Running Reports in Intellicus

Intellicus Enterprise Reporting and BI Platform

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Enterprise Reporting and
Business Insights 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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Running Reports

Reports are available in multi-level folder structure. You can locate the desired report in multiple ways and run it.

Locating the report

Reports are available in multi-level folder structure. To locate a report, you need to navigate to the folder. You can do so in the following ways:

Click **Navigation** > **Inbox** > **Categories**. It will open list of categories at highest level (root). From here you can further navigate to the desired folder.

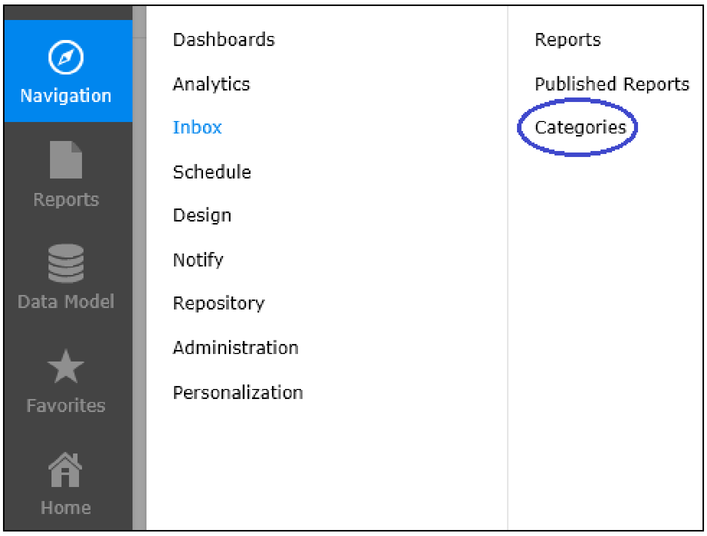


Figure 1: Getting a list of categories from Navigation menu

Click **Reports**. It will open a list of categories at highest level (root). From here you can further navigate to the desired folder.

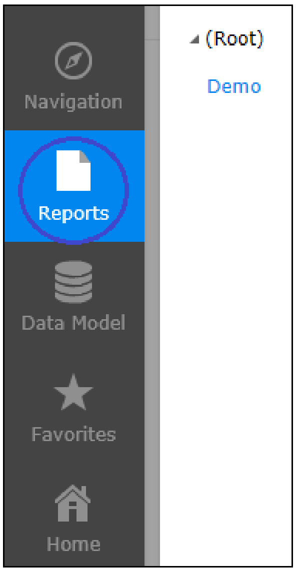


Figure 2: Getting a list of categories from Reports menu

Click **Favorites**. It will open list of objects (including folders and reports which you have added in your Favorites list). From here you can further navigate to the desired folder.

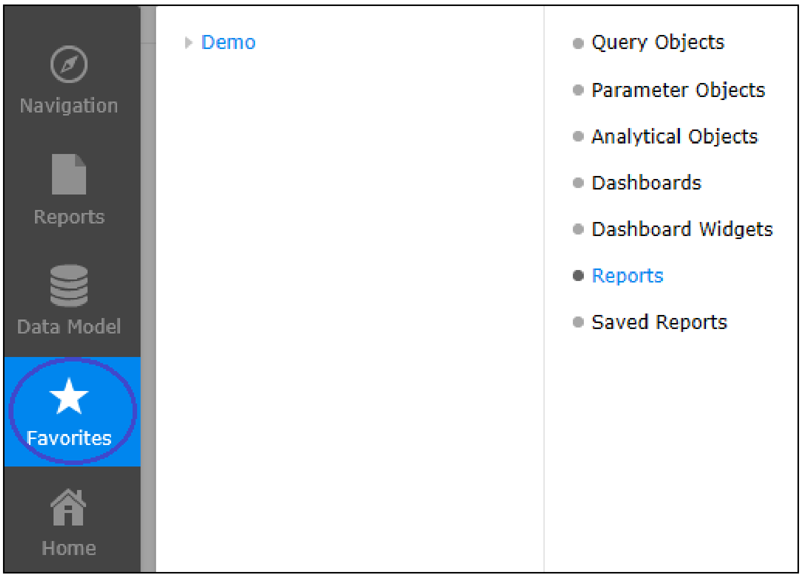


Figure 3: Getting a list of 'Favorites' folders

Click **Data Model**. It will open list of objects including folders available at root level. From here you can further navigate to the desired folder.

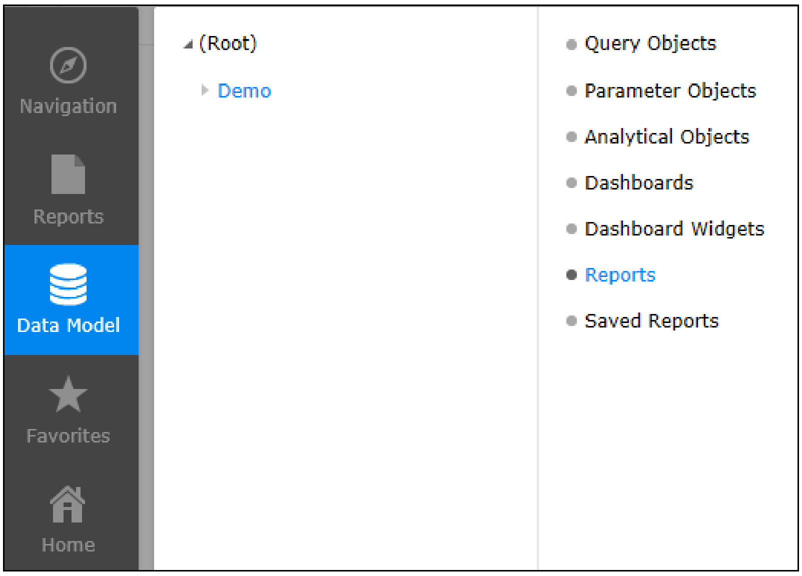


Figure 4: Getting a list of categories from Data Model menu

Selecting the report and performing report operations

To initiate a task, select a report by clicking in order to see the list of actions corresponding to that report type.

At the time of report deployment, default values for report attributes, like output format, database etc. are set. To run the report using these default preferences, click **Quick Run with default options**. If the report has user parameters, **Input Parameter Form** page will open where you need to provide the parameter values.

If the report you are executing is expected to take longer to generate (may be due to large volume of data), or you want to carry on with another activity immediately after starting the report execution, click **Run in Background**. Report will be executed and output will be generated in the default format (set at the time of report deployment). If the report has user parameters, **Input Parameter Form** page will open where you need to provide the parameter values. You will be navigated to Report Execution Page, where execution status of the report will be displayed.

Click **Run Report** when you want to execute a report with preferences other than those set during report deployment (for example, report format).

A report can be generated and saved (published) on server (for private viewing or public viewing). Click **List Published Outputs** to view the list of published outputs of this report. The list page also displays the user name that generated (published) the report, time and expiry time of the report. From this page, you can view report output as well as user comments on the report.

If you want to auto-execute this report at a specific date and time, click **Schedule**. If schedule is not set for the report, Schedule Job page opens where you can create a new schedule job for the report.

When you click **Create Dashboard Widget,** Widget Designer page is displayed. You can create a Widget using the report.

To know more about creating Widgets please refer to Creating Dashboard Widgets.pdf.

If selected report is an ad hoc report, you can click **Customize Report** to open and edit it in **Ad hoc Visualizer**.

