



Automated Distribution UBE

By Mary Woltman

Editor's Note: *So, you've got lots of reports to run, and everyone only wants to see what they need to see---not a bit more. Does this mean you have to spend the entire day recreating the report for each individual, then embark on the tedious task of emailing each one individually? Mary Woltman feels your pain—she dealt with a similar situation and found a UBE solution that addresses this need, to run specific reports for specific individuals automatically, without having someone stand guard. We're sure you'll appreciate the flexibility of this solution, too!*

Reports—they drive our business. Sometimes, they drive us nuts. Consider this situation: The client wishes to have a lot of very specific reports run for various management levels automatically every month and available for them to review without needing to resort to email or impacting their network traffic in any way. Sounds like someone is dreaming . . . or maybe it's not as far fetched of a request as we think.

Fortunately, we have a custom UBE solution to address this request: Automated Distribution R5598091. First, it's used to run various reports via the scheduler in an automated fashion based on processing options for each report, version, and user combination stored in the custom table F5598091. Second, it's used to distribute the report via the EnterpriseOne® submitted jobs function by finding the last report run and updating F986110 with the appropriate User ID.

Let's break this down even farther, using a real-life scenario:

The Situation

The client is a multifamily real estate investment trust organization. This solution pertains to the client's development and management of apartment home communities. In our example, the client's various VPs, Regional Managers, or District Managers needed to have their GL Variance Report (R5510212), 12 Month Trend Report (R55103121B), and GL Detail Report (R5509001) run at the end of each month for their specific real estate management properties. These same managers also need to be able to run any or all of the three reports on their own when they need them. To keep this article easy to follow, we'll only run one of these reports. The method is the same for any number of reports you decide to handle in this manner.

The Solution Concept

We created a table that holds the report to be run, the user's name, and processing options for the appropriate user name. Then, we used the scheduled automatic report (R5598091) to run these desired reports. The reports are distributed based on the User ID value in the custom table. When the managers run any or all of the three the reports, the processing options are specified at the time the report is submitted to be run. But when the reports needed to be run on a monthly, non-attended, automated manner, we needed a method of storing and then providing the processing options values to the individual reports. Hence the table.

Let's Expand

This solution was hand crafted to generate and distribute three reports on a monthly basis for each rental community the client owned or operated; the reports would then go to the responsible property manager. This solution can serve other needs as well. For example, it could possibly be used to run and distribute open purchase order follow-up reports or any other report that needs to be run for a large number of users, each needing their own specific report with specific information. Or, stated another way, a report that needs to be run automatically, in an unattended manner, several times, with different processing options each time it runs. This solution could also be used for reports that don't have varying processing options, but are still required to be run several times for different people and subsequently distributed.



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Solution Steps

Here are the steps we took to set up this process:

1. **Identify the reports**
2. **Identify and plan for the reports' processing options**
3. **Create a table**
4. **Create an application**
5. **Create a UDC**
6. **Add data structures in each report to be run**
7. **Modify the reports**
8. **Create the UBE**

Our goal is to be able to run specific reports in an automated, unattended manner and to distribute these reports to appropriate user via the EnterpriseOne submitted jobs report list.

Objects Needed

The following is the list of objects we used to create this solution:

- Data Structures
- Table
- Business View
- Processing Option Template
- Report/UBE
- Application
- UDC (55/FP)

STEP 1: Identify the Reports

Identify those reports that are to be run and distributed automatically in an unattended manner. Ideally these will be reports that run every month and most likely for a large number of different people with their own relative information. In our example, the client's property managers and district managers need to see the various expenses each month or as requested for the real estate properties/communities that they manage. In this case, we've identified three monthly reports that need to be run for about 200 managers managing about 1,500 properties. The three reports we identified are: GL Variance Report (R5510212), 12 Month Trend Report (R55103121B), and GL Detail Report (R5509001). However, in this article we'll only be talking about how to do one of them: R5510212.

STEP 2: Identify and Plan for the Reports' Processing Options

This step is optional and applies only to reports in which the processing options need to be changed when run. Our unattended report example does have processing options, so let's look at them and see what fields we will need to plan to include in our table. If your report has no processing options, you can skip this step. The report will still need to be listed in the table, but without any associated processing option type fields.

The GL Variance Report R5510212 (Figure 1) has six processing options for which we must plan. We'll handle four of them as fields within table F5598091 Property Report Automation Configuration:

- Property Number (MCU)
- Related Business Unit (RP08)
- VP Center (RP03)
- District Manager Center (RP09)

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