

Getting Started with Intellicus

Version: 18.1

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.

Intellicus is OWASP compliant and it follows industry standard testing methodology for the security of Web applications. It protects user's data from web based security vulnerabilities such as Cross-site scripting (XSS), SQL Injection etc. Intellicus is 3 Green star rated Web application by MicroFocus FOD (Fortify on Demand) security testing tool.

What does Intellicus 18 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. With Intellicus' customized Dashboard Theme feature, you can apply a custom color theme to your reports on dashboard.

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 you to tweak the ad hoc reports according to emergent needs allowing decision makers to access required business facts in an agile fashion. With Intellicus 18, you can let the creativity flow when telling the story of your data unlike ever before. Now, you can display comprehensive maps, entire shop floors, images of trucks or animals, and virtually any relatable SVG image to the business. You can also use your own customized SVG images to be rendered as a chart type.

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.

The new infographic custom visual for Intellicus charts gives the flexibility to build both simple pictograms and complex highly tailored visuals.

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 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.

Data Science enabled Intellicus BI helps you to bring out predictions based on their historical data. This empowers you to take well-informed decisions for your business. With what-if analysis in Intellicus, you can also analyze the predictions based on different conditions. Intellicus lets you connect to different data science engines to process your data. It returns the predicted data on which you can perform further transformation steps and visualize it on the Intellicus UI. Intellicus gives you numerous intuitive charts to understand and analyze your current and predicted data.

Cloud Solution provides a complete business intelligence solution that enables you to get deeper insights from your data, whenever you want. We have partnered with AWS and Azure platforms to offer a hassle-free BI solution that can easily fit into your cloud strategy. Whether you're keeping your data on premise or on the cloud, Intellicus on cloud gives you the flexibility to connect it in a few clicks and build reports and dashboards instantly.

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 Cluster
- Hive
- HP Vertica
- H2
- Greenplum

- AsterData
- Teradata
- Amazon EC2
- Amazon Redshift
- HBASE
- Cassandra
- MongoDB
- Impala
- SQLite
- Elastic Search
- Custom JDBC
- Spark SQL
- Files/Stream
- Web Service
- REST Web Service
- Google Sheet
- Social Media (Twitter)
- SAP HANA
- Data Science Engine (Rserve)

Intellicus License 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.

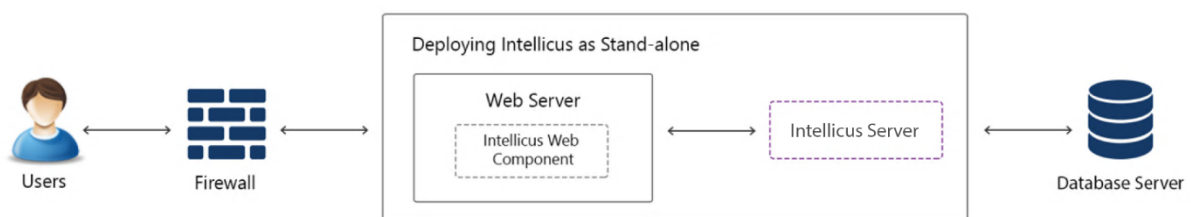
2 Deployment Scenarios

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

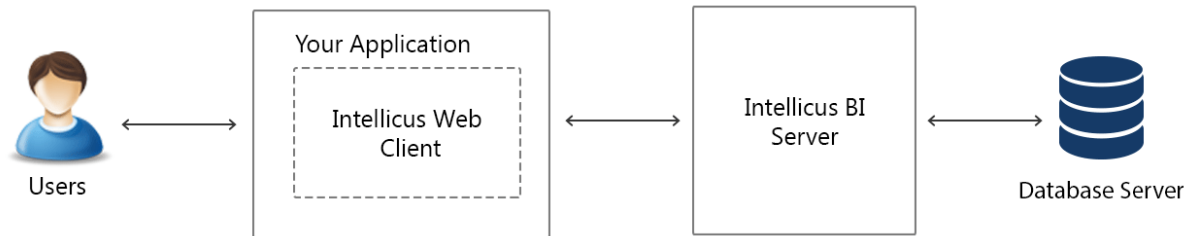
You can install Intellicus as a stand-alone reporting application or as a bundled setup within another application.