Click **Copy Report** to copy the selected report into another category.
This will make a copy of the selected report into another category with the same name. If the same name of the report already exists in the category where you want to paste the report an error will be shown.

Click **Copy Report as Link** to copy the selected report into another category as link. This will make a copy of the selected report into another category as a link.

Click **Cut Report** to remove the report from the category. You can paste the report which is cut into another category. The report will now be available in the pasted category only.

Click **Properties** to view or change the properties of the selected report. Properties of the report are also available from "Manage Folders and Reports". The properties include, Report Name, Report ID, Deployment Type, Design Mode etc.

Click **Advanced Properties** to view or change the advanced properties of the selected report. The properties include, Audit Log, Run Priority, Database Connection Timeout, Data Source Fetch Size etc.

Click **Access Rights** to view or change on the selected report.

Click **Download Report** to download the report locally.

Click **View Description** to view the description of the report.

Click **Add to Favorites** to add the selected report into favorites. This will list the report in 'Favorites Navigation' menu for easy and quick access.

To delete selected report, click **Delete Report** (available if configured).

Run a report

You can run a report (standard report as well as ad hoc report) by clicking **Run Report** button, you can:

- Select delivery options
- Provide view options (optional)

Ad hoc Reports

When you click **Run Report** button of any of the Ad hoc reports, **Run Ad hoc Report** page will appear.

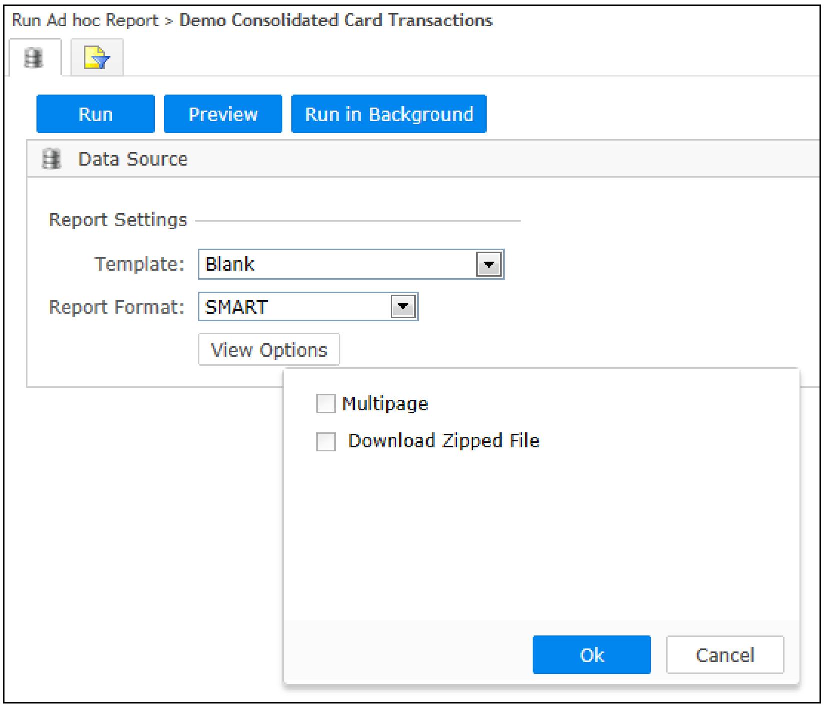


Figure 5: Run Ad hoc Report page

- **Template:** Select a template to be applied on the report being designed.
- **Report Format:** Select the output format in which report is required.
- **View Options:** Select View Options specific to the chosen Report Format type.

Run time parameters for Ad hoc report

Figure 6: Report Parameters (run time parameter input form)

This page will appear if run time filter parameters (run time parameters) were set for this report.

Select report parameters and click **Run Now** or **Run in Background** to proceed.

If the report does not have run time parameters, Report Parameter form will not appear.

Standard Reports

When you click **Run Report** on a standard report, **Report Delivery Options** page opens up.

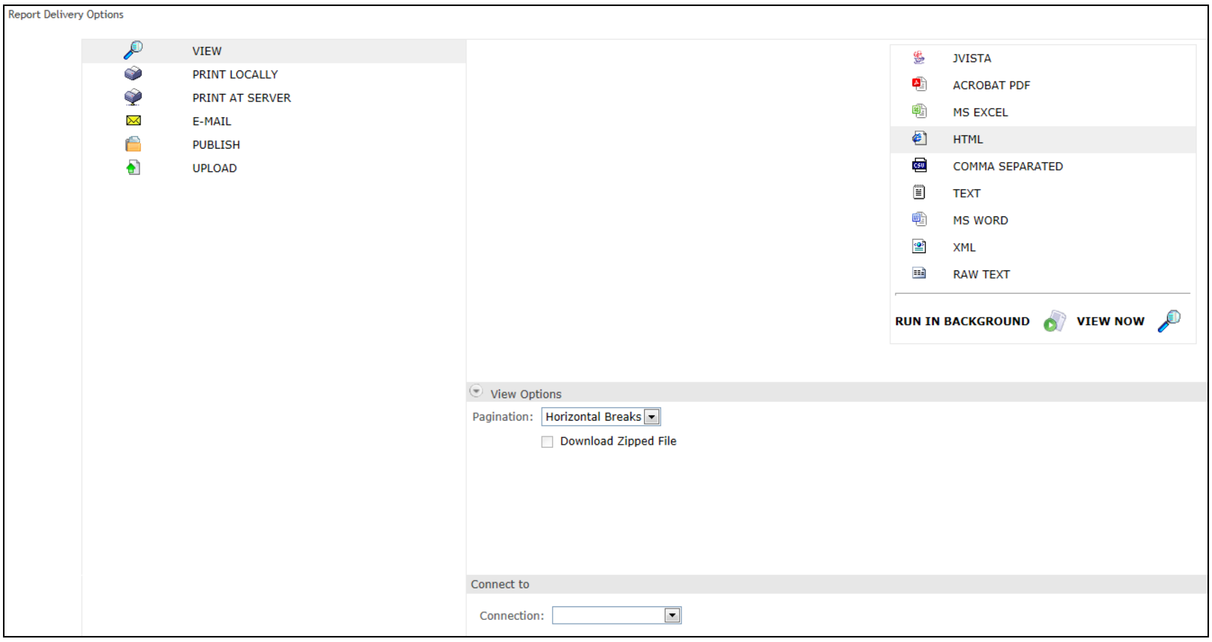


Figure 7: Report Delivery Options page

From this page, you can view report on-screen in selected output format, print it locally or on printer attached to the server as well as Email, Publish or Upload a report.

When a report is executed, application can cache its data so that next time when the report is executed with same parameters, it can run with cached data. This method improves performance. If Data caching feature is turned on, **Refresh Data** checkbox will be displayed. Uncheck the checkbox to use cached data (if cached) to run the report. Check the checkbox to get the data from database server and run the report.

To get report data, a report connects to the default database. If desired, you can connect to any of the database connections accessible to you by selecting it from **Connection** dropdown box under **Connect to** area.

> **Note:** If selected connection needs user credentials at run time, **User Name** and **Password** entry boxes will appear. Specify user name and password required to connect with selected database and click the **Test** button. If the connection is established successfully, **Connection Test Succeeded** message will appear.

