

iPacker Manual

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intelllicus

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Acknowledgements

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

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1 Introduction

What is iPackager

iPackager is a utility to package repository objects, users' preferences and configuration settings from Intellicus repository or local file system. This packaged information can then be deployed at any of the installation of Intellicus.

This way, you can use iPackager to setup and maintain Intellicus repository from remote location.

When Intellicus is deployed at multiple locations, iPackager helps save a lot of efforts spent to set up Intellicus repository at each of the locations. Set it up at one location and just upload the package at other locations. This method completely eliminates the need of re-doing all the configuration activities at multiple locations.

How to access iPackager

You can launch iPackager from the Intellicus Portal as shown below.

To open iPackager, click Navigate > Repository > iPackager.

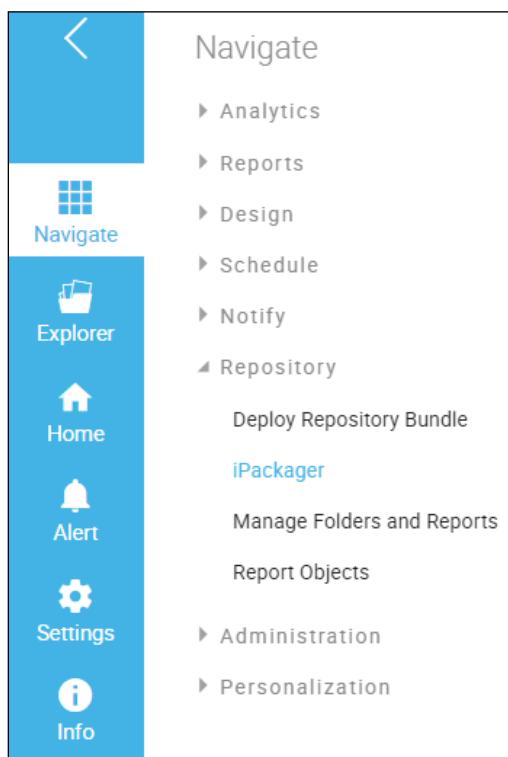


Figure 1: Menu option to open iPackager from Intellicus portal

How does it work

iPackager extracts references of the selected information (repository objects/user preferences/configuration settings) from the repository or file system and stores as .conf file (saved on the Web Server with a default name ‘Untitled.conf’). You can open a configuration file and make changes to it. A configuration file is then used to build the cab file. This cab file is later deployed on the Intellicus server.

Using Intellicus iPackager, you can package and distribute:

- Organization, User, User Access Rights and User Mappings
- User Created Private Objects
- User/Organization Preferences
- Repository objects like categories, reports, query objects, parameter objects, analytical objects, dashboards and dashboard widgets
- Approval Process details
- Report Schedules
- Data Connection information (along with access rights information)
- Printer Settings
- Web Client Properties
- Report Server Properties
- License File
- Templates

Tip: Use iPackager to package entire repository (all the information that iPackager can presently package) and keep it as a backup at a safe place.

Who should use iPackager

Only Super Administrator can use iPackager.

Application Window

Top of the application window has menus. Remaining part of the screen is divided in three panes: Entity Type, Select Entities and Selection Summary.

