

Personalizing 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 Personalization

Intellicus lets you personalize the content and functionality within the portal for specific users or user groups. Under personalization, you have options to personalize data as per your needs.

Personalization preferences are organized in following tabs:

- User Preferences
- Parameter Preferences
- Dashboard Preferences

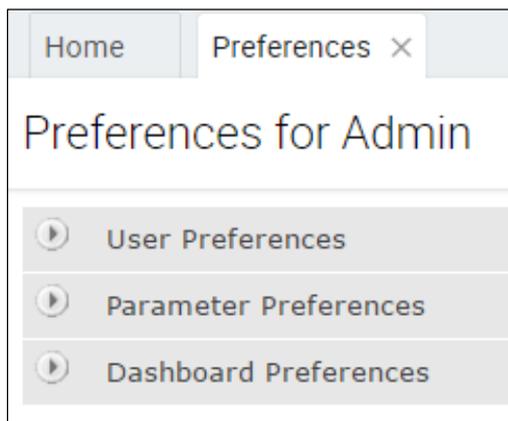


Figure 1: Personalization menu pad

Let us discuss the options available under these preferences in subsequent sections.

User Preferences

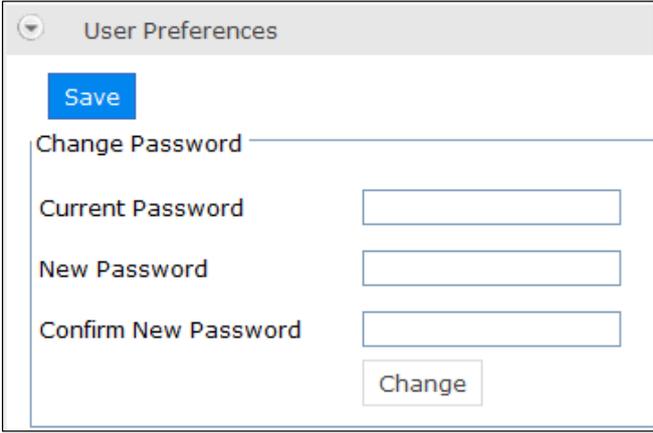
To open User Preferences tab click Navigate > Personalization > Preferences > User Preferences.

You can do the following on User Preferences tab:

- Change Password
- Set Default connection to get data for reports that you run
- Set Portal Preferences
- Set Email Preferences

Changing Password

To change your password,



The screenshot shows a dialog box titled "User Preferences". At the top left, there is a blue "Save" button. Below it, the "Change Password" section is visible, containing three text input fields: "Current Password", "New Password", and "Confirm New Password". A "Change" button is located at the bottom right of this section.

Figure 2: Changing password

1. In Current Password entry box, specify the present password that you use to log into Intellicus.
2. In New Password entry box, specify new password.
3. In Confirm New Password entry box, specify the new password again.
4. Click Change button.

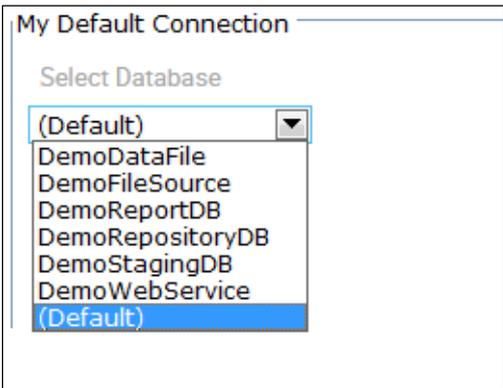
Setting Default Connection

Intellicus access data from data sources using respective data connection (sometimes referred as 'connection'). You as a user can set a default data connection that you want to use each time database is accessed. For example, to run reports.

To set default connection,

In Select Database dropdown box, select a connection.

If selected connection needs user name and password, entry boxes User Name and Password will appear. (Some of the connections may need user name and password every time it is accessed). Specify the user name and password required to access the database.



The screenshot shows a dialog box titled "My Default Connection". It features a "Select Database" dropdown menu. The dropdown is open, showing a list of options: "(Default)", "DemoDataFile", "DemoFileSource", "DemoReportDB", "DemoRepositoryDB", "DemoStagingDB", "DemoWebService", and "(Default)". The bottom "(Default)" option is highlighted in blue.

Figure 3: Setting default connection

Click **Test** button.

Upon clicking **Test** button Intellicus will actually establish the connection and set it if the test is successful. Intellicus will pop up an error if the connection could not be set.

Intellicus will NOT test a connection when the selected connection does not need user name and password.

Note: If you specify database connection while actually running the report, the report will be run using the connection set at run time. In this case, connection setup here will not be considered.

