

## Working with Folders and Objects

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Intellicus Enterprise Reporting and BI Platform



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**Dated: - September 2010.**

## **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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## Working with folders and objects

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Intellicus metadata is stored in repository. Reports and objects used in report designing and execution are stored in multi-level folder structure. Report objects include:

- Reports
- Saved Reports
- Folders
- Query Objects
- Parameter Objects
- Dashboards
- Dashboard Widgets

Users who have required access privileges design these objects and saved in repository.

### Repository Explorer

From repository explorer, you can navigate to the folder, list folder contents within the open folder and carry out tasks using the selected object (depending on access privileges granted to you).

When you have multiple level of folder structure, repository explorer allows you to view entire folder structure, which is otherwise not possible.

To open repository explorer, click  button on the slider. When you click the button, 1<sup>st</sup> level of the repository opens, listing folders and object types that can be stored at root level.

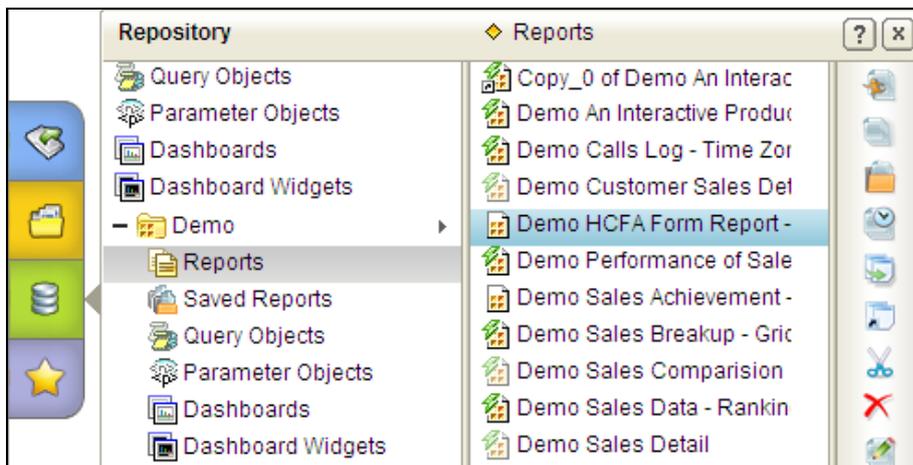


Figure 1: Repository Explorer listing Query Objects at Root level

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Click a folder to view folders and entities in it. Click an object type to view list of entities of that type in the selected folder.

Buttons that the toolbar will have will depend on entities you have selected. You can select one or more entities at a time.

If you have copied or moved (cut) item(s) or copy link a report, corresponding Paste icon will be displayed. You can select a folder and then the object type to place the copied / moved item in that list.

## Mass operations

You can select multiple entities like multiple reports, dashboard or QOs, and perform following operations on them:

- **On all entities:** Delete, cut-paste, Copy-paste.
- **Categories:** Access rights, Properties.
- **Report:** Access Rights, Properties, Advanced properties.
- **QO / PO:** Access rights, Advance properties.
- **Dashboards, Dashboard widgets:** Access rights

**Note:** When different property values are set for selected entities, such a check box and option will be displayed in third state. If property is a dropdown, its value will display \*\*\*\* as value.

For information on what you can do with entity selected from Repository menu, refer to its online help.

## Favorites

Favorites menu lists folders and objects that you added as Favorites from other menus like Repository menu or Reports menu.

When you add an object as Favorites, it gets listed under corresponding object's list under Favorites menu. Once added in the Favorites menu, you can access it at a single click after opening list of corresponding object. For example, if you need to execute a report frequently, you can add it as Favorites. This will save the efforts of every time going through the menu structure to list the report before executing it.

Like other objects, if you want to access a folder at a single click, add it as Favorites. If such a folder has folders within, sub-folders' contents are listed as a sub menu.

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## Working with Folders (category)

Reports and other objects (like Query and Parameters) are stored in folders. Folders are stored in repository as hierarchical structure. You use **Manage Folders and Reports** page to create a folder, modify folder details, change a folder name and delete a folder.

Standard reports are designed using Desktop studio and Web Studio. On this page, you can deploy standard reports, delete a deployed report as well as download an already deployed report (to modify it). You can also copy or move a report to one or more folders.

When you update a report that is copied in multiple folders, you have to make sure you re-deploy the updated report in all those folders. To simplify this, you may deploy a report in a folder and then copy it as "link" to multiple folders.

