

Getting Started with Intellicus

Intellicus Enterprise Reporting and BI Platform



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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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Introduction

Most organizational decisions are consequential of reports and thus reporting is a vital and integral component of any company. Intellicus is a Reporting Tool that can deal with operational and analytical reports right through complete reporting life-cycle.

Intellicus supports most of the popular databases as report-database, provides reports in popular file types like HTML, PDF, MS Word, MS Excel and CSV) and delivers for on-screen view, sent as email as well as FTP to a web site.

What does Intellicus Offer?

Intellicus Report Server is a highly scalable component, that is capable of handling simultaneous requests 24 x 7 without performance issues and delivering graphical and richly formatted reports in any of the offered formats for on-screen view and analysis, print, mail, publish or FTP.



Use **Desktop Studio** 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.

Intellicus Portal, provides web-based secure access to all Intellicus functionalities – reporting to administration and monitoring. Navigation panel and Objects Explorer provide users quicker access to functionalities. Personalized Favorites menus, which users can build on their own, provide one-click access to entities they frequently use.

The **Portal Home Page** keeps you updated by graphically displaying current status of report server resources, report execution and report execution errors so that you can ensure smooth operation by taking corrective actions when required. Home page also has quick links to important functionalities.

Dashboards, which can be designed by anyone, display multiple pieces of business-critical information - richly designed graphical reports or web content - on single screen. It serves as an interface for business analysts and administrators to analyze their systems in a comprehensive and personalized manner.

Introduction

Using **Ad hoc Report Wizard**, a browser-based tool, your business users can create their own reports complete with groupings, summaries, charts, matrices and data highlights.



User-friendly **Report Viewer** displays output of standard reports, adhoc report as well as OLAP reports. After viewing the report, you can carry out post-view operations like printing, saving, mailing and exporting to other formats.

While viewing OLAP Reports on Report Viewer, you can explore large complex data sets with drag-and-drop techniques, drilling down through levels of detail to view information from many angles, perform detailed data analysis and retrieve transactional detail.



Use PowerViewer to analyze adhoc reports by regrouping, resorting, re-filtering the data and re-drawing charts without returning to the Wizard. It helps end-users to categorize, summarize and analyze their business information independently.

Scheduler allows you to create a job (that should execute once or re-occurring) that will auto-generate reports at pre-specified time and deliver at as email, publish, FTP or print. Using scheduler, you can use your resources such as servers and printers optimally.

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 (on Intel or on AMD)
- Linux (On Intel, IBM, or others)
- Solaris (on Sun or Intel)
- HP UX
- AIX

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:

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- IBM-Websphere
- Jakarta Tomcat
- Microsoft-IIS
- Oracle Application Server
- Oracle-Glassfish
- Oracle-Weblogic

Supported Databases

Intellicus supports most of the widely used databases:

- Oracle
- MS SQL Server
- MySQL
- PostgreSQL
- Sybase
- CacheDB
- ODBC.

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
- Standard Edition
- Standard Plus
- Professional Edition
- Enterprise Edition

What does specific Edition of Intellicus offer?

The following table lists down the features of the various Intellicus' editions:

Feature	Basic	Standard	Standard Plus	Professional	Enterprise
Reporting					
Web Studio	No	Yes	Yes	Yes	Yes
Desktop Studio	Yes	Yes	Yes	Yes	Yes
Standard Report Run	Yes	Yes	Yes	Yes	Yes
Adhoc Reporting					
Adhoc Report Run	Yes	Yes	Yes	Yes	Yes
Adhoc Report Wizard	Yes	Yes	Yes	Yes	Yes
Power Viewer	No	No	No	Yes	Yes
Meta Layer-QO Creator	Yes	Yes	Yes	Yes	Yes
Dashboards	No	No	Single Personal	Multi-Personal	Corporate
OLAP View	No	No	No	Yes	Yes
Advanced Data Visualization	No	No	No	Yes	Yes
Management & Delivery					
Alerts & Notifications	No	No	Yes	Yes	Yes
Quick Schedules	No	Yes	Yes	Yes	Yes
Batch Schedules	No	No	Yes	Yes	Yes
Report Commenting	No	No	No	Yes	Yes
Approval Workflow	No	No	No	Yes	Yes
Output Formats					
HTML/PDF/CSV/RDF*	Yes	Yes	Yes	Yes	Yes
XLS/DOC	No	Yes	Yes	Yes	Yes
TXT	No	No	Yes	Yes	Yes
RAW TXT	No	No	No	No	Yes
IHTML	No	No	No	Yes	Yes
Output Mode					
Email	No	Yes	Yes	Yes	Yes
FTP	No	Yes	Yes	Yes	Yes
Print & Publish	Yes	No	Yes	Yes	Yes
Messenger/mobile (Natural language)	No	No	No	Yes	Yes
Performance & Security					
Performance Control					
Health Monitor to check system status	No	No	Yes	Yes	Yes
Run in background	No	Yes	Yes	Yes	Yes
Advanced Properties (Max rows limit, Restrict to formats)	No	No	Yes	Yes	Yes

