

Olympic Report Integration Setup Tools

The Olympic Report Integration Report Setup Tools are designed to permit organizations to manage the operations of custom reports.

Report Integration Setup has 3 primary operation control functions:

1. Report Manager – Controls access rights to the Windows from where reports will be launched
2. Report Button Setup – Controls access rights to the Project Data related to a given report.

This allows a Manager to only have access to the data related only to their assigned Projects.

3. Report Assignment – Controls access

Olympic Report Integration Setup

1. Report Manager Window

1.1 Import Reports

1.2 Export Reports

1.3 Delete Report

1.4 Report Properties

1.5 Run Reports

1.6 Create New Reports

1.7 Report Design (Modify)

2. Report Button Setup

3. Report Assignment

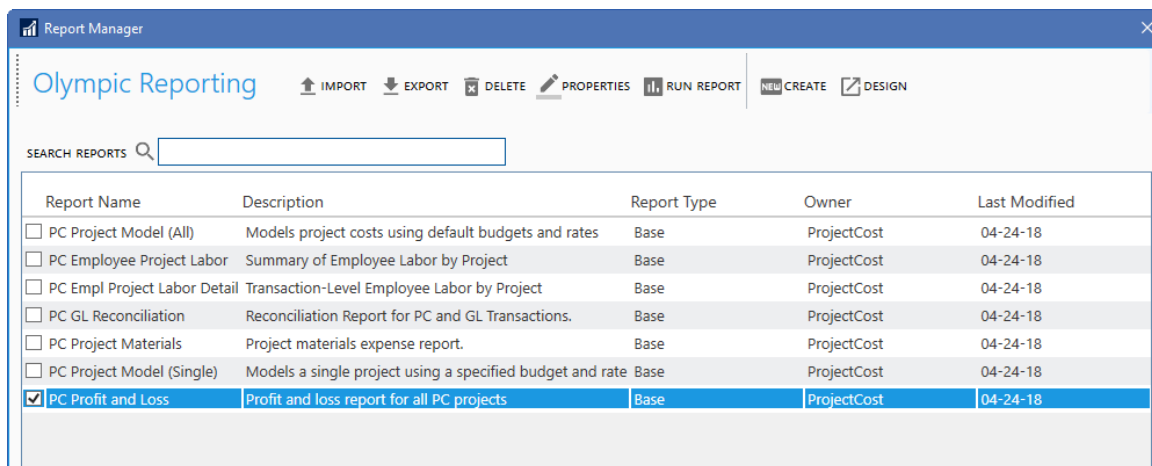
1. REPORT MANAGER WINDOW

[Reports >> Project Cost >> Report Manager](#)

Overview

The **GP User Setup Window** was designed to permit users to create user records in Microsoft Dynamics GP.

Please reference Microsoft Dynamics User Guide




1.1 Import Reports

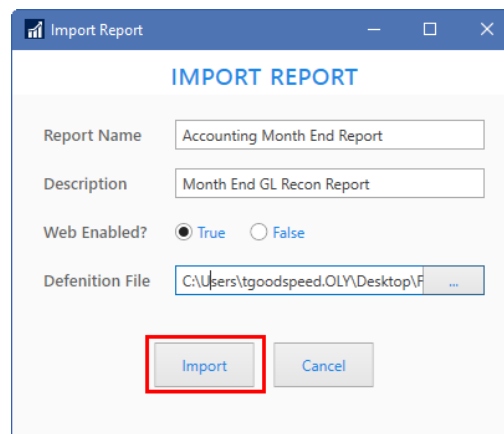
[Access from Report Manager Window >> Import](#)  [Button](#)

To Import a report, start from the Report Manager Window
Click the Import button,

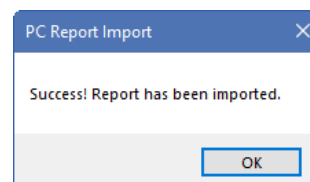
Type the Report Name as you want it to be listed in Report Manager.
Type the Description of the report as you want it to appear in Report Manager

Click the ellipse  button to locate the .repx file

Click Import Yes to confirm that you want to Import this report.

