



## Running reports in Intellicus

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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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**Dated: - May 2009.**

## **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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## Reports menu

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**Reports** menu has options related to report execution. First two options are:

- **Search:** To search for reports (report layouts as well as published reports)
- **My Reports:** To work with reports run in background

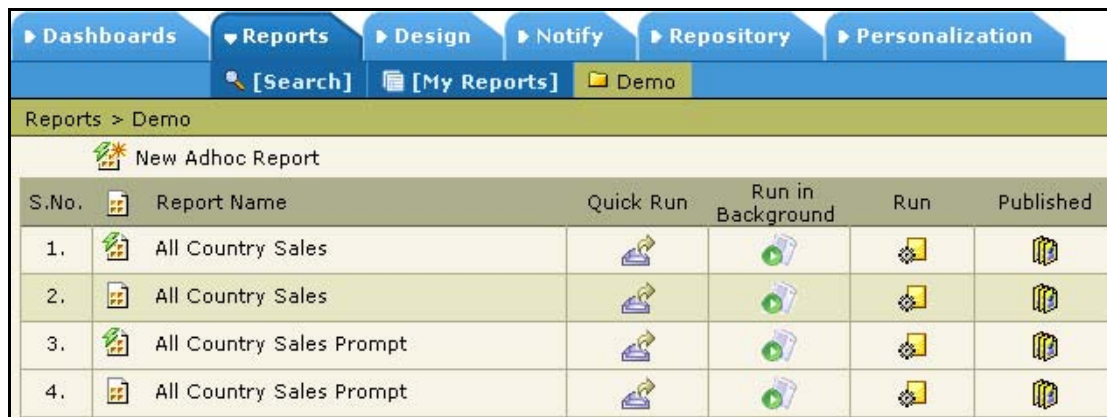


Figure 1: Tabs under Reports menu

Names listed on the right of **[My Reports]** option represent each of the folders (categories) available in the application. Reports are listed within folders.

You can click-open a folder and run a report from it, if you know folder name where report is placed. If you don't know folder name, you can search a report and then run it.

## Running reports listed in a category

When you click Reports option, following categories will be listed:

- All the categories that you have created, and
- The categories for which the Intellicus Administrator has given you the rights.

To open a category,

1. Click menu-pad **Reports**. All the categories are listed below the Menu.
2. Click the category you want to open.

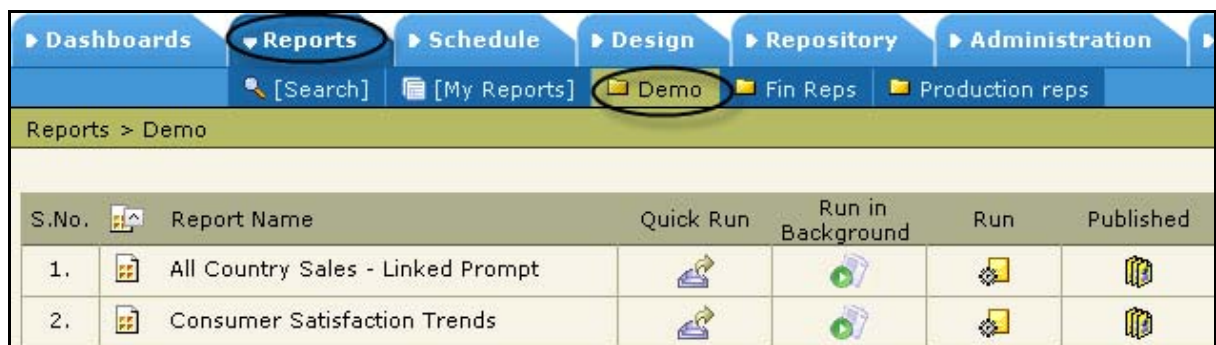


Figure 2: Opening a category

## Reports under selected Category



**Note:** Some of the functionalities are not available in Smart Developer and Smart Viewer.

The entries under the selected category will have reports or report-links of Standard reports and Adhoc reports. They all have these specific icons:

Icon	Type	Availability
	Standard Report	Public (everyone)
	Adhoc report	Public
	Standard report	Private
	Adhoc report	Private
	Linked standard report	Public
	Linked adhoc report	Public
	Linked standard report	Private
	Linked adhoc report	Private

Private reports as well as their links are available only to the user who has created it.

Reports > Demo											
New Adhoc Report											
S.No.	Report Name	Quick Run	Run in Background	Re-Run	Run	Published	Schedule	Edit	Description	Delete	
1.	All Country Sales										
2.	All Country Sales										
3.	All Country Sales Prompt										
4.	All Country Sales Prompt										
5.	Annual Sales Comparison Cross Tab										

Figure 3: Reports within Demo folder

Report list can be sorted in ascending or descending order of:

- Name
- Type

To sort the report list, click respective column header. By default, report list is sorted in the ascending order of Report Name.






Reports > Demo		
 New Adhoc Report		
S.No.	Report Name	Quick Run
1.	 All Country Sales	
2.	 All Country Sales	

Figure 4: List sorted by ascending order of Report Name.

When you click respective header, the list gets sorted and a button indicating sorting type appears on the right of the header.

You can also create a new Adhoc report from this page. Click **New Adhoc Report** button to open Adhoc report wizard.



**Note:** If you choose to create an adhoc report from within this page, you will need to save the report in this folder only.

You can carry out the following actions for a report:

- **Quick Run:** To run the report using default preferences. These preferences (report output type) were set at the time the report was deployed.
- **Run in Background:** To start the report execution and view it later. Status of the report being run in background is listed on **Report Execution Status** page.
- **Re Run:** Useful when report has user parameters. Clicking **Re Run** after running a report at least once, it opens parameter input page with values provided during previous run. When you click **Re Run** to run the report for the first time, it functions like **Run**.
- **Run:** To specify output preferences / delivery options such as viewing, e-mail, publish and then execute the report.
- **Published:** Displays the list of reports that were generated in past and are not yet expired. You can view the user (user name) who generated the report, execution and expiry time of the report. Depending on access rights given, you can also view the comments of various users on the report. The report can be viewed as well as deleted from the saved report list.
- **Schedule:** To set a Quick Schedule for the selected report as well as to view schedules set for the report.
- **Edit:** To make change in the adhoc report. A click on this will open the report in Adhoc Report Wizard.
- **Description:** To view description of the report. This is the information that is stored at the time of report deployment.
- **Delete:** To delete the report.



## Searching reports

You need to search for reports when you are not sure about report type (adhoc or standard), report name or the category in which the report might have been deployed. Use this page to search for reports.

You can search reports by providing any of the following information:

- Character or word used as report name or part of report name
- Category
- Type (standard report / adhoc report)

S.No.	Report Name	Quick Run	Run in Background	Run	Published	Schedule	Edit	Description
1.	All Country Sales							
2.	All Country Sales							
3.	All Country Sales Prompt							
4.	All Country Sales Prompt							

Figure 5: Search option of Reports menu pad

To search for reports,

1. If you know name of report or part of it, specify in **Report Name Includes** text box.
2. If you know the date range between which reports were updated, specify dates in the **Updated Between**. To get reports published on a specific date, select that date in any of the date boxes. (This option is available only to application administrators).
3. To include reports within a specific category, select a category from **Look in Category** drop-down box.
4. To include reports of specific type, select the right option in **Type**.
5. Click **Search** button.

Reports matching the search criteria provided are listed.



**Tip:** To get a list of all the reports, just click **Search** button without providing any search criterion.

## Searching published reports

On this page, one can search and list names of published reports that meet specified criteria. You can search a published report based on:

- Character or word used in name of published report
- Category
- Report name

S.No.	File Name	Generated By	Generated Time	Expiry Time	Approval Process	View	Pending Operations	Comments	Description	Delete
1.	Monthly	Admin	03/12/2008;17:14	04/12/2008;17:14						
2.		Admin	03/12/2008;12:20	Never						
3.	AprilData	Admin	03/11/2008;19:25	Never	Report Approval		PUBLISH			
4.	FebData	Admin	03/11/2008;19:20	Never						
5.	MarchData	User	03/11/2008;19:14	Never	Report Approval		PUBLISH			

Figure 6: Searching for published reports

You can do following on listed reports:

- Viewing published report
- Viewing review comments
- Viewing description of report
- Deleting report
- View comments for the report

To search for published reports,

1. If you know name or part of the name of published report, specify in **Published Name Includes** text box.
2. If you know the date range between which reports were published, specify dates in **Updated Between**. To get reports published on a specific date, select that date in any of the date boxes (available only to application administrators).
3. To include reports within a specific category, select a category from **Look in Category** drop-down box.
4. To include reports of specific type, select the right option in **Report Layout**.
5. To find reports based on approval status, select the right option in **Approval Process Status** drop-down box.