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Feature	Basic	Standard	Standard Plus	Professional	Enterprise
by Admin)					
Load Balancer	No	No	No	No	Yes
Security					
Column Masking	No	No	No	Yes	Yes
Authorization & Authentication	Yes	Yes	Yes	Yes	Yes
Log Events	No	No	No	Yes	Yes
Role based Granular Access	No	No	Yes	Yes	Yes
Platform & Capacity					
Number of named users	5	10	10	Unlimited	Unlimited
Number of Concurrent requests	2	2	2	As per Licensee	Unlimited
CPU Support	Single	Single	Multi	Multi	Multi/Cluster
Multi-tenant Support	No	No	No	No	Yes
Operating System	Windows, Linux	Windows, Linux	Windows, Linux	Windows, Linux, Solaris, AIX, HPUX	Windows, Linux, Solaris, AIX, HPUX
Architecture	32 bit	32 bit	32 bit	32 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.

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- **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.

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Deployment Scenarios

Intellicus can be deployed in several ways. You can deploy Intellicus in a way that best meets your organizational needs.

Single machine or distributed deployment

- You can install Report Server and Web Component on the same or on different machines.

Standalone or Integrated

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

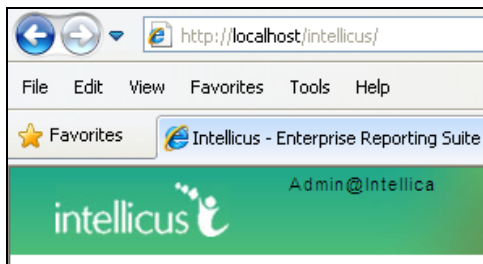
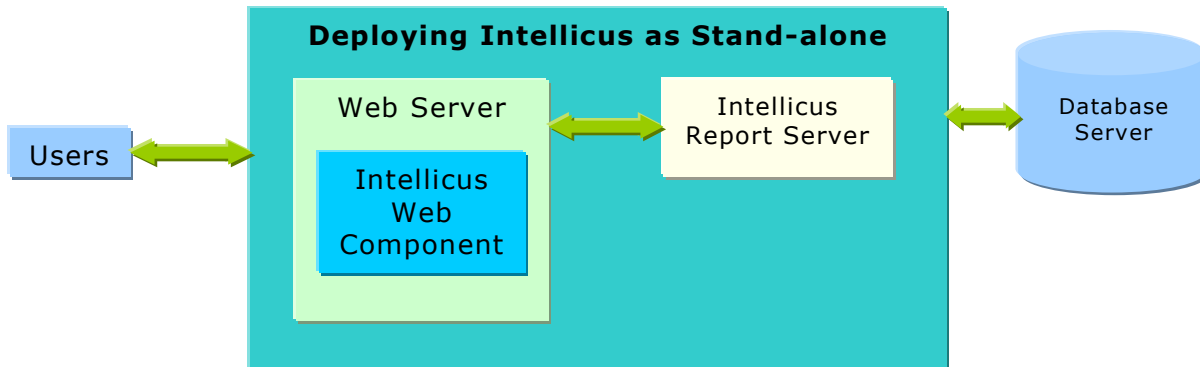


Figure 1: The URL to launch portal when it is installed on local machine.

Intellicus on a Single machine

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 on separate machines:

- Intellicus Report Server
- Intellicus Web Client (web component)
- Database

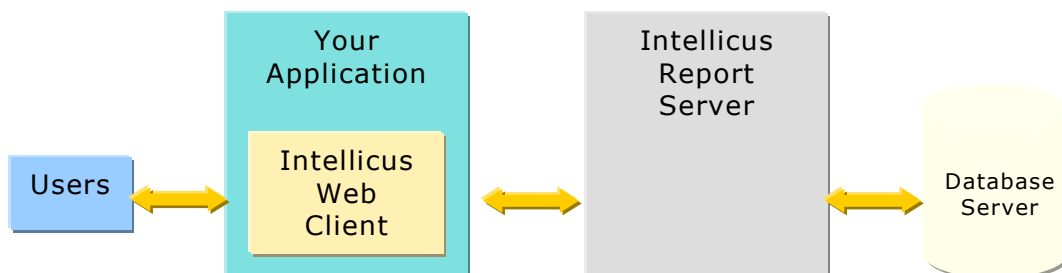
Intellicus, integrated with other applications

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 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.