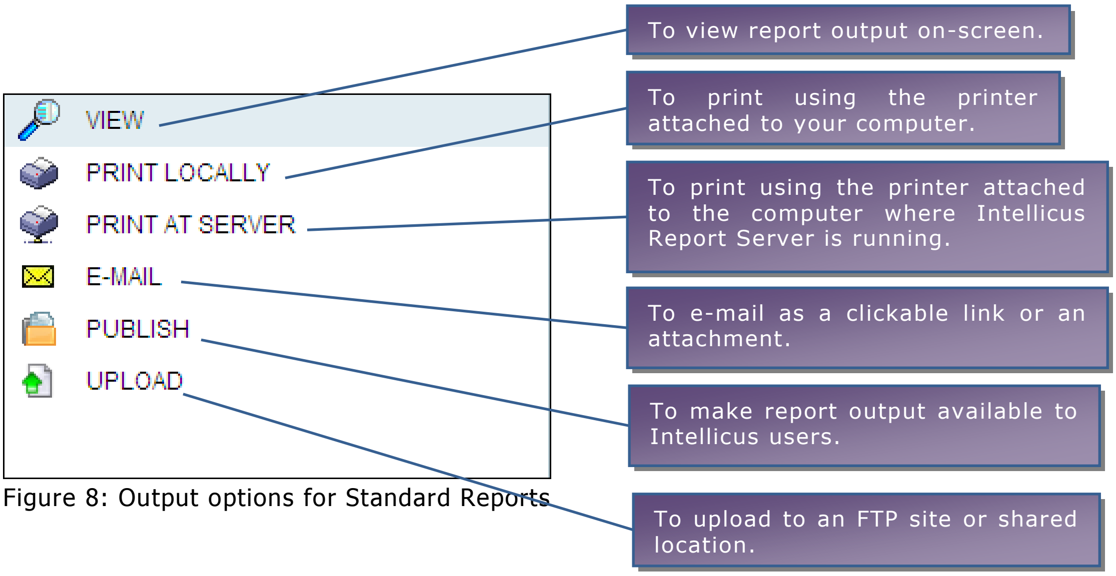


Figure 8: Output options for Standard Reports

View (on screen) in selected format

You can view a report in any of the following formats:

- **JVISTA:** To view output in Intellicus' own report viewer.
- **ACROBAT PDF:** To get output in Adobe PDF format.
- **MS EXCEL:** To get output as an MS Excel file.
- **HTML:** Web page (HTML format).
- **MS WORD:** To get output as an MS Word file.
- **TEXT:** To get output as a text file.
- **COMMA SEPARATED:** Delimiter (Generally comma) separated file.
- **XML:** Output as an XML file.
- **RAW TEXT:** Comma separated file having only headers and data values just as received from database.

Note: Some of the report formats will need the workstation to have respective Viewers. For example, PDF format needs Adobe Reader.

Important: You can't export a report in RAW TEXT format. Report in JVISTA and HTML output formats will open in browser. For other output types, you need viewer applications to open and view reports in corresponding formats.

Depending on the selected output type, you can select **View Options** for the report. For example, to zip the file before publish, ignoring page breaks, options specific to CSV or MS Excel output, etc. Refer to online help for details on View options.

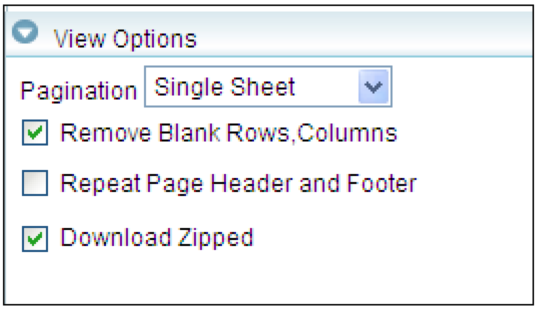


Figure 9: View Options for View as MS Excel file

Click **VIEW NOW** to run the report and view report output immediately. If the report has huge data-volume, it may take some time to generate entire report. If this is the case, click **RUN IN BACKGROUND** to start report-execution and continue working with the application without having to wait until entire report is generated. Report execution will continue in the background and you will be redirected to Report Execution Status page. It displays execution status of all the reports that were RUN IN BACKGROUND.

Note: RUN IN BACKGROUND is not available in JVISTA. RAW TEXT report is made available as a file having .csv.zip extension. It needs to be decompressed using an application with which .zip file type is associated.

If you click **Run in Background**, **Report Execution Status** page appears. On this page, you can click **Refresh** to view status of the report being executed in background.

Note: Instructions to view a report run in background is provided later in the chapter.

Print on printer attached to your computer

From **Report Delivery Options** page, you may prefer to print the report on the printer attached to your computer.

Figure 10: Printing a report locally

Options available are:

Print: To get Print dialog to select printer followed by printing. The dialog box will have printers installed on the workstation you are using to access this page.

Print Direct: To make use of default print settings on the workstation and go ahead with printing.

To print a report,

1. On Report Delivery Options page, click anywhere on PRINT LOCALLY.
2. If you want to run the report using a specific connection, select the connection from **Run on Database** dropdown box.
3. Click the print preferences (**PRINT** or **PRINT DIRECT**).

The report gets printed as per options set.

Printing at Server

From **Report Delivery Options** page the report can be printed to a printer attached to the machine where Intellicus Report Server is running.

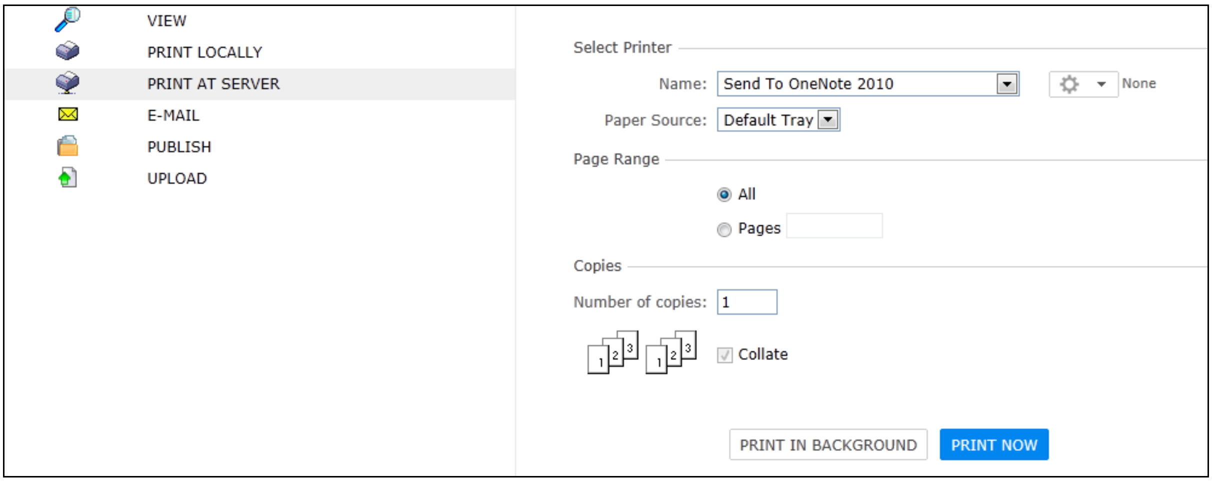


Figure 11: Printing report at server

Name: Select the printer name on which the report should be printed.
Click the **Printer Setting** icon. A small window opens, listing the print settings related to printers installed on the machine, where the Report Server is running. Select the setting you want to use. Other information is filled in based on the settings done by the administrator. However you can change the information.

