How To Guide
SAP Business One
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PUBLIC

How to Schedule Report Execution and Mailing

Applicable Releases: SAP Business One 8.81 PL10 and higher, SAP Business One 8.82

Typographic Conventions

Type Style	Description
Example	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Textual cross-references to other documents.
Example	Emphasized words or expressions.
`EXAMPLE`	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
`Example`	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
`Example`	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
`<Example>`	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
`EXAMPLE`	Keys on the keyboard, for example, `F2` or `ENTER`.

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Document History

Version	Date	Change
1.0	<YYYY-MM-DD>	<Change Description>

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Introduction

This how-to guide introduces the report scheduling function of SAP Business One. You schedule report executions by running queries and specify recipients of the generated reports. The recipient either obtains the reports via email or views them directly in SAP Business One as a user.

Formats of generated reports include PDF, HTML, and XML. Via email, these reports are sent as attachments; reports in HTML format can also be sent as the email message body.

The following situations are the main triggers for setting up report execution schedules:

- You cannot or do not want to wait a long time for a report to be executed.
- You need to obtain data of certain reports on a regular basis.
- You have no immediate access to SAP Business One, either frequently or for a long time.
- You want to compare the different results of one report executed at regular intervals.

Prerequisites

- You have full authorization for the report scheduling functionality. For more information about authorizations, see the SAP Business One online help.
- You have configured *SBO Mailer*. For more information, see *Configuring SBO Mailer for Report Scheduling and Mailing*

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Scheduling Report Execution

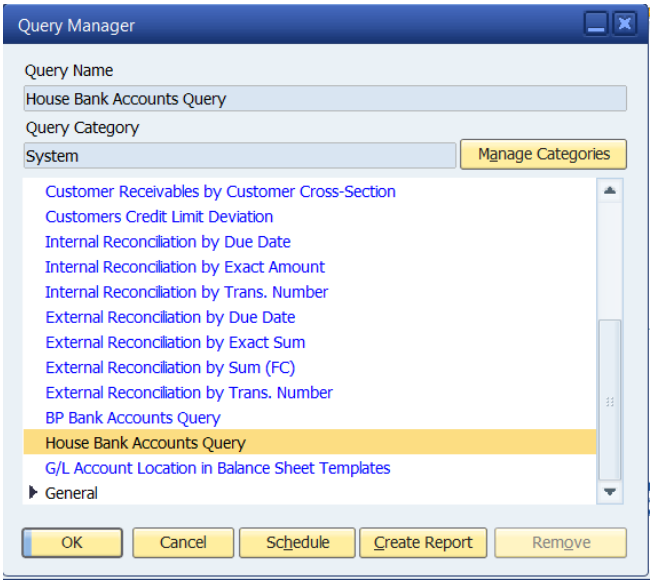
> **Note**
>
> You can schedule executions of reports only by running queries without parameters.

Prerequisites

- You have assigned at least one layout to the query you want to run. For more information, see the SAP Business One online help.
- You have configured *SBO Mailer*.

Procedure

1. From the SAP Business One menu bar, choose *Tools* →*Queries* → *Query Manager*.
2. In the *Query Manager* window, select a query and choose the *Schedule* button



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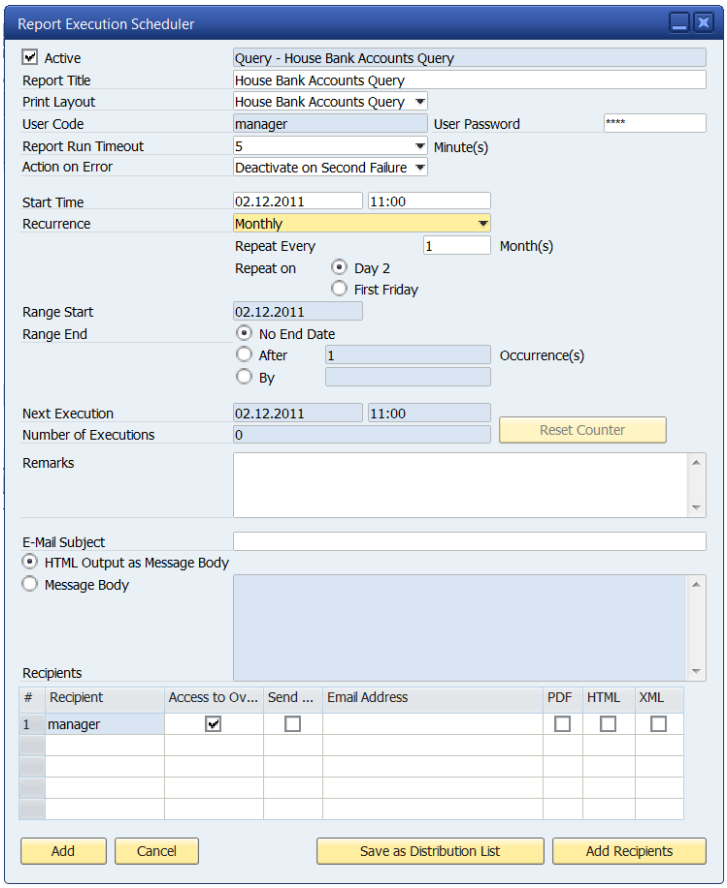
3. In the *Report Execution Scheduler* window, in the general area, specify the required details.