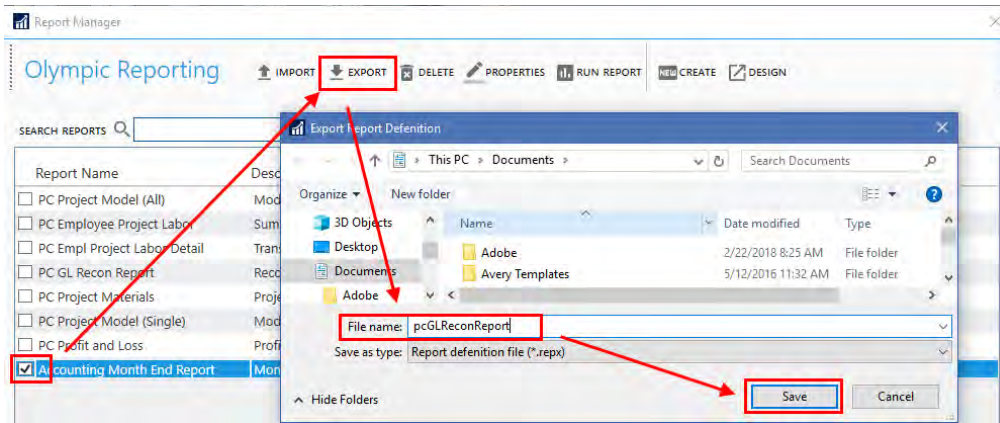


You should receive a message indicating the import was successful.



1.2 Export Reports

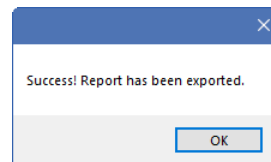
Access from Report Manager Window >> Export  Button



To Export a report, start from the Report Manager Window

Select the desired report,
Click the Export button,

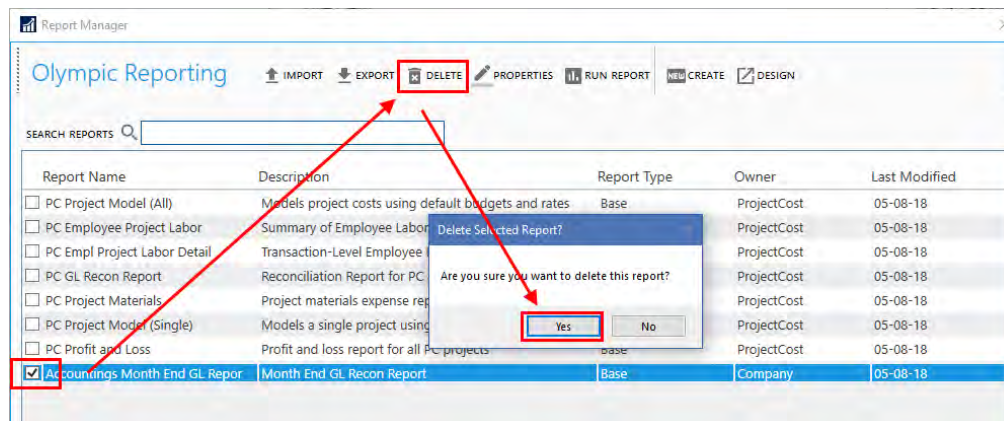
Find the location to store the Exported File
Give the File a Name
Click Save



You should receive a message indicating the export was successful.

