

Getting Started with Intellicus

Version: 16.0

intellicus

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Acknowledgements

Intellicus acknowledges using of third-party libraries to extend support to the functionalities that they provide.

For details, visit: <http://www.intellicus.com/acknowledgements.htm>

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1 Introduction

There is a global need for an intuitive web-based interactive interface to visualize and analyze large amounts of data. Intellicus helps organizations make better informed decisions with the help of our easy-to-use, self-serve reports and dashboards.

Intellicus' highly informative reports enable user interactivity and provide thrilling end user experience. Our intuitive, drag-and-drop UI enables you to customize reports according to your business needs and derive meaningful insights.

What does Intellicus 16 Offer?

Intellicus BI (Report) Server is a highly scalable server that is capable of handling simultaneous reporting requests 24x7 without performance issues and delivering rich formatted reports in any of the offered formats. BI server has built-in reporting engine, OLAP engine, scheduling and delivery engine and data extraction and transformation engines. A very simple SOA (Service Oriented Architecture) that provides a high value to the complete organization's multifaceted BI needs.

Intellicus Web Portal provides web-based secure access to all Intellicus functionalities from end user reporting to data administration and monitoring. Navigation panel and Objects Explorer provide users quicker access to functionalities.

Dashboards collate multiple key performance indicators, drillable to detailed, richly designed graphical reports. Each end user gets a personalized and customizable view of dashboard, according to the business needs.

Intellicus Studio helps to design richly formatted graphical reports with pixel perfect alignment of data represented as charts, tables and matrices. Features like drill down, conditional formatting and alerting will improve your report viewing experience.

Ad hoc Reporting empowers your business end users to tweak their ad hoc reports according to emergent needs allowing decision makers to access required business facts in an agile fashion.

Smart View is a self-service tool to design smart reports with drag and drop actions for performing on-the-fly operations. It allows you to choose visualizations according to relationships between different data elements, and helps you uncover new patterns and insights. These include GIS maps, tree maps, heat maps, packed bubbles, funnel, counter, gauge, donut, scatter plot and other advanced visualizations.

OLAP engine provides a multidimensional data storage and pre-aggregation solution. Huge volumes of transactional data can be summarized on multiple dimensions at multiple levels.

High Speed View allows to build multi-dimensional cubes of data from multiple data sources. You can slice and dice the dimensions, drill through multiple levels and analyze your data for deeper business insights. With one click, Intellicus lets you burst open your cube in all possible dimensions, and lets you slice and dice all views at the same time.

Heterogeneous Data Sourcing of Intellicus lets you connect to multiple databases of your organization to correlate their data and prepare common cubes and reports from them.

Scheduler allows users to create recurring jobs to generate reports and deliver by email, print or publishing on FTP locations.

Mobile Analytics Server and iOS /Android application, combined together, provide the Reporting and Dashboard functionalities on popular mobile devices to decision makers for on-the-move access of required information in the required format.

Supported Platforms

A platform can be defined as computer architecture, an operating system, or combination of both. Intellicus can be installed on most of the popular platforms. The list of such platforms is given below:

- Windows
- Linux
- Solaris (on Sun or Intel)
- HP UX
- AIX
- MAC
- iOS
- Android

Supported Web Servers

A Web Server is a server application that is responsible for serving web browsers with HTML content – pages or applications.

Intellicus portal can be deployed on industry-standard web servers, namely:

- IBM-Websphere
- Jakarta Tomcat
- Microsoft-IIS
- Oracle Application Server
- Oracle-Glassfish
- Oracle-Weblogic
- Resin
- JBoss

Supported Databases

Intellicus supports most of the widely used databases as listed below:

- Oracle
- MS SQL Server
- MySQL
- PostgreSQL
- Sybase
- CacheDB
- ODBC
- DB2
- Hadoop
- Hive
- HP Vertica
- H2
- Greenplum
- AsterData
- Teradata
- Amazon EC2
- HBASE
- Cassandra
- MongoDB
- SQLite
- Elastic Search
- Files/Stream
- Web Service
- Google Sheet
- Social Media (Twitter)

Editions

Intellicus is scalable to cater to the needs of varied spectra of customers in terms of features and load requirements. It has the following editions:

- Basic Edition
- Standard Plus Edition
- Professional Edition
- Enterprise Edition

The following table lists down features of the various Intellicus' editions:

| Feature | Basic | Standard Plus | Professional | Enterprise |
|--------------------------|-------|--------------------|----------------|------------|
| Reporting | | | | |
| Web Studio | Yes | Yes | Yes | Yes |
| Desktop Studio | Yes | Yes | Yes | Yes |
| Standard Report Run | Yes | Yes | Yes | Yes |
| Ad hoc Reporting | | | | |
| Ad hoc Report Run | Yes | Yes | Yes | Yes |
| Ad hoc Report Wizard | Yes | Yes | Yes | Yes |
| Ad hoc Visualizer | No | Yes | Yes | Yes |
| Power Viewer | No | No | Yes | Yes |
| MetaLayer-QO Creator | Yes | Yes | Yes | Yes |
| Dashboards | No | Single Personal | Multi-Personal | Corporate |
| OLAP | No | No | Add-on | Yes |
| Management & Delivery | | | | |
| Alerts & Notifications | No | No | Yes | Yes |
| Quick Schedules | No | Yes | Yes | Yes |
| Batch Schedules | No | No | Yes | Yes |
| Report Commenting | No | No | Yes | Yes |
| Approval Workflow | No | No | Yes | Yes |

| Feature | Basic | Standard Plus | Professional | Enterprise |
|--|-------|---------------|--------------|------------|
| Output Formats | | | | |
| HTML/SMART/PDF/CSV | Yes | Yes | Yes | Yes |
| XLSX/DOCX | No | Yes | Yes | Yes |
| TXT | No | Yes | Yes | Yes |
| RAW TXT | No | No | No | Yes |
| IHTML | No | No | Yes | Yes |
| Output Mode | | | | |
| Email | No | Yes | Yes | Yes |
| FTP | No | No | Yes | Yes |
| Print & Publish | Yes | Yes | Yes | Yes |
| Performance & Security | | | | |
| <i>Performance Control</i> | | | | |
| Health Monitor to check system status | No | No | Yes | Yes |
| Run in background | No | Yes | Yes | Yes |
| Advanced Properties (Max rows limit, Restrict to formats by Admin) | No | Yes | Yes | Yes |
| Load Balancer | No | No | No | Add-on |

| | | | | |
|--------------------------------|----------------|----------------|------------------------------------|------------------------------------|
| <i>Security</i> | | | | |
| Column Masking | No | No | Yes | Yes |
| Authorization & Authentication | Yes | Yes | Yes | Yes |
| Log Events | No | No | Yes | Yes |
| Role based Granular Access | No | Yes | Yes | Yes |
| Platform & Capacity | | | | |
| Number of named users | 5 | 10 | Unlimited | Unlimited |
| Number of Concurrent requests | 2 | 2 | As per License | As per License |
| CPU Support | Single | Multi | Multi | Multi |
| Multi-tenant Support | No | No | No | Yes |
| Operating System | Windows, Linux | Windows, Linux | Windows, Linux, Solaris, AIX, HPUX | Windows, Linux, Solaris, AIX, HPUX |
| Architecture | 64 bit | 64 bit | 64 bit | 64 bit |

Supported Web Servers

- **Basic:** IBM-Websphere, Jakarta Tomcat, Microsoft-IIS, Oracle Application Server, Oracle-Glassfish, Oracle-Weblogic.
- **Standard:** IBM-Websphere, Jakarta Tomcat, Microsoft-IIS, Oracle Application Server, Oracle-Glassfish, Oracle-Weblogic.
- **Standard Plus:** IBM-Websphere, Jakarta Tomcat, Microsoft-IIS, Oracle Application Server, Oracle-Glassfish, Oracle-Weblogic.
- **Professional:** IBM-Websphere, Jakarta Tomcat, Microsoft-IIS, Oracle Application Server, Oracle-Glassfish, Oracle-Weblogic.
- **Enterprise:** IBM-Websphere, Jakarta Tomcat, Microsoft-IIS, Oracle Application Server, Oracle-Glassfish, Oracle-Weblogic.

