



Archiving: Reports backup and restore

Intellicus Enterprise Reporting and BI Platform



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

Contents

Archiving	5
Backup	5
Setting up filter	5
Saved Reports List.....	6
To provide Archive details and build archive	8
Restore	9
Uploading archive.....	9
Restoring archive	10
Downloading Archive.....	11

Archiving

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:

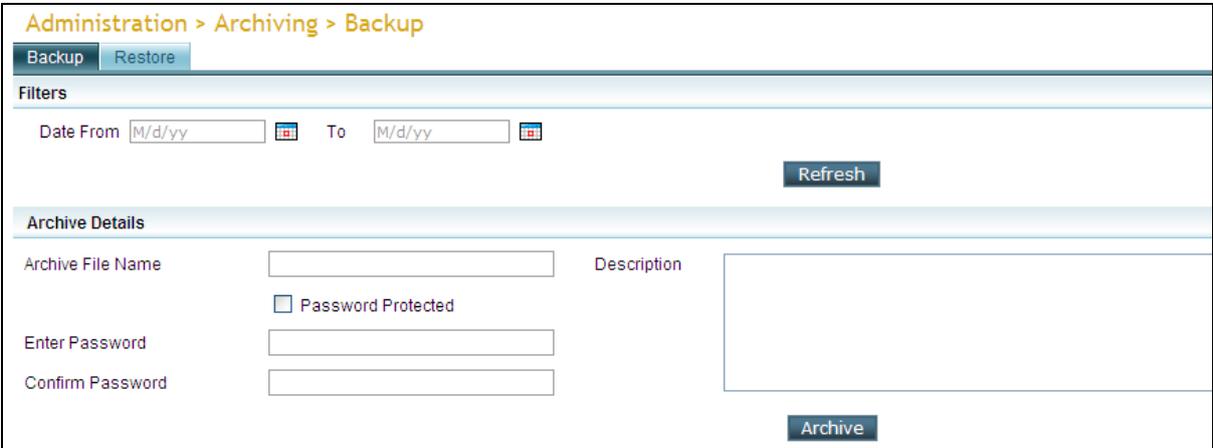
1. Get a list of all or filtered (by date) published reports.
2. Archive it.

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

Setting up filter

To setup a filter, you need to do the following:

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. Click  icon to select date. For explanation of date formats, refer online help. To view a list of reports, click the **Refresh** button.



Administration > Archiving > Backup

Backup Restore

Filters

Date From  To 

Refresh

Archive Details

Archive File Name Description

Password Protected

Enter Password

Confirm Password

Archive

Figure 1: Setting filters

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

Saved Report List				
Demo				
Sr.No.	File Name	Generated By	Generated Time	Expiry Time
1	DemoWeatherRep	Intellica/Admin	RECENT 12/22/09 11:18 AM	Never
2	AllCntrySalesDec09	Intellica/Admin	12/22/09 11:16 AM	Never
3	StatusDec23	Intellica/Admin	12/22/09 11:06 AM	Never

Figure 2: Saved Report List on Backup page

Saved Reports List

You can view list of reports under selected category and take actions on a selected report.

Upper part of the list has categories (folders) available in the selected folder. If folder area is not open, you can click icon to open folder list and view names of folders available in the selected folder. Click icon to close folder area. When folder list is open, double-click respective folder icon to open a sub-folder. Click icon to open parent folder.

You can also change the way folders appear in folder area. To get Icon View, click . To get Tile View, click .

Saved Report List				
(Root)				
Demo				
Sr.No.	File Name	Generated By	Generated Time	Expiry Time
1		Intellica/Admin	RECENT 4/29/10 3:58 PM	5/29/10 3:58 PM
2		Intellica/Admin	4/29/10 1:00 PM	5/29/10 1:00 PM
3		Intellica/Admin	4/29/10 12:00 PM	5/29/10 12:00 PM
4	Archivetest	Intellica/Admin	4/26/10 12:17 PM	Never

Figure 3: Opened folder area on Saved Report List

Click **(Root)** header. It will expand displaying list of folders available at root level. Double-click a folder to open it. Navigate to the desired folder. Published reports filtered based on the criteria will be listed. About each published report, the list contains following detail:

- File Name: Name of the published file.
- Generated by: User ID who published the report.