Setting Portal Preferences

You can set portal preferences can be set by specifying respective values in options given in **Portal Preferences** area.

Figure 4: Portal Preferences

Below are the preferences options that can be specified under Portal Preferences:

- **Default Locale:** Select the locale to be applied when you login. Formatting of information like date, time and portal language depends on selected locale.
- **Default Time Zone:** Select the time zone from where you will login. Before starting the report generation, the application will convert date / time field in the time zone selected here. To continue using browser time zone (time zone as per your machine), as your default time zone, check Use My Browser Time Zone. Default time zone set here will be used when user has not specified time zone at the time of login.
- **Default Portal Theme:** Select the theme that the portal should apply when you login.
- **Default Print Option:** Select the option upon **Print** operation for the selected report in PDF Reader. 'View PDF' would open the PDF in a separate tab while 'Download PDF' option would download the PDF onto your local system. You can then choose to print the PDF.
- **Default Report Format:** Set the format in which the report should be presented.
- **Default Ad hoc Template:** Set the template that should be used when you design an ad hoc report.
- **Recent Report Count:** Specify the number of reports you wish to list.
- **Working Folder:** Application objects are saved in folders. Number of pages in application require user to navigate to the folder in which an object is available. If you will need to access a specific folder frequently, you can set it as your Working Folder. When Working Folder is set on this page, and you try to access folders, working folder set here will get selected. This way you save time to navigate to the folder every time you wish to access that folder. To set the working folder, (make sure the folder already exist), click . It will open object selector where you can navigate to the desired folder.

- **Entity Types:** Select the entity types like Query Object, Analytical Object, Report, etc. that should get selected by default under the Explorer tab.
- **Entity Type Properties:** Specify the properties that should appear for the selected Entity Type under the Explorer tab.

Send Email Preferences

Specify an e-mail address where you want to receive notification e-mails from portal. You can select your preferences about e-mails from the below:

- **All:** All the mails (all of the options listed below).
- **Approval Process:** To receive email when you are required to act on a publish-pending report.
- **Asynchronous Report Completion:** When you execute a report in background, to receive a mail about its success or failure.
- **Fault Tolerance:** Select this checkbox to receive e-mails in case of Fault Tolerance.
 - **Memory Trigger:** When report server memory goes above trigger level.
 - **Request Rejection on Memory Trigger:** When request rejection takes place due to memory trigger.

Parameter Preferences

Some of the reports may need users to provide multiple values at run time, for example, Country. Selecting a few country names from a long list may be very difficult.

For this a user with administration rights creates parameter value groups (from under Navigate > Design > Parameter Value Groups). Example: A group (called Cameras) is created that contains camera types. There is another group (Televisions) that lists the television types. Under Parameter Preferences you can select the groups so that when a user selects a group, all the values belonging to that group will appear as selected at the time of report execution.

In order to make parameter selection user-friendly, you can use parameter preferences. To open Parameter Preference tab click Navigate > Personalization > Preferences > Parameter Preferences.

