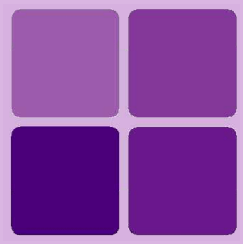

iPackager Manual

Intellicus Enterprise Reporting and BI Platform

intellicus
Enterprise Reporting and
Business Insights Platform

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Dated: - August 2013

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

What is iPackager

iPackager is a utility to package repository objects, users preferences and configuration settings from Intellicus repository or local file system. This packaged information can then be deployed at any of the installation of Intellicus.

This way, you can use iPackager to setup and maintain Intellicus repository from remote location.

When Intellicus is deployed at multiple locations, iPackager saves you a lot of efforts spent to set up Intellicus repository at each of the locations. Set it up at one location and just upload the package at other locations. This method completely eliminates the need of re-doing all the configuration activities at multiple locations.

Note: This is a license-controlled feature. You need to have a compatible license in order to run iPackager.

How to Access iPackager

You can launch iPackager either from Intellicus Portal or as Standalone Installation or via Command Line Interface.

1. iPackager is available for access from Portal.

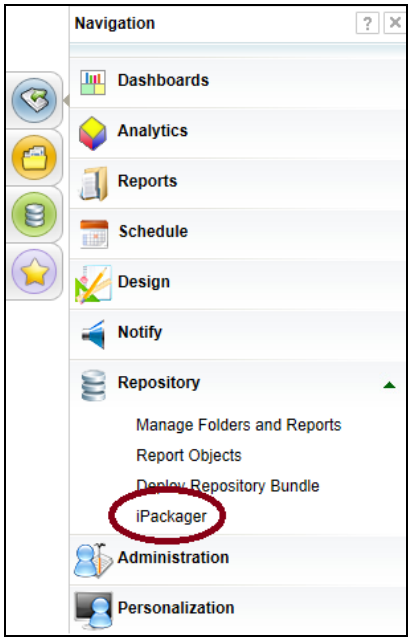

Figure 1: Menu option to open iPackager from Intellicus portal

To open iPackager from portal, click Navigation> Repository > iPackager.

2. iPackager can also be used as a standalone application.

Standalone iPackager is available as an installable file, which you need to install on your machine.

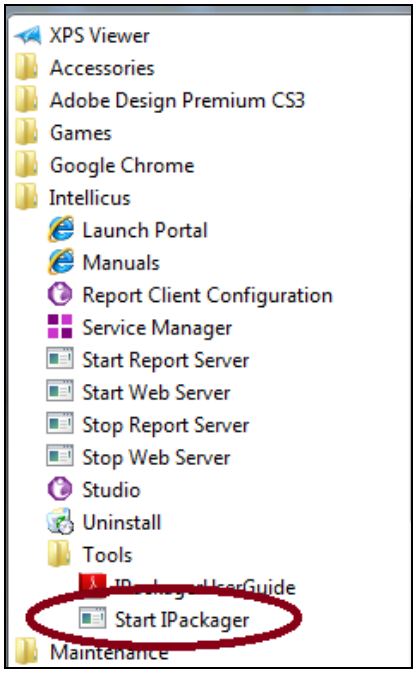

Figure 2: Open iPackager after installation of standalone application

To open iPackager, click Start > All Programs > Intellicus > Tools > iPackager.

3. iPackager to run from Command Line.

You need to follow the steps below:

i. Request Intellicus support for a zip file that has the executable to run iPackager.
ii. Unzipping this file would create the following folders and files –

Folders:

- **clientinfo**
- **lib**
- **logs**

Files:

- **cabCreator.bat**
- **CabCreator.class**
- **CabCreator.java**

iii. Copy the below jar files located in the Intellicus **APIs** folder to the above **lib** folder

- **intellica.jar**
- **log4ij.jar**
- **xercesImpl.jar**
- **xmlParserAPIs.jar**

iv. Go to clientinfo**config** and open file **ReportClient.properties**

Set the values for REPORT_ENGINE_IP and REPORT_ENGINE_PORT (IP address and Port number of machine where Report Engine is running)

v. Open the file **cabCreator.bat** in any text editor

- Set the java path
- Set the path of the conf file and the path where cab should be created

vi. Run the file **cabCreater.bat**

How does it work

iPackager extracts references of the selected information (repository objects/users preferences/configuration settings) from the repository or file system and stores as .conf file. You can open a conf file and make changes in it. A conf file is then used to build the package. This package is then uploaded on Intellicus server and deployed.

Using Intellicus iPackager, you can package and distribute:

- Repository objects like folders, reports, query objects, parameter objects, OLAP layouts and dashboards (along with access rights information)
- Organization, user, user access rights and user mappings
- User created private objects
- Schedules
- Data connection information (along with access rights information)
- Print settings
- Web client properties
- Report server configuration files
- Adhoc report templates
- Java plug-ins
- Approval process details

Reports and categories can be imported from report server as well as local file system. Client properties related files are imported from local file system. Other information can only be imported from server.

Tip: Use iPackager to package entire repository (all the information that iPackager can presently package) and keep it as a backup at a safe place.

Who should use iPackager

- Only Super Administrator can use iPackager.

