PURPOSE:

Published Data refers to the reports, queries, and graphs that can be run, saved, and then re-run or refreshed as often as needed without having to manually re-create them every time.

PROCESS STEPS:

1. Navigate to the grid you want to publish
2. Click on the ellipsis button (…)
3. Click Publish Data
4. Choose Type
    a. "Favorite" – will appear on the left side of your main screen. You will need to click on these to run the report
    b. "Favorite With Preview" - This will appear in the middle of your main screen. These will automatically refresh.
5. Description – Enter the name you wish to give the report. (i.e. Orders due to ship this week)
6. Choose a Start Date Type
    a. Note: if you enter none, this will display everything
7. Enter a End Date Type
8. Click Save
9. Click OK

If you saved as a Favorite with Preview

1. Navigate to Favorite on the left side of your screen
2. Hover over the report name
3. Click the modify (pencil) icon
4. Enter the Refresh Minutes
    a. The default is 5 minutes
5. Click Save
6. Exit

Note: If you no longer wish this to be a preview, follow the steps above and uncheck the preview box.

To delete a favorite
1. Navigate to Favorite on the left side of your screen
2. Hover over the report name
3. Click the X

Administrator Note: Administrator may create/copy Favorites from User (i.e., "Startup") to User(s).
1. System > System Maintenance > Users…
2. Edit User – Copy Favorites (soft button),
3. Select a User
4. Move to Destination > Continue.

REVISIONS

Rev	Date	Change
I/R	10/23/17	New
A	5/7/18	Button names
B	10/9/18	Add note for copy favorites.