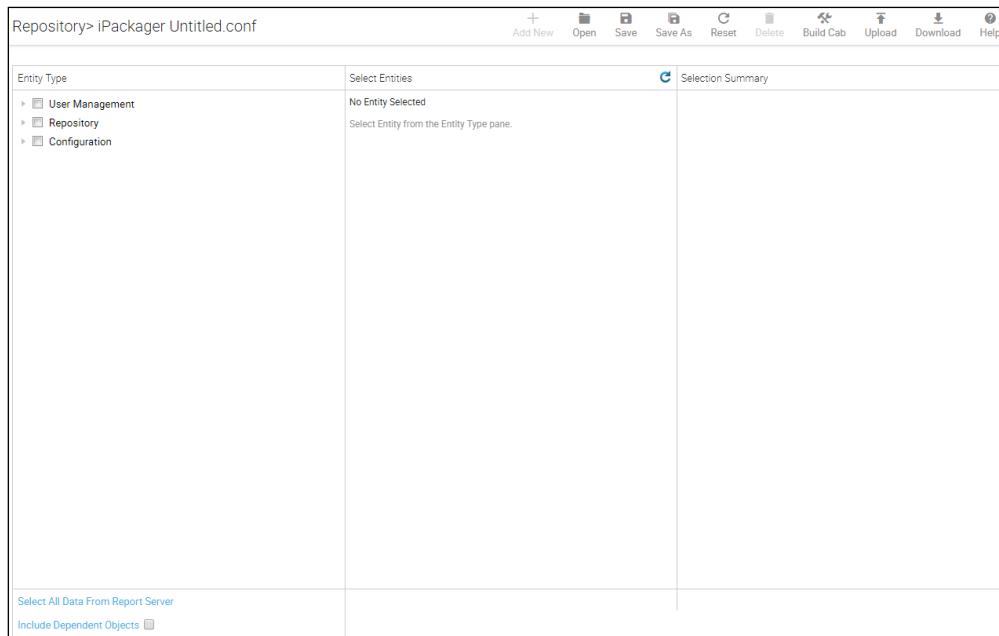


Figure 2: iPackager home screen

- **Entity Type:** This is the list of all repository objects available on Intellicus Report Server.
- **Select Entities:** This is the list of entities selected for creating the configuration file.
- **Selection Summary:** This is the area where you can view the summarized details of your selected objects.

Menus and options

Task that you want to perform can be initiated by clicking the respective menu options.

- **Add New:** To load a new configuration file.
- **Open:** To open an existing configuration file.
- **Save:** To save changes to the configuration file.
- **Save As:** To save the configuration file with a specified name.
- **Reset:** To reset to the last saved state of the configuration file.
- **Delete:** To delete an existing configuration file.
- **Build Cab:** To build the Cab file (discussed under ‘Building the Cab file’ section).
- **Upload:** To upload configuration file onto Web server.
- **Download:** To download configuration file from Web Server to the browser’s default download folder.

Creating a new Configuration file

When you launch iPackager, it also opens a new blank configuration file. You can just start working on it.

If you are already working on a configuration file, then you should click “Add New” to create a new configuration file. This would unload the already loaded configuration file and clear the Entity Type, Select Entities and Selection Summary panes.

Opening a Configuration file

Click “Open” to populate Entity Type, Select Entities and Selection Summary sections of an already saved configuration file on the Web Server.

When you open a configuration file, iPackager validates all the information stored in the configuration file by actually accessing the information from server. If any of the information is missing, it will give an error message and the respective item would be highlighted in red.

Deleting a Configuration file

For an opened Configuration file, click “Delete”. A warning dialog will appear.

Click “OK” to confirm deletion of the configuration file.

Saving a Configuration file

While saving the configuration file for the first time, click “Save As” and provide name of the configuration file. The file gets saved under
`<Intellicus_Installation_Location>/Jakarta/webapps/Intellicus/client/config/ipackager/conf`

It is always a good practice to keep saving your work. Click “Save” in order to save changes to your configuration file.

Uploading/Downloading a Configuration file

Using “Upload” option, you can browse any configuration file from your local file system and upload to the Web Server.

“Download” enables to download the configuration file from the Web Server to the browser’s default download folder.

2 Adding objects to the Configuration file

Information can be added in an open configuration file in the following way.

Under Entity Type, expand Repository, Users and Configuration upon clicking the adjacent arrow keys. You can now click the sub-items like Reports, Query Objects, Parameter Objects, Analytical Objects, Dashboards, Dashboard Widgets, etc. to view the list of objects in the Select Entities pane.

You also have the option of selecting the existing Schedules for Query Objects, Parameter Value Groups for Parameter Objects, Build Options for Analytical Objects etc. by clicking their respective check-boxes. These would be fetched from the Report Server while building the cab file.