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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

If you do not have Intellicus setup, you can download evaluation version from the web site: www.intellicus.com .

Before you install

Here are a few points to be kept in mind 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 under Jakarta tomcat web server. It runs at port 80. 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 80 (or the one allocated to web server) was used by another application.

Installing

Intellicus setup for Windows is made available as setup.exe file. To start installation, you need to double-click setup.exe.

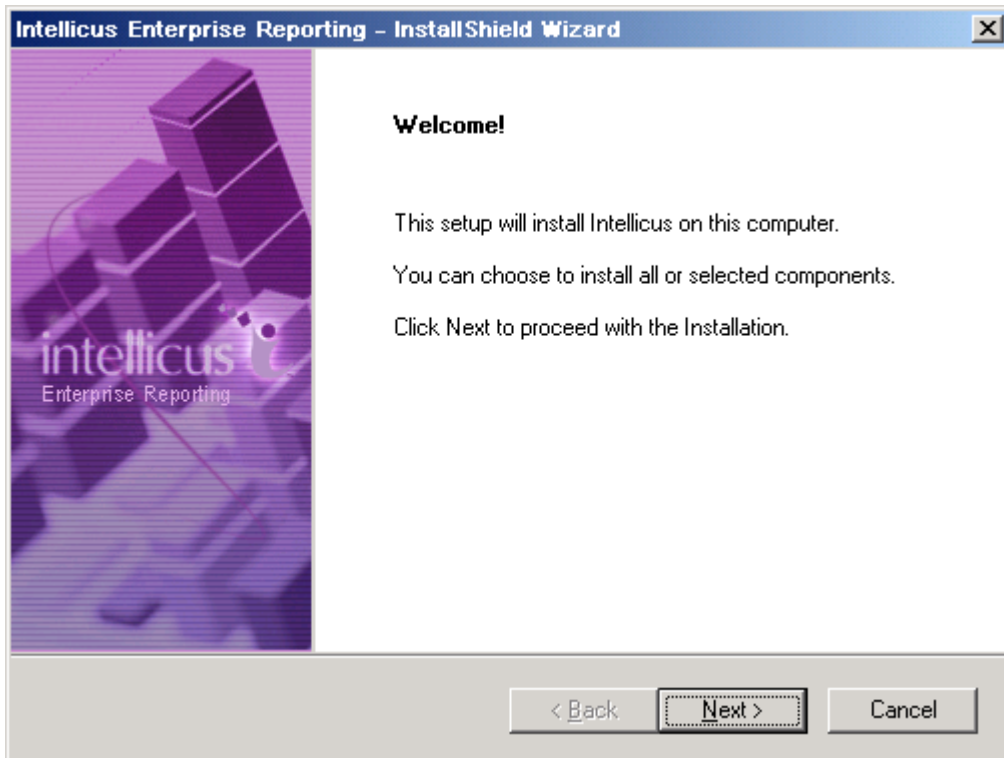


Figure 2: Welcome screen will be displayed when you double-click setup.exe

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

- Installation folder: C:/Program Files/
- Server port: 45450
- Web Server: Jakarta tomcat
- Portal port: 80
- Timeouts: 600 seconds



Note: As part of installation steps, you will be allowed to change above information.

How to know Intellicus (Server and Portal) is running?

In the last step of Installation, setup asks if it should start the server.

