Report Runner

Orchid Systems — Sage Tech Partner

"Streamline the setup, execution, and distribution of reports in Sage 300"

MY BOSS NOW GETS HIS DAILY CASHFLOW REPORT BY EMAIL LIKE CLOCKWORK.

Why use Report Runner?

Report Runner increases productivity by streamlining the execution and distribution of your reports, and improves data security by controlling access to them.

- Pre-configure report parameters to simplify re-running
- Organize reports into custom menus, so you can easily locate and launch them
- Automatically distribute reports by email to nominated recipients
- Set up role-based rules to control who has access to which reports
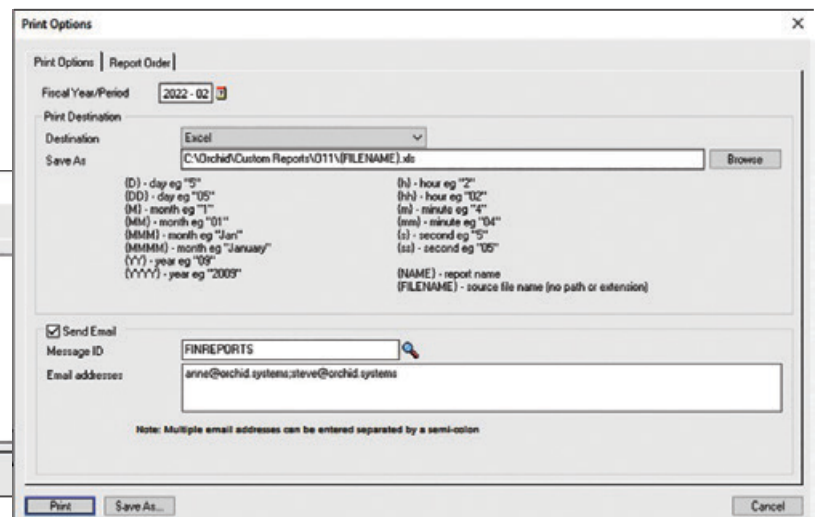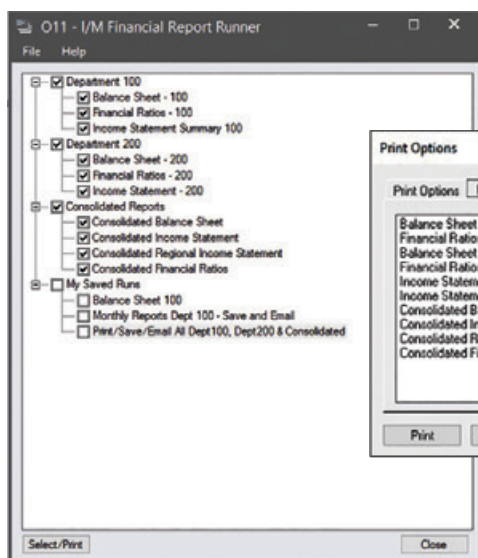- Works with both Crystal Reports and Sage 300 Financial Reports

💡 Combine Report Runner with **Process Scheduler** to automate the execution and distribution of recurring reports, based on defined schedules

Organizing Reports

Reports from all your Sage 300 modules can be centrally managed and launched from within Report Runner, with no need to jump from module to module.

- Group your reports logically by function or process
- Export/import report setups from company to company, and site to site
- Crystal Reports and Sage 300 Financial Reports are stored and organized in separate central repositories

Report Runner setup for Sage 300 Financial Reports

Running & Distributing Reports

Reports can be launched, individually or as groups, from Report Runner screens.

- Default parameters can be set, saved, and hidden to simplify re-running
- Assign the familiar Sage 300 controls (e.g. finders, date & period pickers, checkboxes) to report parameters for easy data entry
- Print, save, schedule, and email reports
- Configure email templates for use when distributing scheduled reports
- Store your default printer in Options

Access Control

Create role-specific report menus, with pre-defined and tailored report parameters. You can then assign role-based report access to individual users.

I love the control and flexibility Report Runner gives my customers. My only regret is that I hadn't taken the time to have a play with it sooner!

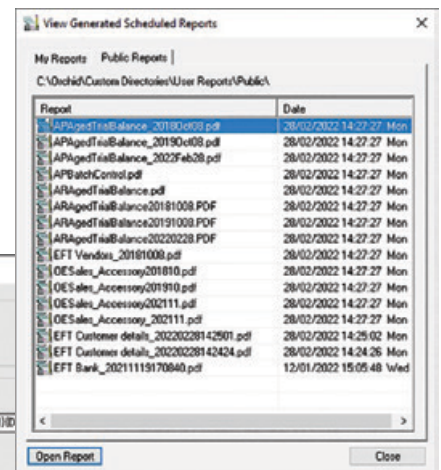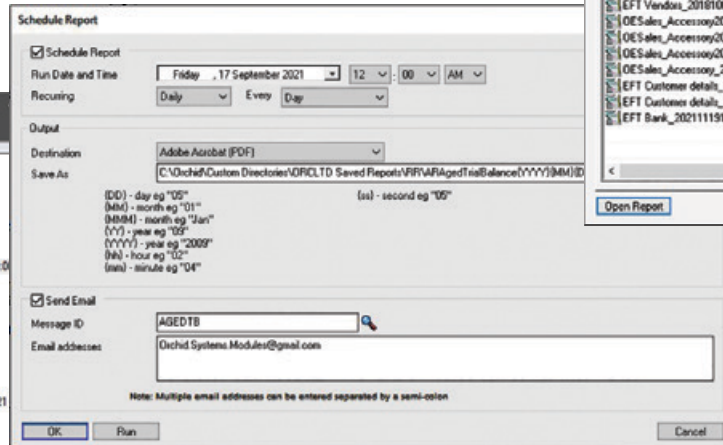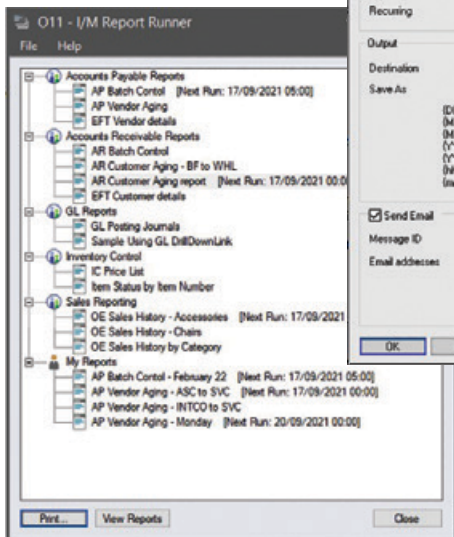PAUL FIELD, NET@WORK, ONTARIO, CANADA

Additional Features for Crystal Report Runner

In addition to features shared with Financial Report Runner:

- Crystal Reports can be exported to additional output types (PDF, Excel, RTF)
- Crystal Report Runner schedules can print reports, store the required printer on the schedule record, and have a specific path and file name
- Individual Crystal Reports can be assigned to Security Groups (26 groups available)

Consider also using **Data Views** to simplify report writing, and speed up execution, by turning Optional Fields into columns.

Report Runner setup and output for Crystal Reports

More information

Further information about Report Runner, including videos, is available from Orchid's Website: www.orchid.systems/products.

Minimum Requirements

Report Runner requires Sage 300. Features relate to the latest supported version. Orchid Process Scheduler is required to automate the scheduled execution of reports. For reports that populate temporary data structures (e.g. AR Statements), you also require Orchid Extender and custom scripts.

Contact your Sage Software Solution Provider

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