



# Personalizing Intellicus

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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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## Personalization

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Under personalization menu pad has options for personalization of Intellicus as per your needs.

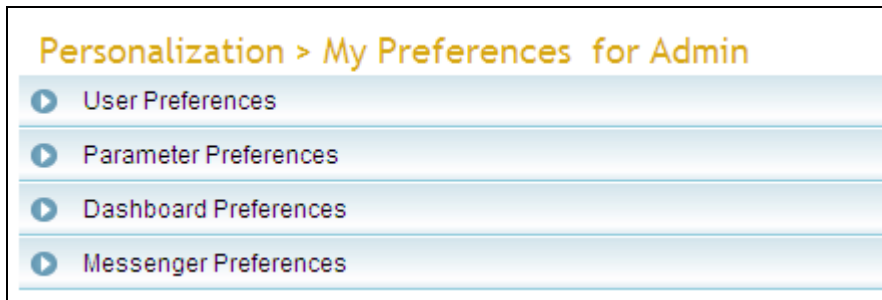


Figure 1: Personalization menu pad

Personalization preferences are organized in following tabs:

- User Preferences
- Parameter Preferences
- Dashboard Preferences
- Messenger Preferences

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## User Preferences tab

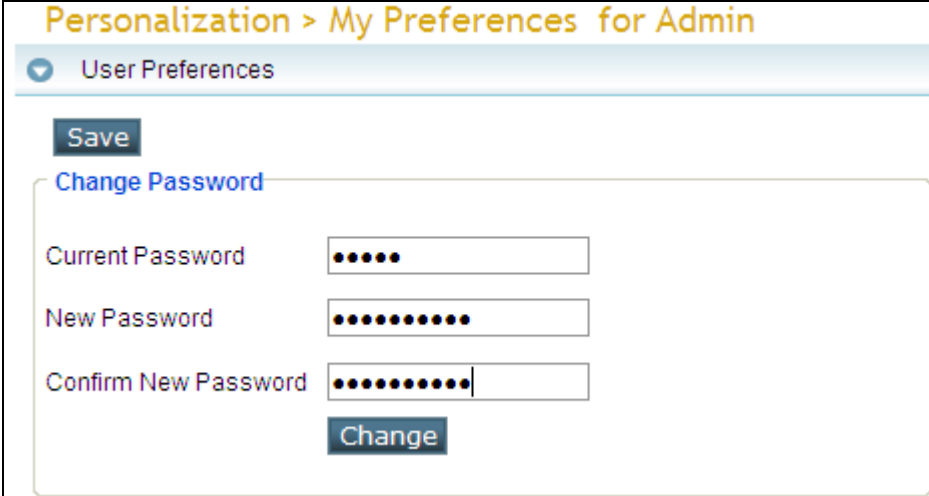
To open User Preferences tab click Navigation > Personalization > My Preferences > User Preferences.

You can do following on User Preferences tab:

- Change Password
- Portal Preferences
- Default connection to get data for reports that you run

### Changing Password

To change your password,



The screenshot shows a web interface for changing a password. At the top, it says 'Personalization > My Preferences for Admin'. Below that is a 'User Preferences' section with a 'Save' button. The 'Change Password' section contains three input fields: 'Current Password' (with 5 dots), 'New Password' (with 10 dots), and 'Confirm New Password' (with 10 dots). A 'Change' button is located below the 'Confirm New Password' field.

Figure 2: Changing password

1. In **Current Password** entry box, specify the present password that you use to log into Intellicus.
2. In **New Password** entry box, specify new password.
3. In **Confirm New Password** entry box, specify the new password again.
4. Click **Change** button.

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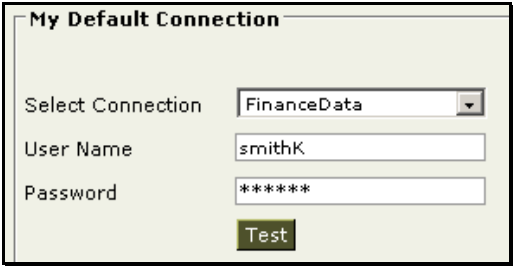
## Setting Default Connection

Intellicus access data from data sources using respective data connection (sometimes referred as 'connection'). You as a user can set a default data connection that you want to use each time database is accessed. For example, to run reports.

To set default connection,

In **Connection Name** dropdown box, select a connection.

If selected connection needs user name and password, entry boxes **User Name** and **Password** will appear. (Some of the connections may need user name and password every time it is accessed). Specify the user name and password required to access the database.