- 
6. Click **Search** button.


Reports satisfying the search criteria will be listed in the table below Search button.



**Tip:** One of the options in **Look in Category** and **Report Layout** is *(Orphan)*. Select *(Orphan)* in **Look in Category** to list published reports whose category does not exist (removed). Select *(Orphan)* in **Report Layout** to list published reports whose layout (report) does not exist (deleted).

## Operations on reports

### Viewing published report

1. Click the  drop-down box under **View** column of respective published report to get a list of output format.
2. To select a format to view a report in, click respective format in the drop-down box.


### Pending Operations

This column has the report output operations that are pending because the report is not approved.


### Viewing review comments

Click  icon in the row of respective report.

### Viewing description

Click  icon in the row of respective report. The description dialog box has following information:

### Deleting a published report

Click  icon in the row of respective report.

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## Quick run a report

Information related to report is stored at the time of report deployment. (Repository > Manager Folders and Reports page). When you Quick Run a report, a report is executed with those default settings.



















Reports > Demo					
S.No.		Report Name	Quick Run	Run in Background	Run
1.		All Country Sales - Linked Prompt			
2.		Consumer Satisfaction Trends			
3.		Customer Order			
4.		Product Details - Tree View Parameter			

Figure 7: Quick Run icon


Click  icon available in the row of report name to run the report using default preferences. These preferences (report output type and other details) were set while deploying the report.

---

## Run a report



**Note:** Some of the delivery options and view options are not available in Smart Developer and Smart Viewer.

You can run a report (standard report as well as adhoc report) by clicking  button from

- **Report List** page
- **Search** page

On this page you can:

- Select delivery options
- Provide view options (optional)
- Set database connection (optional)

### Standard Reports

When you click  icon of a standard report, **Report Delivery Options** page opens up.

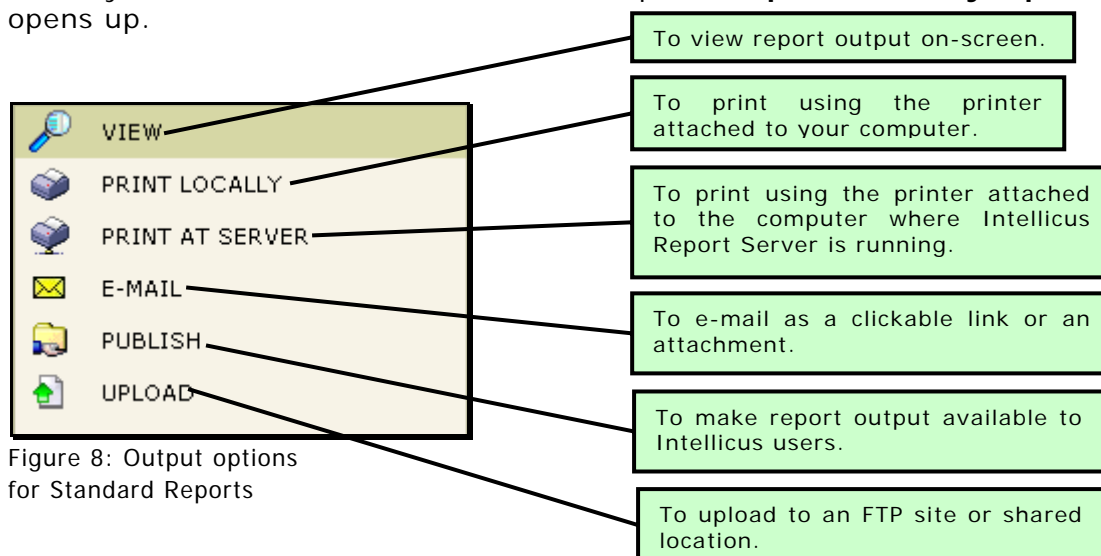


Figure 8: Output options for Standard Reports

### View (on-screen) in selected format

You can view a report in any of the following formats:

- **JVISTA**: To view output in Intellicus' own report viewer.
- **ACROBAT PDF**: To get output in Adobe PDF format.

- **MS EXCEL:** To get output as an MS Excel file.
- **HTML:** Web page (HTML format).
- **INTERACTIVE:** A variation of HTML type report, that has information organized in groups; you can open and close details.
- **MS WORD:** To get output as an MS Word file.
- **TEXT:** To get output as a text file.
- **COMMA SEPARATED:** Delimiter (Generally comma) separated file.
- **XML:** Output as an XML file.
- **RAW TEXT:** Comma separated file having only headers and data values just as received from database.
- **MS POWERPOINT:** To get output as an MS PowerPoint file.



**Note:** Some of the report formats will need the workstation to have respective Viewers. For example, PDF format needs Adobe Reader.

## Refresh Data

Select (check) this checkbox when you want to run the report with latest data.

## View Options

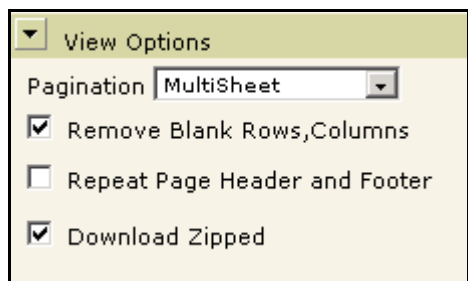


Figure 9: View Options for View as MS Excel file

You can select view options for the selected output type. More information on **View Options** is available in **Export Options** chapter.

## Connect To

Select the connection from **Select Connection** drop down box. If selected connection needs user credentials at run time, **User Name** and **Password** entry boxes will appear.

Specify user name and password required to connect with selected database and click **Test** button. If the connection is established successfully, **Connection Test Succeeded** message will appear.

To view the report,

1. On Report Delivery Options page, click View.
2. Click the required output format from options available.
3. If you want to run the report using a specific connection, select the connection from **Run on Database** dropdown box.
4. Click **VIEW NOW** to view the report now. Click **Run in Background** to run report and view it later.

If you clicked **VIEW NOW**, the report will be displayed in selected format.



Figure 10: Viewing report in HTML format

If you click **Run in Background**, **Report Execution Status** page appears. On this page, you can click **Refresh** to view status of the report being executed in background.



**Note:** Instructions to view a report run in background is provided later in the chapter.

## Cancel Request

When report execution starts, "Loading, Please Wait" message appears on portal page.

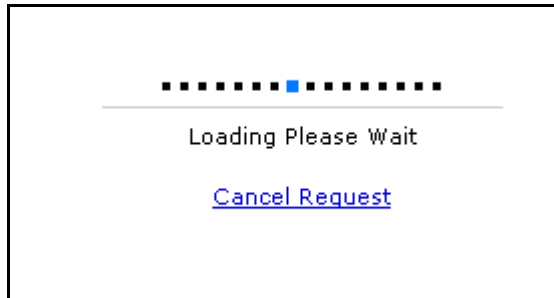



Figure 11: Cancel Report

Click **Cancel Request** hyperlink to cancel the report execution.

## Adhoc Reports

When you click  button of any of the Adhoc reports on **Report List** page **Run Adhoc Report** page will appear.

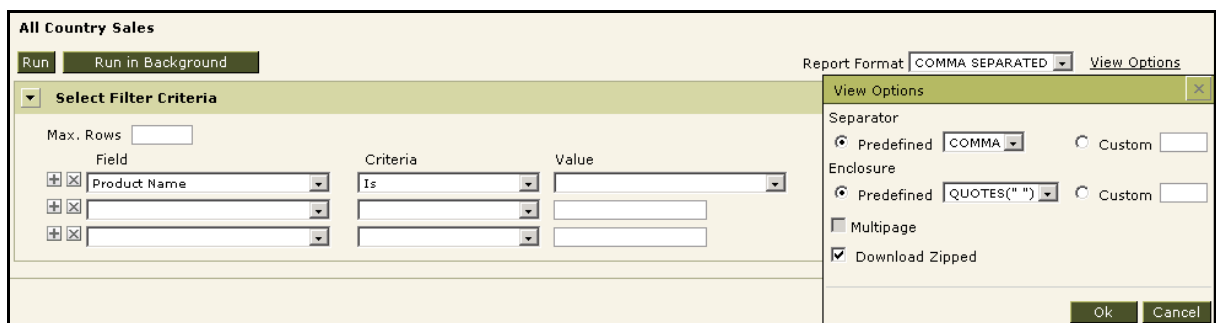


Figure 12: Run Adhoc Report page

Specify filter criteria on this page and click **Run** button. Now, if the report needs runtime user parameters, Parameter Input Form will appear.