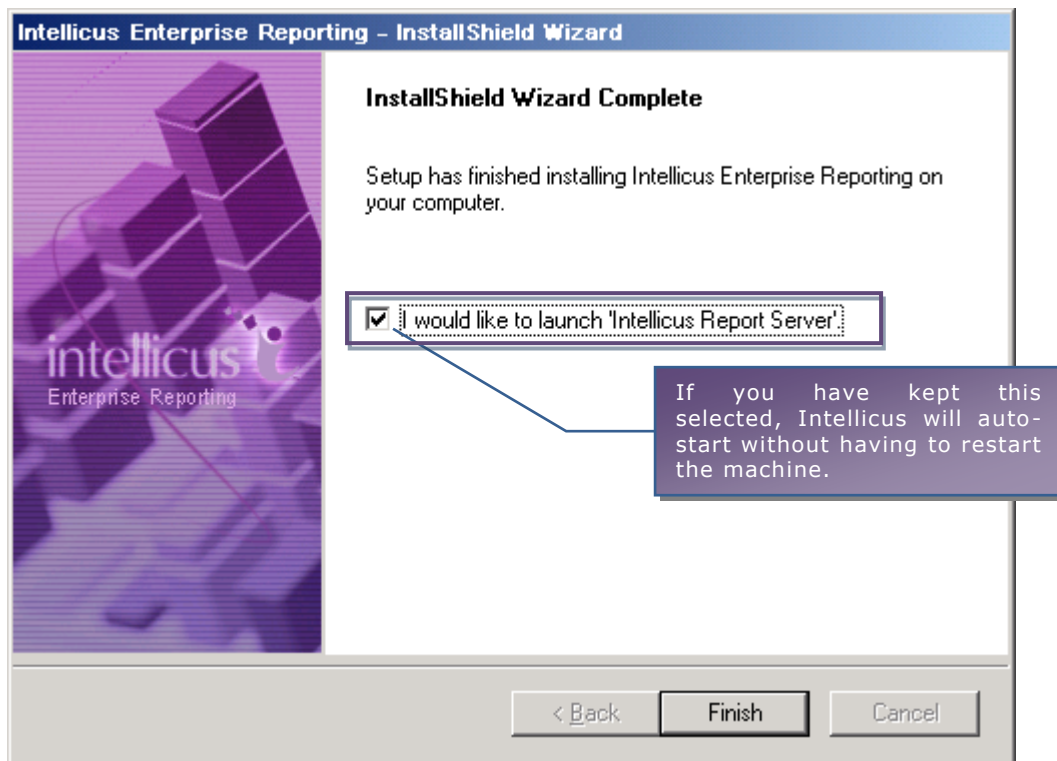


Figure 3: "Installation Complete" screen

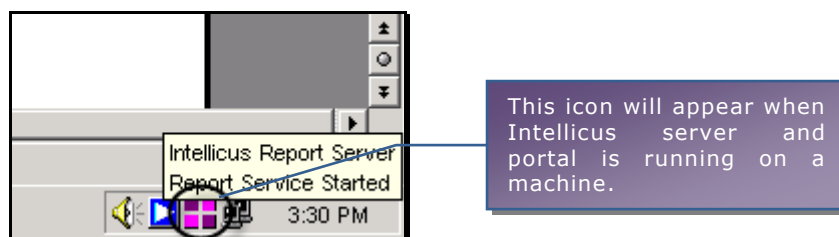


Figure 4: Intellicus Service Icon on machine where Report Server and Portal is running

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/intellicus
```

When Intellicus is running on a remote machine, the URL will be:

```
http://<ip of the machine>/intellicus
```

Intellicus' demo setup has three pre-set user names / password combinations.



Figure 5: Intellicus login page

To explore and evaluate all the features of Intellicus, login using Admin / Admin user name and password combination. Following page will appear after successful login.

Note: You will receive "HTTP 404 error: Page not found" message in the browser when Intellicus portal could not start up because port 80 (or the one allocated to web server) was used by another application.

If you receive this error, make sure the port allocated to webserver is not used by any application and then restart Intellicus portal.

Changing the port number

Here is the information about how to change the port number when Jakarta Web Server is used.

The port number information is stored in server.xml file.

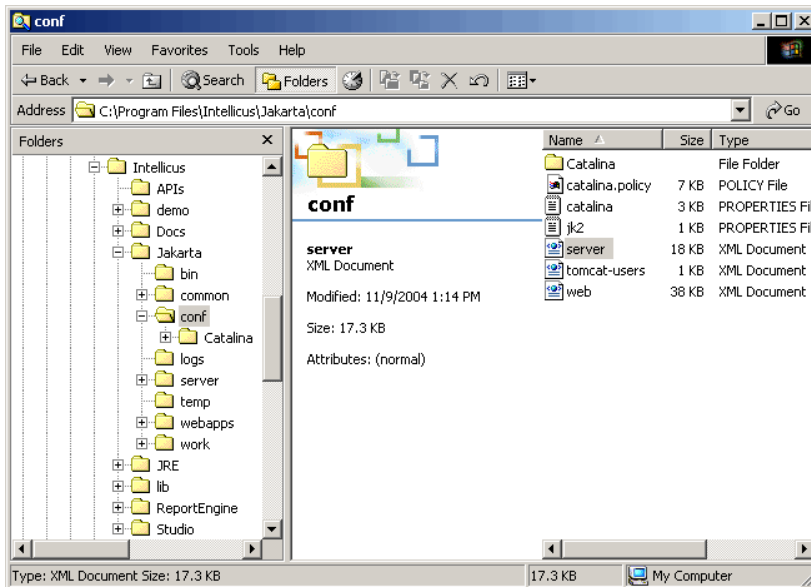


Figure 6: Location of server.xml

To change the port number:

1. Open server.xml in a text editor.
2. Change the value of **Connector port** to a number that is free.
3. Save the changes.

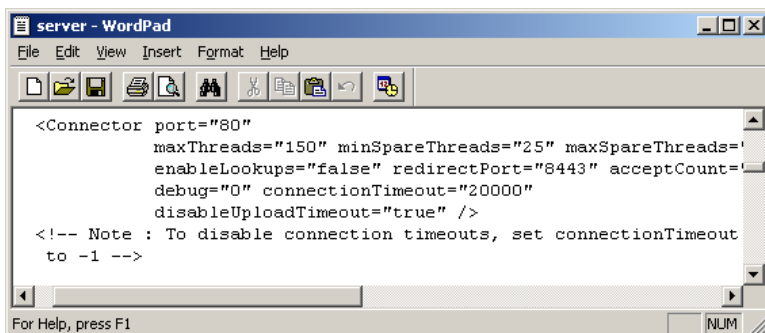


Figure 7: Changing the port number

Getting started with Evaluation

Admin@intellica

intellicus

(Default) About

My Recent Reports

Sr.No.	Report Name	Category Name	Time Stamp
1	<input type="radio"/> Sales Person Ranking	Level1	12/1/09 6:15 PM
2	<input type="radio"/> Sales Person Ranking	Level1	12/1/09 6:15 PM
3	<input type="radio"/> Consumer Satisfaction Trends	Demo	12/1/09 5:00 PM
4	<input type="radio"/> Product Sales - Chart Drilldown	Demo	12/1/09 5:00 PM
5	<input type="radio"/> Product Sales - Chart Drilldown	Demo	12/1/09 4:58 PM

Execution Status

Completed (0)

Running (0)

Failed (0)

[View All](#)

Server Status

Memory Usage 92.6%

Thread Pools

Reports	100%
DashBoard	100%
OLAP	100%
Services	96%
Scheduler	100%

My Links

Reports

- [Show Reports](#)
- [Published Reports](#)

Design

- [Design Adhoc Reports](#)
- [Design Standard Reports](#)

Repository

- [Manage Folders and Reports](#)
- [Report Objects](#)

Figure 8: 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 here are some of the portal pages you may wish to explore.

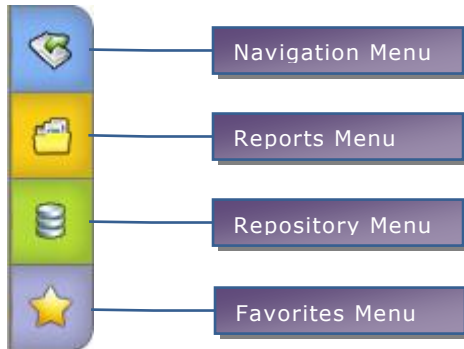


Figure 9: Intellicus Menus

- Database connections: Navigation > Administration > Configure > **Database**
- Query Objects / Data sources: Repository > **Query Objects**
- OLAP reports: Navigation > Administration > Configure > Database, Navigation > OLAP > **OLAP Viewer**
- Adhoc Reports – wizard customization and report design: Administration > Configure > **Adhoc Wizard**, Design > **Adhoc Template Configuration**, Design > **Adhoc Wizard**
- Running Reports: Reports > Demo > **Run**
- Dashboards: Dashboards > **Widget Designer**, Dashboards > **Preferences**, Dashboard > **View**
- Batch Scheduler: Navigation > Schedule > Jobs
- Customizations: Navigation > Administration > Configure
- Favorites: Adding items to favorites

To design standard reports

After having a look at portal, running pre-deployed demo reports as well as designing and running adhoc reports, you may wish to design standard reports.

You need to use Intellicus Studio to design and deploy standard reports. In Windows, click Start > Intellicus > **Studio** .

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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 from Intellicus menu shortcut. This page contains list of documents and information about the contents that you can expect in each document.

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.