The screenshot shows a dialog box titled "My Default Connection". It contains a "Select Connection" dropdown menu with "FinanceData" selected. Below this are two text input fields: "User Name" with the value "srnithK" and "Password" with the value "\*\*\*\*\*". A "Test" button is positioned at the bottom center of the dialog.

Figure 3: Setting default connection

Click **Test** button.

Upon clicking **Test** button Intellicus will actually establish the connection and set it if the test is successful. Intellicus will pop up an error if the connection could not be set.

Intellicus will NOT test a connection when the selected connection does not need user name and password.



**Note:** If you specify data connection while actually running the report, the report will be run using the connection set at run time. In this case, connection setup here will not be considered.

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## Setting portal preferences

You can set portal preferences can be set by specifying respective values in options given in **Portal Preferences** area.

### Detail of fields

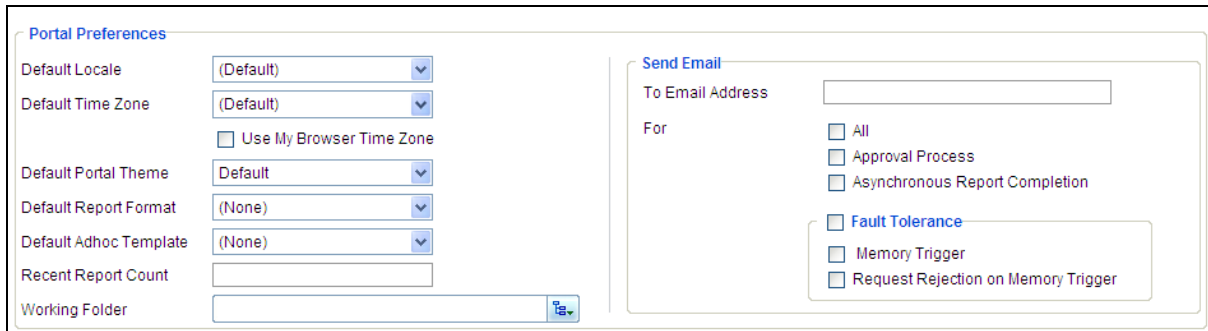



Figure 4: Portal Preferences

- **Default Locale:** Select the locale to be applied when you login. Formatting of information like date, time and portal language depends on selected locale.
- **Default Time Zone:** Select the time zone from where you will login. Before starting the report generation, the application will convert date / time field in the time zone selected here. To continue using browser time zone (time zone as per your machine), as your default time zone, check Use My Browser Time Zone. Default time zone set here will be used when user has not specified time zone at the time of login.
- **Default Portal Theme:** Select the theme that the portal should apply when you login.
- **Default Report Format:** Set the format in which the report should be presented.
- **Default Adhoc Template:** Set the template that should be used when you design an adhoc report.
- **Show Report Count:** Specify the number of reports you wish to list.

### Working Folder

Application objects are saved in folders. Number of pages in application require user to navigate to the folder in which an object is available. If you will need to access a specific folder frequently, you can set it as your Working Folder.

When Working Folder is set on this page, and you will try to access folders, working folder set here will appear selected. This way you save time to navigate to the folder every time you wish to access that folder. To set the working folder, (make sure the folder already exist), click . It will open Object selector where you can navigate to the desired folder.

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## Send Email

Specify an e-mail Address where you want to receive E-mails. Select your preferences about e-mails:

- **All:** All the mails (all of the options listed below).
- **Approval process:** When you are required to act on a publish-pending report.
- **Asynchronous Report Completion:** When you execute a report in background, to receive a mail about its success or failure.
- **Fault Tolerance:** Select this checkbox to receive e-mails in case of Fault Tolerance.
  - **Memory trigger:** When report server memory goes above trigger level.
  - **Request Rejection on Memory Trigger:** When request rejection takes place due to memory trigger.



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## Parameter Preferences Tab

In order to get a report when you need to provide a lot of values for one parameter for example 25 countries, or Ids of 19 employees, it becomes quite difficult to hold Control Key on the keyboard and move across dropdown box using mouse and selecting all the values.

This kind of work also invites errors. There are all the chances that you may miss-out one or more country names of some of the employees. This will result in a report that would not have all the information that it should have.

To get rid of this problem, you can use parameter preferences. This is done on **Parameter Preferences** tab of **My Preferences** page.