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: <http://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 8080. 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 8080 (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.

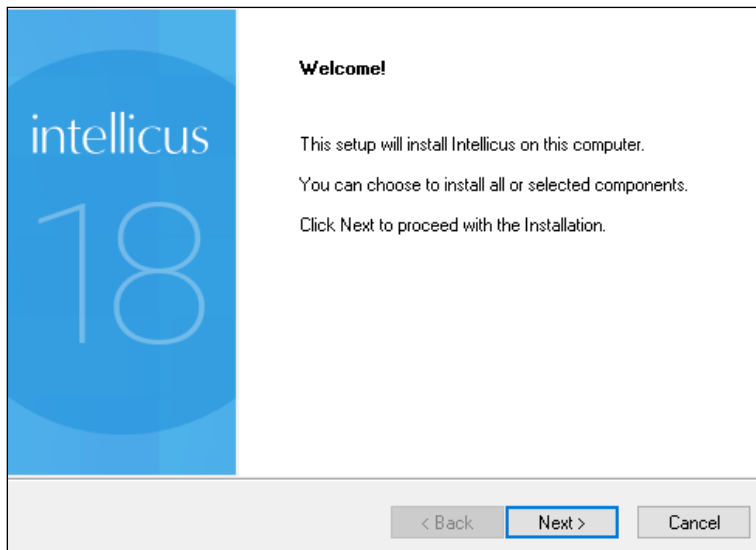


Figure 1: Welcome screen displayed upon running setup.exe

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

- Installation folder: C:/Program Files/
- Server port: 45450
- Web Server: Jakarta tomcat
- Portal port: 8080
- 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.

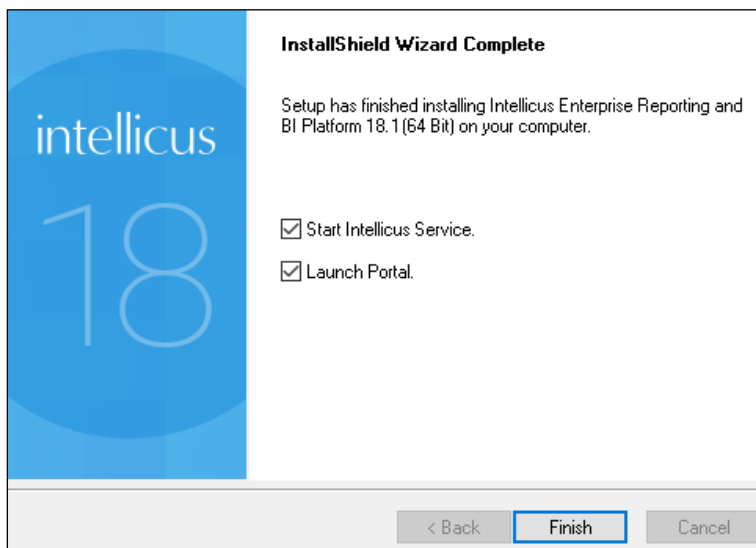


Figure 2: "Installation Complete" screen

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:port/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:port>/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 screenshot shows the Intellicus login interface. On the left, a blue sidebar features the 'intellicus' logo and the words 'Simple', 'Secure', 'Scalable', and 'Self-Serve' stacked vertically, separated by a thin white line. The main white area on the right is titled 'SIGN IN' and contains two input fields labeled 'User Name:' and 'Password:'. Below these fields are two links: 'MORE OPTION' and a blue-outlined 'SIGN IN' button. The footer at the bottom of the page includes the URL 'www.intellicus.com | info@intellicus.com' on the left and the copyright notice '© 2003-18 Intellicus Technologies' on the right.

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.