Databases

- **Basic:** Oracle, MS SQL Server, MySQL, PostgreSQL.
- **Standard:** Oracle, MS SQL Server, MySQL, PostgreSQL, Sybase, CacheDB, ODBC.
- **Standard Plus:** Oracle, MS SQL Server, MySQL, PostgreSQL, Sybase, CacheDB, ODBC.
- **Professional:** Oracle, MS SQL Server, MySQL, PostgreSQL, Sybase, CacheDB, ODBC.
- **Enterprise:** Oracle, MS SQL Server, MySQL, PostgreSQL, Sybase, CacheDB, ODBC, Hadoop, HDFS, HBase, Cassandra, Greenplum, AsterData, Teradata.

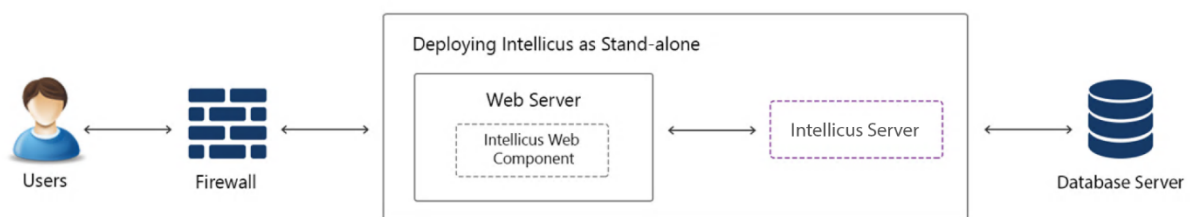
2 Deployment Scenarios

You can deploy Intellicus in a way that best meets your organizational needs. The installation and configuration choices that produce the best performance depend on your reporting requirements, resources and preferences. Intellicus can be deployed in the following ways:

- Single machine or Distributed
- Standalone or Integrated

Intellicus on single or multiple machine(s)

You can install all the components of Intellicus Web-based reporting suite on a single machine.



However, it is also possible to install any of the following components on separate machines:

- Intellicus Report Server
- Intellicus Web Client (web component)
- Database Server

Intellicus as stand-alone or integrated with other applications

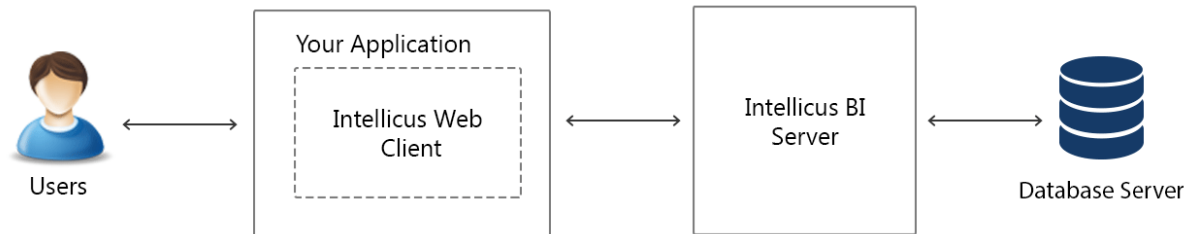
You can install Intellicus as a stand-alone reporting application or as a bundled setup within another application.

Intellicus provides seamless integration with other applications. Your application can use the Intellicus portal (installed on the same web server or a separate server) for reporting related activities or can use its native UI and make a call to Intellicus for reporting related activities.

This way, Intellicus becomes completely transparent to the end user.

To deploy Intellicus web component, a host application can:

- Use its own web server or
- Use the Intellicus' default web server.



Intellicus Report Server can be installed on one machine and Intellicus Web Client (portal) can be installed on another machine where your web application is running.

3 Getting started with Evaluation

This chapter has information and steps to get you started with installing and evaluating Intellicus in the quickest way.

Downloading Intellicus

To acquire Intellicus setup, you can either contact our support team (support@intellicus.com) or download evaluation version from the web site: www.intellicus.com

Before you install

Here are a few points to be noted before starting the Installation:

Operating System

Intellicus server and portal can be deployed on most of the popular Operating Systems. Instructions provided in this manual are for Windows platform.

Server Port

By default, Intellicus report server listens at port 45450. If this port is busy on the machine where Intellicus is being installed for evaluation, you can specify a different server port at the time of Installation.