To open Parameter Preference tab click Navigation > Personalization > My Preferences > Parameter Preferences.

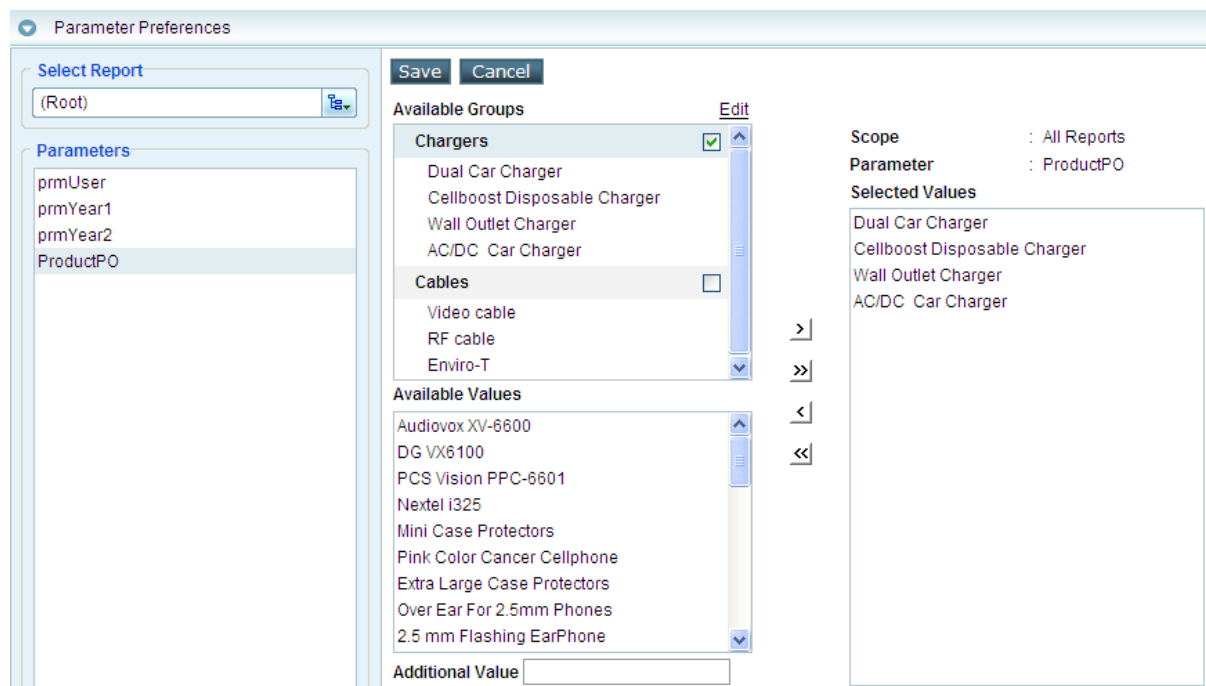


Figure 5: Parameter value grouping

After setting parameter references, when you execute that report, you will see

- List boxes having groups.
- Dropdown box of parameter values having specific values selected.

All you need to do is just to go further. You just don't need to specify parameter values.

To understand how to work with parameter value grouping, let us know about the information available on the tab.

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## Details on Parameter Preferences tab

### Select Report

Within **Select report**, you select a category from **Categories** drop down box. The reports available under selected category are displayed under **Reports** list.

When you don't select a report, all the parameters appear in **Parameters** list. When you select a specific report, parameters associated with selected report appear in **Parameters** list.

### Parameters

Based on the report saved on the **Reports** list, parameters associated with the selected reports will be listed here.

### Available Groups

All the value groups and values within each group that your Intellicus administrator has set for selected parameter are listed here. A click on the **Edit** link will open up a page to create parameter value groups.

Once you create a value group it will also appear here.

### Available Values

This lists the values that were set while creating the parameter.

### Additional Value

Here you can specify the value that you want to include in **Selected Values**. Generally you will do this when a value that you want to have in **Selected Values** List is not available in **Available Groups** as well as **Available Values**.



**Note:** Additional Value will appear disabled for Boolean type parameters. Boolean type parameters have only two values.

### Selected Values

These are the values that will appear (at run time) as selected.

### Scope

This displays name of the report or **All Reports** depending on selected parameter.

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## Parameter

This displays name of the selected parameter.




## Setting the Preferences

### Including values in *Selected Values* list for a parameter



#### From Available Groups

Select (check) the check box on the right of the group name. The values will be added in the **Selected Values** list. If a group has some of the values that you want to exclude, you can remove them.

