



## Archiving: Reports backup and restore

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Intellicus Web-based Reporting Suite **Version 4.5**



Enterprise  
Professional  
Smart Developer  
Smart Viewer

**intellicus**   
Enterprise Reporting  
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## **Acknowledgements**

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

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## Contents

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<b>Archiving .....</b>	<b>3</b>
Backup.....	3
Applying filter .....	3
Information on Saved Reports List .....	4
To provide Archive details and build archive.....	4
Restore .....	5
Uploading archive .....	5
Restoring archive .....	5
Downloading Archive .....	6

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## Archiving

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Make use of Archiving feature to backup all or selected saved (published) reports. This feature is especially useful when database is subjected to frequent data changes and you need to have record of published reports, may be for future reference or just for record purposes. Feature includes two activities:

- **Backup:** To backup all or selected saved (published) reports
- **Recovery:** To upload archive file to report server

### Backup

The process of backup is divided in two main steps:

1. Get a list of all or filtered (based on category, report name, published date) published reports.
2. Archive it.

To reach Backup page click Administration > Archiving and click **Backup** tab.

### Applying filter

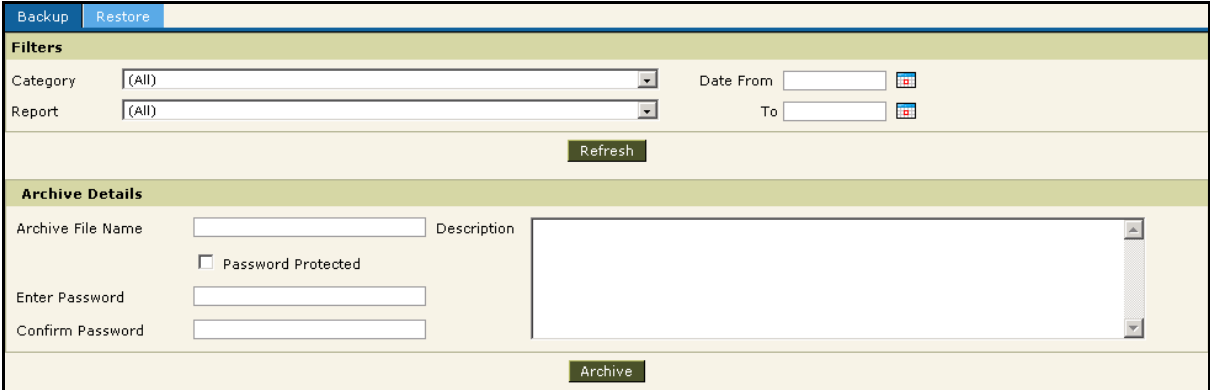
The screenshot shows a web interface for archiving reports. At the top, there are two tabs: 'Backup' (selected) and 'Restore'. Below the tabs is a 'Filters' section with three input fields: 'Category' (a dropdown menu showing '(All)'), 'Date From' (a text box with a calendar icon), and 'Report' (a dropdown menu showing '(All)'). There is also a 'To' text box with a calendar icon. A 'Refresh' button is located below these fields. Below the 'Filters' section is an 'Archive Details' section. It contains an 'Archive File Name' text box, a 'Description' text area, a 'Password Protected' checkbox, an 'Enter Password' text box, and a 'Confirm Password' text box. An 'Archive' button is located at the bottom of this section.

Figure 1: Setting filters

1. To include reports from a specific category, select the category from **Category** drop-down box. Leave it as *(All)* to include reports from all the categories.
2. To include a specific report, select the report from **Report** drop-down box. Leave it as *(All)* to include all the reports.
3. To include reports generated from a specific date, up to a specific date, or within a date range, specify dates in **Date From** and **To** as needed.
4. To view a list of reports, click **Refresh** button. (These reports will be considered for archiving).

List of published reports based on the filter will appear in **Saved Report List**.

Saved Report List								
S.No.	File Name	Generated By	Generated Time	Expiry Time	Approval Process Name	View	Comments	Description
1.		User	01/04/2008;16:14	Never	Approval Chain			
2.	Sales07	Admin	01/02/2008;17:08	Never	Approval Chain			
3.	HADec06	Admin	01/02/2008;17:04	Never	Approval Chain			
4.	HADec06	Admin	01/02/2008;17:01	Never	Approval Chain			

Figure 2: Saved Report List on Backup page

## Information on Saved Reports List

For each report following information is listed:

- The user who generated the report
- The date and time when the report was generated
- Information related to report expiry

You can view the report in any of the following formats: PDF, MS Excel, JVista, HTML, Interactive, MS Word, CSV, Text.

Click **Comments** to view comments specified by users for this report.

## To provide Archive details and build archive

Archive Details	
Archive File Name	Feb17AllReps
Description	All reports published up to Feb 15.
<input type="checkbox"/> Password protected	
Enter Password	
Confirm Password	
<b>Archive</b>	

Figure 3: Specifying archive details

1. In **Archive File Name**, specify unique name to identify this archive.
2. In **Description**, specify description for the archive.
3. To protect recovery by password, select **Password Protected** checkbox. Specify password in **Enter Password** and confirm the password by re-typing the same in **Confirm Password** entry boxes.
4. Click **Archive** to create the archive file.

