



Infor VISUAL for .NET Applications Report Scheduling

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Overview

This document describes how to schedule a report for printing. Scheduling a report for printing consists of these steps:

- Defining report parameters
- Creating the report schedule
- Managing the report schedule

All reports in VISUAL for .NET Applications can be scheduled for printing.

A scheduled report can be ready for you at a time convenient to you without adversely affecting productivity or workflow. For example, you can generate your reports during off-hours and have them ready for the Accounting Department on the first day of the accounting period close, or generate the reports for the VTA Administrator as soon as a payroll period ends. Scheduling reports for printing is especially useful for recurring report generation.

Reports are scheduled using the Microsoft Task Scheduler and a publically available wrapper program. The public wrapper is used as an interface between VISUAL for .NET applications and Microsoft Task Scheduler.

Disclaimer:

Only the functionality described in this document is supported by Infor. Aspects of the Microsoft's Task Scheduler and public wrapper program that are not mentioned in this document are not certified or supported by Infor.

Requirements

To print a report on a schedule, you do not have to be signed into Infor VISUAL .NET applications. To execute the scheduled task, you must meet these requirements:

- To print reports that you have scheduled, your computer must be powered up and you must be signed into the network. Print schedules are stored on the local machine.
- Your computer is in one of these modes: Unlocked, Locked, Sleep, or Hibernate.
- The Computer Management Task Scheduler setting "Run only when user is logged on" is selected.
- You save your report parameters to a Print Parameter Name. The Print Parameter Name defines the report information. You can create only one report schedule per Print Parameter Name.

You can schedule reports to be outputted to a printer only. You cannot schedule other report outputs.

Scheduling reports

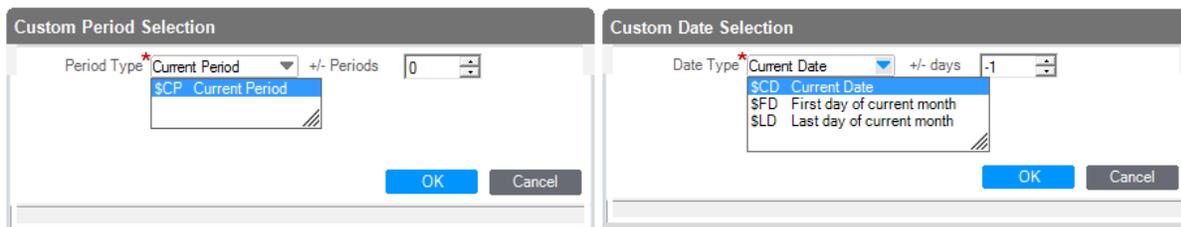
To schedule a report, you must complete these tasks:

- Save report parameters
- Create the schedule

Saving report parameters

To schedule a report for printing, you must define the report parameters and associate them with a Print Parameter Name. You can create one schedule for each saved report parameter. For example, you could create a Print Parameter Name for receivable accounts and another Print Parameter Name for payable accounts and later schedule them to be printed at pertinent times.

When you set up parameters for scheduled reports, we recommend that you use custom date or custom period selections. You can use custom date and custom period selection to set up logical dates, such as the first date of the current month or the current period plus the previous period. Because you are not selecting a specific date, you do not need to edit your report parameters before each scheduled report print job.



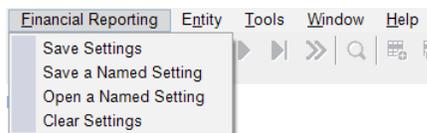
- 1 Navigate to the Global Financials or Time and Attendance report for which you want to create print parameters.
- 2 In the Select Report Parameters dialog, select or specify all relevant report settings.
- 3 Click the **Save parameter values** toolbar button.
- 4 Specify the name of the parameters in the Name field. Use a unique title for each set of parameters that you save.

- 5 To save the report parameters as private, select the **Private Settings** check box. Clear the Private Settings check box to save as shared report parameters.
- 6 Click **OK** to save your report settings.

Saving report parameters for financial reports

You can also save report parameters for financial reports in Global Financials:

- 1 From the Financials area in the navigation bar, click **Financial Reports**.
- 2 Select your settings in the Financial Reporting window.
- 3 Select **Financial Reporting > Save a Named Setting**.



- 5 To save the report parameters as private, select the **Private Settings** check box. Clear the Private Settings check box to save as shared report parameters.
- 6 Click **OK** to save your named report settings.