Application Window

Top of the application window has menus. Toolbar is available just below the menu bar. Remaining part of the screen is divided in three parts: explorer area, work area and message area.

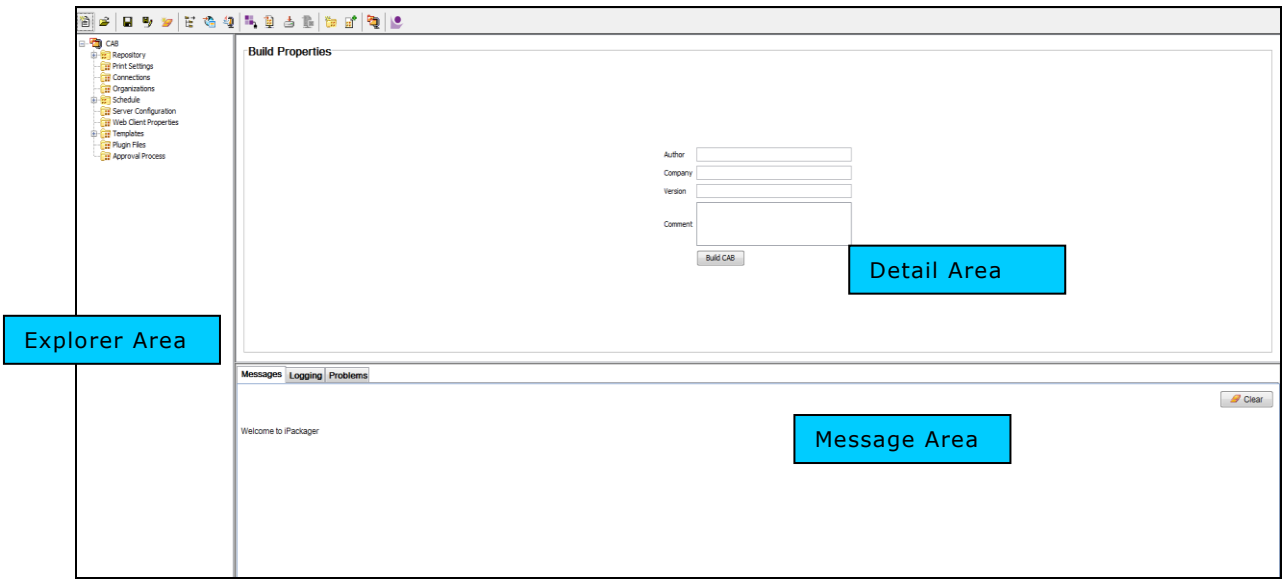

Figure 3: A typical iPackager screen

- **Explorer Area:** This is the area on the left where all the information presently included in the project can be viewed.
- **Detail Area:** This is the area on top-right of explorer area. This area displays detail of the object selected from Explorer area. Addition, modification and deletion tasks are carried out on this area.
- **Message Area:** This is the area on bottom-right of explorer area. iPackager uses this area to communicate with you. In this area, it displays messages, logging details and problems faced while working on the project.

Menus and options

Task that you want to perform can be initiated by clicking the respective menu options.

Project menu

- **New:** To open a new project.
- **Open:** To open an existing project.
- **Save:** To save the open project.
- **Save As:** To save the project for the first time as well as to save the open project under another name.
- **Clear Package:** To clear the contents of open project.

Tools menu

- **Import Categories and Reports from File System:** To import report layouts and category structure from file system and include in the open project.
- **Import Web Client Properties from File System:** To import all details from client configuration files.
- **Add Plugin Files:** To import plugin files.
- **Connect to Report Server:** To connect to the Report Server. Once you are connected, iPackager will not ask to provide report server details and authentication each time you try to import an object from the Report Server.
- **Import Selective Data from Report Server:** To select objects and import from the report server.
- **Import Complete Data from Report Server:** To import all details from report server.

- **Cancel Server Import:** To cancel ongoing importing from server.
- **Create New Category:** To add a new category in the project.
- **Add Report From File System:** To add report saved in a file.
- **Build CAB:** To initiate the process of building CAB.

Create a new Package

When you launch iPackager, it also opens a new blank package (conf file). You can just start working on it.

If you are already working on a conf file, then to create a new conf file, you should close the open package before you can open a new blank package.

To create a new package,

- Click button from the toolbar.
- From menu bar, click **Project** > **New**.
- On keyboard, press **Ctrl** + **N** key combination.

While issuing this command if a package is already open and not saved, **Save Configuration File** dialog box will appear.

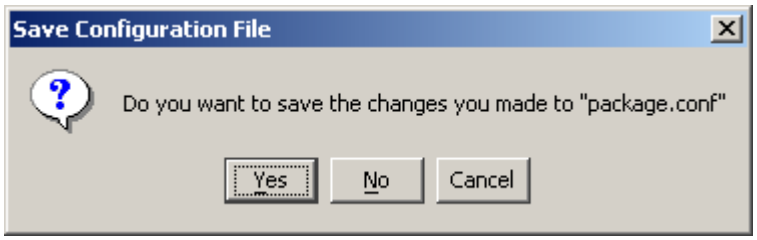

Figure 4: Saving Configuration File

- Click **Yes** to save the changes in the open package before opening a new package.
- Click **No** to abandon the changes made in the open package and open a new package. (In this case, changes made in the open package will be lost).
- Click **Cancel** to cancel the command and continue working with the open package.

