The output number format is not used if you generate the report in Excel because this field follows the default number format in Excel.

5 Click **Save.**

Modifying a report file

In the report section, you can change the M3 start program, report name, and report text of a report file.

1 On the **Administration** tab, click the **Reports** tab.
2 In the Standard reports tree, access the report to configure. Double-click the report to open the Report details screen.
3 Specify this information:

Start program
Specify the M3 start program that is displayed when a user double-clicks a report from the **Reports** tab or the **Favorites** tab.

Report name
Specify the report name of the file. The report name is displayed in the report trees.

Report text
Specify the report text to be used if the **Report text** field in the M3 start program is left blank.

4 Click **Save**.

Setting up email

1 Access Report Manager.

2 On the **Administration** tab, click the **Reports** tab.
3 In the Standard reports tree, access the report to configure. Double-click the report to open the Report details screen.
4 Use these reserved words to specify information in the **Attachment**, **Subject**, and **Body** fields:

Option	Description
[DATE]	The date that the report was created in Report Manager
[TIME]	The time that the report was created in Report Manager
[NAME]	The report name
[REPORT]	The report printer file name
[PROGRAM]	The M3 start program
[ENVIRONMENT]	A text that can be set in order to identify the Report Manager environment, such as Production, Development, or Test

5 Optionally, use all fields from the stream file *-record and all fields from the header-record. For example, you can use [*SERVER] or [*USER] for *-record, and [AHZDROW2], or [0HOAORNO] for header-record.
6 Click **Save**.

Report configuration lists

The Report configuration section of the Report details screen contains these lists:

List	Description
Record format list	Contains the record formats that are available in a report
Available fields list	Contains all the fields that are available in a report
Selected fields list	Contains the fields that are displayed in a report output

Use the Report Configuration section to modify the Record format list that are available in a report. You can also select which available fields will be displayed in a report output. Other functions that you can perform in the Report configuration section include adding a new amend configuration, adding a report layout field, editing a field script, and language handling of a field.

Modifying a Record format

The record formats are the row types of the stream file.

1 On the **Administration** tab, click the **Reports** tab.
2 In the Standard reports tree, access the report to configure. Double-click the report to open the Report details screen.
3 To configure the fields, click the **Add data** button.
4 Specify this information:

   Type
   Specify whether the record format will hold the header data or the line data.

   Primary
   Specify which record format to use for the main column headings of the PDF report.

   Heading
   Specify whether the record format will include column headings.

   Vertical
   Specify whether the record format must align horizontally or vertically.

   Active
   Specify **Yes** to activate the entire record format.

5 In the Record format list, double-click a report to modify the fields and show the fields in the Available fields list and Selected fields list.

Splitting a layout into different report layouts

The Report layout column in the Record format list is connected to the Report layout field of a printer file. The printer file is the screen that is displayed when you run a report.

By default, the Report layout column is blank. If you specify a value in the Report layout column, the record format is split into different report layouts: a base entry with a blank report layout and a new entry with the report layout that you specified. By splitting the report layout, you can make modifications to the record format for a particular report layout without changing the base file.

1 On the **Reports** tab, expand the reports tree to access a report.
2 Right-click and select **Run report**. The printer file is displayed.
3 Select a value for the **Report layout** field, for example, **03-only subtotals**.
4 Access the Report details screen:
   a On the **Administration** tab, click the **Reports** tab.
   b In the Standard reports tree, access the same report. Double-click the report to open the Report details screen.
5 Right-click a record format name wherein you want to create a specific report layout configuration. Select **Copy**.
6 Specify the Report layout field value, for example, **03**, in the second field box. Click **Save**.

   A new Record format name is created under the base record format. This new Record format name shows the value for the Report layout.

7 Double-click the new record format name to make modifications to the available and selected fields of this record format.

8 To remove the new record format, right-click the name in the Record format list and select **Remove**. You cannot delete the base record format.

Adding a new amend configuration field

When you add a new amend configuration field, the fields are displayed in the Available fields list and can be used for the record format of the report.

1. On the **Administration** tab, click the **Reports** tab.
2. In the Standard reports tree, access the report to configure. Double-click the report to open the Report details screen.
3. In the Record format list, select a record and click the arrow button to the right of the list. The Amend external data to report dialog box is displayed.
4. Specify a name for the new amend configuration.
5. Click **Add New**.
6. Specify this information:

   External data name
   Verify whether the field shows the newly added amend configuration.

   Connection field
   Select a connection to the amend configuration.