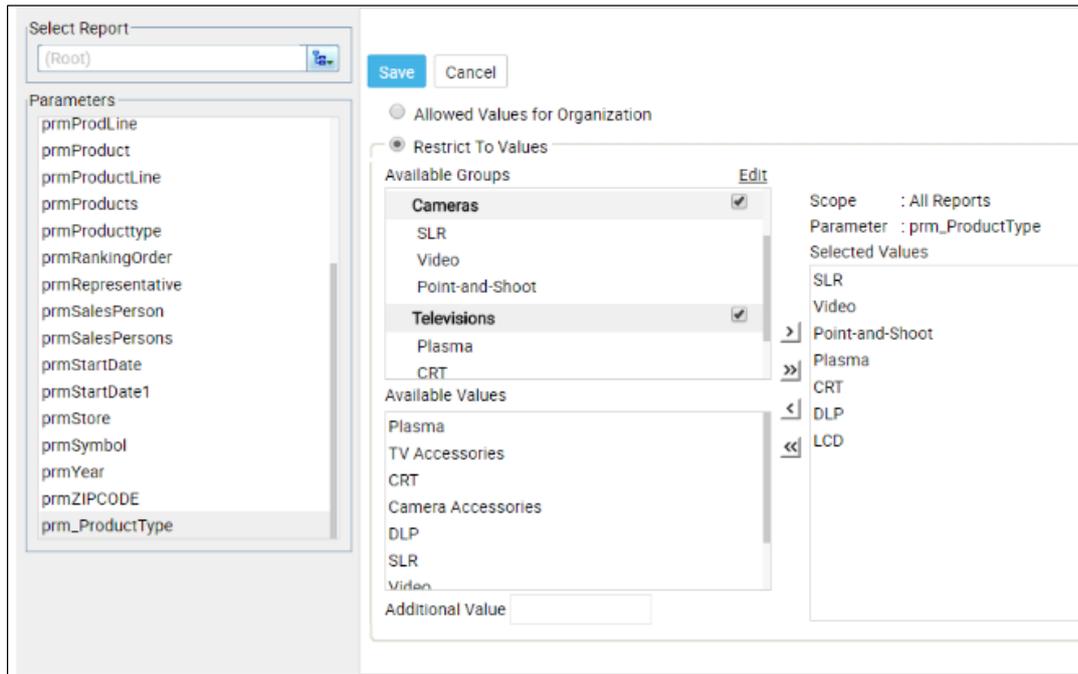


Figure 5: Parameter Preferences

Details on Parameter Preferences tab

Select Report

Within Select Report, you need to select a category to further select reports.

When you don't select a report, all the parameters appear in Parameters list. When you select a specific report, parameters associated with selected report appear in Parameters list.

Parameters

Based on the report saved on the Reports list, parameters associated with the selected reports will be listed here.

Available Groups

All the value groups and values within each group that your Intellicus administrator has set for selected parameter are listed here. A click on the Edit link will open up a page to create parameter value groups.

Once you create a value group it will also appear here.

Available Values

This lists the values that were set while creating the parameter.

Additional Value

Here you can specify the value that you want to include in Selected Values. Generally you will do this when a value that you want to have in Selected Values List is not available in Available Groups as well as Available Values.

Note: Additional Value will appear disabled for Boolean type parameters. Boolean type parameters have only two values.

Selected Values

These are the values that will appear (at run time) as selected.

Scope

This displays name of the report or All Reports depending on selected parameter.

Parameter

This displays name of the selected parameter.

Setting the Preferences

When you check the Allowed Values for Organization checkbox, the values for the selected parameter that are specified at the organization level are available for the current user. In case you check the Restrict To Values checkbox, you can select values for the parameter by specifying the following:

From Available Groups

Select (check) the check box on the right of the group name. The values will be added in the Selected Values list. If a group has some of the values that you want to exclude, you can remove them.

From Available Values

Select (click) a value and click  button. Clicking  button will add all the values in Selected Values list. The value gets added in the Selected Values List. Clicking  button will add all the values in Selected Values list.

From Additional Value

In **Additional Value** entry box, specify the value that you want to include in the Selected Values list and click  button. The value gets added in the Selected Values List. Clicking  button will have the same effect.

Removing a value from *Selected Values* list

- Select the value from Selected Values list and click  button. Clicking  button will remove all the values from Selected Values list.
- After including required values in Selected Values list, click Save button to save the preferences.

Setting your own Parameter Value Groups

You can set your own parameter value groups on the page that appears when you click Edit link next to Available Groups list header.

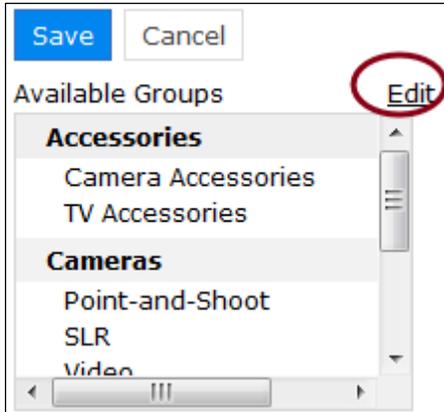


Figure 6: Click Edit link to get a page to create Groups

Information changes on the right side of the page. Now it shows details related to creating parameter value groups.

Details on the page

Available Values

This lists the values that were set while creating the parameter.

Value Groups

Value groups that have been created (generally by Intellicus Administrator) are listed here. The group that you will create will also be listed here. The group that you have created will have  icon before the group name.