Opening a package

To open a package,

- Click button from the toolbar.
- From menu bar click **Project** > **Open**.
- On keyboard, press **Ctrl** + **O** key combination.

When you open a package (conf file), iPackager validates all the information stored in the conf file by actually accessing the information from server. If any of the information is missing, it will give error message in message area. Also, respective item in the tree (explorer area) will have an error icon.

Saving the package

To save the package for the first time

While saving the package for the first time, you need to provide name and location to save the package.

- Click button from the toolbar.
- From menu bar click **Project** > **Save As**.

To save the package

It is always a good practice to keep saving your work.

- Click button from the toolbar.
- From menu bar click **Project** > **Save**.
- On keyboard, press **Ctrl** + **S** key combination.

Adding information in the package

Information can be added in an open package in any of the following ways:

- Importing all report server data
- Importing selected components from server

Tip: A conf file may have components from different servers.

Detail of each of the above is given in the following pages.

During the import process, references of the components are created. When you click **Save** button, these references are stored as .conf file. Components are actually picked up when **BUILD CAB** operation is carried out.

It is possible to import components in multiple sessions. Import some components and save the information as .conf file. During the next session, open that conf file, and start importing another set of components.

Data to be packaged in a single cab can be imported from multiple sources as well.

When iPackager opens a conf file, it checks for the availability of the components already imported in the conf file. If any of the components already imported are not found on the report server / client, it is indicated on the tree-view. In such a case, a cab cannot be built.

Importing all report server data

Use this method if you want to create a package that has all information stored on server.

In this method you can select component(s) for import. All the information within a component is imported.

For example, you can choose to import query objects parameter objects and reports only.

This is a 3-step process:

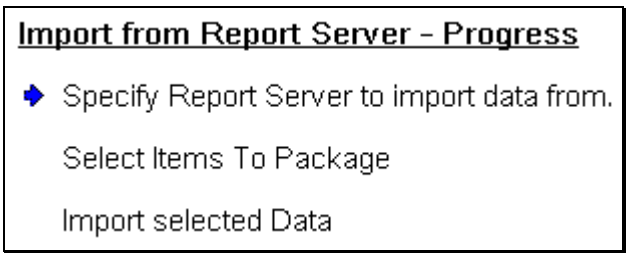

Figure 5: Importing report server data

To import all report server data as it is, click button on the toolbar. Import from Report Server – Progress steps will appear on the left area and related details will appear on the right side.

Specify Report Server to import data from

(Only for standalone iPackager)

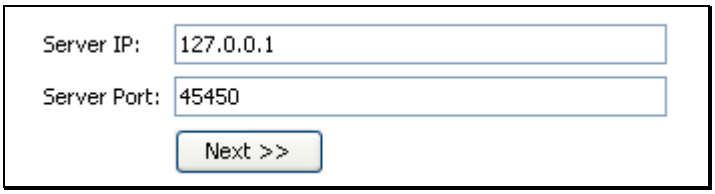

Figure 6: Specify report server details

In **Server IP** entry box, specify server IP. In **Server Port** entry box, specify the port at which the server is listening to.

Important: Default server port has been changed from 50000 to 45450. Make sure, you have specified the correct port number here.

Click **Next>>** to proceed.

Note: Click button from the toolbar at any point of time to cancel the data transfer.

In this case, package state will be restored to the state before import began. None of the data from the current import will be included in the package.

Enter User Credentials

(Only for standalone iPackager)

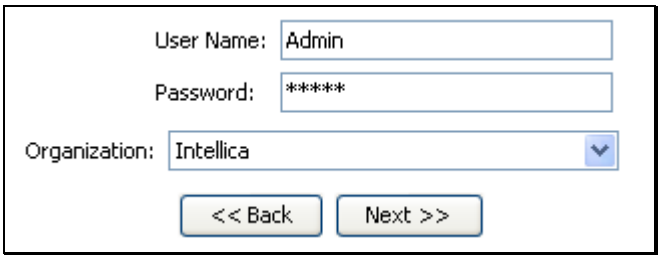

Figure 7: Specifying user credentials

In **Login Name** entry box, specify the ID used to log into Intellicus. In **Password** specify the password used with the login ID specified. Select the right option in **Organization**.

Click **Next>>** to proceed.

Click <<**Back** to return to previous step.

Important: The login screen given here appears when Intellicus is supposed to perform authentication. If host application is supposed to perform authentication, different screen will appear. Contact your Intellicus administrator for more information.

Select Items to Package

In this step you select the items (set of information) that you want to import. The selected set of information will be imported in whole.