Click Navigation > Repository > Manage Folders and Reports to open Manage Folders and Reports page.

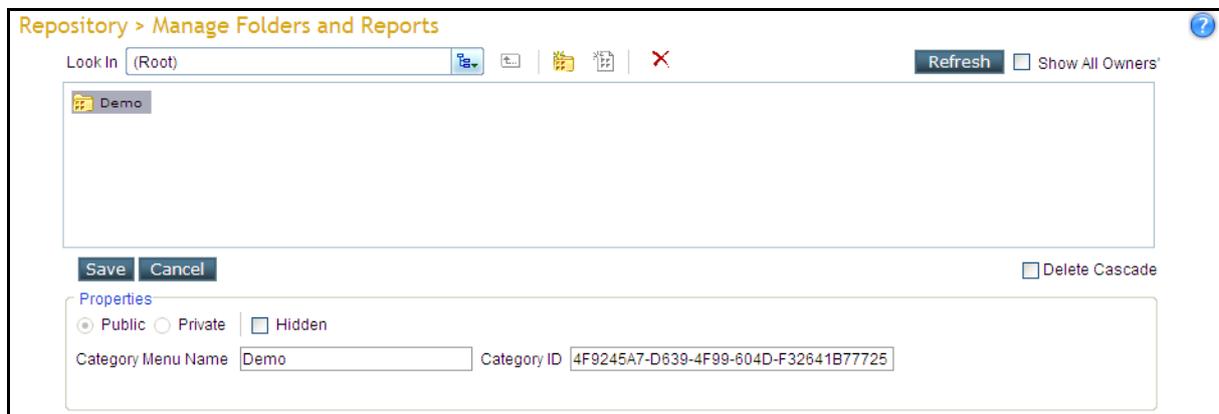


Figure 2: Manage Folders and Reports folder

Intellicus supports multi-level (hierarchical) folder structure. For better management, user can group desired reports and other objects in one folder.

Every category has a **Category Menu Name**, which uniquely identifies the category at that level in the hierarchy. This name will be displayed in all the dialogs and pages where category name is displayed. **Category ID** should be unique across all the categories. By default, it is auto-generated by Intellicus. To specify the **Category ID** manually, uncheck **System Generated** checkbox and specify the category ID.

A **Public** category is (and the objects in that category are) available to all the users. A **Private** category is available only to the owner. So, objects stored in a private category will be available only to the owner.

To create a Public category, you need to login into the application using Super Administrator ID, Administrator ID or using the ID that has Category Setup rights.

Check **Hidden** checkbox, if you do not want to display this category in any of the dialogs and pages (except Manage Folders and Reports page). Mark a category as hidden to stop users from directly accessing the objects and reports stored in

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it. For example, reports that are used as sub-reports and executed from within a report.

### Creating a new folder (category)

1. Click  to open object selector and navigate to the folder in which you want to create category and click the  button.
2. Provide required details and click the **Save** button.

### To change a category information

Once set, **Category ID** and scope (**Public** / **Private** options) cannot be changed.

Application allows to change **Category Menu Name** and **Hidden** property of the selected category. To be able to make changes in category information, you need to be owner of the category, user having Category Setup rights, Super Administrator or Administrator.

### To delete a category

You can delete a category only if it is empty. To delete a category including its contents, check **Delete Cascade** checkbox.

Click  to delete the selected category.

**Note:** When you delete a **Category** that is not empty, and **Delete Cascade** check box is clear, a message "Failed to delete the category" will appear on top left of the page.

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## Reports

Use this page to carryout following report related operations:

- Deploy a report
- Copy, Move, or Copy-link a report
- Change details of deployed report
- Delete a report or a linked report

Click  to open object selector, navigate to the desired folder and select a report. Object Selector's features like multiple views, filtering and sorting makes it easier and quicker to find the desired folder. Refer to the online help to know more about Object Selector. When you navigate to a folder and click a report listed there, name and other properties of the selected report will be displayed.