   API Program
   Specify the API program that you must use to amend data.

   API Transaction
   Specify the API transaction that is specified in the **API Program** field.

7. In the Input configuration section, pair all API columns with data from the STMF column.
   a. Select a field from the API list.
   b. Select a field from the STMF list.
   c. Click **Add**.
8. In the Output configuration section, pair all API columns with data from the STMF column.
   a. Select an API output field from the API list.
   b. Specify an STMF field name. The file name must start with the Record format suffix.
      For example, if the Record format's name is CAS5311L, the suffix is **1L**. The STMF field is named **1LZZTEST**.
   c. Click **Add**.
   d. To test the API amend configuration, click **Test API**. The test provides data in the **Value** column of Output configuration. If the setup is correct, the data is added to the stream file.
9. After you add all the required pairs, click **Save**.

Selecting fields for a report output

To select the fields that must be displayed in the output, you must move the fields from the Available fields list to the Selected fields list.

1 On the **Administration** tab, click the **Reports** tab.
2 In the Standard reports tree, access the report to configure. Double-click the report to open the Report details screen.
3 Select a field in the Available fields list to be moved to the Selected fields list.
4 Click the right-arrow button in between the field lists.
5 To remove a field from the Selected fields list, select a field and click the left-arrow button.

Modifying the fields in the Selected fields list

The Selected fields list shows all the fields that are displayed in a report output. Use the Selected fields list to modify how the fields will look in the report output, for example, you can arrange the sequence of field columns or change the name, type, width, and column span of the field.

1 On the **Administration** tab, click the **Reports** tab.
2 In the Standard reports tree, access the report to configure. Double-click the report to open the Report details screen.
3 To arrange the sequence of field columns in the PDF or Excel report, use the up and down buttons to the right of the Selected fields list. The top field in the list is displayed as the first column in the PDF or Excel report.
4 In the Selected fields list, specify this information:

Field name
Verify that the field name is displayed in the language that was selected by the logged-in user.

Type
Specify any of these values:

- Char (Text field, left adjusted, normal)
- LChar (Text field, left adjusted, normal)
- RChar (Text field, right adjusted, normal)
- CharB (Text field, left adjusted, bold)
- LCharB (Text field, left adjusted, bold)
- RCharB (Text field, right adjusted, bold)
- Decimal (Numeric field, right adjusted, normal)
- DecimalB (Numeric, right adjusted, bold)
- Date (Date, left adjusted, normal)
- DateB (Date, left adjusted, bold)

Width
Specify the width of the field. The width can be changed to any number and is not a fixed width in pixels. This field applies to the PDF report.

Colspan
Specify the column span of the field. You can span a field over several columns if the data in the fields requires more than one column. It can never span to more than the total number of columns of the report.

Data
You can turn off this feature to enhance the performance in report generation. If this feature is activated, then a sample data is recorded every time a report is generated.

5. To show or hide the field ID of the stream file field, right-click a field and select **Toggle view**.

Editing a field script

You can edit a field script to combine fields and text or specify conditional data.

1. Access the Report configuration section of the Report Details screen.
2. Open the Field script window.

   If you are using the Smart Office Client, right-click a field in the Available fields list or the Selected fields.

   If you are using the M3 H5 Client, click the **Field Script** button in the Available fields list or the Selected fields list.
3. Write a JavaScript. Insert the variable data within the hard brackets. See this example:

```
if(1 == 2)
{
return "Not possible";
}
else
{
return "[1LMTITNO]" + "-[1LWWUNMS]";
}
```

4. To test the script, click **Validate**. If the script is correct, a validation notification, which is highlighted in green, is displayed. The validation notification shows the real sample data, which replaces the variable data. If the script is invalid, the validation notification is highlighted in yellow.
5. Click **Save**.

Language handling of fields

1 On the **Administration** tab, click the **Reports** tab.

2 In the Standard reports tree, navigate to the report to be configured. Double-click the report to open the Report details screen.

3 Right-click a field in the Available fields list or Selected fields list. Select Edit field headings. The Field headings screen shows these fields:

Field
This field shows the field that will be edited.

Field Heading
This field shows the field heading that is selected if the report would be generated with the logged-on user's default language.

Heading ID
This field shows if there is a Heading ID (General Word) that is connected to the field that is displayed.

Grid matrix

The matrix contains these columns:

- Language

  All installed languages are listed in this column. There is one record that is used for setting language IDs (language IDs from MVXCONxx.lng are then used instead) rather than using a text translation.