- **Template:** Select a template to be applied on the report being designed.
- **Report Format:** Select the output format in which report is required.
- **Refresh Data:** Select (check) this checkbox when you want to run the report with latest data.



**Note:** Steps to **Quick Run** an adhoc report are the same as that of Standard Report.



## View Options

You can select View options for the selected report format.

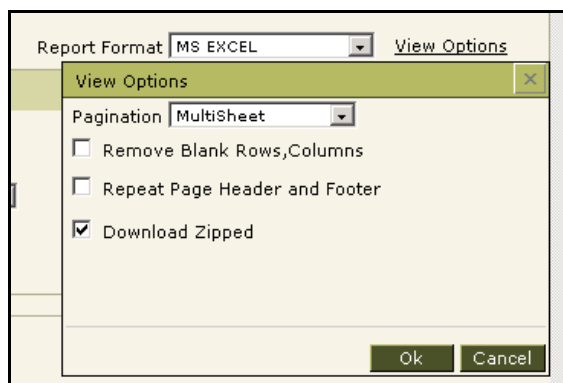


Figure 13: View Options (Adhoc Reports)

1. Click **View Options** link.
2. In **View Options** dialog, select options for the selected output type.
3. Click **OK** to proceed.



**Note:** More information about View options is available in **Export Options** chapter.



**Note:** For instructions on how to specify Filter criteria, refer to chapter **Adhoc Report Designer**, Topic **Selecting Filter Criteria**.

## Run time parameters for Adhoc report

Figure 14: Report Parameters (run time parameter input form)

This page will appear if run time filter parameters (run time parameters) were set for this report.

Select report parameters and click **Run Now** or **Run in Background** to go ahead.

If the report does not have run time parameters, Report Parameter form will not appear.

Prod No	Prod Type	Prod Line	Product	Sales 92
<b>Audio Systems</b>				
***03	Audio Systems	VCD P	RF cable	*
***02	Audio Systems	VCD P	Video cable	*
***01	Audio Systems	VCD P	Remote control	*
***02	Audio Systems	MP3 p1	iRiver H320	*
***01	Audio Systems	MP3 p1	Gmini XS200	*
***00	Audio Systems	MP3 p1	MP3 Photo Jukebox	*
<b>Home Accessories</b>				
***01	Home Accessories	Water Purifiers	Pocket Water Filter	*
***00	Home Accessories	Water Purifiers	Pro-Lite Water Filter	*
***02	Home Accessories	Sunblock	Sun Shelter-30	*
***01	Home Accessories	Sunblock	Sun Shelter-15	*
***00	Home Accessories	Sunblock	Sun Shelter-8	*
***02	Home Accessories	Bio-Friendly Soaps	RiverKind Detergent	*

Figure 15: Viewing an adhoc report in a separate window

## Repeat request of report execution

Repeat request comes into picture when:

- Execution of a report is currently under process, and
- You have again requested execution of that report with same operational and (if there any) user parameters.

Depending on application configuration any of the following may happen:

1. Execution continues and another request is also processed.
2. Execution continues and another request is rejected.
3. Execution continues and you are prompted to (1) cancel currently running request and start executing new request, or (2) Cancel new request.

---

## Print on your workstation

From **Report Delivery Options** page, you may prefer to print the report on your workstation: printers installed on your workstation.



Figure 16: Printing a report locally

Options available are:

- **Print:** To get **Print** dialog to provide print preferences followed by printing. The dialog box will have printers installed on the workstation you are using to access this page.
- **Print Direct:** To use default print settings on the workstation and go ahead with printing.

To print a report,

1. On Report Delivery Options page, click anywhere on PRINT LOCALLY.
2. If you want to run the report using a specific connection, select the connection from **Run on Database** dropdown box.
3. Click the print preferences (**PRINT** or **PRINT DIRECT**).

The report gets printed as per options set.

---

## Printing at Server



From **Report Delivery Options** page the report can be printed to a printer attached to the machine where Intellicus Report Server is running.

Figure 17: Printing report at server

Click the **Print Setting**. A small window opens, listing the print settings related to printers installed on the machine, where the Report Server is running. Select the setting you want to use. Other information is filled in based on the settings done by the administrator. However you can change the information.

**Printer Name:** Select the printer name on which the report should be printed.

**Page Range:** Select All to print all the pages. Specify page number(s) in Pages separated by comma to print selected pages.

**Number of Copies:** Specify the number of copies for the report. Specify Collate preference.

**Paper Source:** Specify the tray preferences.

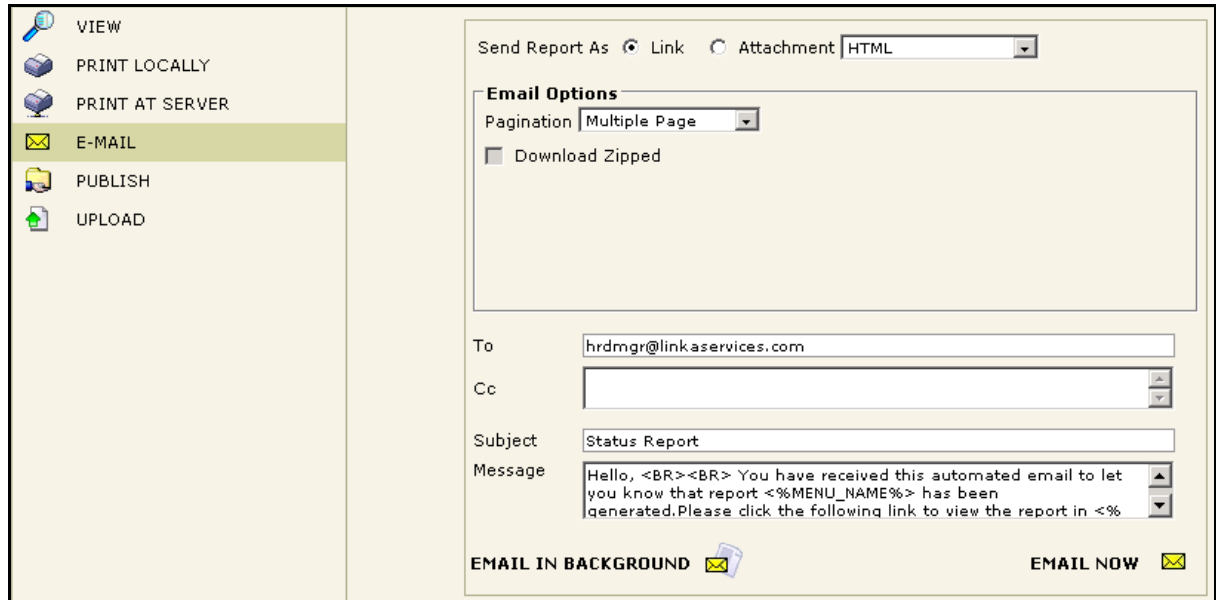
**Include comments:** Effective if report being printed on server has to undergo approval process. Select this checkbox to print approval comments along with report as tail pages.



**Note:** Status of a report executed in background can be viewed on My Reports page.

## E-mail the report

A report can be sent to concerned person as attachment in the mail as well as a link.



The screenshot shows a web interface for selecting email delivery options. On the left is a sidebar menu with icons and labels: VIEW, PRINT LOCALLY, PRINT AT SERVER, E-MAIL (highlighted), PUBLISH, and UPLOAD. The main area contains the 'Send Report As' section with radio buttons for 'Link' (selected) and 'Attachment', and a dropdown menu set to 'HTML'. Below this is the 'Email Options' section with a 'Pagination' dropdown set to 'Multiple Page' and a 'Download Zipped' checkbox. The bottom section contains input fields for 'To' (hrdmgr@linkaservices.com), 'Cc', 'Subject' (Status Report), and 'Message' (a default automated email template). At the bottom right are two buttons: 'EMAIL IN BACKGROUND' with a mail icon and 'EMAIL NOW' with a mail icon.

Figure 18: Selecting Email as report delivery option

On **Report Delivery Options** page, when you click E-MAIL, the page is refreshed having entry boxes for details required to send a mail.

- **Send Report As:** Select **Link** if you want the mail to have link to the report. Click **Attachment** followed by selecting the report format.
- **Email Options:** Specify email options.



**Note:** More information about **Email Options** is available in **Export Options** chapter.

- **To and CC:** Specify the e-mail Ids where the report should be sent.
- **Subject:** Subject that the mail will carry.
- **Message:** This entry box displays default message that will appear on the mail. You may change the message.

Specify the details, and click **EMAIL NOW** to proceed with report running and mailing.