Paper Source: Specify the tray preferences.

Page Range: Select All to print all the pages. Specify page number(s) in Pages separated by comma to print selected pages.

Number of Copies: Specify the number of copies for the report. Specify Collate preference.

Include comments: Effective if report being printed on server has to undergo approval process. Select this checkbox to print approval comments along with report as tail pages.

Note: Status of a report executed in background can be viewed on My Reports page.

E-mail the report

A report can be mailed as an attachment or a link. Under **Send Report As**, select *Attachment* to send report as an attachment with the mail. If the report is very heavy or attachments are filtered by recipient's mail server, you may select *Link*. In this method, report is generated and saved on report server at specified location. When recipient clicks the link in the mail, report opens up.

Depending on the selected output type, you can select **Options** for the report. For example, to zip the file before attaching it with the mail, ignoring page breaks options specific to CSV or MS Excel output, etc. Refer to online help for more details about the options.

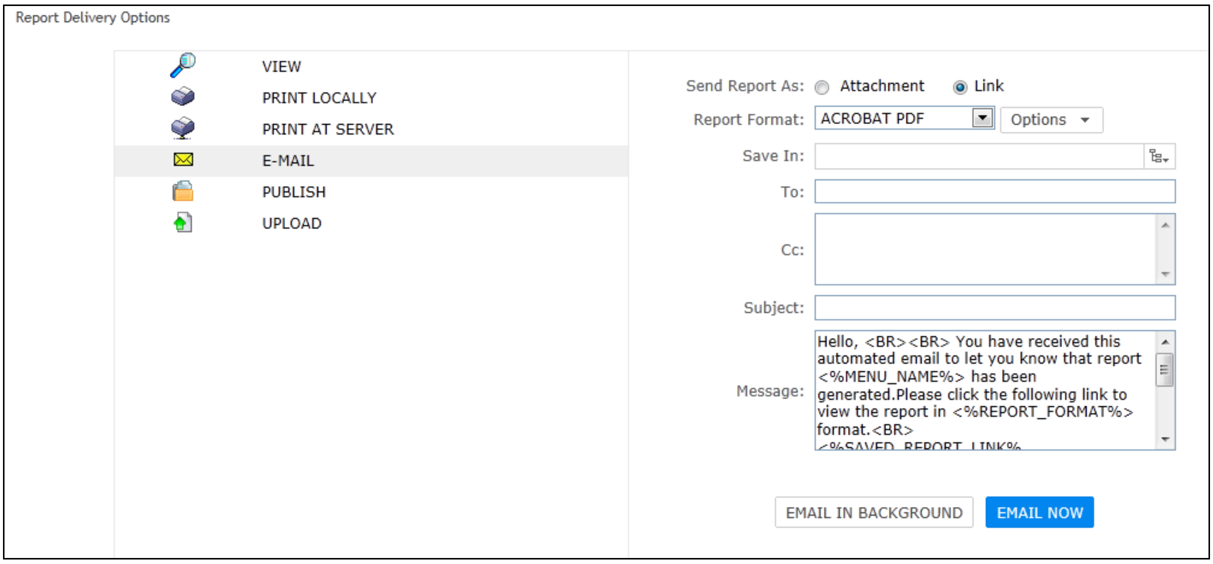


Figure 12: Selecting Email as report delivery option

While sending report as a link, you also need to specify file name and location where report will be saved. Reports are saved inside a folder. In **Save In**, click to open object selector and navigate to the desired folder.

Object Selector's features like multiple views, filtering and sorting makes it easier and quicker to locate the desired folder. Refer to the online help for more information on Object Selector window.

Default message text set by your application administrator is displayed in **Message** box, which you can change if desired. You can include user parameters as well as system parameters in the message text. For example, if the report you are mailing has a parameter "ReportDate", then you can insert it as <%ReportDate%> in your message text, which will be replaced by report execution date at run time.

To mail the report and view the result (like success or failure), click **EMAIL NOW**. You will be redirected to **Report Status** page, which will display the status message. Click **Email in Background** to start the process and continue working with the application without having to wait till the operation is complete. The operation will continue in background and you will be redirected to **Report Execution Status** page. This page displays execution status of all the reports executed in background.

Publish the report

When you publish a report, its output is generated and saved which can be opened and viewed in the future. Next time you open the output, you get a faster response because time taken in generating the report is saved.

You can view a published report output from All Published page as well as from Report List page for the selected category.

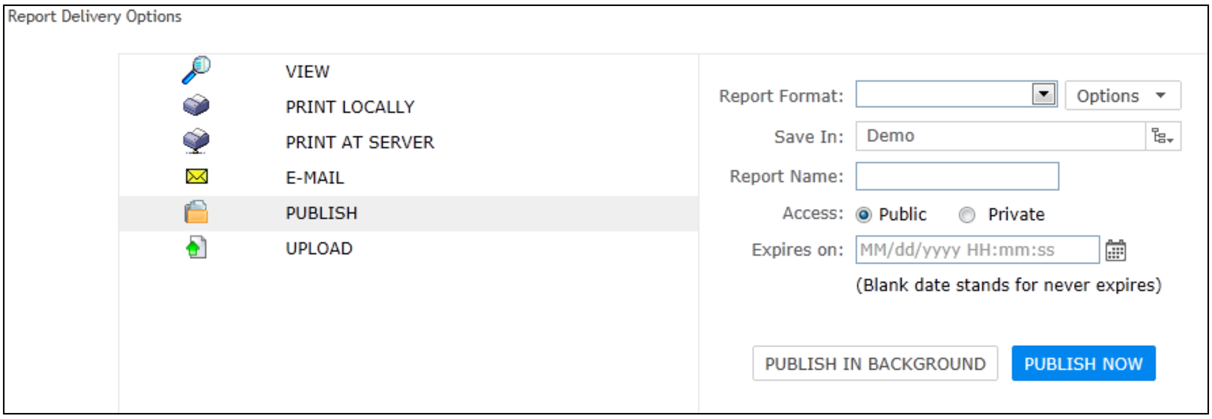


Figure 13: Publishing a report

In **Save In**, click to open object selector and navigate to the folder in which you want to save the report. Object Selector's features like multiple views, filtering and sorting makes it easier and quicker to find the desired folder. Refer to online help to know more about Object Selector window.

Though not mandatory, it is always good to specify a unique **Report Name** for the published report.

Depending on the selected output type, you can select **Options** for the report. For example, to zip the file before publish, ignoring page breaks, options specific to CSV or MS Excel output, etc. Refer to online help for more details about the options.

You can keep the published report output accessible to yourself (select **Private**) or make it available for all (select **Public**).

If the report-data will not be valid forever, application can delete the published report on date and time you specify. In **Expires on**, set date and time after which the report should be deleted. If the report is valid forever or you would delete it manually, keep **Expires on** blank.

Important: A published report is stored on Report Server. It is recommended that you specify an expiry date. Deletion of the expired reports will free up the server space.

An expired report cannot be retrieved back. You may backup the reports to keep the output. This will make sure you have the data with you at the same time server space doesn't not remain occupied for a report output.

You can publish a report in any of the available Report formats. Publishing a report in desired format will save time (of selecting report format) when it is viewed. Even if you publish the report in a selected format, you can view it in other formats, if needed. Select an output format from **Report Format** dropdown.