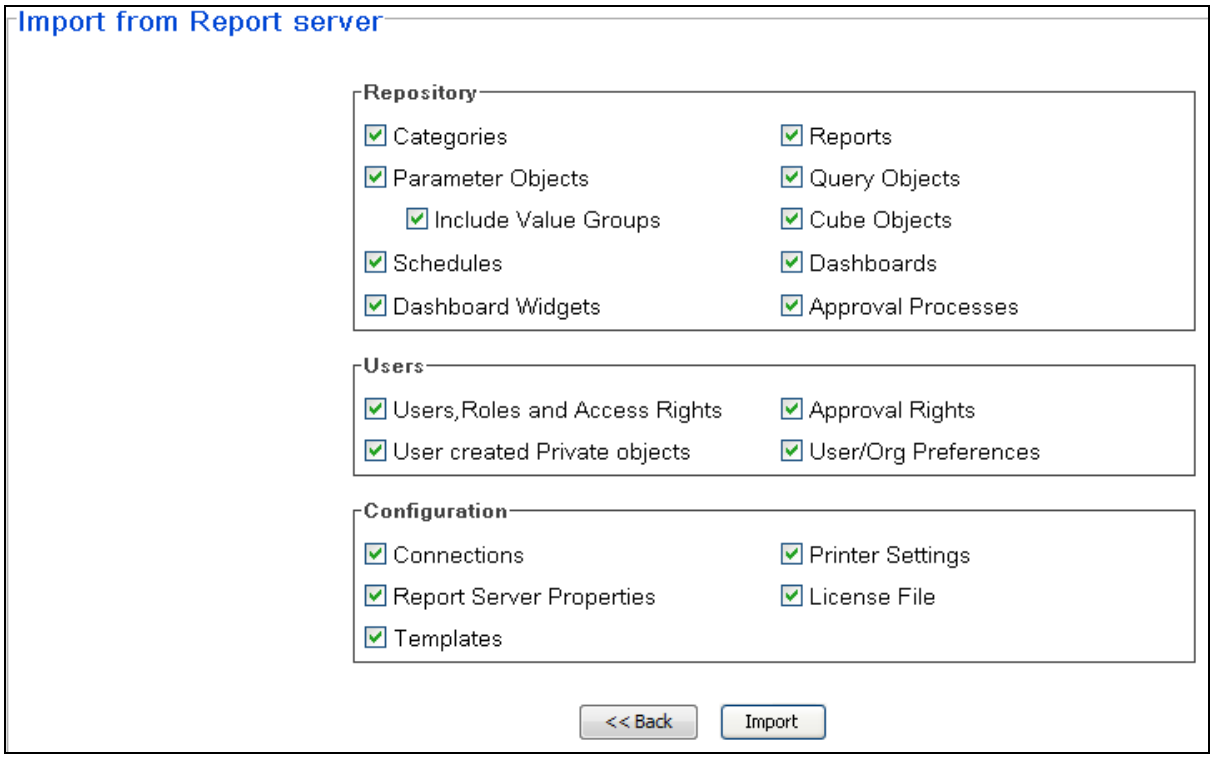

Figure 8: Selecting items to import

Uncheck the item that you don't want to import.

Note: Since reports are available in categories, if you select **Reports**, you need to select **Categories** as well.

Similarly, you need to select **Users, Roles and Access Rights** to select related items like **User created Private objects**, **Approval Rights** and **User preferences**.

Check **User created Private objects** check box, in case you want to include user specific private objects also in the package.

Click **Import** to proceed with the next step.

The process of import starts and the tree structure on the left side gets updated with information received from the server.

Importing selected components from server

Each component / items that are imported from server may have one or more items within. For example, there may be a number of parameters. There may be many query objects, or categories and many reports within categories.

You may not wish to include all the categories, or may wish to include only selected reports within a category.

To include selected components from server,

- Click on the toolbar.
- From menu bar, click **Project** > **Import from Report Server**.

When you do any of the above, screens having first step appears:

Specify Report Server to import data from

(Only for standalone iPackager)

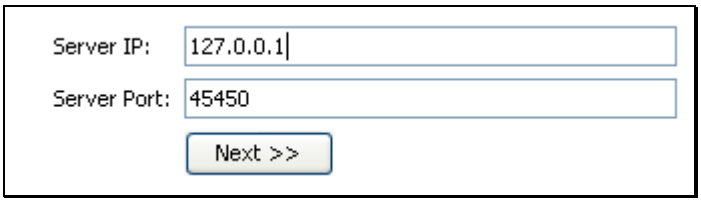

Figure 9: Specifying report server details

In **Server IP** entry box, specify server IP. In **Server Port** entry box, specify the port at which the server is listening to.

Important: Default server port has changed from 50000 to 45450. Make sure, you have specified the correct Server Port.

Click **Next>>** to proceed.

Note: Click button from the toolbar at any point of time to cancel data transfer.

Enter User Credentials

(Only for standalone iPackager)

Figure 10: Specifying user credentials

In **Login Name** entry box, specify the ID used to log into Intellicus. In **Password** specify the password used with the login ID specified. Select the right option in **Organization**.

Click **Next>>** to proceed.

Click <<**Back** to return to the previous step.

Important: The login screen given here appears when Intellicus is supposed to perform authentication. If host application is supposed to perform authentication, different screen will appear. Contact your Intellicus administrator for more information.

Select Items to Package

In this step you select the items (set of information) that you want to import. The selected set of information will be imported.