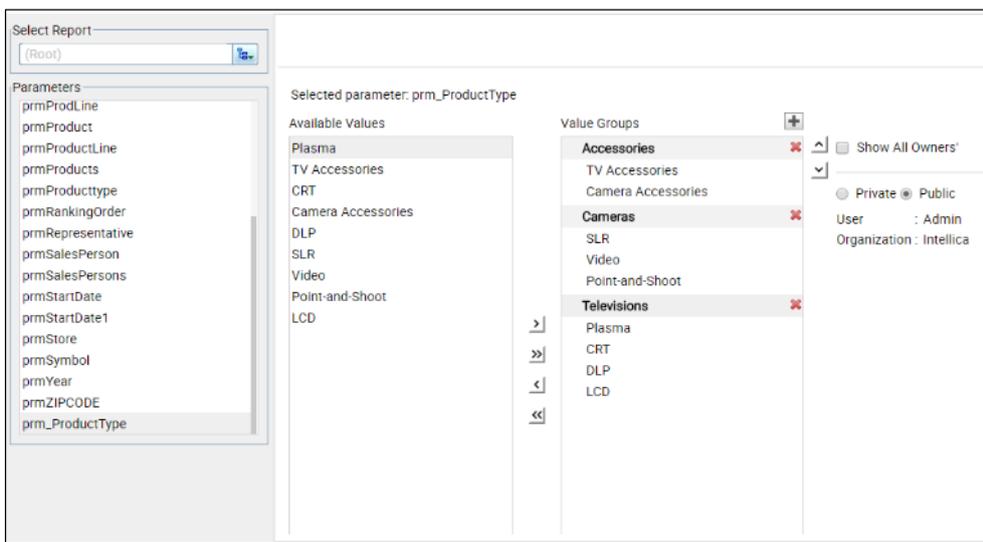


Figure 7: Creating value groups

Additional Value

Here you can specify the value that you want to include in Selected Values. Generally you will do this when a value that you want to have in Selected Values List is not available in Available Groups as well as Available Values.

Private / Public option button

Indicates that selected group is a public group (generally setup by an Intellicus Administrator), or private (you have set).

User / Organization

Displays the user credentials of the person who created the group.

To create an empty group

1. Click  icon next to Available Groups title. A group is created with a default name.
2. Delete the default name and specify a unique name for the group.

A new group has been created. Now, you can add values in the group.

To add values in a group

1. Click the group in which you want to add values.
2. From the values listed in Available Values, click the value to be included in the group and click  button. Click  to include all the values in the group.

Repeat the process for all the values to be included in the selected group. Click Save button after the process is over.

To remove value(s) from a group

1. Click the value to be removed in Value Groups.
2. Click  button.

The selected value will be removed from the group. You can click  to remove all the values. Click Save button after making changes.

Dashboard Preferences

From the dashboards that you either designed or are available to you, you need to select dashboards that should appear upon logging into the application. This task is performed on Dashboard Preferences page. The dashboards added under Dashboard Preferences get displayed when you login into Intellicus.

To open Dashboard Preferences tab, click Navigate > Personalization > Preferences > Dashboard Preferences.

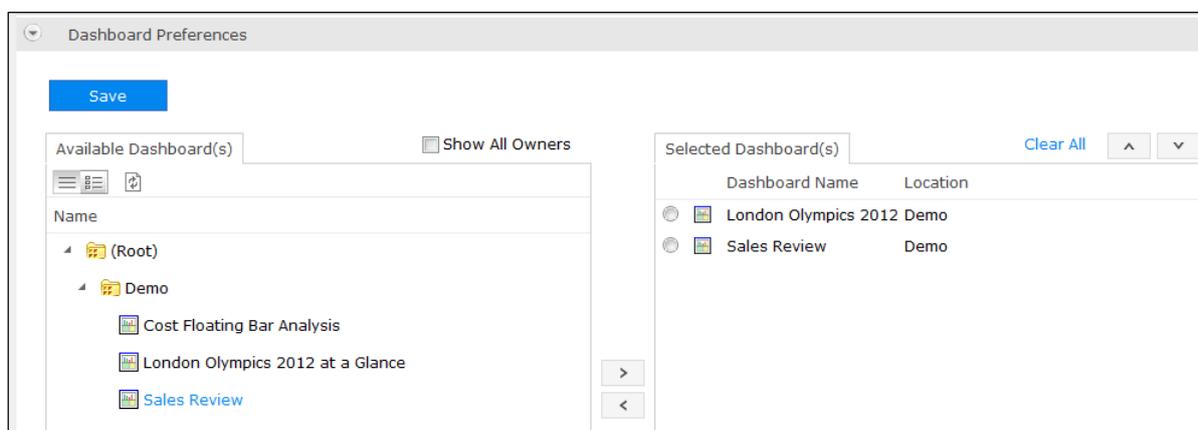


Figure 8: Setting dashboard preferences

Dashboards are available under folders. To list dashboards created by all the users, check Show All Owners checkbox (available only to application administrators).

Selecting Dashboards for viewing

To shift a dashboard in **Selected Dashboard(s)** list, from **Available Dashboard(s)** list, select the dashboard by clicking it and click the  button. The selected dashboard is shifted to **Selected Dashboard(s)** list.

To remove a dashboard from **Selected Dashboard(s)** list, Select the dashboard from the list, and click the  button.

To decide sequence of dashboard tabs (left to right) as they would appear on the dashboard, make use of  and  buttons placed on the top-right of the **Selected Dashboard(s)** list.

You can remove all the selected dashboards by clicking Clear All.

Click Save to save your preferences.