Note: A report published in RAW TEXT will not be available for view in any of the other formats.

To publish the report and view the result (like success or failure), click **PUBLISH NOW**. You will be redirected to **Report Status** page, which will display the status message. Click **PUBLISH IN BACKGROUND** to start the process and continue working with the application without having to wait till the operation is complete. The operation will continue in background and you will be redirected to **Report Execution Status** page. It displays execution status of all the reports executed in background.

Important: When a report is published, its output is stored on Intellicus Report Server. When a published report is requested from Published reports list, the respective output is displayed. Because a published report does not have the latest data, the information on a published report, may be old.

A report may be associated with workflow (approval process). When such a report is published, it would be available to you on **Saved Reports List** page if you were an approver. If you are not an approver, such a report will be available to you on Saved Reports List page only after approved by an approver.

Upload the report

Use this delivery option to generate the report in desired output format and upload it to an FTP server or a shared network location.

Report output will be generated in the selected **Report Format** and **Upload Options**. If desired, change the report format.

Depending on the selected output type, you can select Upload Options for the report. For example, to zip the file before publish, ignoring page breaks, options specific to CSV or MS Excel output, etc. Refer to online help for more details about the options.

Uploading the report on FTP Server

This is the desired option to upload the report on your web site and make it available to web site visitors.

In **Upload Type**, select *FTP* option.

To upload report on a secure FTP server, check **Secure** checkbox. Intellicus uses Secure Shell Protocol (SSH) protocol (TCP port 22) to provide secure file transfer. When you do this, **Use PASV mode** checkbox will be unchecked and disabled.

Most of the FTP Servers use Passive mode. Uncheck **Use PASV mode** if you are sure that the FTP server does not use Passive mode.

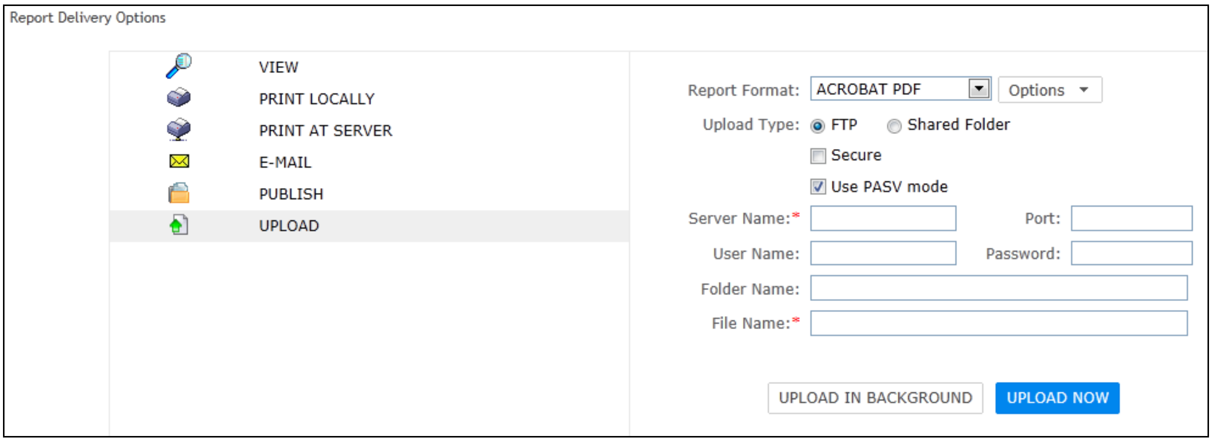


Figure 14: Uploading a report output to FTP server

Server Name, where to FTP and File Name for the uploaded file is mandatory information you need to provide. You may specify server name as URL (for example, coname.servername.com) or as IP address (for example, 290.340.1.98).

Specify **Port** value if the server listens to a port other than universal port (21). If you are sure that the **FTP** server needs user authentication, specify User **Name** and **Password** to login.

Specify **Folder Name**, to upload the file in a folder other than root. For example, /reports/hr/branch01.

Saving in a shared folder

Use this option to save the report in a shared folder on a network location. Users can open that folder and view the report output stored in that folder.

In **Upload Type**, select *Shared Folder* option.

In **Folder Name**, specify the network path in UNC format (\\computername\folder) where the report should be placed.

In **File Name**, specify the name for the report file. This is a mandatory field.

In both of the above, you have option to **UPLOAD NOW** or **UPLOAD IN BACKGROUND**.

To upload the report and view the result (like success or failure), click **UPLOAD NOW**. You will be redirected to a Report Status page, which will display the status message. Click **UPLOAD IN BACKGROUND** to start the process and continue working with the application without having to wait till the operation is complete. The operation will continue in background and you will be redirected to **Report Execution Status** page. It displays execution status of all the reports executed in background.

Cancel Request

When report execution starts, "Loading, Please Wait" message appears on portal page.

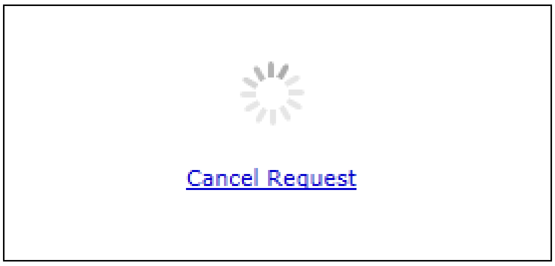


Figure 15: Cancel Report

Click **Cancel Request** hyperlink to cancel the report execution.

In case of an error

In case the requested operation is not completed, Intellicus displays an error page.

The error page is designed to contain the entire sequence of the errors that resulted in the final error.

Figure 16: Error page having hyperlinked error numbers

Click the error number to get more information and resolution.

Note: Which page will open when you click the error number, will also depend on configuration. Depending on configuration, the error number may not appear as a hyperlink. Please contact your application administrator for more information.

Repeat request of report execution

Repeat request comes into picture when:

- Execution of a report is currently under process, and
- You have again requested execution of that report with same operational and (if there any) user parameters.

Depending on application configuration any of the following may happen:

1. Execution continues and another request is also processed.
2. Execution continues and another request is rejected.
3. Execution continues and you are prompted to (1) Cancel currently running request and start executing new request, or (2) Cancel new request.

Input Parameter Form: Provide values for report parameters

These are the values that are specified at run time. Parameters will appear here if a report needs user parameters. You need to select parameters. If a report does not need user parameters, this area will remain blank.

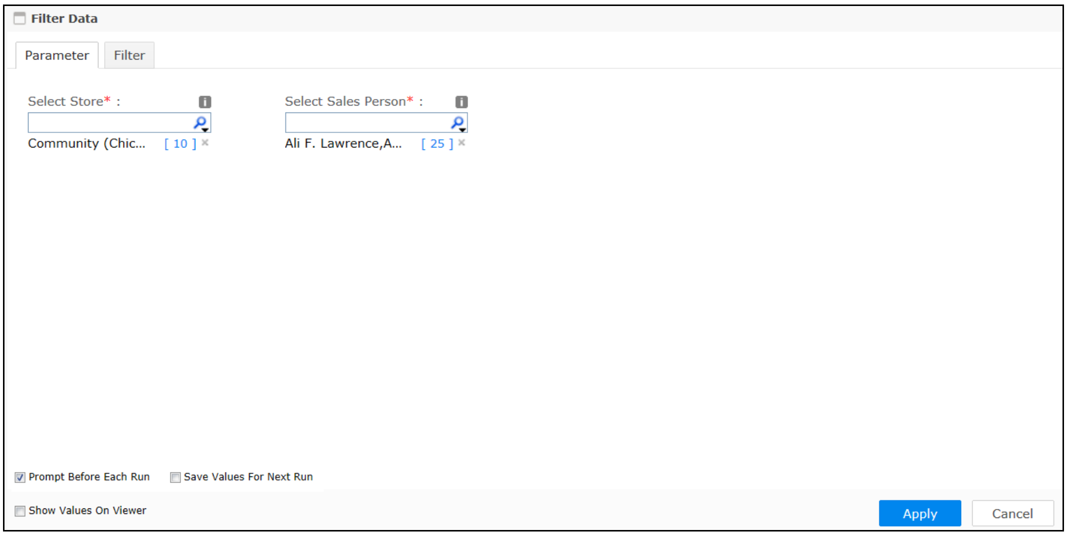


Figure 17: Input Parameter Form when Report is Run in SMART Format

Parameter tab

On this tab you specify values for parameters. A parameter may need only one value, while others may need multiple values.