Intellicus Portal

By default, Intellicus runs on Jakarta tomcat web server at port 80. If this port is already used by another application, you can specify a different portal port for Intellicus at the time of installation.

Note: You will receive “HTTP 404 error: Page not found” message in the browser; when Intellicus portal does not start up because port 80 (or the one allocated to web server) was used by another application.

Installing Intellicus

Intellicus setup for Windows is made available as 'Intellicus<version>_win<architecture>.exe' file. To start installation, you need to double-click this file.

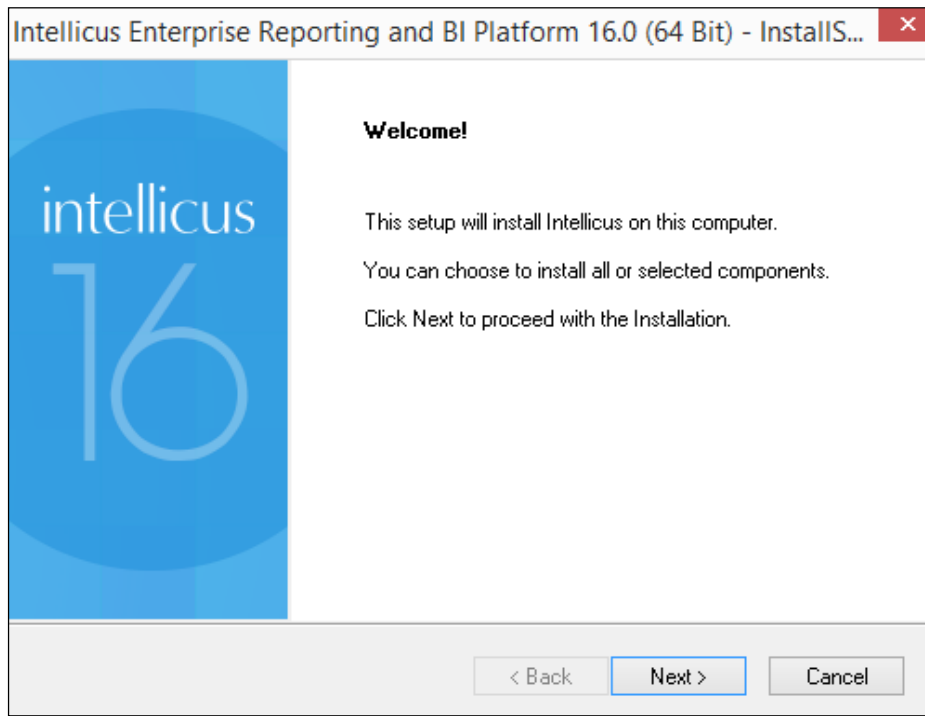


Figure 1: Welcome screen displayed upon running setup.exe

Click **Next** on screens to install Intellicus with default configuration:

- Installation folder: C:/Program Files/
- Server port: 45450
- Web Server: Jakarta tomcat
- Portal port: 80
- Timeouts: 600 seconds

Note: As part of installation steps, you will be allowed to change above information.

In the last step of Installation, setup asks if it should start Intellicus Service and Launch Portal.