-
- Generated Time: Date and time when the report was published.
 - Expiry time: The date and time after which the report will be deleted.

Sorting the list

It is quicker to find the desired item if the reference is sorted. To sort the list by a column, click its column-title. The list will be sorted in ascending order of the column. Look for an arrow icon on the right edge of the column. It indicates current sort order. Click the column once more to sort the list in opposite order. Clicking another column's title will sort the list in ascending order of that column.

Add or remove columns in the list

By adding or removing columns you may list only the columns that you need.

Right-click on title-bar to open a context-menu. Context-menu has checkboxes of columns that can be displayed. Check name of the column to display and uncheck the column that you don't want to display. The columns will be instantly added / removed from the view.

To close the context-menu, click anywhere on the title-bar.

Changing column-width

If content of a column is not completely visible or if a column is too wide hiding other columns in the row, you may wish to adjust respective column-width. To do this, take the mouse pointer towards the right boundary of the column-title till pointer changes to double-headed arrow. Now, drag it on the right or left to increase or decrease the column-width respectively.

Actions on the report list

Select a report by clicking option button in corresponding row. A toolbar will be displayed.

Toolbar's availability depends on configuration. If toolbar is not available, it will be displayed when you select a report by clicking the option button. To select and initiate an action, point and click the mouse pointer on the corresponding toolbar icon.

The toolbar can be moved, if it is configured to do so. To move the toolbar anywhere on report list, click on the centre of the toolbar header and drag. To close the toolbar, click **Close** button on top right of the bar.

Selecting the report and taking actions

To initiate an action on a report, click the option button on left of the report icon. A toolbar appears.

The toolbar

Toolbar may appear or not depends on configuration. If toolbar does not appear, it will appear when you select a report. To select and initiate an action, point the mouse pointer to the respective icon and click.



Moving the toolbar

If configured, the toolbar can be moved. To move the toolbar anywhere on report list, click on the center of the toolbar header and drag.

Closing the toolbar

Click **Close** button on top right of the bar.

Toolbar may have buttons to initiate following tasks:

To view report output, click  button. A menu having all the allowed output types will open. Click the icon representing the desired output type. Change **View Options** if needed and click **OK** on View Options dialog.

To delete the published report, click  button. The selected report will be deleted.

To view the comments that users have given for the report, click  button.

To provide Archive details and build archive

Archive Details			
Archive File Name	<input type="text" value="BackupDec23"/>	Description	<input type="text" value="Reports published on Dec 23 2009"/>
	<input checked="" type="checkbox"/> Password Protected		
Enter Password	<input type="password" value="....."/>		
Confirm Password	<input type="password" value="....."/>		
			<input type="button" value="Archive"/>

Figure 4: 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.

S.No.	Archive Name	Security	Size	Created On	Restore	Show Contents	Description
1.	BackupDec23.ira		1 MB	12/22/09 11:24 AM	Restore	Show Contents	
2.	BackupNov30.ira		1 MB	12/22/09 11:25 AM	Restore	Show Contents	

Figure 5: 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 dialog box titled "Enter Details" 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 labeled "hh:mm".
- A note below the date field: "(Blank date stands for never expires)".
- "Ok" and "Cancel" buttons at the bottom.

Figure 6: Restoring archive

1. Click **Restore** link of respective archive.
2. In **Enter Password** dialog box, specify password. (You will need to provide password only if it was provided at the time of backup).
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 BackupNov30.ira					
Assigned Filters					
Category				Date From	
Report				To	
File Name	Generated By	Generated Time	Expiry Time	Status	
DemoWeatherRep	Admin	12/22/09 11:18 AM	Never	Restored Successfully	
AllCntrySalesDec09	Admin	12/22/09 11:16 AM	Never	Restored Successfully	
StatusDec23	Admin	12/22/09 11:06 AM	Never	Restored Successfully	

3 of 3 Restored Successfully. Total backup file size - 1 MB

Figure 7: 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.	BackupDec23.ira		1 MB	12/22/09 11:24 AM	Restore	Show Contents	
2.	BackupNov30.ira		1 MB	12/22/09 11:25 AM	Restore	Show Contents	

[Download](#)

Figure 8: 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.