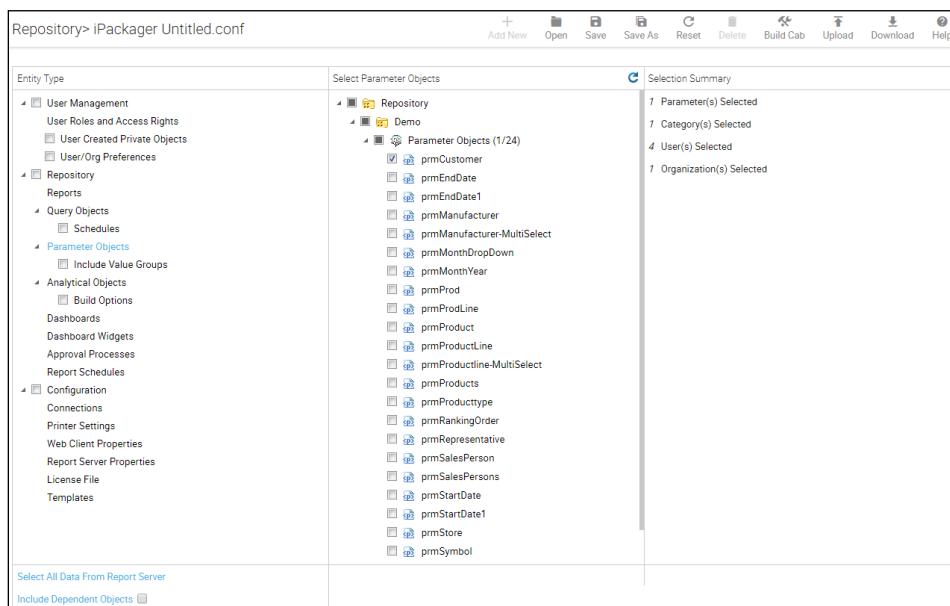


Figure 3: Adding objects to configuration file

Under Select entities, you can then either select the parent (say Category) to select all objects under it or individually select the objects you wish to add to the configuration file.

The Selection Summary pane enables you to view the number of all the selected objects.

Clicking “Select All Data From Report Server” would enable to select all the objects from Intellicus repository.

Click “Include Dependent Objects” checkbox to package referenced/dependent objects at the time of creating a cab file. For example, for a selected Dashboard object, you can build a cab using all the objects associated to that dashboard.

For each of the selected items, you can select all or specific sub-items:

- Reports
- Query Objects
- Parameter Objects
- Analytical Objects
- Dashboards
- Dashboard Widgets

- Approval Processes
- Report Schedules
- User Roles and Access Rights
- Connections
- Printer settings
- Web Client Properties
- Report Server Properties
- License File
- Templates

To modify entity properties

For entities, you can change **Deployment Type** and **Deployment Options** on the Properties pop-up that appears on right clicking the entity.

Deployment Type can either be of the following types:

- **Editable:** The editable entities can be modified by the users having required access rights post deployment.
- **Read Only:** The entities with Read Only option cannot be modified post deployment of the cab.

Note: In case of 'Read Only', a user (having administrative privilege) can change the entity's Deployment Type to "Custom" to enable the 'Save' button on the portal. This can be specified on right-clicking the report under Explorer after deploying the Cab file.

Deployment Options can be of the following:

- **if Exists:** If the entity is found in the repository, **Overwrite** would replace the entity in repository with the one in bundle.
Delete: If the entity is found in the repository, selecting Delete would delete it. In case of category, click **Cascade Delete** to delete the folder (category) even if it contains sub-folders.
- **if Not Exists:** Add would add the entity to the repository.