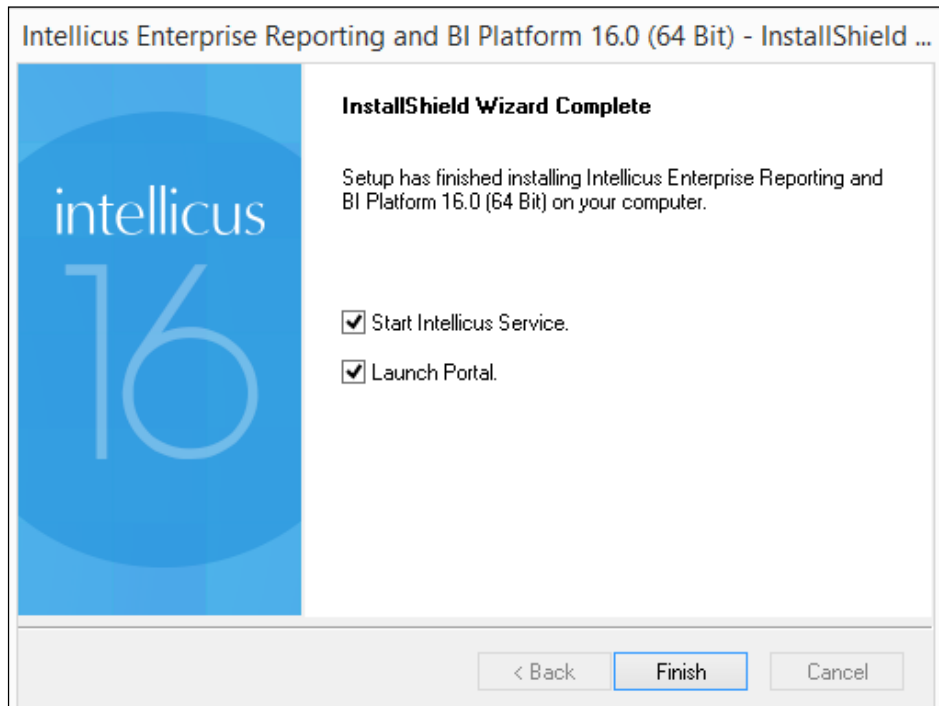


Figure 2: "Installation Complete" screen

Launching Intellicus Portal

Intellicus provides browser based user interface. Specify following in your browser's address bar to launch Intellicus when it is running on local machine:

<http://localhost/intellicus>

When Intellicus is running on a remote machine (in the same network as the local host), the URL will be:

<http://<ip of the machine>/intellicus>

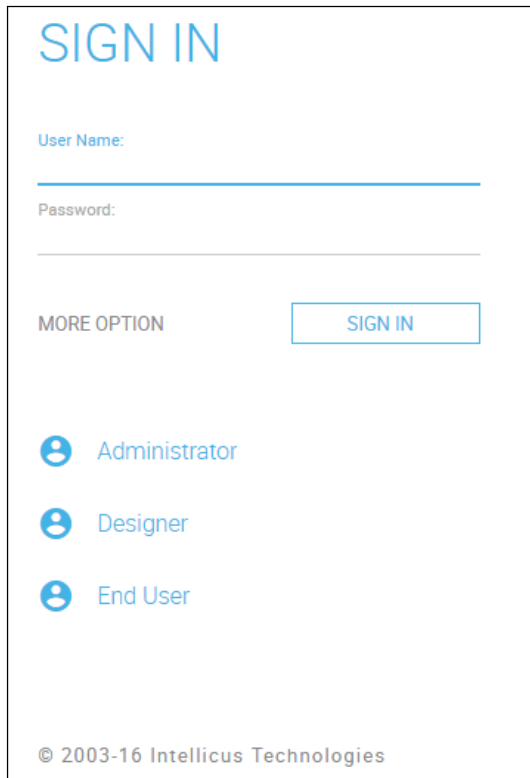
Below are the default credentials provided by Intellicus:

- User Name: Admin
- Password: Admin
- Organization Name: Intellica
(Click "More Option" if you wish to select any organization other than the default.)

Intellicus' demo setup has three pre-defined user roles:

- **Administrator:** Super admin user will be able to carry out all configuration and administrative activities of the application across all organizations
- **Designer:** User who can design standard, ad hoc and smart reports on permitted databases/ data sources
- **End User:** Business user who can view the already designed and saved reports to which he/she has been allowed access permissions

To explore and evaluate all the features of Intellicus, login using Admin / Admin user name and password combination. The below screen enables you to login to the application.



The login page has a light blue header with the text "SIGN IN" in large blue letters. Below this, there are two input fields: "User Name:" and "Password:", each followed by a horizontal line for text entry. To the left of the "SIGN IN" button is a link labeled "MORE OPTION". The "SIGN IN" button is a blue rectangle with white text. Below the button, there are three user selection options, each with a blue circular icon containing a white person silhouette and a text label: "Administrator", "Designer", and "End User". At the bottom left, there is a copyright notice: "© 2003-16 Intellicus Technologies".

Figure 3: Intellicus login page

Changing the port number

Below is the information on how to change the port number when Jakarta Web Server is used.

The port number information is stored in server.xml file.