#### From Available Values

Select (click) a value and click  button. Clicking  button will add all the values in Selected Values list. The value gets added in the **Selected Values** List. Clicking  button will add all the values in **Selected Values** list.

#### From Additional Value

In **Additional Value** entry box, specify the value that you want to include in the **Selected Values** list and click  button. The value gets added in the **Selected Values** List. Clicking  button will have the same effect.

### Removing a value from *Selected Values* list

Select the value from **Selected Values** list and click  button. Clicking  button will remove all the values from **Selected Values** list.

After including required values in **Selected Values** list, click **Save** button to save the preferences.

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## Setting your own Parameter Value Groups

You can set your own parameter value groups on the page that appears when you click **Edit** link next to **Available Groups** list header.

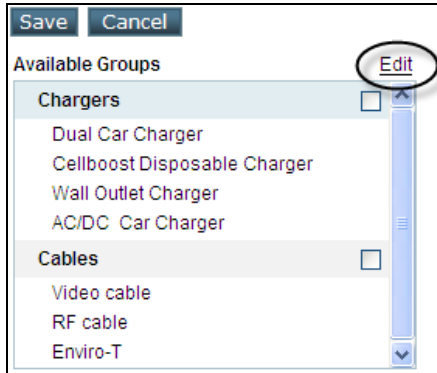


Figure 6: Click Edit link to get a page to create Groups

Information changes on the right side of the page. Now it shows details related to creating parameter value groups.

### Details on the page

#### Available Values

This lists the values that were set while creating the parameter.

#### Value Groups

Value groups that have been created (generally by Intellicus Administrator) are listed here. The group that you will create will also be listed here. The group that you have created will have  icon before the group name.

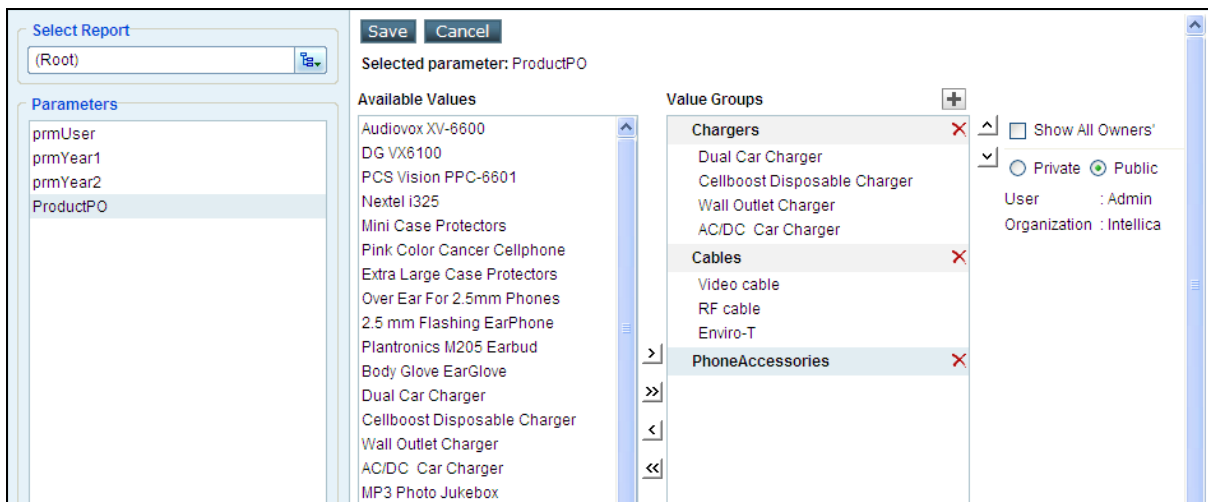


Figure 7: Creating value groups

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## Additional Value

Here you can specify the value that you want to include in **Selected Values**. Generally you will do this when a value that you want to have in **Selected Values** List is not available in **Available Groups** as well as **Available Values**.


## Private / Public option button

Indicates that selected group is a public group (generally setup by an Intellicus Administrator), or private (you have set).

## User / Organization



Displays the user credentials of the person who created the group.

## To create an empty group

1. Click  icon next to **Available Groups** title. A group is created with a default name.
2. Delete the default name and specify a unique name for the group.


A new group has been created. Now, you can add values in the group.


## To add values in a group

1. Click the group in which you want to add values.
2. From the values listed in **Available Values**, click the value to be included in the group and click  button. Click  to include all the values in the group.