- Report

  By default, this field is blank. You must specify a report name to make field language modifications for a specific report file.

- Report layout

  By default, this field is blank. You must specify a report layout to make field language modifications for a specific report file.

- Stream file fields

  The last three columns are a split of the stream file fields. The first column shows the field with 8 characters, the second is 6 characters, and the third is 4 characters long. This means that the translation is more generic between the reports for the 4-character field than the 6-and 8-character fields.

4 In the Grid matrix, double-click an installed language in the Language column.

The columns containing the text connected to the selected language record are displayed. The columns vary depending on the language handling used by the language record.

5 Specify value in the fields.

6 Click **Save.**

Modifying fields of a report or a report layout for a language

You can create field language modifications by specifying information in the Report and Report layout columns.

Making field language modifications for a report

1. Access the Report details screen:
   a. On the **Administration** tab, click the **Reports** tab.
   b. In the reports tree, access the report to be modified. Double-click the report to open the Report details screen.
2. Double-click a record format name in the Record format list to show the report's available fields and selected fields.
3. In the Selected fields list, double-click a field that you want to modify.
4. Right-click a language where you want to create a specific translation for a report. Select **Copy**.
5. Click the drop-down arrow beside the report name. Select the blank option so that only the stream file field, language, and report fields are populated.
6. Click **Copy**.

   A new language entry is created in the language matrix. This new entry is a copy of the base entry and contains the report name where you can apply the particular field language modifications.
7. To modify the field for the new language entry, for example, the last stream file field, double-click the row.
8. On the first row of the stream file field column, specify the field name. On the second row, select the stream file field type.
9. Click **Save**.
   In the Selected fields list, the field name is changed for the particular report and language that you specified.
10. To remove the new language entry:
    a. Double-click the modified field in the Selected fields list and select **Remove**.
    b. Right-click the new language entry and select **Delete**. You cannot delete the base language entry.

Making field language modifications for a report layout

1. Access the report details screen:
   a. On the **Administration** tab, click the **Reports** tab.
   b. In the reports tree, access the report to be modified. Double-click the report to open the Report details screen.
2. Double-click a record format name in the Record format list to show the report's available fields and selected fields.
3. In the Selected fields list, double-click a field that you want to modify.

4 Right-click a language where you want to create a specific translation for a report. Select **Copy**.
5 Click the drop-down arrow beside the report name. Select a report layout value. This report layout is connected to the Report layout field of the printer file.
6 Click **Copy**.
A new language entry is created in the language matrix. This new entry is a copy of the base entry and contains the report name and report layout where the particular field language modifications will be applied.
7 To make modifications to the new language entry, double-click the row.
8 On the first row of the stream file field column, specify the field name. On the second row, select the stream file field type.
9 Click **Save**.
In the Selected fields list, the field name is changed for the particular report, report layout, and language that you specified.
10 To remove the new language entry:
   a Double-click the modified field in the Selected fields list.
   b Right-click the new language entry and select **Delete**. You cannot delete the base language entry.

Archiving reports

1 On the **Administration** tab, click the **Reports** tab.
2 Select **Archive**.
3 Double-click the corresponding cell to specify the company, division, facility, report configuration group, or user name where you want this modification to be applied.
4 In the **Archive days** column, specify the number of days the report will stay in archive.
5 In the Active column, specify **Yes**.
6 Click **Save.**

Publishing reports

You must publish a report after you have made modifications. Published reports are displayed on the reports tree of a regular end-user.

1 On the **Administration** tab, click the **Reports** tab.
2 In the Standard reports tree, access the report to be published. Double-click the report to open the Report details screen.
3 Click **Publish**.
4 Click **Save.**

Reports

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You can run reports when all of the required configuration is completed and the report is published by an administrator. After you run a report, the PDF or Excel file is listed on the Reports view of the Reports tab or the Favorites tab, and is also listed on the Archive tab. The report output will also be sent to the email address specified in the printer file.

Filtering reports

On the **Reports** tab or the **Favorites** tab, you can view or filter the company reports that are published by an administrator.

1 On the **Reports** tab or the **Favorites** tab, click the **Search** field.
2 Specify information on these fields to limit your search:
   - Report file
   - Report name
   - Start program
   - Category
   - Date
   - Type

   Note: In H5, the **Status** field is not available. To filter published reports, select the **Published** option.
3 To do a wildcard filter, insert an asterisk at the beginning or at the end of the search text.
4 Click **Filter**. If you are using H5, click **Save**.