1.3 Delete Reports

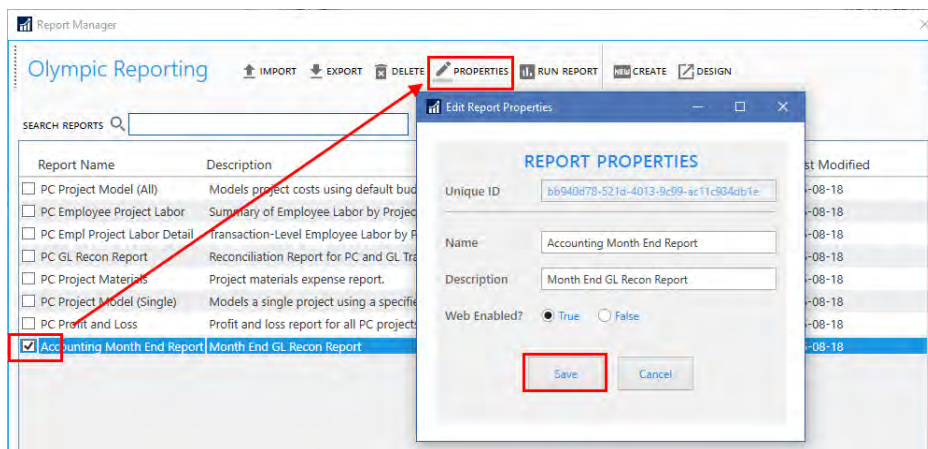
Access from Report Manager Window >> Delete  Button




To delete a report, start from the Report Manager Window
Select the desired report,
Click the Delete button,
Click Yes to confirm that you want to delete this report.

1.4 Report Properties

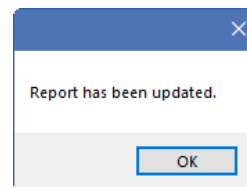
Access from Report Manager Window >> Properties  Button



To Edit the Report Properties, start from the Report Manager Window
Select the desired report,

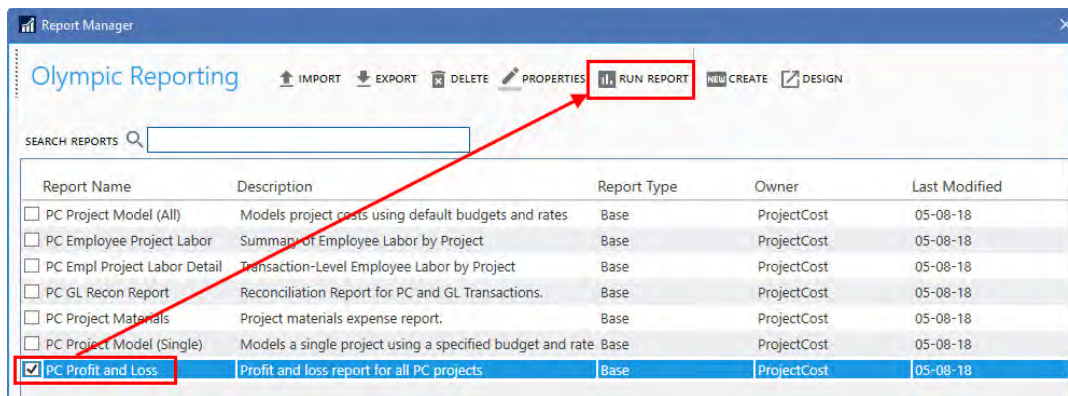
Click the Properties  button,
Edit the Properties as needed
Click Save

You should receive a message indicating the update was successful.



1.5 Run Reports

Access from Report Manager Window >> Run Report  Button



To Run a report, start from the Report Manager Window
Select the desired report,

Click the Run Report  button,

We have additional documentation and tutorials related to this topic on the following links.

[Olympic Reporting End-User Documentation](#)

[Report Viewer](#)

1.6 Create New Reports

1.7 Report Design (Modify)

[Access from Report Manager Window >> New Create](#)  [Button or Design](#)  [Button](#)

The Report Designer tool allows users to either create new reports or to modify existing reports.

