



Automate with Orchestrator!

Executing and Emailing Reports Automatically

By Cindy Grim

E1 Editor's Note: We love it when we can answer clients' questions in our articles, especially when they are written by a subject matter expert like Cindy! This is a very real and desirable use case for Orchestrator, and after this read you will not only be able to automate the execution and emailing of a report, but you will also learn the steps to trigger the orchestration using a Form Extension on an E1 application.

Introduction

A common question I often receive revolves around the ability to use Orchestrator to run a JD Edwards report then send the output to someone via email. The answer to that is Yes, Orchestrator gives you the ability to run and email report output. In this article, I will walk you through the steps necessary to run a report using Orchestrator, retrieve the report output then email the output to the appropriate party. In addition, I will walk you through how to add a button on a form that will run the Orchestration. We will be using the Print Invoices report (R42565) to print and send an order acknowledgement; however, these concepts apply to any other reports you wish to run. I am using application version 9.2 and tools version 9.2.4.3 in my examples; however, the examples are relevant to other tools releases as well.

Overview

First, we will create an Orchestrator Report Request object to run the R42565 report. Next, we will create an Orchestrator Message Request to email the report to the email address associated with an Address Book number. Once the Report and Message Requests are created, we will add them to an orchestration. After testing the orchestration, we will use a Form Extension to add a button to a Form (P42101). The new button will be configured to launch the orchestration just created, passing in the order and customer information for the selected row.

How to Run a Report Using Orchestrator

JD Edwards Orchestrator provides several types of Service Requests, each containing instructions used by an orchestration. The Report Request type of Service Request provides the ability to invoke an EnterpriseOne (E1) report.

Report Request

A Report Request is a type of Service Request available for use in orchestrations. A Report Request provides the ability to run an EnterpriseOne (E1) report. In addition to running a report, Report Requests provides the same functionality you find when running a report from within E1. You can define data selection, data sequencing, processing option values and even report interconnect values. In addition, you can define the Output Options and the queue you want the report to be run in.

Report Requests are accessed from the Orchestrator Studio Home page as displayed in Figure 1.



Figure 1: Orchestrator Home Page – Report Request option outlined

Upon selecting Reports from the Orchestrator Home page, the Reports side panel is displayed. From the side panel, you can search for and find an existing Report Request or create a new Report Request. We will create a new Report Request by clicking the New button as illustrated in Figure 2.

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