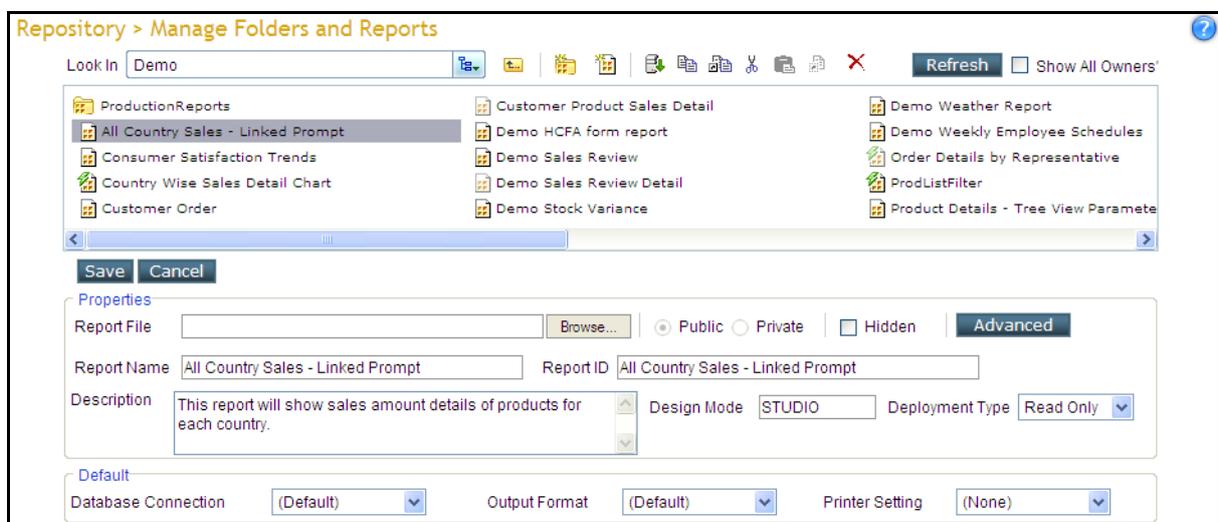


Figure 3: Report selected on Manage Folders and Reports page

A report has a **Report Name** (unique within the category) and a **Report ID** (unique across the repository). Report Name is visible in all the dialogs and pages where the report is listed. When you deploy the report, application by default generates a unique Report ID. To specify it manually, uncheck **System Generated** checkbox and specify the Report ID.

Content provided in the **Description** is displayed at all the places where the report name is listed.

A **Public** report is available to all the users. A **Private** report is available only to the owner. To deploy a report as Public, you need to login into the application using Super Administrator ID, Administrator ID or using the ID that has Category Setup rights.

Check **Hidden** checkbox when you don't want users to access it directly. For example, a report that is used as sub-report and executed only from within a report. A hidden report is not listed in any of the dialogs and pages (except Manage Folders and Reports page).

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Text in **Design Mode** indicates if the report was designed using *Studio* (Web Studio or Desktop Studio) or *Adhoc Report Wizard*.

## Defaults

These are the default values for **Database connection**, **Report Output** and **Printer Setting** for the selected report. If at the time of report generation, user does not specify these, then

- Report will run on the **Database Connection** selected on this page,
- in the **Report Output** selected on this page and
- if chosen to **Print Direct**, will use the **Printer Setting** selected here.

If you are Super Administrator, you can set following for a report:

- **Deployment Type:** A report deployed as Read Only cannot be modified and uploaded with same name. A report deployed as *Custom* can be modified and uploaded with the same name. For end-user, Deployment Type is pre-set as *Custom*.
- **Approval Process:** Select an approval process to be followed while publishing a report. As a part of it, report needs to be approved before it can be published. To publish report without undergoing approval process, select *Direct*.
- **Assign Users:** To assign users with the workflow process associated with all the reports deployed in this folder.

Administrators can also set advanced properties for the report. To know about Advanced Properties, click **Advanced** button.

## To deploy a report

Use this page to locate a standard report from local or network machine and deploy it in the repository.

After navigating to the desired folder, click  button. The page is cleared for you to specify details of report being deployed. Click **Browse** button to locate and select the report to be deployed. Provide required details and click **Save** button.

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## Approval Process details

### Assign Users button

When you click this button a dialog box opens. Users / Roles are selected as Approver / commenter on this dialog.

### Detach button

Click **Detach** button when you want to take the report out of approval process.

When you are taking this report out of the approval process, it may have report outputs which are pending for approvals. On **Action on pending report outputs** dialog box, select *Approve* to approve and publish all the pending outputs, select *Reject* to reject all the pending outputs and click **OK**. Approved outputs will be published and made available to users.