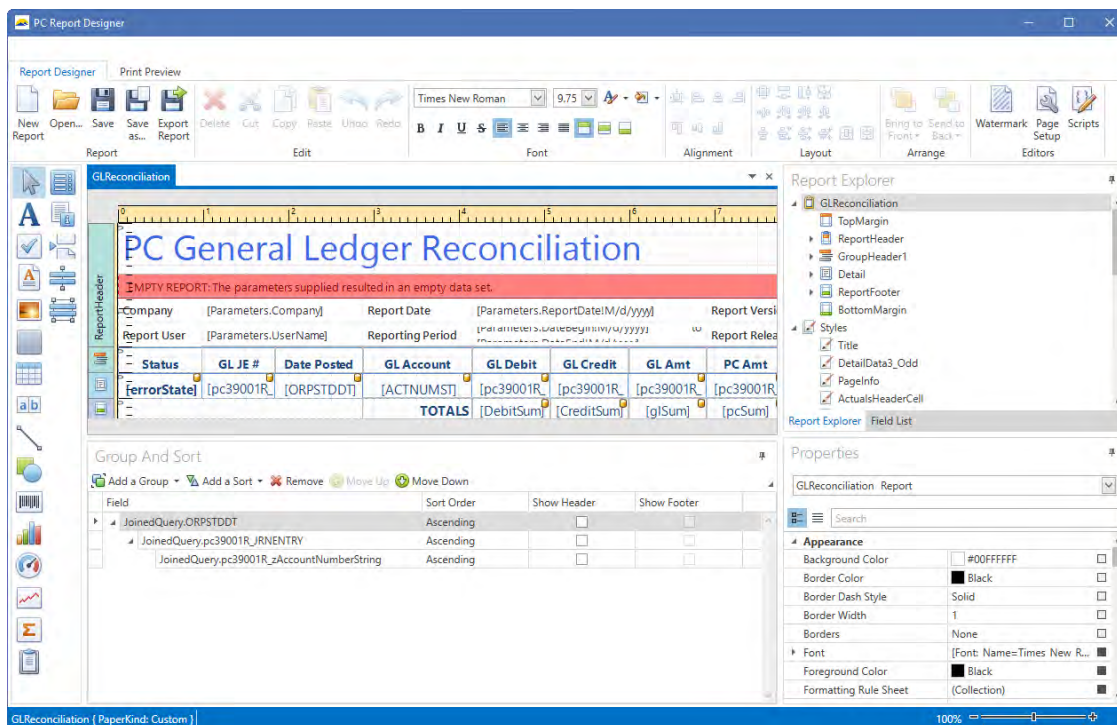
To modify an existing report

Select the report from the Report Manager window

Click the Design  button.

To create a new report

Click the New Create  button.



We have additional documentation and tutorials related to this topic on the following links.

[Olympic Reporting End-User Documentation](#)

[Report Designer](#)

2. REPORT BUTTON SETUP WINDOW

Reports >> Project Cost >> Report Button

PC Report Button Setup

File Edit Tools Browse Help abarr Fabrikam, Inc. 5/10/2018

Save Cancel Clear Delete View Existing

Dictionary ID Microsoft Dynamics GP

Form Name GL_Account_Maintenance

Report Name PC GL Recon Report

Report Description Reconciliation Report for PC and GL Transactions.

Report Type Base

Menu Name Project Account Reconciliation

Security Option ☒ All Users ☐ Filter by Assignments

Overview

The **Report Button Setup Window** was designed to permit users to setup reports to be run from the “Additional” menu on any standard GP window.

Window Operational Fields:

Dictionary ID: Select a Dictionary ID

The ellipse button will look up DictionaryID's from the Launch File

Dictionary Lookup

File Edit Tools Help Fabrikam, Inc. 5/10/2018 >>

Launch File: C:\Program Files (x86)\Microsoft Dynamics\GP21

Product ID	Product Name
0	Microsoft Dynamics GP
232	ProjectCost
949	FieldService
1,042	Interfund Management
1,493	SmartList
1,632	Cash Flow Management