Creating report schedules

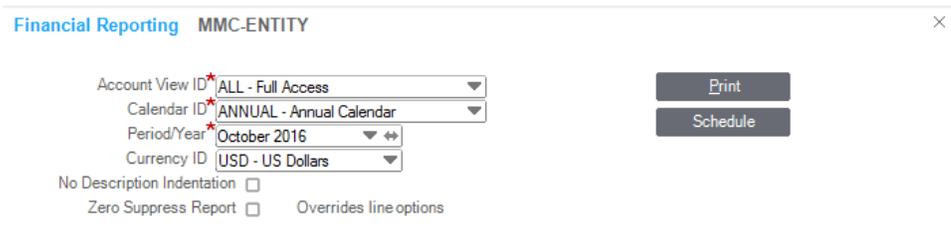
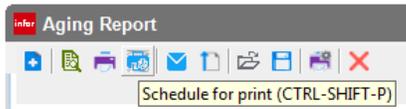
When you schedule reports for printing in VISUAL for .NET, a public wrapper is used to create the print tasks in Microsoft's Task Scheduler.

Neither the public wrapper nor the Task Scheduler are Infor products. They are not documented or supported by Infor. Aspects of the Microsoft's Task Scheduler and public wrapper program that are not mentioned in this document are not certified or supported by Infor.

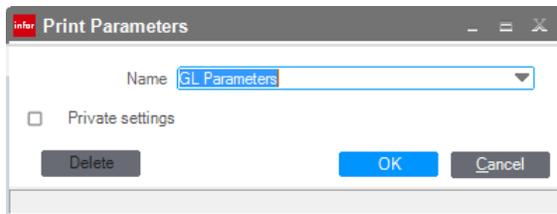
After you create a report schedule, you can edit the schedule. See [Managing the Printed Report Schedules](#).

To schedule the printing of a report:

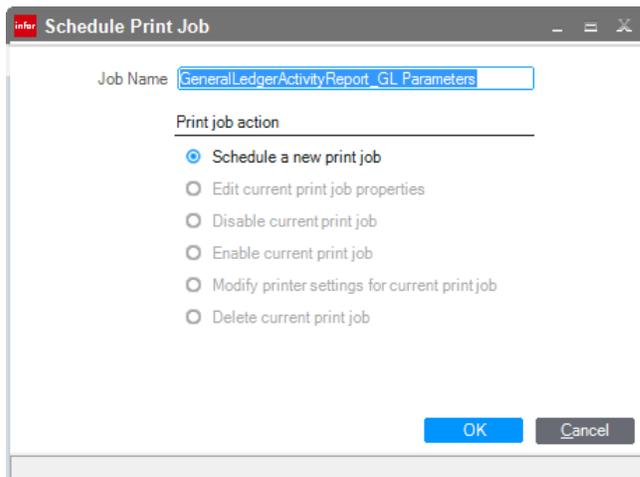
- 1 Navigate to the report that you want to schedule.
- 2 Perform one of these tasks:
 - If you are scheduling a standard Global Financials report or a Time and Attendance report, click the **Schedule for print** toolbar button.



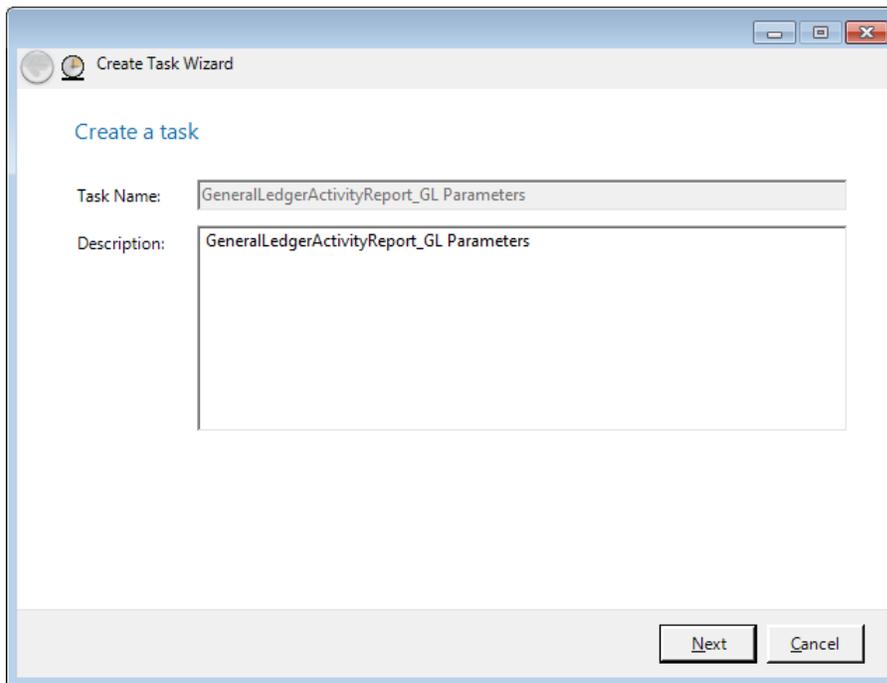
- 3 Click the **Name** drop-down button and select the Print Parameter Name file. If the print parameters that you are selecting are private print parameters, select the **Private settings** check box before you select a name from the drop-down list. If you are scheduling a financial report, the Report ID is displayed on the Print Parameters dialog.