4. In the *Recipients* area, specify information about recipients of the generated reports.

   To add recipients, choose the *Add Recipients* button.

   In the *Add Recipients* window, select required SAP Business One users and distribution lists and choose the *OK* button.

   To save specified recipients as members of a new distribution list, choose the *Save as Distribution List* button.

5. To enable viewing the report execution results in SAP Business One, select the *Access to Overview* checkbox.

   > **Note**
   >
   > This function is available only for SAP Business One users

6. To enable sending emails with generated reports to a recipient, select the *Email* checkbox and specify an email address.
7. Specify in which formats you want the generated reports to be sent via email as attachments.
8. Choose the *Add* button.

   The scheduled report will be executed and sent to the specified recipients via email at specified times.

   > **Note**
   >
   > To modify a specific report execution schedule, you can access the *Report Execution Scheduler* window to find it or access it directly from the *Scheduled Report Overview* window. For more information, see Viewing Scheduled Reports in SAP Business One

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Report Execution Scheduler Window

To open the Report *Execution Scheduler* window, from the SAP Business One menu bar, choose *Tools* → *Queries* → *Query Manager*.

General Area

Field	Description
Active checkbox	Select this checkbox to specify whether the report is to be executed as scheduled.
Query type and name	8.81: Displays the query name: `Query - <Query Name>` Not editable 8.82: Displays the query category: `System Query or User Query` Not editable
Report Title	Name of the scheduled report. Displays by default the name of the query to run to generate the report
Print Layout dropdown list	List of print layouts for generated reports in PDF format
User Code	Displays the code of the user who makes this particular report execution schedule Not editable
User Password	Password of the current user who is making the schedule
Report Execution Timeout dropdown list	Time limit for an unsuccessful report execution
Action on Error dropdown list	Action to be taken if there is any error during report execution. Available options are: • *Deactivate Immediately* • *Continue* • *Deactivate On Second Failure* • *Deactivate On Third Failure* • *Deactivate On Fourth Failure* **Note** The second option (*Continue*) deactivates the schedule.

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Field	Description
Start Time	Date and time for the report execution or the first recurring report execution
Recurrence dropdown list	The basis on which the report execution should recur. Available options are: • *None* • *Daily* • *Weekly* • *Monthly* • *Annually*
Repeat Every	The frequency at which the report execution should recur. Available for daily, weekly, monthly, and annual recurrences
Repeat on	Days on which the report execution recurs. Available for weekly, monthly, and annual recurrences
Range Start	Date of the *Start Time* field. Available only for recurring executions and not editable
Range End	Ending date or condition of the report execution. Available only for recurring executions
Next Execution	Due time of the next report execution. Available only for recurring executions
Number of Executions	Number of completed executions of the scheduled report, including both successful and failed executions. Not editable.
Reset Counter button	Resets the value of the *Number of Executions* field to 0. Available only if the value of the *Number of Executions* field is greater than zero.
Remarks	Notes to the scheduled report; shown in the *Scheduled Report Overview* window. Optional
Email Subject	Email subject to be displayed after the prefix defined in the *SBO Mailer* settings. For more information, see. Configuring SBO Mailer for Report Scheduling and Mailing.
HTML Output as Message Body radio button	Select this radio button to use the HTML format of the generated report as the email message body.
Message Body radio button	Select this radio button to enter words as the email message body. You can use any HTML tags for formatting the text, except for `<HTML>` and `<BODY>`.

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Recipients Table

This table lists all recipients of the generated reports and other relevant information.