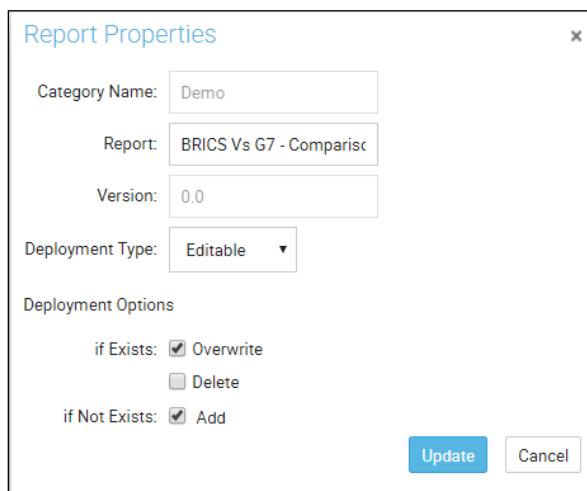


Figure 4: Report Properties

In addition to the above, you can also change:

- Category name
- Report name
- Query Object name
- Parameter Object name
- Cube Object name

No property of Printer Settings, Web Client Properties, Report Server Properties and License File can be changed.

3 Building the Cab file

When you issue a command to build the cab file, all the information that you stored in the open configuration file is picked up from the respective locations.

If any of the information saved in configuration file is not available at the right source while building the cab, then respective error message will be given and the cab building process will be stopped.

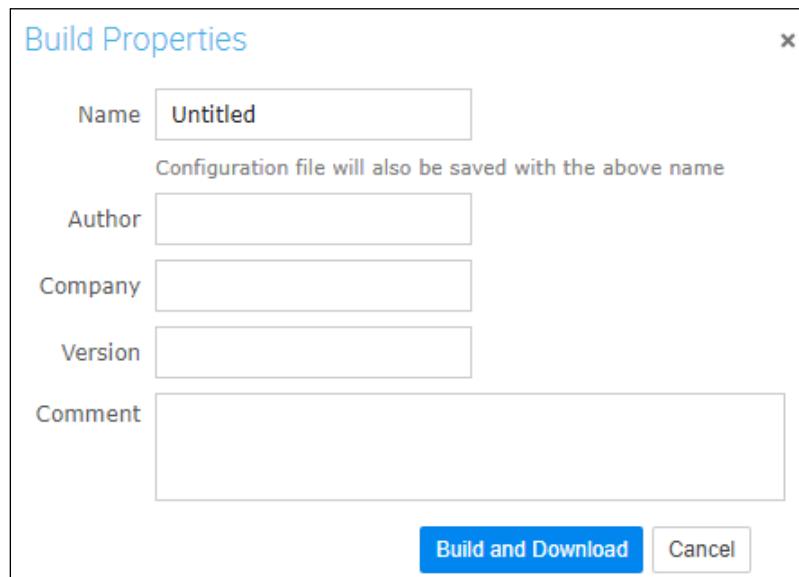


Figure 5: Building the Cab file

To build the cab,

1. Click "Build Cab". The **Build Properties** screen appears.
2. Specify build properties like Name of the cab, along with its Author, Company, Version and any additional information under Comment.
The configuration file gets saved with the same name as the Cab file if not saved earlier.
If the configuration file already exists on the Web Server with the same name, the user is prompted with a message to overwrite or not.
3. Click the "Build and Download" button.
4. The cab building process starts.
5. The cab file gets saved under the browser's default download folder location.

Error Cases

A cab is built only when all the objects added in an open configuration file are available on the Report Server at the time of building the cab.

When the configuration file is opened, iPackager validates the information stored in the configuration file with respective server. If any of the information stored in configuration file is not found on server, the entry (including parent entries) is highlighted in red. In addition to this, if any of the following conditions exist, red highlight would appear.

- Source report for a linked report is not found.
- Task for a job is not found.
- Report for a task is not found.
- Any object added but not found in the server at the time of opening a configuration file or building the cab file.
- Invalid characters used in object names.

Valid and Invalid characters for filenames

Valid characters for filename: 0-9, a-z, A-Z, "-", "_", "@", "."

All of the above can be one word or multiple words.

Configuration file having invalid filename is prompted with a warning message stating that the file cannot be saved.