- 4 Click **OK**.

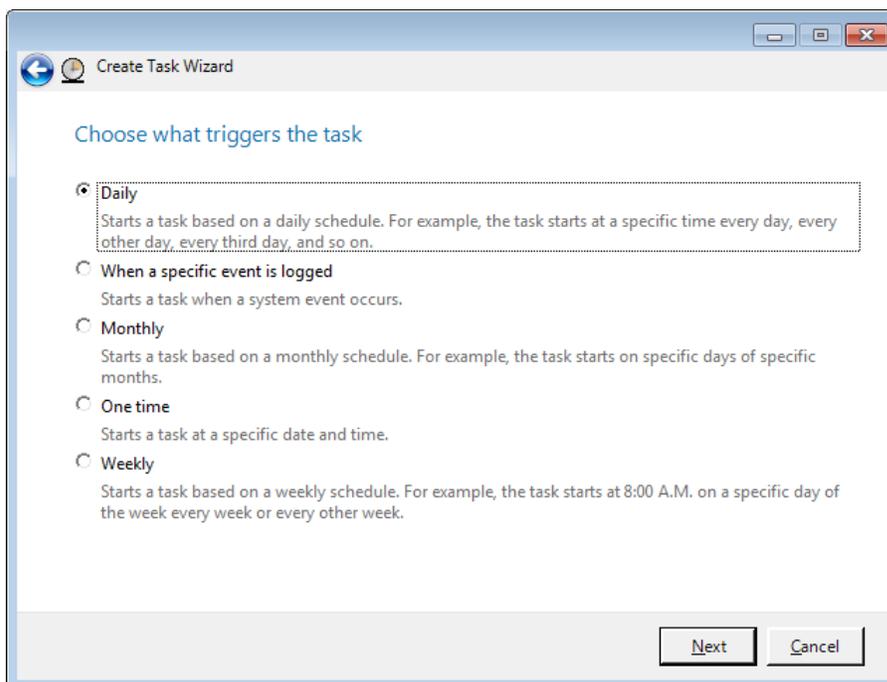


- 6 Click **OK**.
- 7 Optionally, edit the description of the print job in the Description field.



The screenshot shows a window titled "Create Task Wizard" with a light blue header. Below the header, the text "Create a task" is displayed in blue. There are two input fields: "Task Name:" and "Description:". Both fields contain the text "GeneralLedgerActivityReport_GL Parameters". At the bottom right of the window, there are two buttons: "Next" and "Cancel".

8 Click **Next**.



The screenshot shows a window titled "Create Task Wizard" with a light blue header. Below the header, the text "Choose what triggers the task" is displayed in blue. There are five radio button options, each with a description:

- Daily**
Starts a task based on a daily schedule. For example, the task starts at a specific time every day, every other day, every third day, and so on.
- When a specific event is logged**
Starts a task when a system event occurs.
- Monthly**
Starts a task based on a monthly schedule. For example, the task starts on specific days of specific months.
- One time**
Starts a task at a specific date and time.
- Weekly**
Starts a task based on a weekly schedule. For example, the task starts at 8:00 A.M. on a specific day of the week every week or every other week.