Repeat the process for all the values to be included in the selected group. Click **Save** button after the process is over.

## To remove value(s) from a group

1. Click the value to be removed in **Value Groups**.
2. Click  button.

The selected value will be removed from the group. You can click  to remove all the values. Click **Save** button after making changes.

A click on **Save** button will once again bring the main page on screen.



**Note:** This feature will work only if your report has referenced parameters. If a report you are trying to work with uses non-referenced parameters, those parameters would not be listed on this page.

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## Dashboards tab

Out of the dashboards you designed and the dashboards available to you, you need to select dashboards that you wish to view. This task is performed on Dashboard Preferences page.

To open Dashboard Preferences tab, click Navigation > Personalization > My Preferences > Dashboard Preferences.

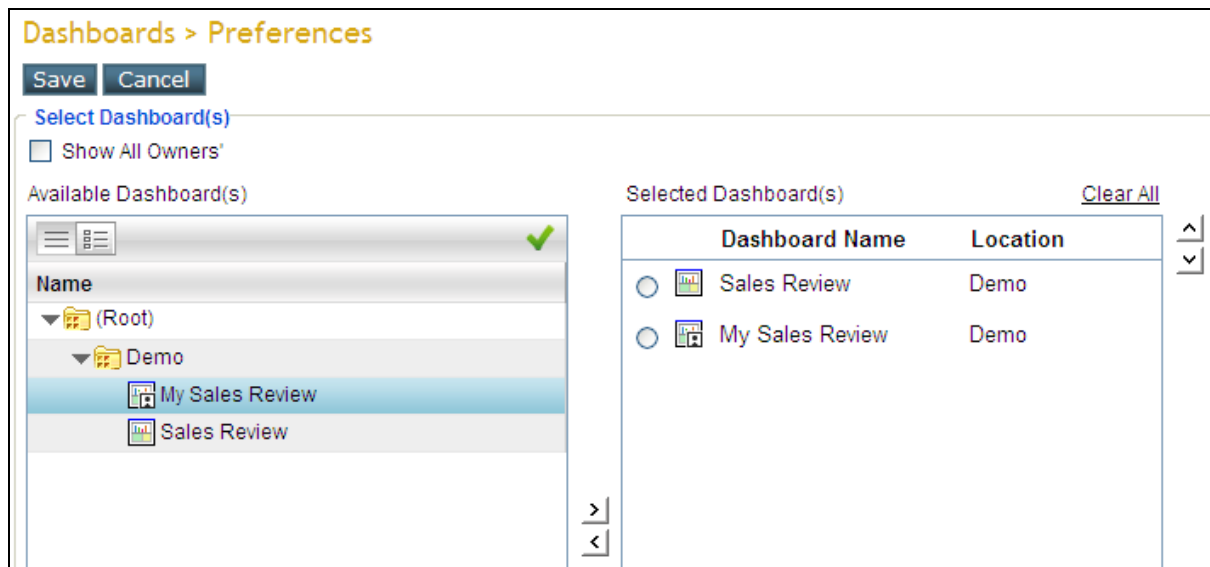




Figure 8: Setting dashboard preferences

Dashboards are available in folders. To get dashboards made by all the users, check **Show All Owners'** checkbox (available only to application administrators).

### Selecting Dashboards for viewing

To shift a dashboard in **Selected Dashboard(s)** list, From **Available Dashboard(s)** list, select the dashboard by clicking it and click the  button. The selected dashboard is also shifted to **Selected Dashboard(s)** list.

To remove a dashboard from **Selected Dashboard(s)** list, Select the dashboard from the list, and click the  button.

To decide sequence of dashboard tabs (left to right) and dashboard options in combo (up to down), make use of  and  buttons placed on the right of the **Selected Dashboard(s)** list.


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## Messenger Preferences tab

Some of the Intellicus functionalities like running reports, getting list of categories, getting report lists in category etc. can be used over the IM too.

Select the Ids (email IDs) to be used with respective Instant Messenger.



To open Messenger Preferences tab click Navigation > Personalization > My Preferences > Messenger Preferences.



Email Id	Messenger Type	
InteConnect	Yahoo	X
	Yahoo	X

Figure 9: Setting messenger preferences

In **Email ID**, specify the e-mail ID. In **Messenger Type**, select the messenger with which specified ID should be associated.

To add more Ids, click  button. To delete an ID click  on respective row of messenger preference.