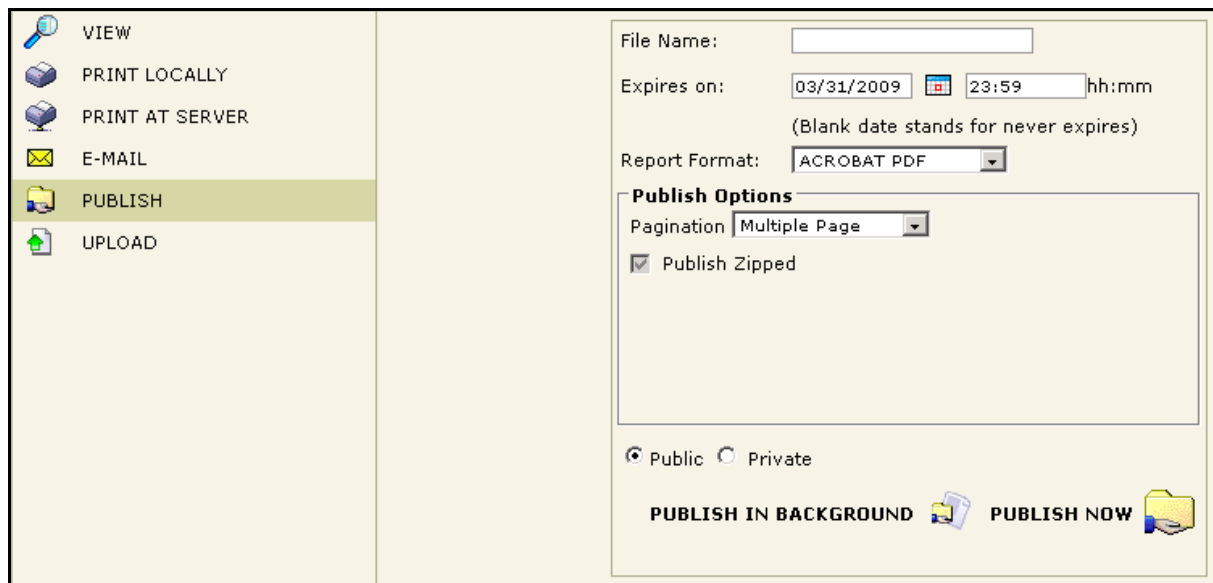
If you click **Email in Background**, **Report Execution Status** page appears. On this page, you can click **Refresh** to view status of the report being emailed in Background.



**Note:** Information on what you can do on **Report Execution Status** page when you mail a report in background is provided later in the chapter.

## Publish the report

A report can be published. After a report is published, it appears in the list of **Published** report outputs. You can click  icon in the respective report's row on report list to view the list of published outputs for the report. Click the one that you want to view.



The screenshot shows a web interface for publishing a report. On the left is a sidebar with icons and labels: VIEW, PRINT LOCALLY, PRINT AT SERVER, E-MAIL, PUBLISH (highlighted), and UPLOAD. The main area contains a form with the following fields: File Name (text input), Expires on (date and time pickers set to 03/31/2009 23:59), a note "(Blank date stands for never expires)", Report Format (dropdown menu set to ACROBAT PDF), a section titled "Publish Options" containing a Pagination dropdown (set to Multiple Page) and a checked checkbox for "Publish Zipped", radio buttons for "Public" (selected) and "Private", and two buttons at the bottom: "PUBLISH IN BACKGROUND" and "PUBLISH NOW".

Figure 19: Publishing a report

To publish a report, you need to fill in the following:

- **File Name:** The name that will appear for this report on the published reports list.
- **Expires on:** The date and time after which the report will become unavailable to the user. Keep it blank, if you want it to be available forever.
- **Report Format:** Select RAW TEXT to view the published report in raw text format.



**Important:** A report published in raw text format will not be available for view in any other format except raw text.

- **Publish Options:** Specify Publish Options.
- **Public / Private:** Selecting Public will make the report available to everyone. The Private option will make the report available to you only.

Specify these details and then click the **PUBLISH NOW** button. The required report will appear on the Published reports' list.

If you click **Publish in Background**, **Report Execution Status** page appears. On this page, you can click **Refresh** to view status of the report being published in Background.



**Note:** Information on what you can do on **Report Execution Status** page when you publish a report in background is provided later in the chapter.



**Important:** When a report is published, its output is stored on Intellicus Report Server. When a published report is requested from Published reports list, the respective output is displayed. Because a published report does not have the latest data, the information on a published report, may be old.

A report may be associated with workflow (approval process). When such a report is published, it would be available to you on **Saved Reports List** page if you were an approver. If you are not an approver, such a report will be available to you on Saved Reports List page only after approved by an approver.

## Upload the report



A report can be uploaded to an FTP server or a shard location. Click Upload option to get the details need to be filled in to upload a report.

VIEW  
PRINT LOCALLY  
PRINT AT SERVER  
E-MAIL  
PUBLISH  
UPLOAD

Report Format: ACROBAT PDF

Upload Options

Pagination: Multiple Page

☒ Upload Zipped

Upload Type: ☒ FTP ☐ Shared Folder

Use PASV mode: ☒

Server Name\*  Port

User Name  Password

Folder Name

File Name\*

UPLOAD IN BACKGROUND

UPLOAD NOW

Figure 20: Uploading a report output to FTP server

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## Uploading the report

You need to provide following information to upload a report output to an FTP Server or a shared location on the network.

- **Report Format:** Select report format in which report output will be generated for upload.
- **Upload Options:** Specify Upload Options.
- **Upload Type:** Select *FTP* to upload to an FTP server. Select *Shared Folder* to upload it to a shared folder on the network.
- **Use PASV mode:** Check this checkbox to upload in passive mode.
- **Server Name** (only for FTP): The server where the report should be uploaded.
- **Port** (only for FTP): The port at which should be used during upload.
- **User Name** (only for FTP): Specify the user name by which application to login into server.
- **Password** (only for FTP): Specify the password to be used at the time of login.
- **Folder Name:** In case of FTP upload, specify the folder where the report should be placed. Specify backslash / if you want to place the report at root. In case of Shared Folder upload, specify the network path in UNC format(\\computername\folder) where the report should be placed.
- **File name:** Specify name by which the report will be stored on server.

Click **Upload Now** to upload the report. Click **Upload in Background** to start execution of the report and proceed with other activities.




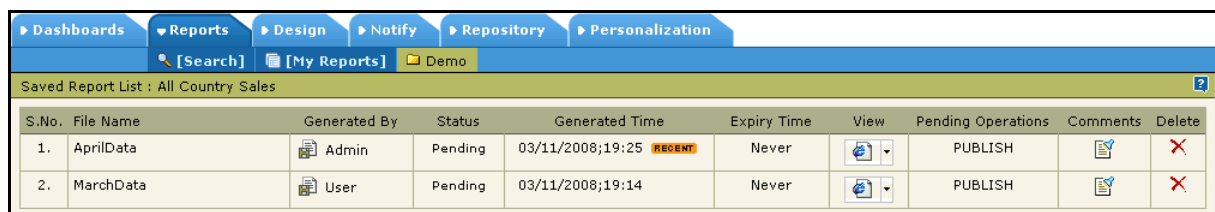
## View Published report

You can view / get output of a published report on:

- **[Search] > All Published page:** Lists all the published reports
- **Saved Reports List page:** Lists published instances of selected report

To view a published report on **Saved Reports List** page,

1. Under the **Reports**, click the respective Folder (category) and on the page that opens, click  button in the row of the report that you want to have.
2. **Saved Report List** page appears having one row for each time the report was published.



S.No.	File Name	Generated By	Status	Generated Time	Expiry Time	View	Pending Operations	Comments	Delete
1.	AprilData	Admin	Pending	03/11/2008;19:25 <b>RECENT</b>	Never		PUBLISH		
2.	MarchData	User	Pending	03/11/2008;19:14	Never		PUBLISH		

Figure 21: Viewing a published report

This page lists all those reports that are published and are not yet expired. For each report the following information is listed:

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

On this page, you can view the report all allowed formats.

### Viewing a report output

Each row in the table represents one report.

1. From **View** dropdown in the table, click the icon indicating respective output type.
2. In **View Options** dialog, select options for the selected output type.
3. Click **OK** to proceed.




**Note:** More information about View Options is available in Export Options chapter.



**Important:** A report published in raw text format will not be available for view in any other format except raw text.

---

Click  to view users' comments for this report.


Click  button to delete the report from the list. You can delete a report that you have published.

**Pending Operations:** This column has the report output operations that are pending because the report is not approved.