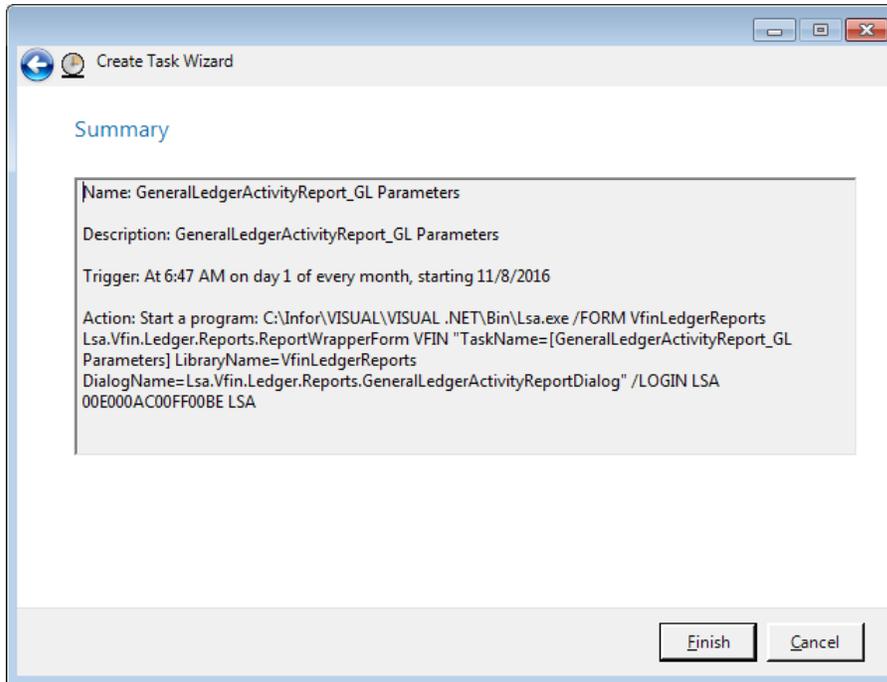
At the bottom right of the window, there are two buttons: "Next" and "Cancel".

9 Specify when to print the report.

- **Daily** - Click this option to print the report at a certain time each day.
- **When a specific event is logged** - Click this option to print the report when a specific system event is logged.

- **Monthly** - Click this option to print the report on a certain date and time each month.
- **One time** - Click this option to schedule the report to be printed one time on a specific date and time.
- **Weekly** - Click this option to print the report on a certain day and time each week.

10 Specify frequency details based on your previous selection.



12 Click **Finish**. The report is scheduled and will be printed at the scheduled time.

Your computer must be powered up and signed into the network. The computer can be in Sleep, Hibernate, Locked, or Active Mode. You do not have to be logged into Infor VISUAL .Net applications for the job to complete successfully.

Example: defining report parameters and scheduling the report

This example illustrates these concepts:

- Using logical dates in print parameters
- Saving print parameters
- Scheduling the report for printing

In this example, you define the parameters for a Receivables Aging Report to view aging information as of the previous day.

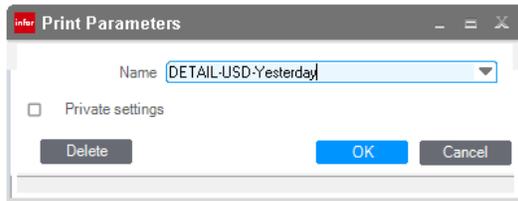
- 1 From the Financials area in the navigation bar, click **Standard Reports**.

- 3 Specify the parameters that you want to use.
- 4 In the Age As of field, click the Custom Date button. Select \$CD Current Date for the Date Type and "-1" for +/- days.

- 6 Specify the Print Parameter Name in the Name field.

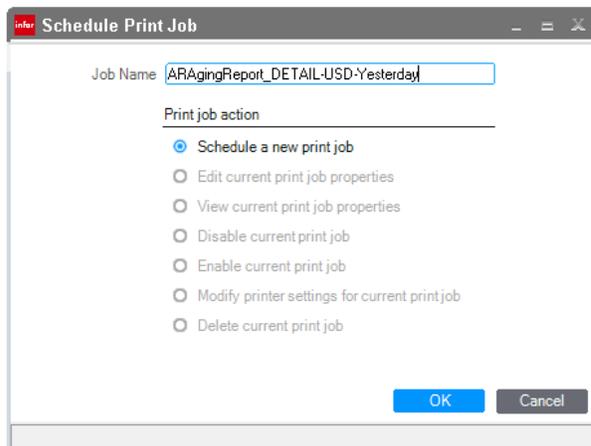
The Print Parameter Name is saved and associated with the report information that you specified.