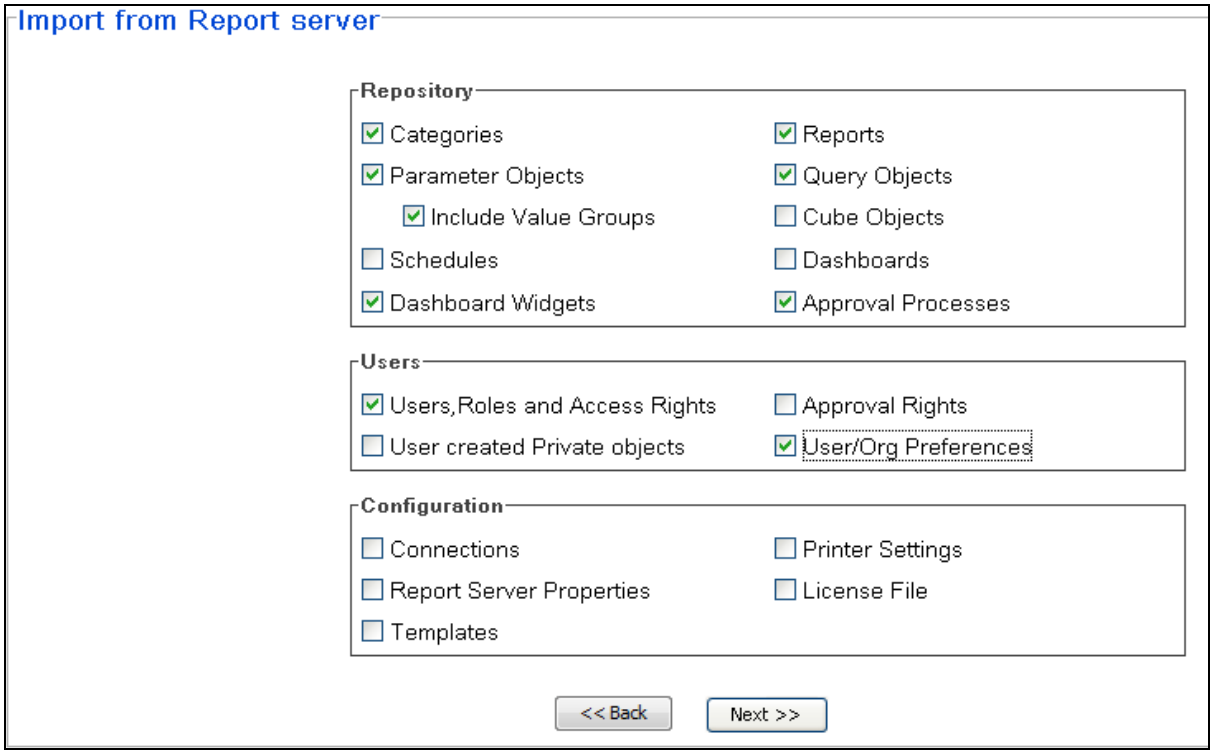

Figure 11: Selecting items to package

Check the items you want to import.

Note: Since reports are available in categories, if you select **Reports**, you need to select **Categories** as well.

Similarly, you need to select **Users, Roles and Access Rights** to select related items like **User created Private objects**, **Approval Rights** and **User preferences**.

Select **user created Private objects** check box, in case you want to include those private objects also in the package.

Click **Next** >> to proceed.

For each of the selected items, you can select following sub-items:

- **Organization:** Users, Roles, Access Rights and Preferences.
- **Categories:** All or specific categories.
- **Reports:** All or specific reports within selected categories.
- **Print settings:** All or specific print settings.
- **Parameters Objects:** All or specific parameters.

- **Query Objects:** All or specific query objects.
- **Connections:** All or specific connections.
- **Templates:** All or specific templates.
- **Jobs:** All or specific Jobs.
- **Tasks:** All or specific tasks.
- **Calendars:** All or specific calendars.
- **Dashboards:** All or specific dashboards.
- **Approval Process.**

Note: Selection will not be provided for

- Report Server properties
- Report Server License

When you click **Next>>** button on **Select Items to Package** step, screens to work on User Management, Repository and Configuration (depending on what is selected) will appear.

Important: In order to import **Web Client properties**, you need to place following files (which ever you want to package) on the workstation used to run iPackager or any other workstation on the network.

- adhoc.properties
- PortalUseCases.xml
- HtmlToolBar.properties
- ReportClient.properties
- Portal.xml
- Theme related files (in zip form)

User Management

This screen will appear if you have checked any items under User Management group.