## Approval Process



A report that you publish may need to undergo *Approval Process*. In this process such a report needs to be approved before it can be published. Such reports are listed in **Pending Reports** page.

You need to open a report to approve, reject or comment it. From dropdown box in View, click-open it in HTML format. On HTML viewer, click  icon to open comment window.

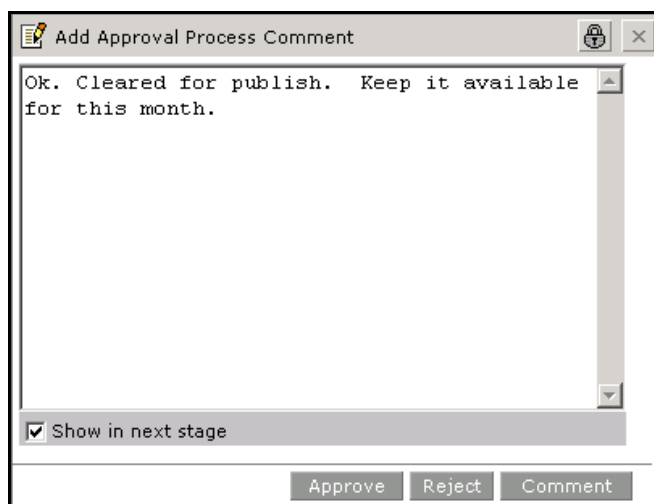



Figure 22: Add Approval Process Comment

Key in the message in text area and click any of the following buttons:

- **Approve:** To approve the report. After approval, this report will be available for view by all authorized users.
- **Reject:** To reject the report. When a report is rejected, it is not published.
- **Comment:** To set the entered text as comment. Comment can be provided before as well as after a report is approved / rejected.

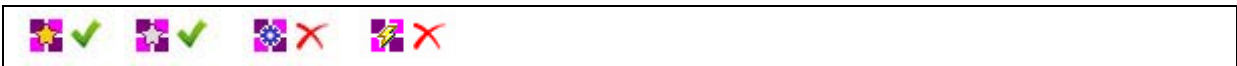
To view comments specified for a report, click  button.

For more information on report collaboration, refer to chapter **Report Collaboration**.

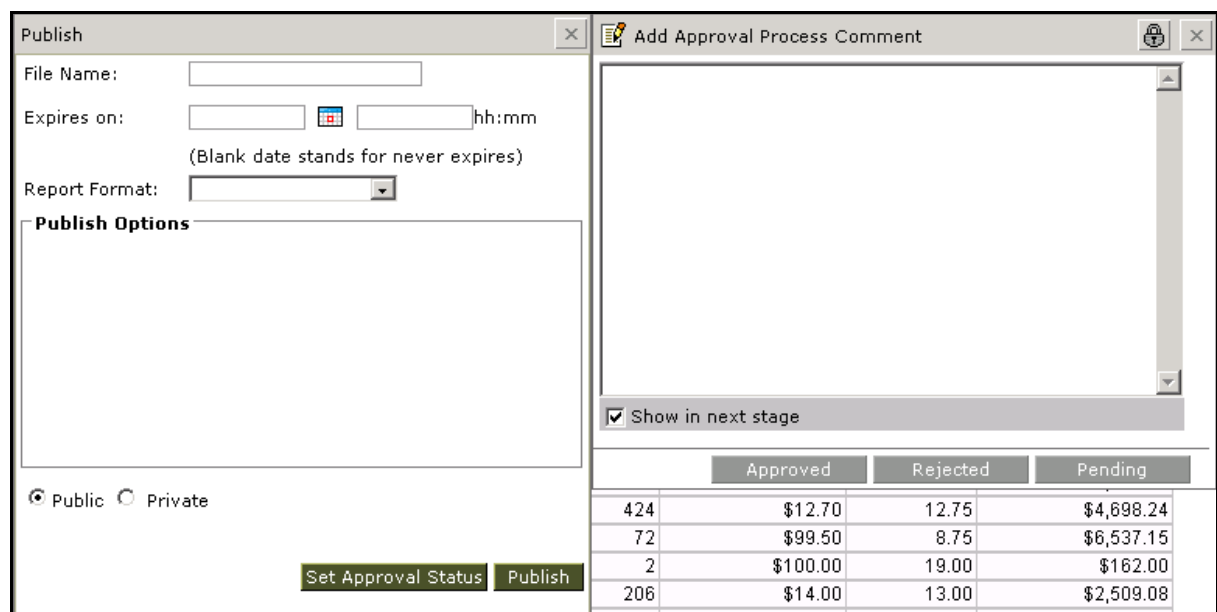
## Publishing a report as post-view operation

A report can also be approved / rejected / commented at the time of viewing the published report in html format.

### Changing approval status



At the time of publishing the report, specify approval related information on **Publish Report** dialog box.



	Approved	Rejected	Pending
424	\$12.70	12.75	\$4,698.24
72	\$99.50	8.75	\$6,537.15
2	\$100.00	19.00	\$162.00
206	\$14.00	13.00	\$2,509.08

Figure 23: Approval process status change at the time of publishing as post view operation

To change approval related information, select a status option from **Status** dropdown box and click **Publish** button to go ahead with publishing.

---

## Report Scheduling (Quick Scheduling)



Intellicus offers a very comprehensive report scheduling mechanism. This feature is available for the users having specific access privileges. However, Quick Scheduling feature is available for all the users.

When you click  icon on **Report List** page, you may get:

- **Schedule Job:** This page appears when a schedule is not setup for the selected report.
- **Schedule Job List:** This page appears when one or more schedules are setup for the selected report.

### Creating a schedule using Schedule Job page

This page appears when you click Schedule icon from Report List page (and there is no schedule setup) or click **Add** button on **Schedule Job List** page.

Schedule job for All Country Sales

Save Cancel Preview

**Job Details**

Name \* Once\_All Country Sales\_for\_User ☐ Skip on no data ☒ Delete on completion

☒ **Once**

Run report on date 3/12/2008 at hh : mm

☐ **Recurring**

Schedule starts at \* 3/12/2008 Schedule ends at

**Frequency** ☒ Daily ☐ Weekly ☐ Monthly

Every 1 Day(s) at hh : mm

**Delivery Operations**

☐ Email ☐ Print ☐ Upload ☒ Publish

**Report Format** ACROBAT PDF

**Delivery Options**

Pagination Multiple Page

☒ Deliver Zipped ☐ Include comments

Figure 24: Scheduling a job using Quick Schedule feature

This includes setting up three set of information:

- Job Details
- Delivery Options
- Report Parameters

---

Each of these is explained below:

### Job Details

- **Name:** Specify a unique name for the Job.
- **Skip on no data:** If selected, report will be delivered to selected delivery options only if the report has any data. Otherwise schedule will be skipped.
- **Delete on Completion:** If selected, job will be deleted after execution for **Run Now** and **Once**. For **Recurring**, it will be deleted if further execution is not scheduled after last execution.

If you want to run this report only once as per set delivery options, select option **Once** and provide date and time. Select **Recurring** if you want to run this report more than once. When you select **Recurring** you need to specify following information:

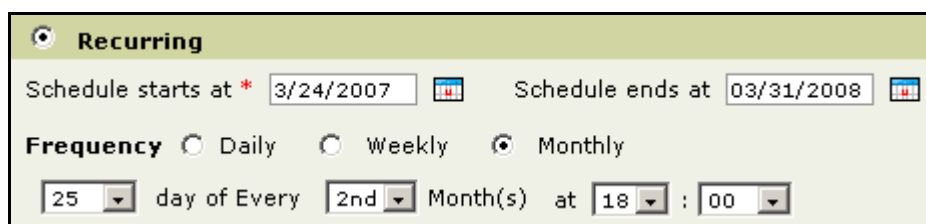
The image shows a software dialog box titled "Recurring" with a green header bar. Inside, there are two date pickers: "Schedule starts at" with the date "3/24/2007" and "Schedule ends at" with the date "03/31/2008". Below these are three radio buttons for "Frequency": "Daily", "Weekly", and "Monthly", with "Monthly" being selected. At the bottom, there are several dropdown menus: "25" for "day of Every", "2nd" for "Month(s)", and "18 : 00" for the time.

Figure 25: Making Recurring (monthly) schedule

Upon selecting **Recurring** you need to specify the following information:

- **Schedule Starts at:** Specify the date on which recurrence of schedule should be started.
- **Schedule ends at:** Specify the last day of execution of schedule.
- **Frequency:** Select Daily, Weekly or Monthly based on the way you want to set recurrence frequency.

### Delivery Options

This information deals with format and delivery of the report.

#### Skip on no data

If selected, report will be delivered to selected delivery options only if the report has any data. Otherwise schedule will be skipped.