- 9 Click the **Name** drop-down button and select the Print Parameter Name file.

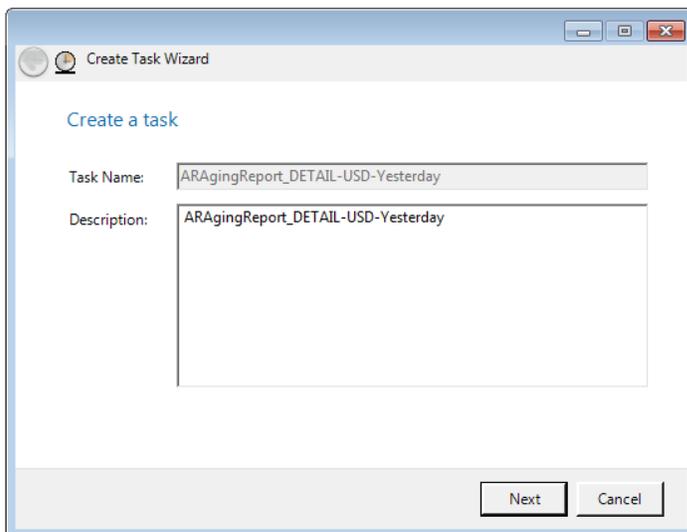


10 Click **OK**.

11 Click **Schedule a new print job**.

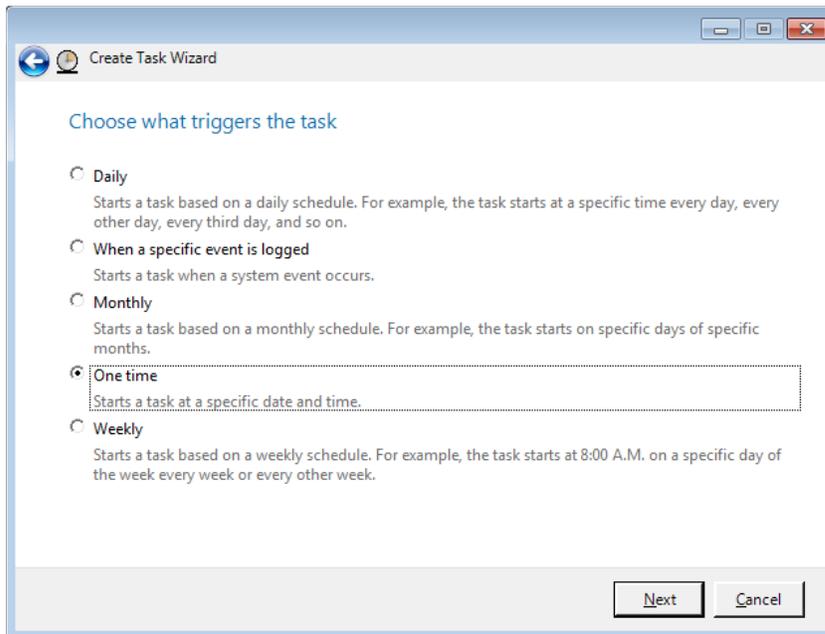


12 Optionally, edit the description of the print job in the Description field.

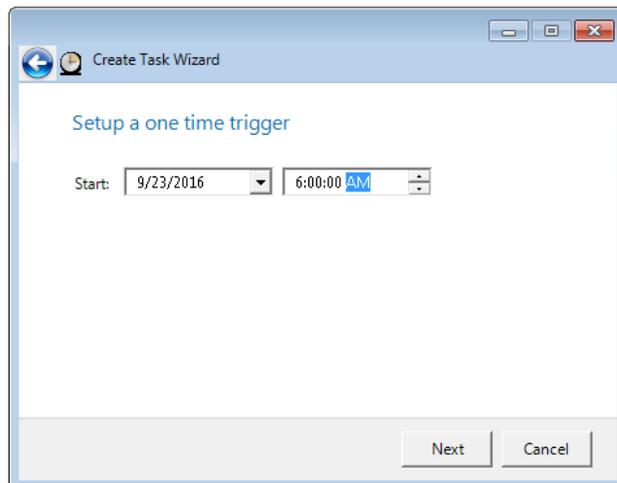


13 Click **Next** to create a task.

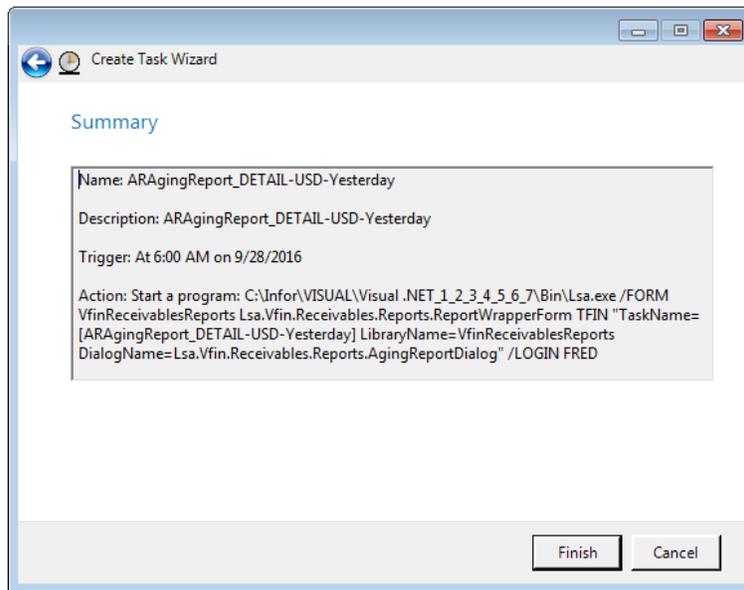
14 Click to select the frequency for the printing of the report. For purposes of the example, select **One time**.



- 15 Specify frequency details based on your previous selection. To continue the example, specify tomorrow's date and a time of 06:00 a.m.



- 16 Click **Next**. A summary of the task displays for a final review.



17 Click **Finish**. The report is scheduled and will be printed at the scheduled time.

Managing report schedules