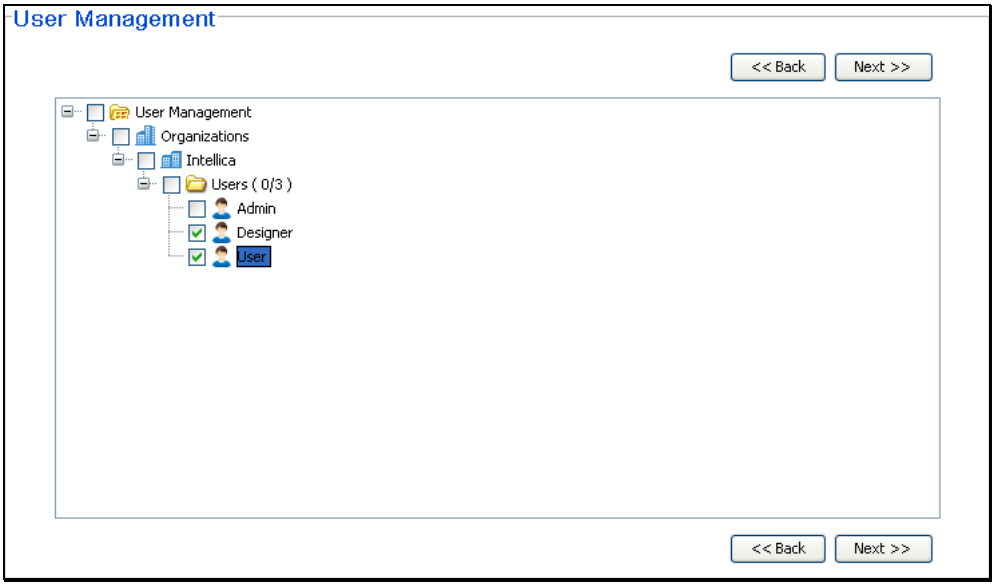

Figure 12: User Management screen

On this screen make your selection for Organizations and users to be imported in the package.

Click **Next>>** after making the selection.

Repository

This screen will appear if you have checked any items under Repository group.

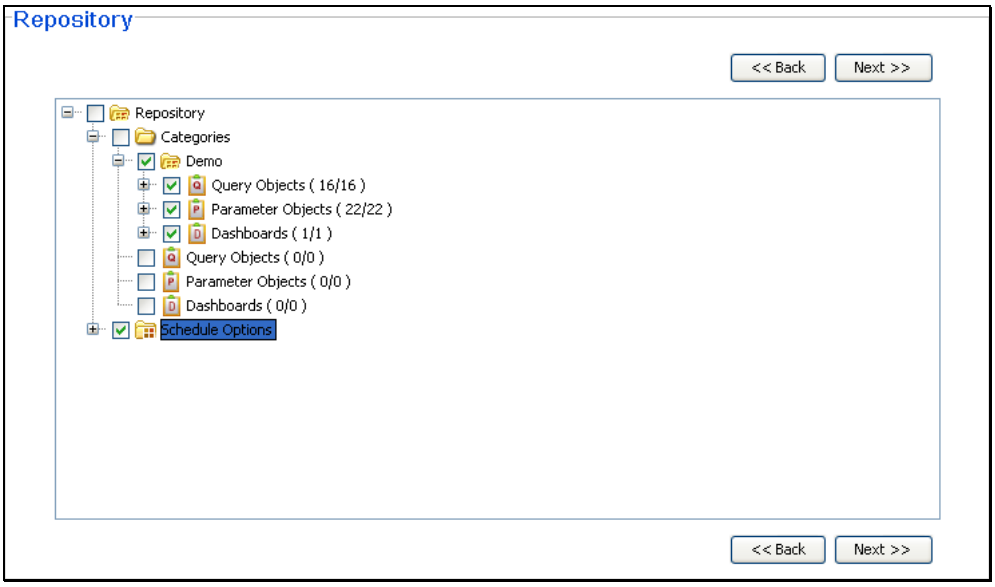

Figure 13: Repository screen

On this screen, depending on what was checked on **Import from Report Server** page, you will select categories and objects within as well as jobs, tasks and schedules.

Click **Next>>** after making the selection.

Configuration

This screen will appear if you have checked any items under Configuration group.