#### Selecting Report Format

When you select a report format, (after selecting any of the report delivery check boxes) **Delivery Options** area just below **Report Format** dropdown box will list properties related to selected report format. Set the options.



**Note:** More information on **Delivery Options** is available in **Export Options** chapter.



**Important:** You can specify more than one report delivery options. For example, Emails and publish options in conjunction.

## E-mails

Use this option when a report is to be sent to e-mail recipients. To get e-mail related delivery options, click **Email** link.



**Note:** In case a public report eligible for approval process is being scheduled, Email option is hidden from the UI if the logged in user is not approver.

The screenshot shows the 'Delivery Operations' form. At the top, there are checkboxes for 'Email' (checked), 'Print', 'Upload', and 'Publish'. A 'Skip delivery on no data' checkbox is on the right. Below this is the 'Report Format' dropdown set to 'COMMA SEPARATED'. A 'Delivery Options' section contains settings for 'Separator' (Predefined: COMMA, Custom: empty), 'Enclosure' (Predefined: QUOTES(" "), Custom: empty), 'Pagination' (Single Page), 'Deliver Zipped' (checked), and 'Include comments' (unchecked). The 'Send Report As' section has 'Link' selected over 'Attachment'. Below are input fields for 'File Name', 'To', 'Cc', 'Bcc', and 'Subject'. A 'Suffix Timestamp Format' dropdown is set to 'MM-dd-yyyy'. The 'Message' field contains a template: 'Hello, <BR><BR> You have received this automated email to let you know that report <% MENU\_NAME%> has been generated.Please click'.

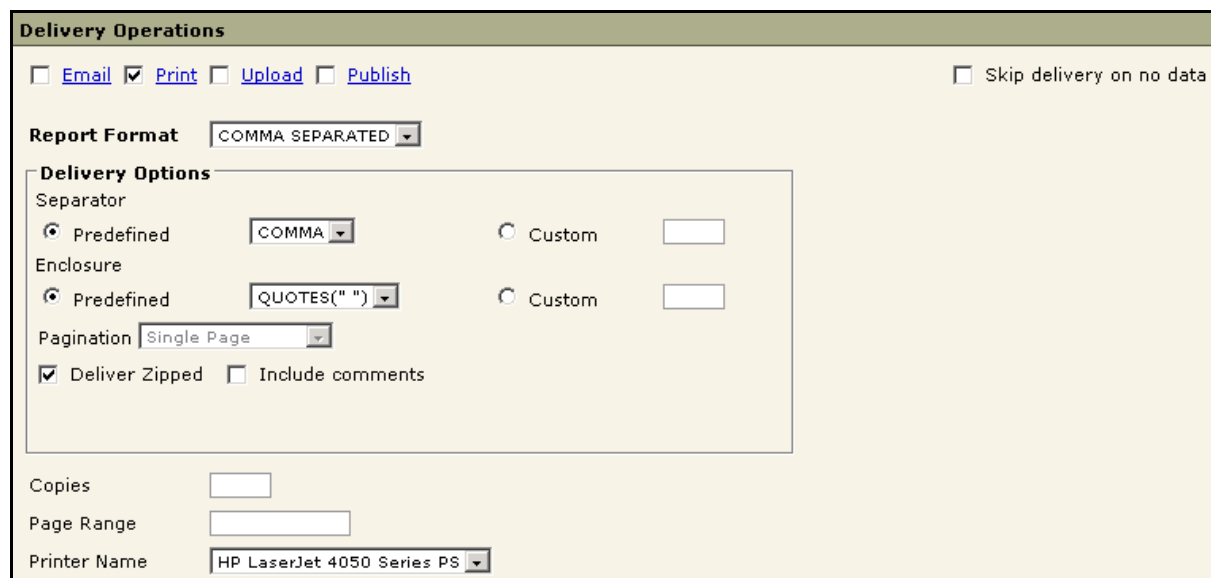
Figure 26: E-mail as report delivery option

To send a report through an email, you need to do the following:

1. Check the **Email** checkbox.
2. In **Report Format**, select the required report format.
3. In **Send Report As**, select *Link* to send link of the report, select *Attachment* to send entire report as an attachment of the mail.
4. Specify e-mail IDs for **To**, **Cc** and **Bcc**.
5. Specify subject that you want the e-mail to have under Subject.
6. In **Message** specify message body of the e-mail.

## Print

Use this option to print the reports onto paper. To get print related delivery options, click **Print** link.



The screenshot shows the 'Delivery Operations' form. At the top, there are four checkboxes: 'Email' (unchecked), 'Print' (checked), 'Upload' (unchecked), and 'Publish' (unchecked). To the right of these is a checkbox for 'Skip delivery on no data' (unchecked). Below this is the 'Report Format' dropdown menu, which is set to 'COMMA SEPARATED'. A 'Delivery Options' box contains several settings: 'Separator' is set to 'Predefined' with a dropdown showing 'COMMA', and 'Custom' is unselected; 'Enclosure' is set to 'Predefined' with a dropdown showing 'QUOTES(" ")', and 'Custom' is unselected; 'Pagination' is set to 'Single Page'; 'Deliver Zipped' is checked, and 'Include comments' is unchecked. Below the 'Delivery Options' box are three input fields: 'Copies' (empty), 'Page Range' (empty), and 'Printer Name' (set to 'HP LaserJet 4050 Series PS').

Figure 27: Print as report delivery option

To do so do the following:

1. Check the **Print** checkbox.
2. In **Report Format**, select the required report format. This will make sure you get exactly you have been viewing on screen in specific format.
3. In **Copies**, specify the number of copies needed to be print.
4. In **Page Range**, specify the starting page and end page of the report to be printed. To print page 2 to 17, specify 2 – 17. If this is kept blank, all the pages will be printed.
5. Select **Printer Name** to be used to print the report. This dropdown box has all the printers installed on Report Server machine.



**Note:** Raw Text format is not available for **Print**.

## Upload



A report can be uploaded to an FTP server as well as stored at a shared location. To get print related operational parameters, click **Upload** link.

### Uploading the report on FTP Server

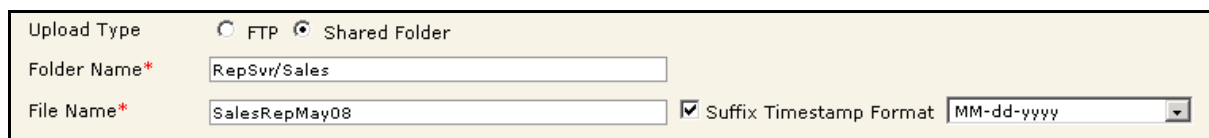
Figure 28: Setting FTP as report delivery

1. Check the **Upload** checkbox.
2. In **Report Format**, select the required report format.
3. In Upload Type, select *FTP*.
4. To upload in passive mode, check **Use PASV** mode checkbox.
5. In **Server Name** specify the server name.
6. In **Port**, specify the port that should be used for upload.
7. In **User Name**, specify the user name by which application to login into server.
8. In **Password**, specify the password to be used at the time of login.
9. In **Folder Name**, specify the folder where the report should be placed. Specify "/" if you want to place the report at root.
10. In **File Name**, specify name by which the report will be stored on server.



## Saving on a shared folder on the Network

A report can be saved on a network location.