To review or modify your print jobs, you can elect to use either the Microsoft Computer Management Task Scheduler or the public wrapper included with VISUAL .NET Applications.

You can use these tools to:

- View and edit a report print job including the individual triggers, actions, conditions, settings, and history of the report and its selected parameters.
- Disable or enable a report print job.
- Modify printer settings for a print job.
- Delete the report print job, which deletes all history of the job. If you need to reinstate the report print job after deletion, you will need to create a new print job.

Microsoft's Task Scheduler and the public wrapper included with VISUAL .NET Applications are not Infor products and are not supported by Infor.

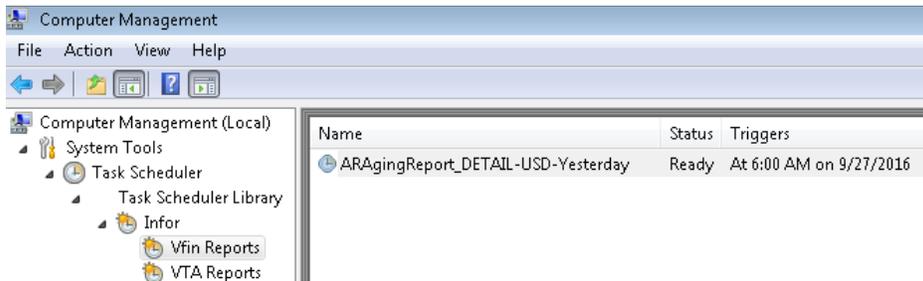
Note: The user must be signed on to the network for successful report generation.