Accessing report tasks from the Context menu

1 On the **Reports** tab or the **Favorites** tab, expand the report tree to access a report.
2 Right-click a report to open the **Context** menu. Select any of these options:

Option	Description
Run report	Opens the M3 printout program that generates the stream file.
Archived reports	Opens the **Archive** tab and set an automatic filter for the selected printer file.
Add to favorites	Adds the report to the current user's **Favorites** tab. On the **Favorites** tab, the **Add to favorites** option is replaced by the **Remove from favorites** option.
Change report name	Changes the report name of a file. This option is available on the **Favorites** tab only.
Reload report tree	Reloads and refreshes the tree for newly published reports.

Running reports

A PDF, Excel file, or both, depending on the output type that you selected, are generated when you run a report.

1 On the **Reports** tab or the **Favorites** tab, expand the reports tree.
2 Right-click the report to open the **Context menu** and select **Run report**.

   Note: If you are an administrator, you can click **Run report** in the Report details screen of the report.

3 Supply information in the required fields of the M3 printout program or printer file. The fields may vary depending on the report.
4 Click **Next.**
5 In the **To e-address**, specify the email address where the generated report will be sent.
6 In the **File type** field, select **PDF**, **Excel**, or **Both**. Click **Next.**
7 If the Click **Confirm Output.**
8 Click **Next** and verify the status displayed in the Status bar.
   The activity is displayed on the Log view. The generated report output is listed on the Reports view.

Viewing a report output

You can view the generated PDF or Excel file by accessing it on the Reports tab, Favorites tab, Archive tab, or in your email's inbox.

1 To access the generated ouput on the Reports tab or the Favorites tab:
   a Expand the report tree and access the report. You can also filter the reports.

   b In the Reports section, double-click a report. If you double-clicked a report marked with the PDF icon, a PDF opens with the locally installed PDF program associated with PDF files. The Excel files open with Microsoft Excel 2003 or a later version.

2 To access the generated report on the **Archive** tab:

   a Click the **Archive** tab. The Archive tab stores reports that are run periodically or over time. The reports listed on this tab are grouped according to the latest run reports or by category.

   b Optionally, specify information in these fields to filter the reports:

   - Report file
   - User
   - Report name
   - Description

   c Double-click the report marked with a PDF or Excel.

3 Alternatively, access your email's inbox. The generated output is sent to the email you specified when you run the report.

Exporting and importing reports

Use the import and export function of Report Manager to transfer documents between two environments, for example, between the test environment and the production environment, or to distribute reports between different customers. You can only distribute the export files between installations of the same version. You can also distribute the exported reports through email.

Exporting a report

When you export a report, an export file is created. You can export multiple reports and append it to the created export file.

1 Access the environment where you want the report to be exported.

2 On the **Administration** tab, click the **Reports** tab.

3 Right-click a report and select **Export report**. This creates an export file with a .rmExport extension.

4 Specify a destination where the export file will be saved.

Note: If you are exporting multiple reports, you can append the reports to the same export file.

5 Click **Save**.

Importing a report

1. Access the environment where you want the report to be imported.
2. On the **Administration** tab, click the **Reports** tab.
3. Right-click a report and select **Import**. The folder where you saved the .rmExport file is displayed.
4. Select the export file and click **Open**.
5. Select the report(s) to be imported.
6. Click **Import and close**.

Ad Hoc reports

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Infor M3 Ad Hoc Reporting is a tool that enables the creation of operational reports and listings direct from the Infor M3 Application database. Ad Hoc reporting further reduces the need to modify or invest in developing replacement for standard Infor M3 operational reports in order to personalize the output from Infor M3. In addition, it also avoids the inappropriate use of the advanced business intelligence or analytics tools to satisfy relatively simple operational needs, and manages access and security using standard Infor M3 user security and privilege levels. With the Ad Hoc Reporting tool, Infor M3 users can manage the design, development, storage, execution, and scheduling of user-defined reports. All output is delivered in the standard XML format to allow choice and flexibility in its end use.

By sending an Ad Hoc XML file to Report Manager, an output can be generated in PDF or Excel format. It is also possible to list and start the execution of Ad Hoc reports from within Report Manager.

Creating Ad Hoc report

1. Access an M3 Ad Hoc report in the AHS110 - Ad Hoc Report. Open program.
2. Specify this information:

   Report group
   Select a report group.

   Ad hoc report
   Select a name for the report.