Archive is created and stored on server.

Optionally, you can choose to download archive to be stored away from server. Click **Download Archive** button to download the archive.

## Restore

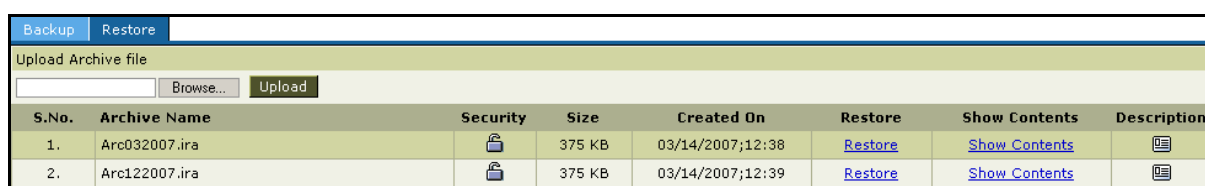
Archives available on server are listed on this page. Created archives are listed on this page. Archive stored away from server can be uploaded to server on this page.

To reach Restore page click Administration > Archiving > Restore tab.

### Uploading archive

1. Click **Browse** button to locate the file.
2. To upload the archive to server, click **Upload** button.

Information related to uploaded archive will appear as a row in the table. An open lock indicates that the archive is not password protected.



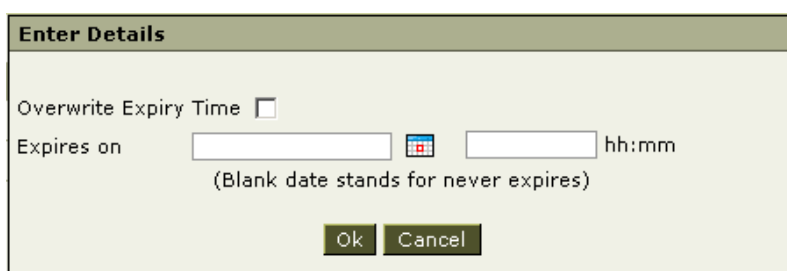
The screenshot shows the 'Restore' tab in the application. At the top, there is a section for 'Upload Archive file' with a text input, a 'Browse...' button, and an 'Upload' button. Below this is a table with the following data:

S.No.	Archive Name	Security	Size	Created On	Restore	Show Contents	Description
1.	Arc032007.ira		375 KB	03/14/2007;12:38	<a href="#">Restore</a>	<a href="#">Show Contents</a>	
2.	Arc122007.ira		375 KB	03/14/2007;12:39	<a href="#">Restore</a>	<a href="#">Show Contents</a>	

Figure 4: List of archives

- To view the contents of the archive, click **Show Contents** of respective archive file.
- To view the description of archive, click **Description** icon.

### Restoring archive



The 'Enter Details' dialog box contains the following elements:

- An 'Overwrite Expiry Time' checkbox, which is currently unchecked.
- An 'Expires on' label followed by a date input field, a calendar icon, and a time input field (hh:mm).
- A note below the input fields: '(Blank date stands for never expires)'
- 'Ok' and 'Cancel' buttons at the bottom.

Figure 5: Restoring archive

1. Click **Restore** link of respective archive.
2. In **Enter Password** dialog box, specify password.
3. To overwrite expiry time with the one being set on this dialog box, select **Overwrite Expiry Time** checkbox.
4. Specify date and time of expiry on the space provided.
5. Click **OK** to proceed with restoring the archive.

Information related to reports in archive appears in a table.





Details of Feb0115.ira				
Assigned Filters				
Category	ALL		Date From	
Report	ALL		To	
File Name	Generated By	Generated Time	Expiry Time	Status
SalesByChannelFeb15	 Admin	02/15/2007;10:37	Never	Restored Successfully
SalesRepFeb15	 Admin	02/15/2007;10:37	Never	Restored Successfully
Feb 6	 Admin	02/13/2007;15:38	Never	Restored Successfully
Feb 5	 Admin	02/13/2007;15:33	Never	Restored Successfully
aa25-08-2007	 Admin	01/08/2007;20:25	Never	Restored Successfully
5 of 5 Restored Successfully. Total backup file size : 881 KB				

Figure 6: Recovered Archive

At the bottom, total backup file size is also displayed.

Remark in **Status** indicates success or failure of the archive restored. If it reads Fail, click the triangle to read the reason of failure.

## Downloading Archive

Archive available at the server can be downloaded so that it can be placed away from server.





S.No.	Archive Name	Security	Size	Created On	Restore	Show Contents	Description
1.	Arc032007.ira		375 KB	03/14/2007;12:38	<a href="#">Restore</a>	<a href="#">Show Contents</a>	
2.	Arc122007.ira		375 KB	03/14/2007;12:39	<a href="#">Restore</a>	<a href="#">Show Contents</a>	
<div>Download</div>							

Figure 7: Downloading archive

1. Click **Restore** link of respective archive.
2. Click **Download** button.
3. On **Download** dialog box, click **Save**.
4. Specify location where you wish to store the archive.
5. Click **Save**.

Archive is downloaded.