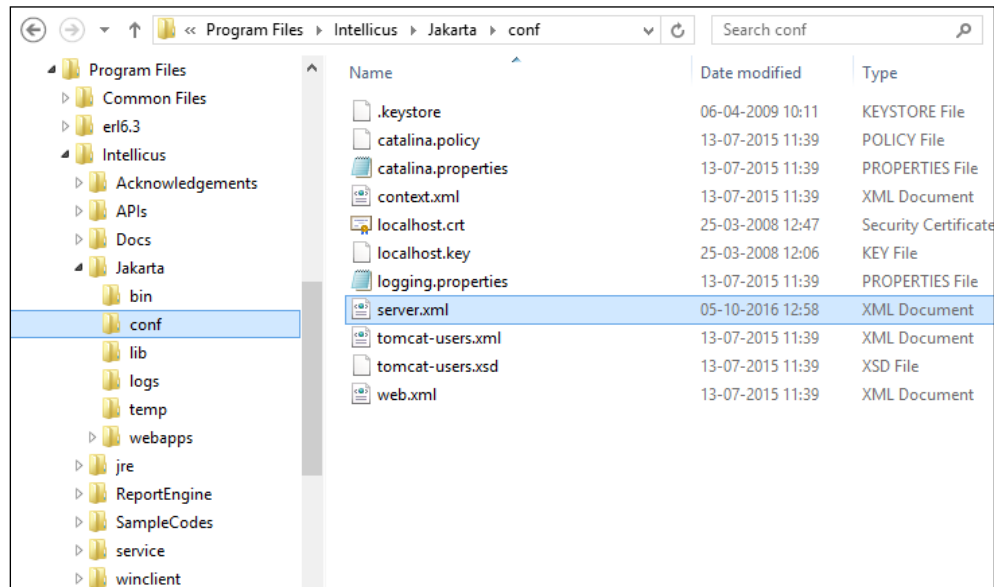


Figure 4: Location of server.xml

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.

```
<!-- A "Connector" using the shared thread pool-->
<Connector executor="tomcatThreadPool"
    port="8080"
    protocol="HTTP/1.1"
    connectionTimeout="20000"
    redirectPort="8443" URIEncoding="UTF-8" />
```

Figure 5: Changing the port number in server.xml

After successful login, the following Home Page appears:

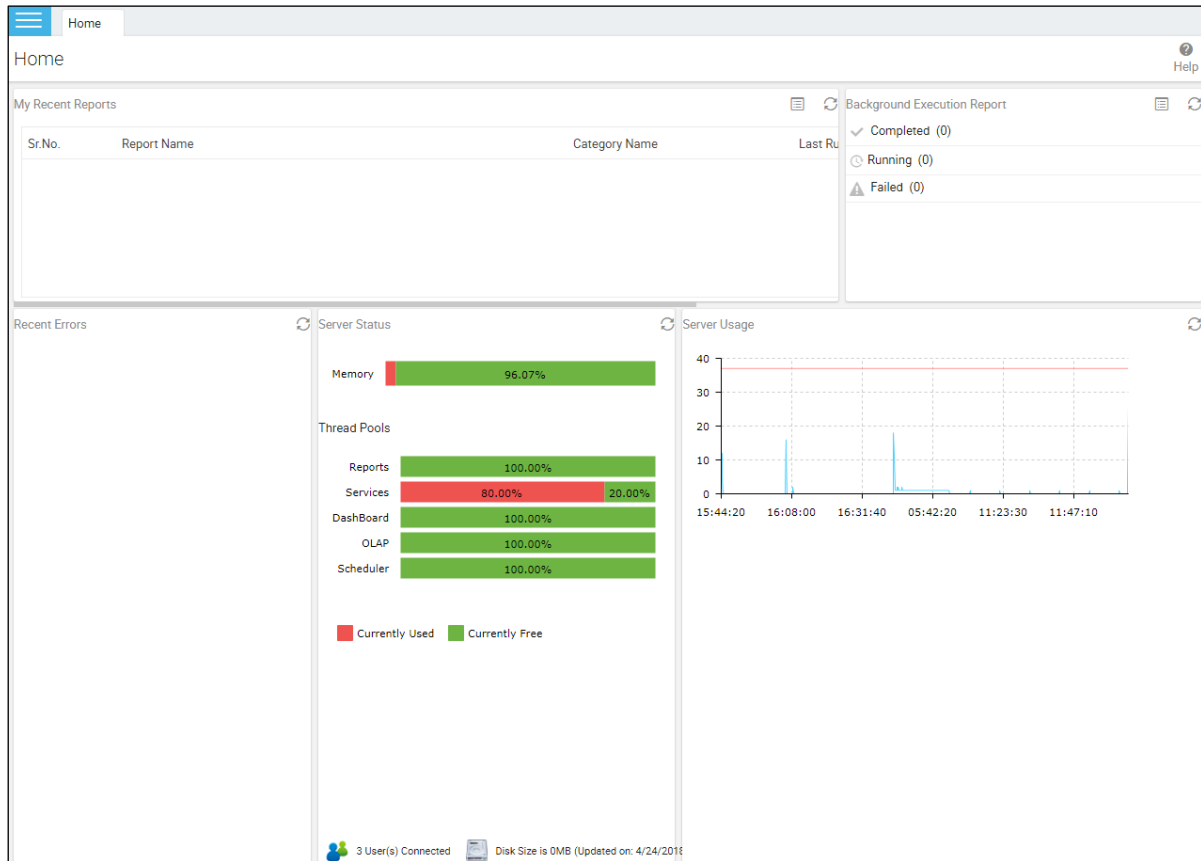


Figure 6: Homepage for the Admin user

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.

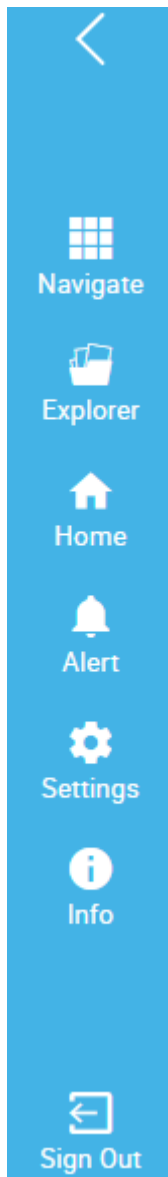


Figure 7: Intellicus Menu

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

Query Objects form the business meta-layer for end user reporting. Query Objects hide the physical database details, SQL complexities, table names etc. from the end user.

A query object contains details to fetch desired data from a data connection. A query object acts as a data source to reports, parameter and analytical objects.

(For details, refer [WorkingwithQueryObjects.pdf](#))

Smart Report: Navigate > Analytics > Smart View

A self-service tool to design reports with drag and drop actions for performing on-the-fly operations.

Get contemporary style of web controls like dynamic data grids and various charting options for data depiction.

(For details, refer [ConfiguringAdhocReporting.pdf](#), [WorkingwithSmartView.pdf](#))

High Speed Report (OLAP Reports): Navigate > Analytics > High Speed View

Intellicus' evolved multi-dimensional analytics to let you explore your data from all dimensions in a single screen to get a panoramic view of your business at the speed of your thought.

(For details, refer [WorkingwithHighSpeedView.pdf](#))

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

Ad hoc reporting feature brings report design functionalities from designers to the users. Users can not only view report output, but also study and analyze the output by carrying out many analysis activities like sorting, grouping and filtering the output without returning to the designer screen.

(For details, refer [ConfiguringAdhocReporting.pdf](#), [DesigningAdhocReports.pdf](#))

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

Intellicus provide facility to run a report in different formats. Apart from this you can also schedule (using Quick Schedule and Batch Scheduling option) and view results later.

(For details, refer [RunningReportsInIntellicus.pdf](#), [BatchScheduler.pdf](#))

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

To visualize your business data at a glance, monitor overall performance and make informed business decisions.

(For details, refer [CreatingDashboardWidgets.pdf](#), [WorkingwithDashboards.pdf](#))

Batch Scheduler: Navigate > Schedule > Jobs

Scheduling of reports is very helpful for better utilization of server and printer resources.

(For details, refer [BatchScheduler.pdf](#))

Configurations: Navigate > Administration > Configure

You can configure properties related to Report Server and Client (portal) as well as configure email templates and customize configuration files.

(For details, refer [ConfiguringIntellicus.pdf](#))

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

Standard Reports: Intellicus standard reporting enables you to create pixel-perfect, form style and printable format reports to support your organization's operational tasks. An enterprise-grade scheduler and dispatcher of Intellicus helps you distribute the soft copies to thousands of users without manual intervention.

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.

(For details, refer [DesktopStudio-ATour.pdf](#))

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 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.