3. Select **Options > Create**.
4. Specify this information:

   Save report run
   Select 2-Yes.

   Save rep lines
   Select 1-No.

   Report location
   Click the field and select **Browse**.

5. In the M3 Browse screen, right click the **Key value** field and select **Browse**.

6 In the M3 Ad Hoc Report Location screen, right-click a service to use when printing your report and click **Select**. You must select the location where the ServiceID is defined for the M3 Report Manager server and port; otherwise, the Ad Hoc report will not be sent to Report Manager.
7 If you must change the ServiceID, right-click a record and select **Change**. Use the E-panel to change the ServiceID. You can also select if you want to save your reports to access the XML file at a later stage. Click **Next**.
8 In the E-panel, specify this information:

   Ad hoc email
   Select 2-Current user.

   Email key val
   You must have already set up an email key. Your email is displayed to the right of your userID.

   Subject
   Optionally, provide the email subject.

   E-mail text
   Optionally, provide a description for the email.

   Sender e-mail
   Browse and select the sender email, for example, **RMADHOC**.

9 Click **Next**.
10 Accept the default value in Job Schedule Information section. Click **Next**.
11 Optionally, in M3 Ad Hoc report designer, select the design by using filters, selection fields, and subtotals to specify what to show on the report.
12 Click **Save**.

Displaying Ad Hoc Report in Report Manager

To display the created Ad Hoc Report in Report Manager, you must connect the report to the user.

1 In Smart Office or Infor Ming.le, access AHS120.
2 Specify this information:

   Report group
   Select the report group where the Ad Hoc report is connected.

   Ad hoc report
   Select the Ad Hoc report name.

   User
   Select the user name where the report must be connected to.

3 Select **Options > Create**.
4 If you require the user to be able to change filter values when running the report, select the **Sel** check box. Otherwise, click **Next**. The report is displayed on AHS120.

5 Use MITEST to test the connection. This option is available only in Smart Office.

a In the **Run** menu of Smart Office, specify **MFORMS://MITEST**.

b Click the **Browse** button of the **Program** field.

c Filter the program that you want to test, for example, AHS200. Report by user, and click **Select**.

d On the MITest screen, click the **Browse** button of the **Transaction** field.

e Filter the transaction and click **Select**.

f On the MITest screen, specify your user ID in the **Value** field and click **Execute**.

Financial Report Generator (RGS)

5

By running a report in Financial Report Generator (RGS), the report is added and displayed in the Standards reports list in Report Manager. After the reports are added to Report Manager, you can then modify the fields and run the RGS reports similar to how standard reports in Report Manager are configured and run.

Adding a report using Report Generator

After you add a report using Report Generator, Report Manager processes the report and shows it in the Standard report list of the **Administration** or **Reports** tab.

1. Access M3 Report. Open - RGS600/B.
2. Select a report.
3. Right-click the report and select **Change**.

   The fields that are displayed in the screens are dynamically configured.
4. Provide information in the fields, and click Next to navigate through the screens. You must specify this information in the mandatory fields of these screens:

   RGS600/E
   Set the **Front page** field to **1** or **2**.

   RGS610/B1
   Right-click a row and select **Change**.

   RGS610/E
   Type **|** (pipe) in the second box of the **Col separator** field. This becomes the separator marker after the column.
5. Click the **Back** arrow until you reach M3 Report. Open - RGS600/B where the reports are listed.
6. Right-click the report. Select **Related Options > Run**.
7. Click **Next** until the job is submitted. If M3 Output. Select Media - MNS212/B1 window is displayed, click **Confirm Output**.

The report output that is sent in your email after you have added and run the report has no line data because no configuration was applied yet.

Configuring and running an RGS report

After a report is added using the Report Generator, you can modify the fields and run the RGS reports similar to how standard reports in Report Manager are modified and run.

Use these guidelines when configuring the RGS reports:

1. On the **Administration tab > Reports tab**, access the report by using filter or by expanding the Standard reports tree.
2. Double-click the report to open the Report details screen.
3. To add fields for a line level or a header level and to modify the Selected fields list, see "Report configuration lists" on page 14.
4. Optionally, select the **Cover page** check box to add a cover page in the report.
5. Click **Publish**.
6. Click **Save**.
7. Access M3 Report. Open - RGS600/B.
8. Right-click the report and select **Related Options > Run**.
9. Click **Next** until the job is submitted. If M3 Output. Select Media - MNS212/B1 window is displayed, click **Confirm Output**.
10. View the report output.