Upload Type ☐ FTP ☒ Shared Folder

Folder Name\*

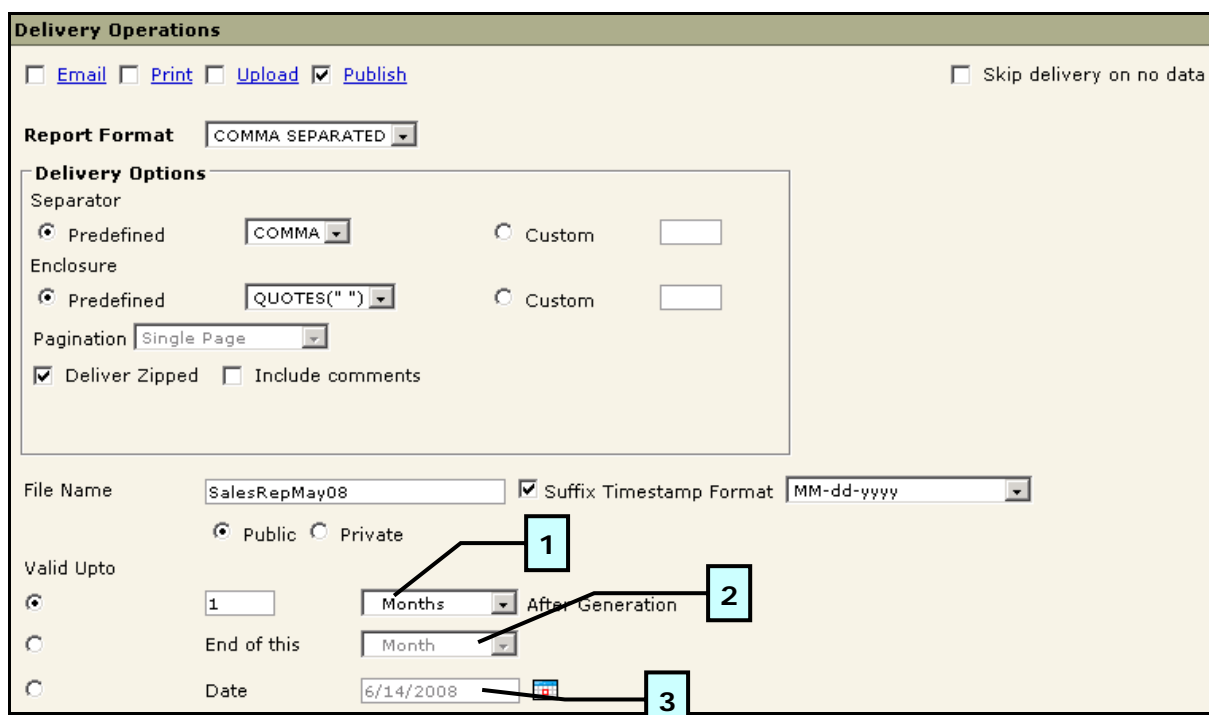
File Name\*  ☒ Suffix Timestamp Format

Figure 29: Saving on shared folder

1. Check the **Upload** checkbox.
2. In **Report Format**, select the required report format.
3. In **Upload Type**, select *Shared Folder*.
4. In **Folder Name**, specify the network path in UNC format(\\computername\\folder) where the report should be placed.
5. In **File Name**, specify the name by which the report will be stored.

## Publish

A report can be published with a pre-set validity period. To set a report for Publish:



☐ Email ☐ Print ☐ Upload ☒ Publish ☐ Skip delivery on no data

Report Format

**Delivery Options**

Separator  
☒ Predefined  ☐ Custom

Enclosure  
☒ Predefined  ☐ Custom

Pagination

☒ Deliver Zipped ☐ Include comments

File Name  ☒ Suffix Timestamp Format

☒ Public ☐ Private

Valid Upto  
☒ 1  After Generation   
☐ End of this   
☐ Date

Figure 30: Publishing a report

1. Check the **Publish** checkbox.
2. In **Report Format**, select the required report format.
3. In **File Name**, specify the name for the published report.
4. To include date and time of report generation, select **Suffix Timestamp** checkbox and select a date format.

- 
5. Click **Public** to make this report available for everyone. Click **Private** to make this report available only to yourself.
  6. For **Valid Upto** field, select the right option and provide details accordingly. Explanation is provided after these steps. It means Reports will be expired / will never be published after the specified period.

## Validity Options

A published report is available as per its validity period. After the validity period is lapsed, the report is removed from the list.

You have the following validity options for report publishing:

### 1. For a specific time period after generation

Example: for 2 months, 3 week, 6 hours, etc.

Select this option and specify the number followed by selecting unit (hour(s), day(s), week(s), month(s) and year(s)).

### 2. Up to end of a duration from generation

Select this option to keep the report published up to the end of the duration (hour, day, week, month and year).

Example: At the end of this **week**, at the end of this **year**, etc.

### 3. Up to end of a specific time period

Select this option button to keep report published up to a specific date.

Example: July 30, 2008.



**Note:** Report will not be available after the period / time duration is over.

## Getting parameter value in fields (on E-mail, Publish and Upload)

You can set parameter value as part of value in free form entry boxes.

To include a parameter in a field, enclose the parameter name in <% and %> and specify in respective entry box.

For example, Sales<%CountryCode%>Jan2006. Here, CountryCode is a parameter name that will be replaced by its actual value when the report is executed.

## Input Parameter form: Provide values for report parameters

These are the values that are specified at run time. Parameters will appear here if a report needs user parameters. You need to select parameters. If a report does not need user parameters, this area will remain blank.

The screenshot shows a web-based 'Report Parameters' form. At the top, it says 'Report Name : All Country Sales Prompt'. There are buttons for 'Run Report' and 'Reset', and a dropdown menu labeled '(Select Form)'. Below this is a 'Select' tab. The form is divided into three sections under the heading 'Mandatory'. The first section is 'Choose the Product Type:\*' with '(3/3 selected)' and an 'All' checkbox checked. It contains a list box with 'Audio Systems', 'Home Accessories', and 'Mobile Devices'. The second section is 'Choose the Product Line:\*' with '(0/11 selected)' and an 'All' checkbox unchecked. It contains a list box with 'Alert Devices', 'Bio-Friendly Soaps', 'CellPhone', 'Charger', 'Cover', 'EarPhone', 'MP3 p1', and 'Recycled Products'. The third section is 'Choose a Country:\*' with '(0/26 selected)' and an 'All' checkbox unchecked. It contains a list box with 'Australia', 'Belgium', 'Brazil', 'Canada', 'Chile', 'China', 'Denmark', and 'France'. At the bottom right, there are buttons for 'Run Report', 'Reset', and a 'Save Form As' button with a text input field.

Figure 31: Input Parameter form

### Select tab

On this tab you specify values for parameters. A parameter may need only one value, while others may need multiple values.

- **Mandatory Parameters:** It is a must to provide values for such type of parameters in order to get the report output. Name of a mandatory parameter is suffixed by a \* and are grouped in **Mandatory** heading.
- **Optional Parameters:** It is optional to provide values for such type of parameters. The report will run successfully even if you do not provide values for these parameters. Optional parameters are grouped under **Optional** heading.
- **Tree View of Parameter values:** Tree view (hierarchical view) of parameter values simplifies the process of selecting one or more parameter values.

**Auto Refresh Nested Parameters:** This is applicable for linked parameters. Select it to automatically refresh values of dependent parameters when value of source parameter is changed.

**Push button:** After making changes in the selection of the parameter, click this button refresh values of dependent parameters.

**Refresh button:** Click this button to refresh the values in this parameter based on possible changes in source parameters.

**Description button:** Click this button to view description of the parameter.

---

## Sort tab

Use this tab to select the field by which the report should be sorted. A report can be sorted on ascending or descending order of the selected field.

## Specifying value for a parameter

Specify value in the entry box. If it is a drop down box, use up and down arrows to make the values visible and click the value to select it.

## Selecting multiple values for a parameter

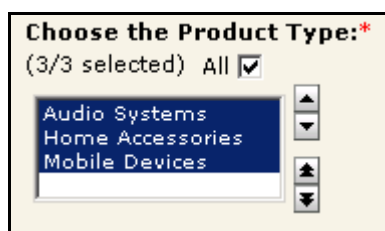


Figure 32: Selecting multiple values

1. In **Available List**, select a value that you want to select. That value will be highlighted.
2. Click **up arrow** or **down arrow** to scroll to the value you want to select.
3. Press and hold **Ctrl** key on the keyboard and click value(s) that you want to select.

All the selected values will appear highlighted.

## Selecting values using value groups

When value groups are created for a parameter, **Value Groups** box appears on the right of respective parameter box.

1. Click a value group to select all the values within that group.
2. To select multiple value groups, press and hold down **Ctrl** key and click mouse on respective group.

## Selecting value(s) from Tree View

### Selecting a single value

1. In **Available List**, click the value and click **Add Node to Selected List** button.

Selected node (value) will be placed under **Selected List**.

---

## Selecting a complete branch or partial branch

This can be done for multiple value parameters. These parameters can take multiple values.

1. In **Available List**, click the topmost node of the branch and click **Add Node to Selected List** button.

Selected branch will be placed under **Selected list**.

## Removing multiple values from different branches

1. In **Available List**, select a value that you want to select. That value will appear bold.
2. Press and hold **Ctrl** key on the keyboard and go on clicking the values that you want to select.
3. Click **Add Node to Selected List** button.

Selected values (along with the node structure) will be placed under **Selected List**.

## Removing one or multiple values

1. From **Selected List**, select value(s) that you want to unselect.
2. Click **Delete Node from Selected List** button.

Selected values will be removed from **Selected List**.

## Removing a branch

1. Click the Topmost node of the branch that you want to remove.
2. Click **Delete Node from Selected List** button.

## Using Search button

1. Click **Search** button. **Search** dialog box appears.
2. Specify search preferences and click **Go**. Result tab appears in front having values that meet search criteria.
3. Select a value and click **Set**. The value will be set.
4. Click **OK** to close the dialog box.