The Looking Glass button will look up existing reports that have been assigned

PC Report Button Lookup

File Edit Tools Help abarr Fabrikam, Inc. 5/10/2018


Restrict to Reports with Assignments ☐ Find by Report Name

Report Name	Form Name	Security Option
Name	Description	Type
PC GL Recon Report	Account_Lookup	GP Security
PC GL Recon Report	IV_Transaction_Entry	GP Security

Select Cancel

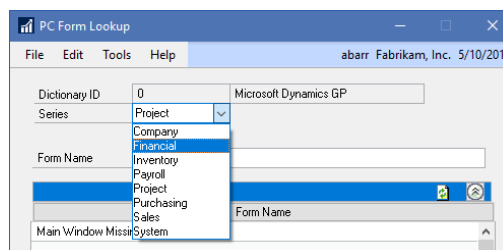
Notice that the same report can be assigned to multiple windows and given different Menu Names to make finding the report a little more user friendly.

Form Name: Select a Form Name

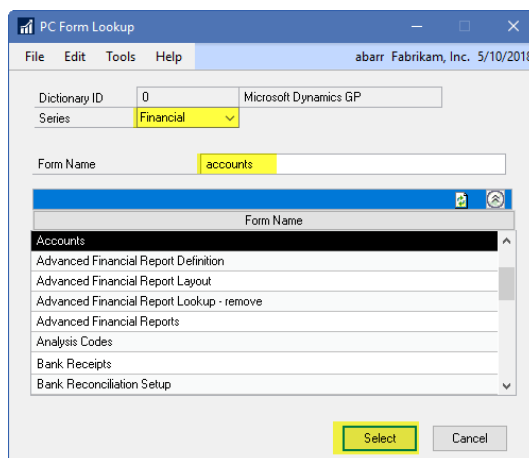
Use the Looking Glass  button to lookup a Form Name from the Dictionary Selected.

First Select the Series

GP has 8 standard series – in our example we will select Financial



Next find the window form name from the list view.

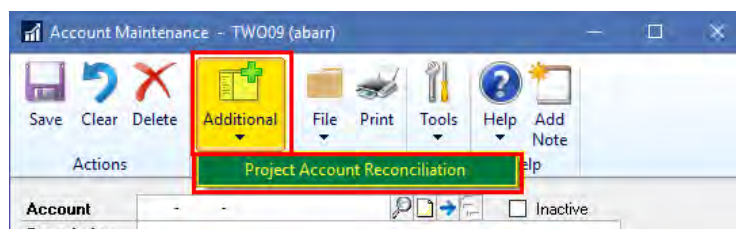


Click the Select button.

Menu Name: Type a name as you want this report to appear on the Additional Menu

In our example we typed: Project Account Reconciliation

Here is a screen shot of the GL Account Maintenance window with the Additional Menu active



Security Option: Select “All Users” or “Filter by Assignments”



“**All Users**” permits All Users to access this report.

“**Filter by Assignments**” permits access only to Users or Classes selected in the Report Assignment window.


3. REPORT ASSIGNMENT WINDOW

Reports >> Project Cost >> Report Assignment

Overview

The **Report Assignment Window** was designed to permit users to assign access to a Report Button (Additional Menu) to specific Users and/or Class of user.

Window Operational Fields:

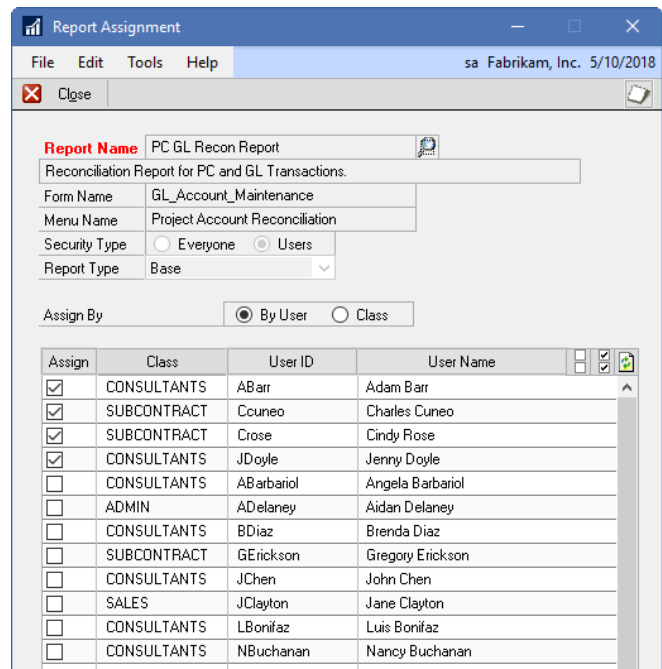
Use the Looking Glass  button to lookup a **Report Name**.