- **Mandatory Parameters:** It is a must to provide values for such type of parameters in order to get the report output. Name of a mandatory parameter is suffixed by an asterisk.
- **Optional Parameters:** It is optional to provide values for such type of parameters. The report will run successfully even if you do not provide values for these parameters.
- **Tree View of Parameter values:** Tree view (hierarchical view) of parameter values simplifies the process of selecting one or more parameter values.

When **'Prompt Before Each Run'** is checked, the Input Parameter Form (IPF) shows up before each report run to enable you change the default parameter value(s).
The IPF shows up in case of mandatory parameters even if this field is unchecked.

If '**Save Values For Next Run**' is checked, report runs with parameter values saved in last run (upon saving the report). In case this is unchecked, report runs using the default parameters.

When **'Show Values On Viewer'** is checked, it enables to view the list of parameters on top of the report.

In case multiple parameters as well as filters are applied, the parameters are separated from each other and from the filters using a pipe symbol.
Description button: Click this button to view description of the control.

Specifying value for a parameter

Specify value in the entry box. If it is a drop down box, use up and down arrows or type first few characters to make the values visible and click the value to select it.
You can multi-select values of a parameter.

View All: This shows all the selected parameter values. You can remove any parameter also from here.

Remove All: This removes all the selected parameter values.

Saving the Form

You can save the information related to selected parameters on this form. After selecting the required parameter values,

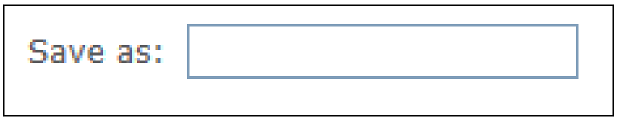


Figure 18: Saving a parameter form having values

1. Specify a name for the form under **Save as**.
2. Click **Apply** button.

Loading a form

When you load a form, the parameters set at the time of saving the form appear selected.

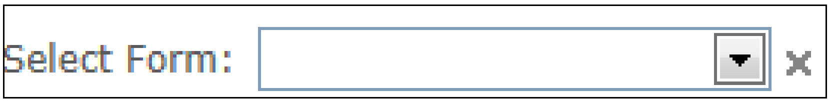


Figure 19: Loading a form

1. Select the form from **Select Form** drop down box.
2. Click **Apply** button.

Deleting a form

1. From **Select Form** drop down box, select name of the form to be deleted.
2. Click ✕ button.

The selected form is deleted.

Report Scheduling (Quick Scheduling)

Intellicus offers a very comprehensive report scheduling mechanism. This feature is available for the users having specific access privileges. However, Quick Scheduling feature is available for all the users.

When you click **Schedule** under Actions, you may get:

- **Schedule Job:** This page appears when a schedule is not setup for the selected report.
- **Schedule Job List:** This page appears when one or more schedules are setup for the selected report.

Creating a schedule using Schedule Job page

This page appears when you click **Schedule** (and there is no schedule setup) on the report.

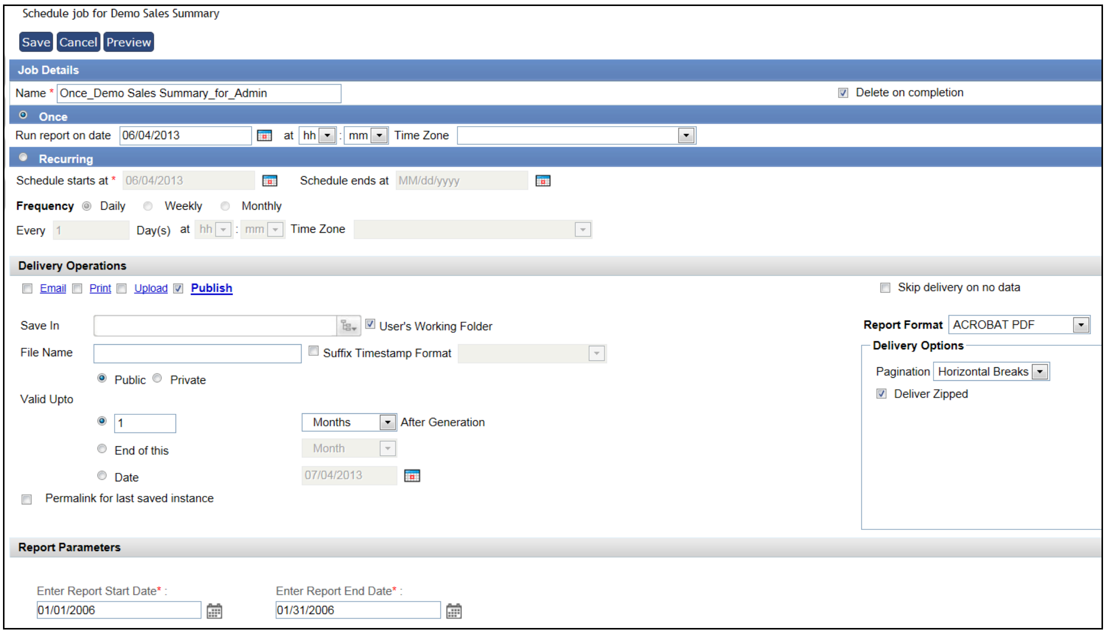


Figure 20: Scheduling a job using Quick Schedule feature

Job Details

- **Name:** Specify a unique name for the Job. Application automatically sets unique name in format: Job type_report name_for_User. For example: Monthly_All Country Sales_for_Admin.

> **Note:** Once you have modified the name, system will not change it on its own.

- **Skip delivery on no data:** If selected, report will be delivered to selected delivery options only if the report has any data. Otherwise schedule will be skipped.
- **Delete on Completion:** If selected, job will be deleted after execution for **Run Now** and **Once**. For **Recurring**, it will be deleted if further execution is not scheduled after last execution.

If you want to run this report only once as per set delivery options, select option **Once** and provide date and time.

Select the **Time Zone** as per which the time will be entered on this page. For example, if you select GMT, schedule job will be executed at specified time as per GMT. If time zone is not selected, job will be executed as per report server's time zone.