Modifying schedules with Microsoft Task Scheduler

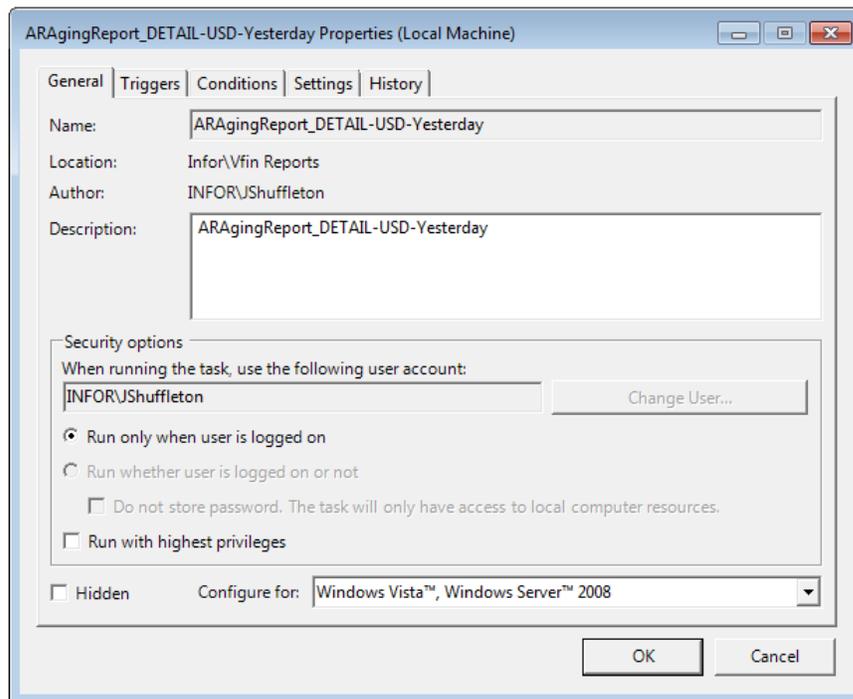
For detailed information about the Task Scheduler, see the Microsoft documentation.

To modify an existing print job schedule using the Computer Management Administrative Tool:

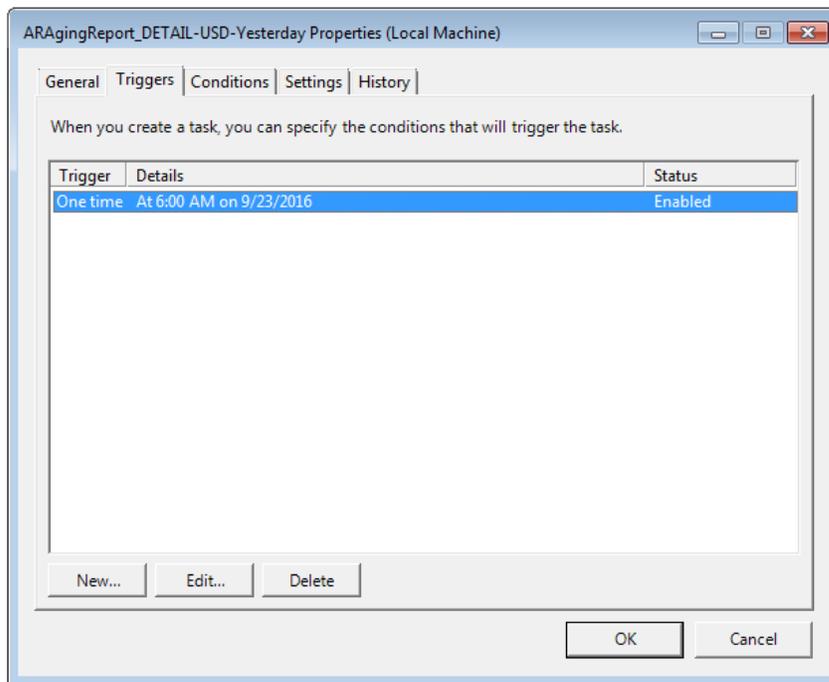
- 1 Click the Microsoft Start button and click **Control Panel**.
- 2 Click **Administrative Tools** and then click **Computer Management**.
- 3 From the navigation bar navigate to **System Tools > Task Scheduler > Task Scheduler Library > Infor** and then select either VFIN Reports or VTA Reports.
- 4 Review the report queue.