Note: Only Reports that have been set with a security option of “Filter by Assignments” need to be filtered.

Select the **Assign By** option:

By User:

Click the check box next to the user

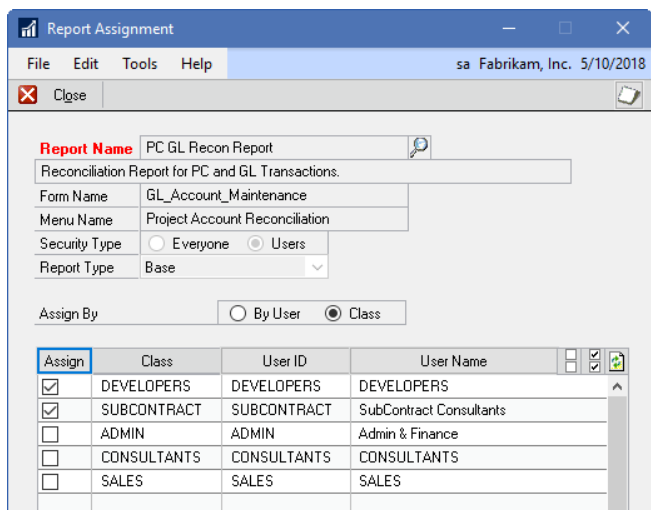


The screenshot shows the 'Report Assignment' window with the 'Assign By' radio button set to 'By User'. The table below lists individual users and their assignment status.

Assign	Class	User ID	User Name
<input checked="" type="checkbox"/>	CONSULTANTS	ABarr	Adam Barr
<input checked="" type="checkbox"/>	SUBCONTRACT	Ccuneo	Charles Cuneo
<input checked="" type="checkbox"/>	SUBCONTRACT	Crose	Cindy Rose
<input checked="" type="checkbox"/>	CONSULTANTS	JDoyle	Jenny Doyle
<input type="checkbox"/>	CONSULTANTS	ABarbariol	Angela Barbariol
<input type="checkbox"/>	ADMIN	ADelaney	Aidan Delaney
<input type="checkbox"/>	CONSULTANTS	BDiaz	Brenda Diaz
<input type="checkbox"/>	SUBCONTRACT	GErickson	Gregory Erickson
<input type="checkbox"/>	CONSULTANTS	JChen	John Chen
<input type="checkbox"/>	SALES	JClayton	Jane Clayton
<input type="checkbox"/>	CONSULTANTS	LBonifaz	Luis Bonifaz
<input type="checkbox"/>	CONSULTANTS	NBuchanan	Nancy Buchanan

By Class:

Click the check box next to the Class



The screenshot shows the 'Report Assignment' window with the 'Assign By' radio button set to 'By Class'. The table below lists classes and their assignment status.

Assign	Class	User ID	User Name
<input checked="" type="checkbox"/>	DEVELOPERS	DEVELOPERS	DEVELOPERS
<input checked="" type="checkbox"/>	SUBCONTRACT	SUBCONTRACT	SubContract Consultants
<input type="checkbox"/>	ADMIN	ADMIN	Admin & Finance
<input type="checkbox"/>	CONSULTANTS	CONSULTANTS	CONSULTANTS
<input type="checkbox"/>	SALES	SALES	SALES