Select **Recurring** if you want to run this report more than once. When you select **Recurring** you need to specify following information:

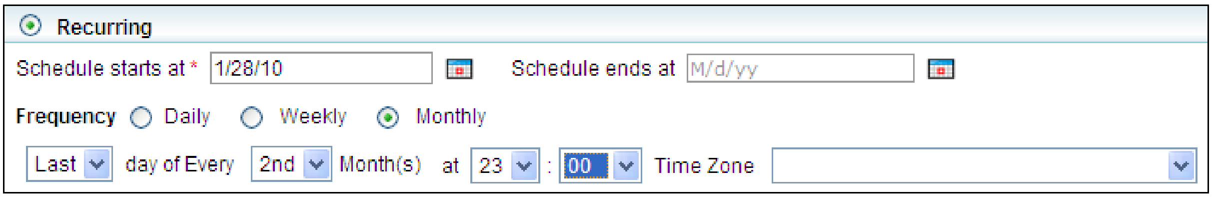


Figure 21: Making Recurring (monthly) schedule

- **Schedule Starts at:** Specify the date on which recurrence of schedule should be started.
- **Schedule ends at:** Specify the last day of execution of schedule.
- **Frequency:** Select Daily, Weekly or Monthly based on the way you want to set recurrence frequency.

Delivery Options

This information deals with format and delivery of the report.

Selecting Report Format

When you select a report format, (after selecting any of the report delivery check boxes) **Delivery Options** area just below **Report Format** dropdown box will list properties related to selected report format. Set the options.

Note: More information on **Delivery Options** is available in **Export Options** chapter.

Important: You can specify more than one report delivery options. For example, Emails and publish options in conjunction.

E-mails

To send a report through an email, check **Email** checkbox.

In **Report Format**, select the required report format.

Depending on the selected output type, you can select **Delivery Options** for the report. For example, to zip the file before attaching it with the mail, ignoring page breaks, options specific to CSV or MS Excel output, etc. Refer to the online help for more details of the options.

Other details to be specified to email the report are available earlier in this document.

Quick Scheduling supports request level parameter for **EMail From Address** property (under Administration > Configure > Server) which is displayed as the sender address in scheduled delivery mails.

Print

Use this option to take printout of the report. Check the Print checkbox.

In **Report Format**, select the required report format. This will make sure you get exactly you have been viewing on screen in specific format.

In **Copies**, specify the number of copies to be printed.

In **Page Range**, specify the starting page and end page of the report to be printed. To print page 2 to 17, specify 2-17. If this is kept blank, all the pages will be printed. Select *All* to print all the pages.

Select **Printer Name** to be used to print the report. This dropdown box has all the printers installed on Report Server machine.

Figure 22: Print as report delivery option

Note: If a print setting is associated with the report, the details will be displayed here when you select the report and click **Go** button. *Raw Text* format is not available for Print.

Important: For selected report if print setting is *forceful*, you would not be able to edit the print parameters.

Upload

A report can be uploaded to an FTP server as well as stored at a shared location. To get upload related operational parameters, click **Upload** link.

Other details to be specified to upload the report are available earlier in this document.

Getting parameter value

When a report is having multi-set parameters and their values come from an SQL, you can have parameter value as part of free form entry boxes:

- Server Name, Port
- User Name, Password
- Folder Name, File name

To include a parameter in a field, enclose the parameter name in <% and %> and specify in respective entry box.

For example, Sales<%CountryCode%>Jan2006. Here, CountryCode is a parameter name that will be replaced by its actual value when the report is executed.

Publish

A report can be published with a pre-set validity period. To set a report for Publish:

Check **Publish** checkbox.

You can publish a report in any of the available **Report Formats**. Publishing a report in desired format will save time (of selecting report format) when it is viewed. Even if you publish the report in a selected format, you can view it in other formats, if needed. Select an output format from **Report Format** dropdown.

> **Note:** A report published in RAW TEXT will not be available for view in any of the other formats.

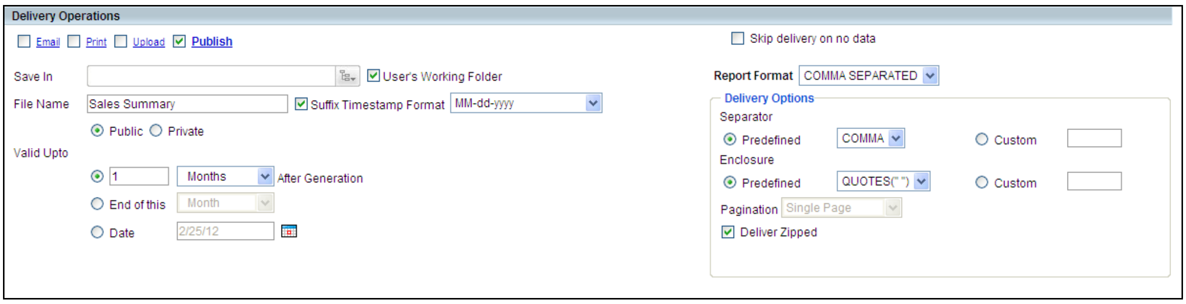


Figure 23: Publishing a report

Depending on the selected output type, you can select **Delivery Options** for the report. For example, to zip the file before publish, ignoring page breaks, options specific to CSV or MS Excel output, etc. Refer to the online help for more details about the options.

In **Save In**, click to open object selector to navigate and open the folder in which you want to save the report. Object Selector's features like multiple views, filtering and sorting makes it easier and quicker to find the desired folder. Refer to online help for more information on Object Selector window. To save the report in users working folder, check **User's Working Folder**.

Though not mandatory, it is always good to specify a unique **File Name** for the published report. To include date and time of report generation, select **Suffix Timestamp Format** checkbox and select a date format.

You can keep the published report output accessible to yourself (select **Private**) or make it available for all (select **Public**).

Validity Options

A published report is available as per its validity period. After the validity period is lapsed, the report is removed from the list.

You have the following validity options for report publishing:

1. For a specific time period after generation

Example: for 2 months, 3 week, 6 hours, etc.

Select this option and specify the number followed by selecting unit (hour(s), day(s), week(s), month(s) and year(s)).

2. Up to end of a duration from generation

Select this option to keep the report published up to the end of the duration (hour, day, week, month and year).

Example: At the end of this **week**, at the end of this **year**, etc.

3. Up to end of a specific time period

Select this option button to keep report published up to a specific date.

Example: July 30, 2008.

Note: Report will not be available after the period / time duration is over.

Important: A published report is stored on Report Server. It is recommended that you specify and expiry date. Deletion of the expired reports will free up the server space.

An expired report cannot be retrieved back. You may backup the reports to keep the output. This will make sure you have the data with you at the same time server space is not remain occupied for a report output.

Getting parameter value in fields (on E-mail, Publish and Upload)

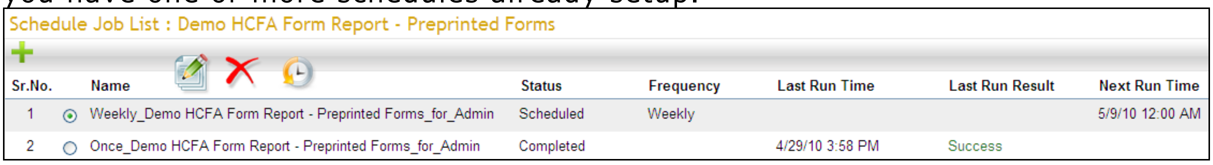
You can set parameter value as part of value in free form entry boxes.

To include a parameter in a field, enclose the parameter name in <% and %> and specify in respective entry box.

For example, Sales<%CountryCode%>Jan2006. Here, CountryCode is a parameter name that will be replaced by its actual value when the report is executed.