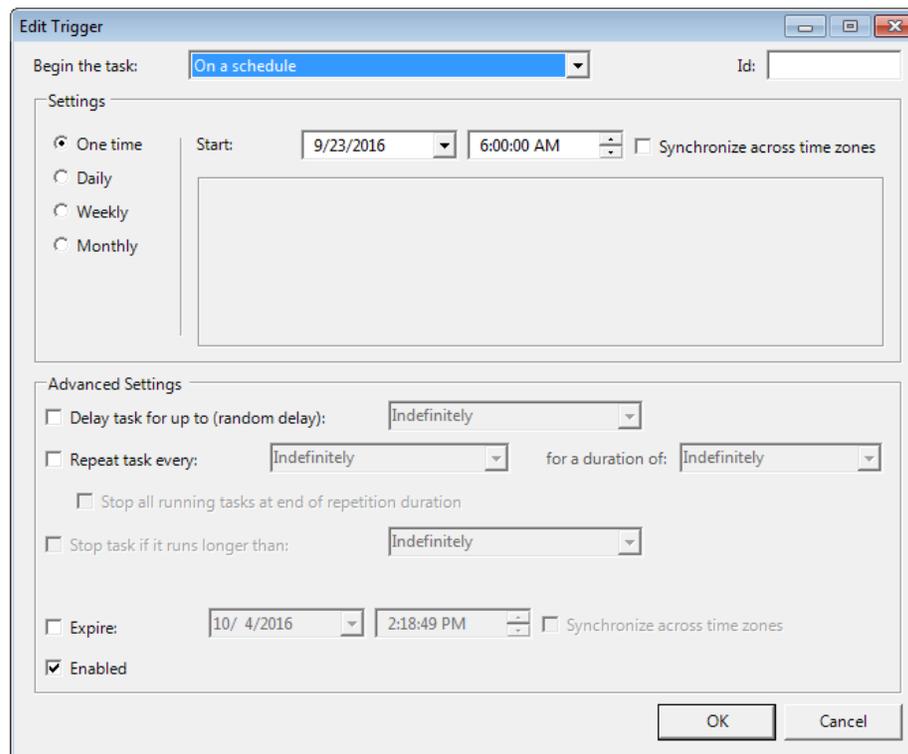
- 5 Double-click a scheduled report print job and review the properties. **Note:** The **Run only when user is logged in** must be selected in the **General** tab for proper scheduling.



- 6 Click the **Triggers** tab and review the trigger properties.



7 Click **Edit** to modify the scheduled triggers

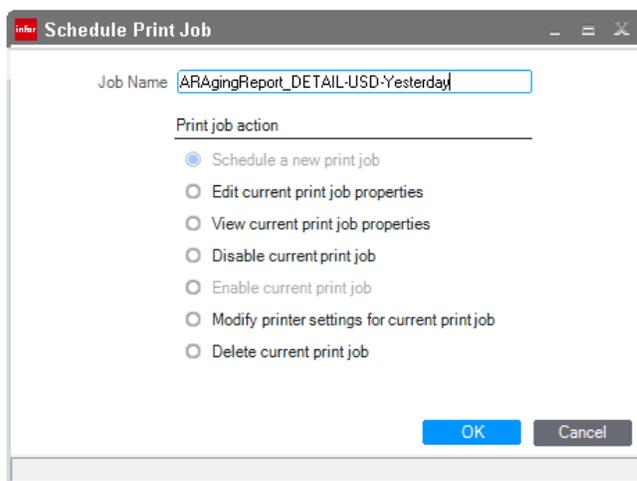


8 Click **OK** to save your modifications.

Modifying schedules with the public wrapper

To modify an existing print job schedule using the VISUAL .NET's public wrapper:

- 1 Navigate to the report whose schedule you want to modify.
- 2 To modify a standard report schedule, click the **Schedule for print** toolbar button. To modify a financial report schedule, click **Schedule**.
- 3 In the **Name** field, select the name of the parameters that you used to set up the print job.
- 4 Click **OK**.
- 5 Click one of these options:



- **Edit current print job properties** - After you click **OK**, the print job Properties dialog is opened. Refer to Microsoft Windows Task Scheduler documentation for information about the options in this dialog. **Note:** Do not clear the **Run only when user is logged on** check box. The print job will not function properly if you clear this check box.
- **Disable current print job** - Click this option to cancel the print job. The print job is not deleted.
- **Enable current print job** - Click this option to re-enable a cancelled print job.
- **Modify printer settings for current print job** - Click this option to change the print job's printer settings.
- **Delete current print job** - Click this option to permanently delete the print job.

- 6 Click **OK**.

Troubleshooting scheduled print jobs

If you have trouble scheduling reports, review the Microsoft Computer Management 's Task Scheduler history of the report print jobs and the VISUAL for .NET error logs. When the scheduled

process is launched, the report generation is recorded as successful in the Microsoft Computer Management history.

The VISUAL .NET error logs are located in the user's \AppData\Local\Temp directory in either:

- VFIN Reports.ErrorLog for Global Financials
- VTA Reports.ErrorLog for Time and Attendance