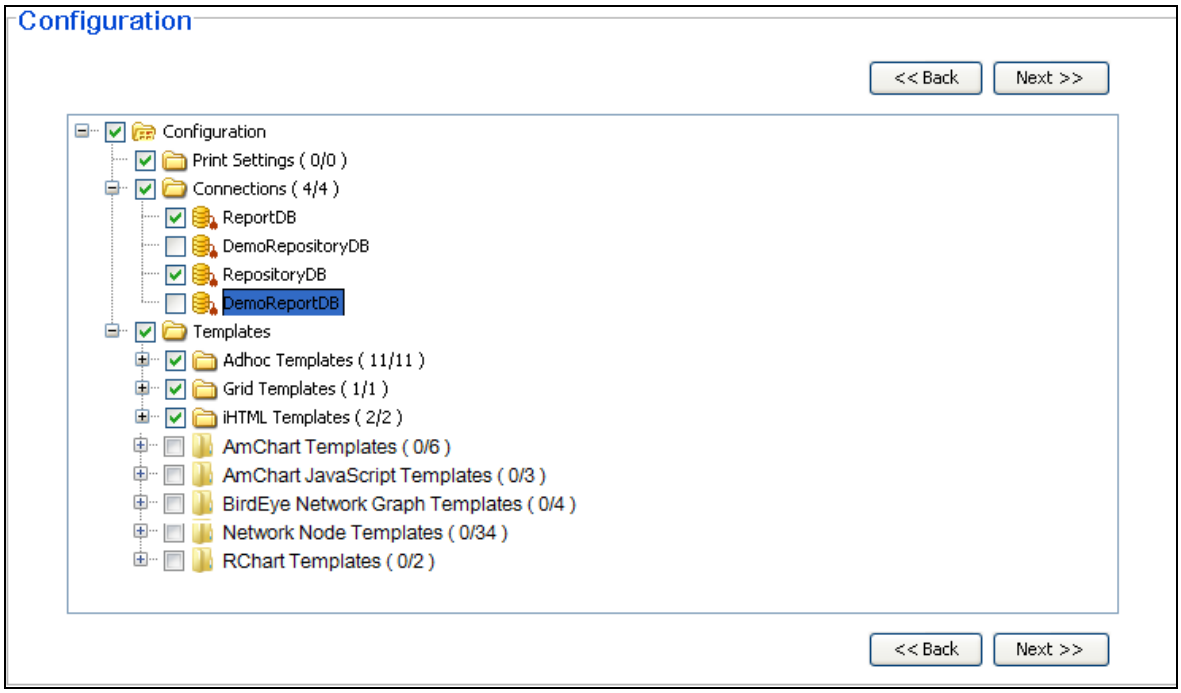

Figure 14: Configuration screen

On this screen, depending on what you checked on **Import from Report Server** page, you will select Print Settings, Database connections and templates.

After making selection, click **Next>>** to proceed.

When you click Next, **Import from Report Server Summary** screen appears.

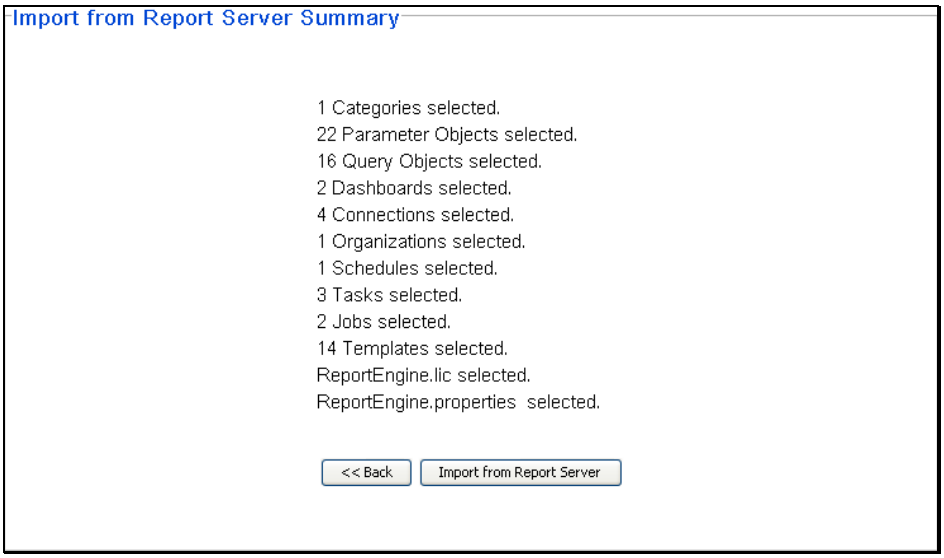

Figure 15: Summary of what is being selected to package

To proceed with Import, click **Import from Report Server** button. Selected objects are imported and list appears on the left side of the screen.

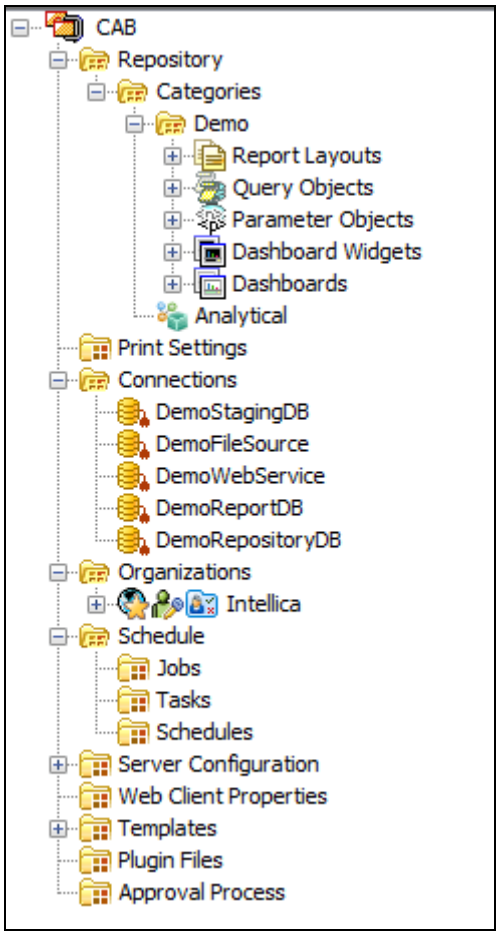

Figure 16: Tree having imported objects

Working with package information

You can add more components modify component details as well as delete one or more components in an open conf file.

Adding a category

You can create a new category in the package (at the top level in the hierarchy). To create a new category in the package,

1. From toolbar, click button. The **Create New Category** screen appears.
2. Specify name for the new category being created.
3. Click the **Add** button.

Note: Valid characters for naming a category are – A-Z, a-z, _ and - .