## Advanced Properties (Advanced Options)



**Note:** Properties set on this page from **Query** page will be applicable to all the reports where this query is used. Properties set on this page from **Manage Folders and Reports** page will be applicable to the selected report.

**Audit Log:** Select Enable to log report operations.

**Run Priority:** Select the run priority needs to be considered while running the report.

**Database Connection Timeout:** Specify the time in seconds for which report server will wait to receive response of query execution.

**Data Source Fetch Size:** Specify the number of records to be fetched from data source in one read.

**Max Rows:** Specify the maximum limit (number of records) that should appear on this report.

**Query Execution:** One of the tasks in report execution is query execution. A query taking longer to execute will keep a report execution thread busy for longer. If all report execution threads are busy and if for this report if query takes longer to execute,

- **Synchronous:** Will hold the report execution thread keeping further requests in queue.
- **Asynchronous:** Will pass on next report execution request to a "helper thread".

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**Restrict to background:** Set this property to Enable to run this report only in background.

**Restrict to Formats:** Select the output formats in which this report can be generated. Formats not selected here will not be available for this report.

**Default Memory Usage Per Exec:** Specify average resource utilization (in MB) for this report per execution. Default: 50 (MB).

**Report Server Chunk Timeout:** Specify the time in seconds for which portal should wait to receive first chunk of response from report server.

**Sort Area Size Per Exec:** Specify the number of records that can reside in memory for all sort threads of a report. Any value more than 0 is a valid value. Default: 600.

**Sort Threads Per Exec:** Specify the number of threads to be created (per report request) at runtime to perform sorting of records. Default: 4.

### **Cache** (*Not for Query page*)

Select **Enable** from **Cache** dropdown box, to enable caching.

Set **Level** to **User** if you want the report to be cached for the user who has generated the report. Set it to **System** if you want the report to be cached for all users after it is generated.

**Refresh:** The setting of refresh frequency. Here are the details:

- **Never:** Report once generated will never be generated again. All the users will be catered with cached report.
- **Hourly:** Refresh frequency is specified in terms of minutes of hour. For example, 4, 19, 55.
- **Daily:** Refresh frequency is specified in terms of hours of the day. For example, 2, 5, 12, 22, 23.
- **Weekly:** Refresh frequency is specified in terms of days of the week. Specify 1 for Sunday, 2 for Monday, and like wise, 7 for Saturday.
- **Monthly:** Refresh frequency is specified in terms of month numbers. Specify 1 for January, 2 for February and like wise, 12 for December.
- **Yearly:** Refresh frequency is specified in terms of year numbers. For example, 2005, 2006.

**Frequency:** Specify the hours, days, weeks, months or years based on value selected in Refresh.

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### To Copy - Paste a report

Select the report and click the  button. Navigate to the category where you want to paste the report and click the  button. Click **Save** button.

### To Cut - Paste a report

Select the report and click  button. Open the category where you want to paste the report and click  button. Click **Save** button.

### To Copy link a report

You can copy link of a report to the same category or another category. When you copy a link, only reference of the report is copied. So, if original report is updated, it will be accessible from all the links pointing to that report.

Select the report and click  button.  button changes to  button. Open the category where you want to paste the report and click  button. Click **Save** button.

### To delete a deployed report or a link

Select the report / report link and click  button. A confirm delete dialog appears. Click **OK** to proceed with the confirmation.

When you delete a report, it will not be available for execution. It will be removed from all of the open dialog boxes where reports are listed. Schedules having the deleted report will fail to execute. Reports that have the deleted report as sub-report, will fail to execute.

When you delete a link, it will be removed from all of the pages and dialogs where reports are listed.

### To download a report

You may need to download a report to make changes in it and upload it back to the server with a different name.

Select the report and click  button.

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## To de-link a linked report

1. Select the linked report and click  button.
2. In **Delink Confirmation** dialog, select the right option and click **Set**.
3. Click **Save** button.

## Options on Delink Confirmation dialog

- **Copy Layout from Source Report:** To make the selected report, exact copy of the original (linked) report.
- **Keep Original Layout:** If this report is an independent report (configured internally as a linked report), click this option to just mark it as delinked.

## Report Explorer

You can use report explorer to navigate to a folder, select a report and carry out any of the following actions on it:

- Edit, run or schedule a report as well as view report's description
- Cut-paste, copy-paste, copy link – paste, delete a report
- Update its properties, advance properties
- Set the report as favorite