Field	Description
Recipient	Name of the recipient
Access to Overview checkbox	Select this checkbox to grant access to viewing the execution outputs of the scheduled report in SAP Business One. Available only for SAP Business One users
Send Email checkbox	Select this checkbox to enable sending emails with generated reports to the recipient
Email Address	Email address of the recipient
PDF, HTML, XML checkboxes	Formats of the generated reports to be sent via email as attachments

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Viewing Scheduled Reports in SAP Business One

In the *Scheduled Report Overview* window, you can view the details of scheduled report executions and the generated reports. The scheduled reports include reports that have not yet been executed or whose schedules have been deactivated.

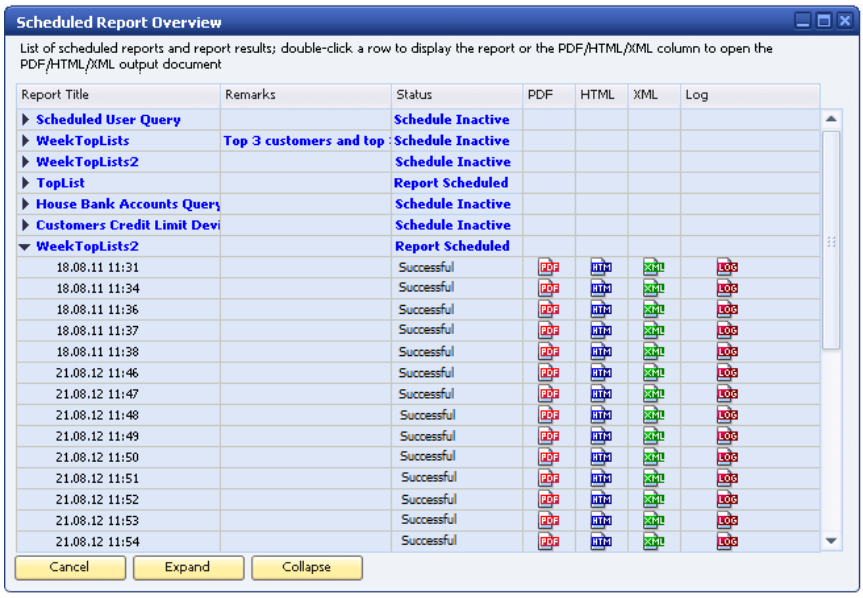
Prerequisite

In the *Report Execution Scheduler* window, you have been granted access to the *Scheduled Report Overview* window.

Procedure

1. From the SAP Business One menu bar, choose *Tools* → *Scheduled Report Overview*.
2. In the *Scheduled Report Overview* window, to view the details of executions of a scheduled report, click the arrow next to the report title.

   To view the details of executions of all scheduled reports, choose the *Expand* button.



3. To view a generated report of one execution, double-click the row.

   To view a particular format of a generated report, click the corresponding icon.

   To view the execution schedule of a report, double-click the scheduled report row (first level). If you are the creator of the report schedule, in the *Report Execution Scheduler* window that opens, you can modify and update the scheduling settings.

   If you are the creator of a report schedule, to remove the report execution details and results, do one of the following:

   - To remove all execution details and generated reports, right-click the scheduled report row (first level) and choose *Remove*.
   - To remove details and generated reports of one execution, right-click the corresponding row (second level) and choose *Remove*.

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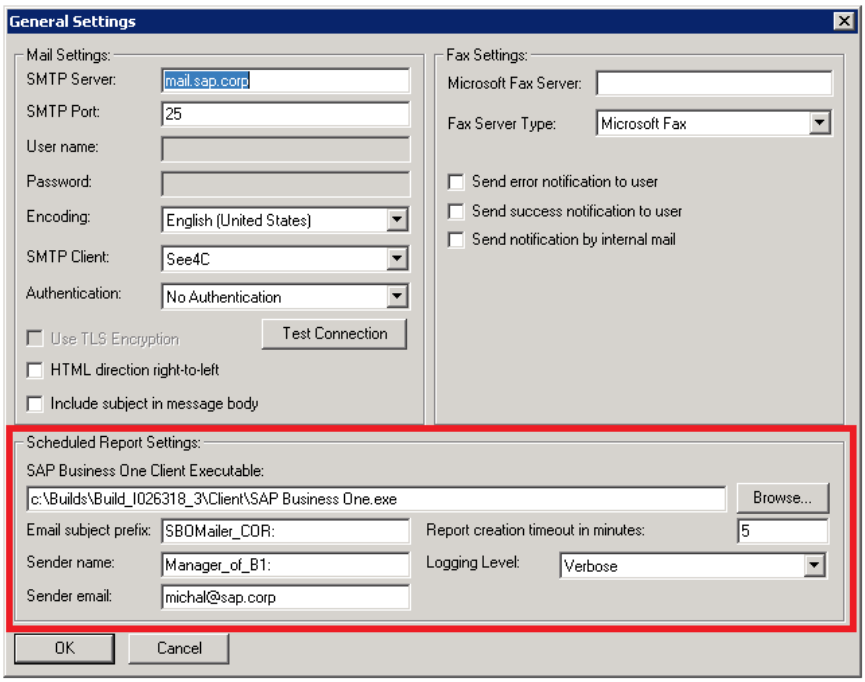
Configuring SBO Mailer for Report Scheduling and Mailing