Add a report

To add a new report in the package,

1. From the Explorer, select the category in which you want to add the report.
2. From toolbar, click button. The **Add Report** screen will be displayed.
3. Browse to the location where report is available and select the report.
4. Specify name for the report being added.
5. Click the **Add** button.

Newly added report will be listed in explorer inside the folder in which it was added.

To modify item properties

No property of plug-in files, server configuration files and license can be changed.

For other items, you can change **Deployment action on target repository**:

- ***Replace if present:*** If the component is found in the repository, replace the one in repository with the one in bundle.

- ***Add if not present:*** Add the component only if it is not found in the repository.
- ***Delete if present:*** If the component is found in the repository, delete it. In case of Category, Click ***Cascade Delete*** to delete the folder (category) even if it contains reports.

Note: Delete if present does not delete the component from bundle. It deletes the component from repository, if found there.

In addition to the above, you can also change:

- **Category:** Name.
- **Report:** Name and Deployment type.
- **Parameter objects:** Name
- **Query Objects:** Name

To change any of the details,

1. From explorer, navigate to the item and select it. Selected item's details will be displayed on the right pane.
2. Make the changes and click **Update** button.

You need to click **Save** button to make the changes permanent.

To delete an item

1. From explorer, navigate to the item and select it. Selected item's details will be displayed on the right pane (properties area).
2. Click **Delete** button on **Properties** area. A warning dialog will appear.
3. On **Warning** dialog, click **Yes** to confirm deletion of the selected item.

Tip: To delete a component, you can right-click its name on explorer and click **Delete** on the context menu.

Writing Package (build) related properties

Following identifying information can be stored for a package:

- Author
- Company
- Version
- Comment

To get the screen and enter the information,

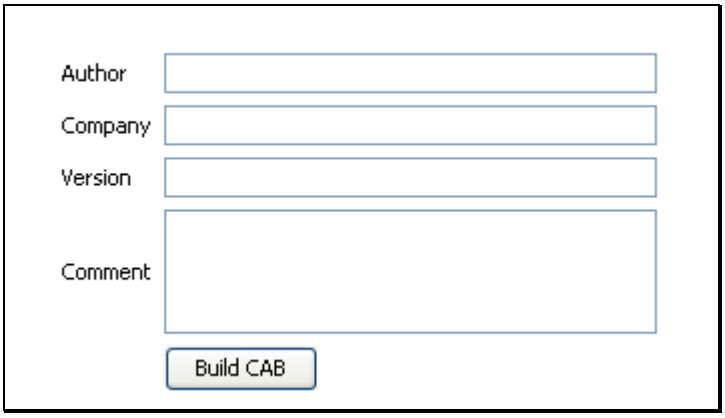

Figure 17: Specifying package information

1. On explorer area, click the **CAB** node. The screen on right will change to **Build Properties**.
2. Specify the information and click the **Save** button on the toolbar.

Clearing the information stored in the package

To clear all the information stored in the open package,

1. From toolbar, click button. A warning dialog box appears.

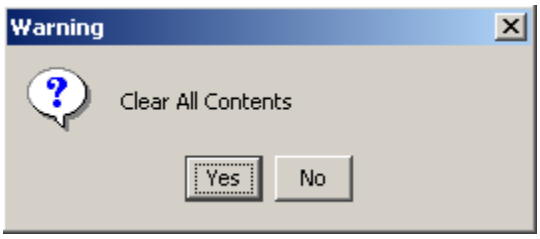

Figure 18: Clearing information in package

2. Click **Yes** to go ahead with deletion.

All the contents in the open package will be deleted.

Building the CAB

When you issue command to build the cab, all the information that you stored in the open conf file is actually picked up from the respective locations and a CAB file is made.

If any of the information saved in conf file is not available at the right source while building the cab, then respective error message will be given and the cab building process will be stopped.

To build the cab,

1. Click on the toolbar. The **Build Properties** screen appears.
2. Specify build properties and click the **Build CAB** button. The **Save** dialog box opens.
3. Specify the credentials and location to save the file.
4. The Cab building process starts.

Error Cases

A Cab is built only when all the objects added in an open conf file are available on the server at the time of building the cab.

When the conf file is opened, iPackager validates the information stored in the conf file with respective server. If any of the information stored in conf file is not found on server, a red lock will appear on its entry (including parent entries). In addition to this, if any of the following conditions exist, red lock will appear.

- Source report for a linked report is not found.
- Calendar for a job is not found.
- Task for a job is not found.
- Report for a task is not found.
- Any object added but not found in the server at the time of opening a conf or building the cab.
- Invalid characters used in object names.

Valid and Invalid characters

- **Valid Characters for filename:** 0-9, a-z, A-Z, "-", "_", "%", "$", "#", "@", "&", "!", "~", "`", "@", "^", "(", ")", "+", "=", ";", single-quote, "}", "]", comma, ".", "[", "{"
- **Invalid characters for user, schedule, category and report:** <, >, &, single-quote, double-quote.

All of the above can be one word or multiple words.

Conf file having invalid information can't be saved. To save a conf file or to build a cab based on the conf file, you need to delete those objects from the cab.