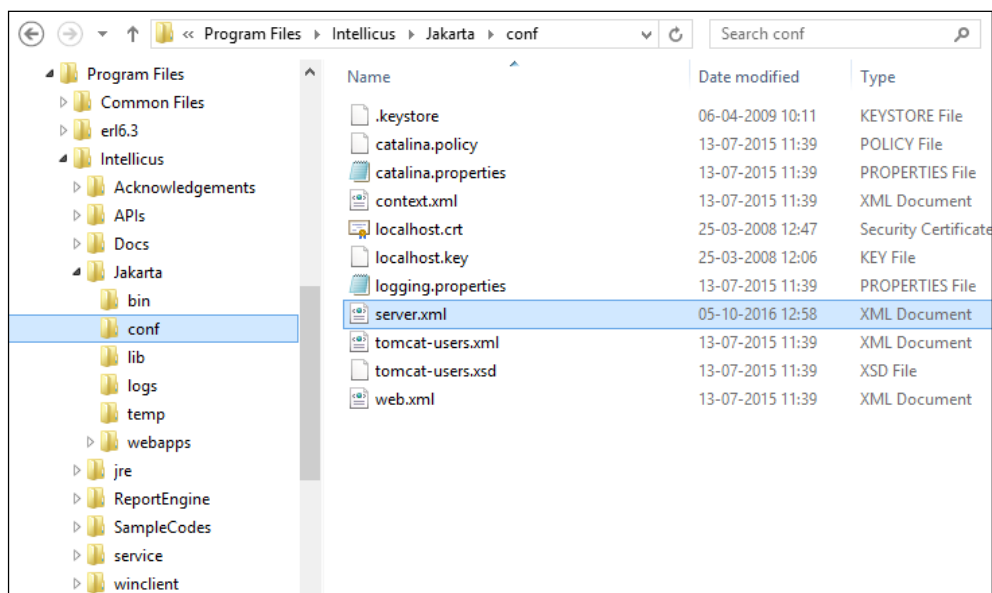


Figure 4: Location of server.xml

To change the port number:

- Open server.xml in a text editor.
- Change the value of **Connector port** to a number that is free.
- Save the changes.

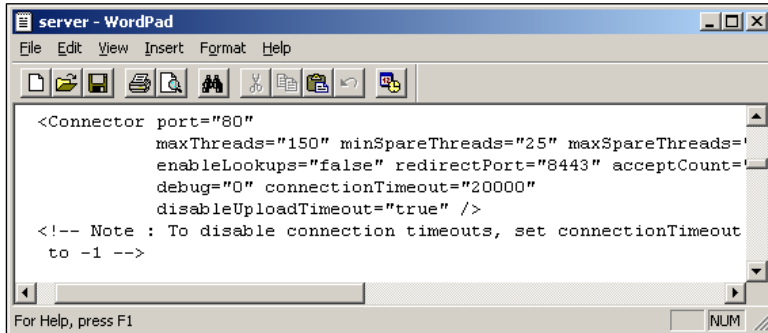


Figure 5: Changing the port number

After successful login, the following Home Page appears:

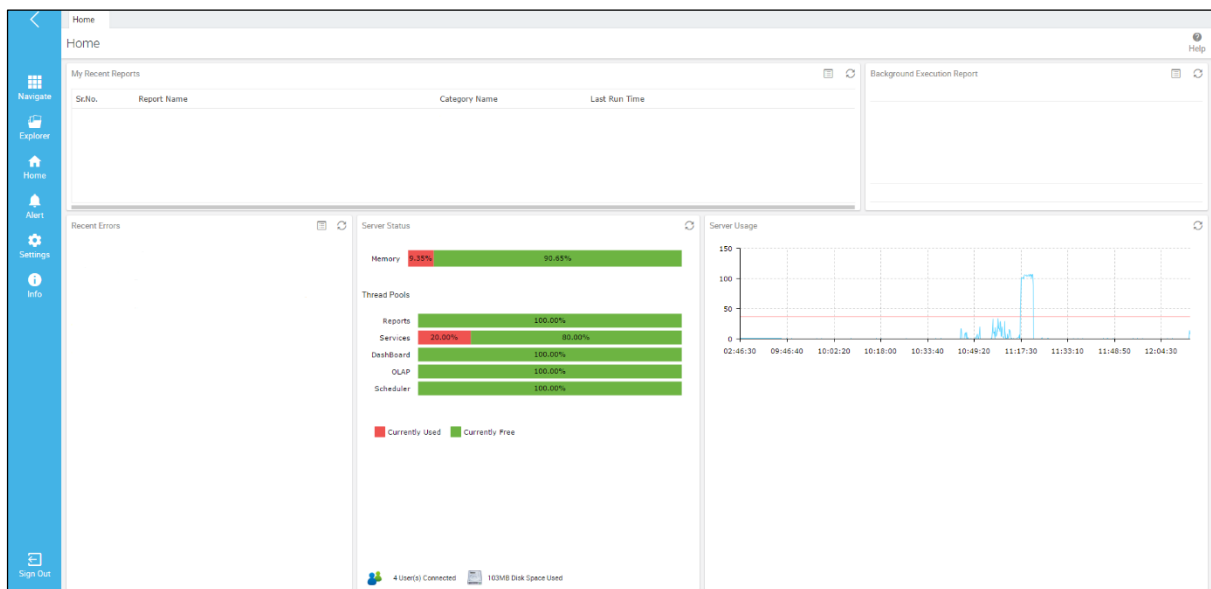


Figure 6: Homepage for the Admin user

What to do next

Intellicus demo installation includes a limited demo data which you can use to get a feel of Intellicus features.

Explore what you can do on portal

Listed below are some of the portal pages you may wish to explore.

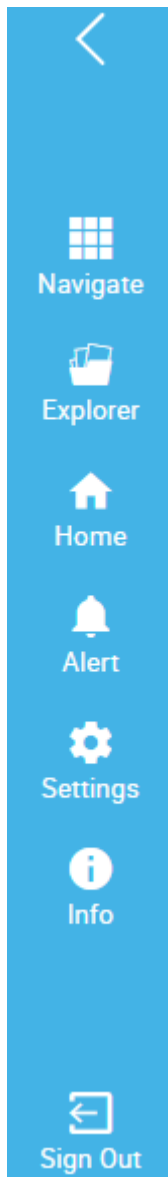


Figure 7: Intellicus Menu

Database Connections: Navigate > Administration > Configure > **Databases**

Query Objects / Data Sources: Navigate > Design > **Query Object**

OLAP Reports: Navigate > Analytics > **High Speed View**

Ad hoc Reports –customization and report design: Navigate > Administration > Configure > **Ad hoc Wizard**,
Navigate > Design > **Ad hoc Template**, Navigate > Design > **Ad hoc Report**, Navigate > Analytics > **Smart View**

Running Reports: Explorer > expand category > right click the report > select option **Run Report**

Dashboards: Navigate > Design > **Dashboard Widget**, Navigate > Analytics > **Dashboard**

Batch Scheduler: Navigate > Schedule > Jobs

Configurations: Navigate > Administration > Configure

Favorites: Explorer > expand category > right click the object > select option **Add to favorites**

To design standard reports

After exploring the portal, running pre-deployed demo reports as well as designing and running ad hoc reports, you may wish to design standard reports.

You need to use Intellicus Studio to design and deploy standard reports. In Windows, click Windows Start > All apps > Intellicus > Studio to start the Studio application.

4 Documents

The User Assistance Documents are organized in terms of their usability. Intellicus provides a blend of PDF documents, Web-based help and On-line help files. The objective is to make necessary information available where a user may need it.

Printable Manuals in PDF Format

Intellicus manuals are created based on functionalities. For example, to know how to run a report in Intellicus, you may refer `RunningReportsInIntellicus.pdf`. Similarly, to understand how to create, modify or delete database connections, you may refer `WorkingWithDatabaseConnections.pdf`.


These manuals can be accessed from an html page that opens up on clicking the Manuals shortcut under Intellicus installed location. This page contains list of documents and information about the contents that you can expect in each document. You may also go to Intellicus installation folder > Docs > Manuals to see the documents.

Online Help Content

Desktop Studio

A context-sensitive online help containing text and images explains the functionality of each dialog and screen. You need to press the Help (F1) key on any given screen to launch this help. Depending upon the context, the right topic will be displayed.

Web Portal

Every screen on portal has a help  icon. You need to click this icon to access help for that screen, a help page will pop up with explanation of the screen functionality.