To schedule report execution and send generated reports via email, you must first define the mail settings and scheduled report settings. For more information, see the *SAP Business One Administrator's Guide*.

Procedure

1. In the Windows system tray, double-click (*SAP Business One Service Manager*).

   Alternatively, choose *Start* → *Programs* → *SAP Business One* → *Server Tools* → *Service Manager*.
2. In the *SAP Business One Service Manager* window, in the Service dropdown list, select *SBO Mailer* and choose the *Settings* button.
3. In the *General Settings* window, define the mail settings according to your company settings.



4. In the *Scheduled Report Settings* area, specify the file path of the SAP Business One client.
5. Optionally, enter an email subject prefix which precedes the subject of each scheduled email with the generated report.
6. Enter a name as the email sender.
7. Enter the sender email address.
8. Specify the timeout period for unsuccessful report execution.
9. Specify the logging level.
10. Choose the *OK* button.
11. Connect to a database for which you want to enable the mailing services. For more information, see *SAP Business One Administrator's Guide,* available from within SAP Business One.

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12. In the *SAP Business One Service Manager* window, in the *Service* dropdown list, select *SBO Mailer*, choose (*Play*), and select the checkbox *Start when operating system starts*.

Establishing User Credentials for SAP Business One Messaging Service on Microsoft Windows

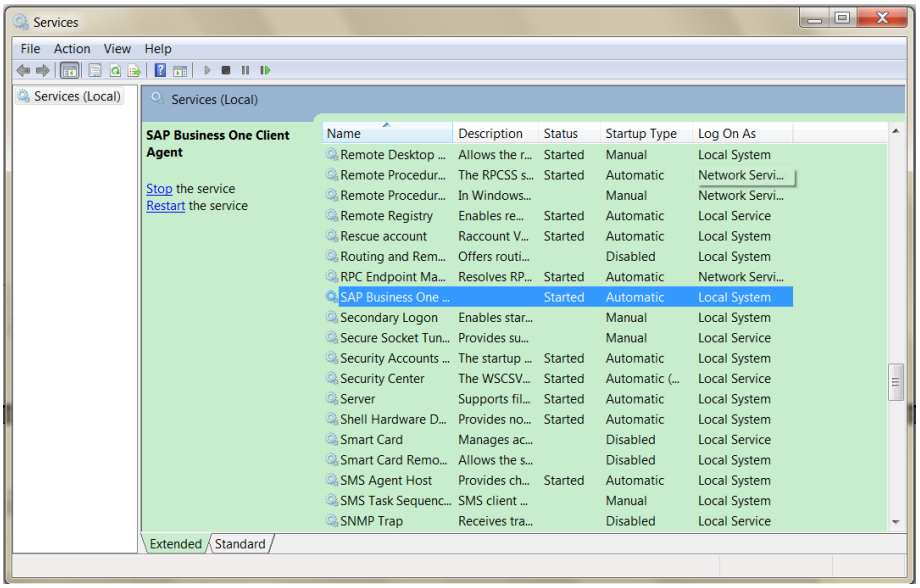
When the SBO Mailer service is first started, the default Microsoft credentials for the SAP Business One messaging service are local system credentials. To fully deliver this service, you need to change the credentials to user credentials.

The authenticated user should meet the following two requirements:

- Has a user account in SAP Business One with full authorization for the report scheduling function
- Has a physical printer (not virtual) available

Procedure

1. In the taskbar of Microsoft Windows, choose the *Start* button or (*Start*).
2. In the start menu, choose *Run,* enter `services.msc`, and choose *OK.*
3. In the *Services* window, configure *SAP Business One Messaging Service* as required.



For more information about configuring services, refer to the Microsoft online help.

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Authorizations

For information about the authorizations required for report scheduling, see the online help as well as the document *How to Define Authorizations*, which you can download from the documentation area of SAP Business One Customer Portal at http://service.sap.com/smb/sbocustomer/documentation.

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