---

## Saving the form



You can save the information related to selected parameters on this form. After selecting the required parameter values,



Figure 33: Saving a parameter form having values

1. Click the check box appearing on the left of **Save Form as**.
2. Specify a name for the form.
3. Click **Run Report** button.

## Loading a form



When you load a form, the parameters set at the time of saving the form appear selected.

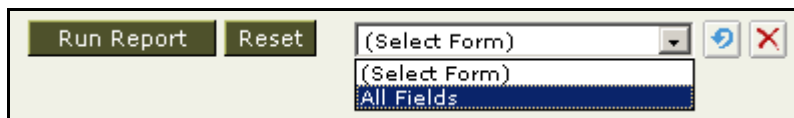



Figure 34: Loading a form

1. Select the form from **Load Form** drop down box.
2. Click  button on the right of **Load Form** drop down box.

The form is refreshed with values selected. After loading the form click **Run Report** button to run the report.

## Deleting a form




1. From **Load Form** drop down box, select name of the form to be deleted.
2. Click  button.

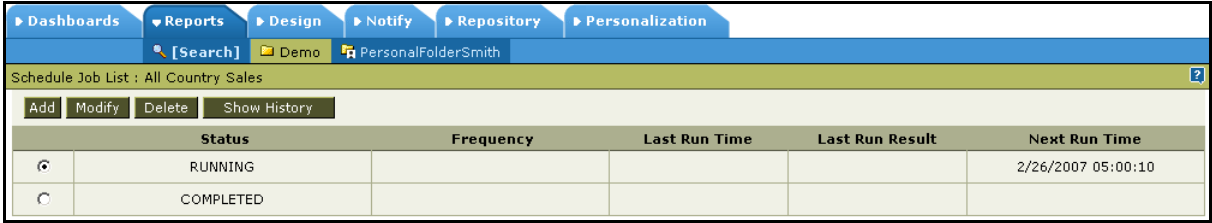
The selected form is deleted.

---

## Viewing and working with schedules



A report may have one or more schedules setup. Schedule list appears when you click  button on a report that has one or more schedules setup.





Schedule Job List : All Country Sales				
Add Modify Delete Show History				
Status	Frequency	Last Run Time	Last Run Result	Next Run Time
 RUNNING				2/26/2007 05:00:10
 COMPLETED				

Figure 35: List of schedules for selected report


This page contains following information:

- Status
- Frequency
- Last Run Time
- Last Run Result
- Next Run time

These schedules are your private schedules.


### Creating a schedule



1. On **Report List**, click  button for the report for which you want to create a schedule. **Schedule Job List** page appears.
2. Click the **Add New** button. **Schedule Job** page opens.
3. Go ahead with further process as per detail provided in previous pages.

### Modifying a schedule




1. On **Report List**, click  button for the report for which you want to modify a schedule. **Schedule Job List** page appears.
2. On this page, select the task that you want to modify. To select a task, click the option button on the left of the task.

- 
3. Click the **Modify** button. The task details opens where you can modify the information.

## Deleting a schedule



1. On **Report List**, click  button for the report for which you want to modify a schedule. **Schedule Job List** page appears.
2. On this page, select the task that you want to delete. To select a task, click the option button on the left of the task.
3. Click the **Delete** button. **Confirm delete** dialog box appears.
4. Next click **OK** to delete the task.

If you have clicked delete button by error, click **Cancel** on confirm delete dialog box to abandon the process of deletion.



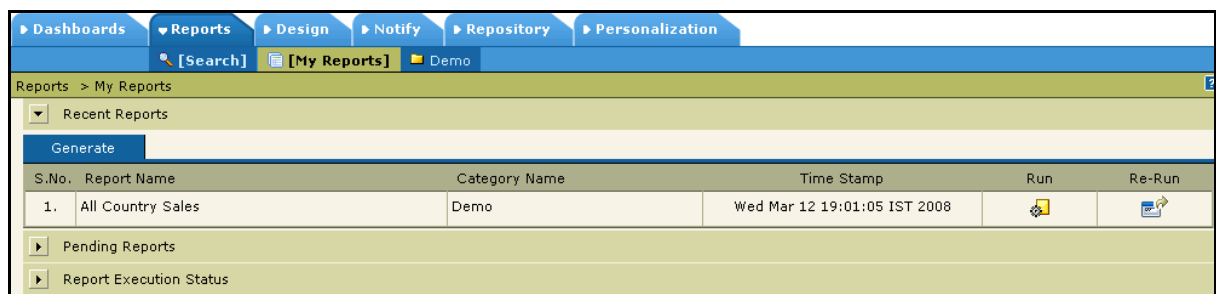
## My Reports page

This page has following tabs:

- **Recent Reports:** It lists the reports that have been published recently. The number of reports listed in this tab depends on personal preferences that you have set.
- **Pending Reports:** It lists the reports that are pending for approval process.
- **Report Execution Status:** It lists status of reports that were run "in background" mode.

### Recent Reports

The reports that you have recently run are listed on **Recent Report List** tab. To get recent report list, click Reports > [My Reports] > Recent Reports tab.





S.No.	Report Name	Category Name	Time Stamp	Run	Re-Run
1.	All Country Sales	Demo	Wed Mar 12 19:01:05 IST 2008		

Figure 36: Recent Reports on Report Listing page

On **Recent Reports**, you can actually generate the report again. The list has following columns for each report:

- **Report Name:** The name of the report (as it appears under respective category).
- **Category Name:** The category to which the report belongs.
- **Time Stamp:** Date and time when the report was generated last.
- **Run:** To run the report.
- **Re-Run:** To run the report with the parameters set during previous run.

## Pending Reports



This tab lists the reports

- That are yet to undergo approval process and
- For which you are one of the approvers or commenter.

For each pending report, it lists

- File Name (The name by which report was published)
- Generated by
- Generated Time
- Expiry time
- Approval status

Pending Reports						
File Name	Generated By	Generated Time	Expiry Time	View	Pending Operations	Comments
Report Name: All Country Sales		Category: Demo		Approval Process Name: Report Approval		
	Admin	03/12/2008;19:00	Never	▾	PUBLISH	
AprilData	Admin	03/11/2008;19:25	Never	▾	PUBLISH	
MarchData	User	03/11/2008;19:14	Never	▾	PUBLISH	

Figure 37: Pending reports

For every pending report layout (file name), its report name (the name specified at the time of publish), category in which layout was deployed and associated approval process name is specified.

Depending on the assignment type, you can approve the report for publishing, reject the report or provide your approval process comments for the report. You can also view the approval process comments and view the report output in any of the available report outputs types.

## Pending Operations

This column has the report output operations that are pending because the report is not approved.

For steps of approval refer to chapter **Running Reports**, topic **View Published Report**, sub-topic [Approval Process](#).

## Report Execution Status



This page lists execution status of reports. When the page opens up, a preset number of reports are listed.

View	Report Name	Action	Execution Type	Status	Generated Time	Pages	Cancel	Delete
	Demo \ Annual Sales Figure Comparision	PUBLISH	ASYNC	SUCCESSFUL	01/28/2008;17:49	-	-	
	Demo \ All Country Sales	EXEC	ASYNC	SUCCESSFUL	01/28/2008;11:13	-	-	

Figure 38: Report Execution Status tab

## Applying filters

To filter the list entries, apply any of the below filters, and click **Refresh** button.

- **Category:** The category in which the report is deployed.
- **Report:** The report name.
- **Execution Type:** Select DIRECT for "Run NOW" type of executions, SCHD for scheduled reports, ASYNC for reports run in background.
- **Status:** Select UNDERPROCESS for reports that are still being executed, select COMPLETED for the reports that are executed.
- **Date From** and **To:** Date range within which report execution was started.
- **User:** Select organization and user who executed the report. (Only for Super administrators).

Filtered list contains following details:

- **View.** A dropdown box, to select output type to view the report.
- **Report Name**
- **Action**
- **Execution Type**
- **Status**
- **Generated Time**

- 
- Pages. Pages generated till that moment.
  - Cancel. This column will have Cancel button when report is being generated.
  - Delete. Click this button to delete that report.
  - To stop execution of a report
  - If a report is currently being executed, Cancel column will display Cancel icon. Click this icon to cancel the execution of the report.

### Viewing a report output

Each row in the table represents one report.

1. From **View** dropdown in the table (the first column), click the icon indicating respective output type.
2. In **View Options** dialog, select options for the selected output type.
3. Click **OK** to proceed.



**Note:** More information on **View Options** is available in **Export Options** chapter.