Viewing and working with schedules

A report may have one or more schedules setup. Schedule list is displayed when you have one or more schedules already setup.


Schedule Job List : Demo HCFA Form Report - Preprinted Forms

Sr.No.	Name	Status	Frequency	Last Run Time	Last Run Result	Next Run Time
1	Weekly_Demo HCFA Form Report - Preprinted Forms_for_Admin	Scheduled	Weekly			5/9/10 12:00 AM
2	Once_Demo HCFA Form Report - Preprinted Forms_for_Admin	Completed		4/29/10 3:58 PM	Success	

Figure 24: Quick schedules list

This page displays jobs set for this report. For each job, the following details can be listed:

- **Name:** The name given to a job.
- **Status:** Running if the time span of the job is not over. Completed if the time span of the job is completed. Error if the job started but could not be completed successfully. Suspended if the job is marked as suspended.
- **Frequency:** Frequency of occurrence of the schedule.
- **Last Run Time:** The time when the report was run last time.
- **Last Run Result:** The outcome of last run of the job. Success, if report was generated successfully. Error, if report could not be generated.
- **Next Run Time:** The time when the job will be run next.

Note: If a job that is set to delete after execution will automatically removed from the list after its execution.

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 clear 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.

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.

Operations on selected Job

To create a new job from scratch, click tool button. Job Details page will open up where you need to fill in the details.

To modify the selected Job, you may also click Modify button from the toolbar. Details of the selected page will be opened on Job Details where you can make changes and save the modified job.

To delete the job, click Delete button from the toolbar.

> **Note:** If you delete a job that is currently being executed, it will continue to execute.

Click to open Job Execution Status page and view chart depicting Status Analysis of Jobs.

These schedules are your private schedules.

Create Dashboard Widget

Click **Create Dashboard Widget** to create a Dashboard widget from the selected report.
This option is available when you click

- Reports > select a report and
- Data Model > select Reports from a category > select a report

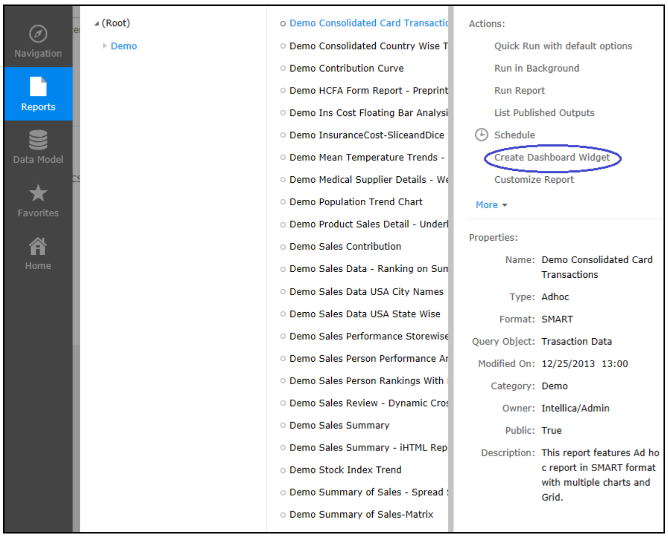


Figure 25: Create Dashboard Widget

To know more about designing widgets please refer "CreatingDashboardWidgets.pdf".

Published reports

To get a list of published reports, click **List Published Outputs**

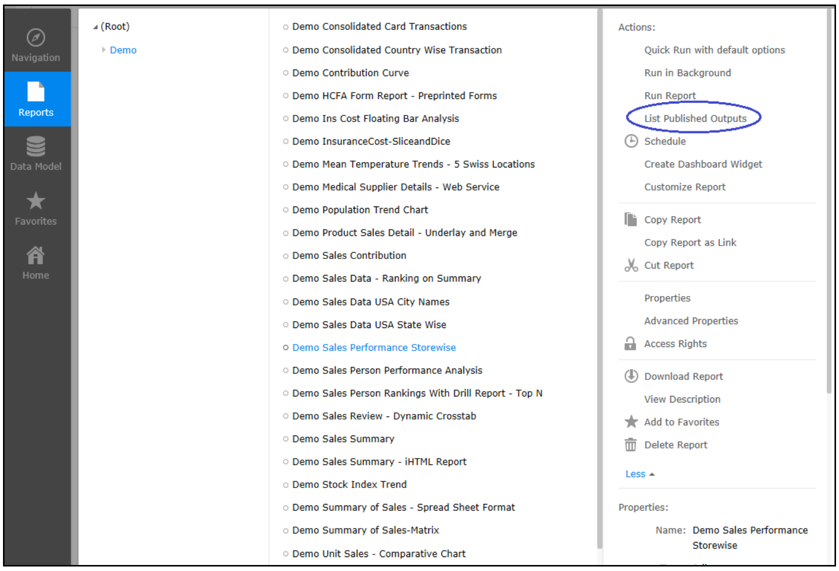


Figure 26: Getting a list of Published Reports

Published reports page

Use this page to get a list of published reports. You can select a published report and view report output. You can also view comments given on the published report as well as delete it. If a report needs to be approved before it is published, then from this page, you can approve, comment or reject the report.

You can filter the published report list by Published name, date range of publishing and report name.

Setting Filters

Figure 27: Filters that can be set on All Published reports page

By Published name

When a report is published, it is saved on report server. User can specify a name at the time of publishing a report. For example, a report "Customer Order" can be published by name "Customer Order December 2009".
In **Published Name Includes**, specify one or more characters from the published name. For example "dec". Click **Search** button.

By Updated dates

You can filter the list by report's publish dates. To filter the lists by date range, specify "from date" in the box after **Updated Between** and specify "to date" in the box after 'and'.

To list reports that were published a date onwards, specify a date in the box before 'and' and keep the box after 'and' blank. To list reports that were published up to a date, keep the box before 'and' blank and specify a date in the box after 'and'. Click **Search** button.

> **Note:** Refer to online help for explanation of format codes appearing in date field.

By Report Name

You can filter the list by report name. In **Select Report**, open the object selector by clicking and navigate to the folder where desired report is deployed. Double-click the report to select it and close the object selector. Click **Search** button.

In **Select Owner**, specify *Organization* and *User name* that published the report. By default, a super administrator can list all self-published reports and public-reports published by others.

In **Private Owned By**, select *None* to not view any of the published private-reports, select *Selected User* to view selected user's published private-reports, select *Selected Org* to view published private-reports of users belonging to the selected organization (in **Select Owner**) and *ALL* to view published private-reports owned by all the users.

In **Public Owned By**, select *None* to not view any published public-reports, select *Selected User* to view selected user's published public-reports, select *Selected Org* to view published public-reports of users belonging to the selected organization (in **Select Owner**) and *ALL* to view published public-reports owned by all the users.

Approval Process Status

You can select the report’s Approval Process Status as All/None/Approved/Pending/Rejected.

Orphan

Select (Orphan) to list published reports whose layout (report) does not exist (deleted).

Tasks you can perform on this page

To view report output, click **View** 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.

Click **Links()** to generate a link of a report.

Intellicus reports were available to the Intellicus users only. Now a non Intellicus user can also view the Intellicus reports. A Intellicus user can mail the report to the non-Intellicus user by generating it as a link enabling a non Intellicus user to view the Intellicus reports. The report which can be linked is either an approved published report or a report outside the approval process.

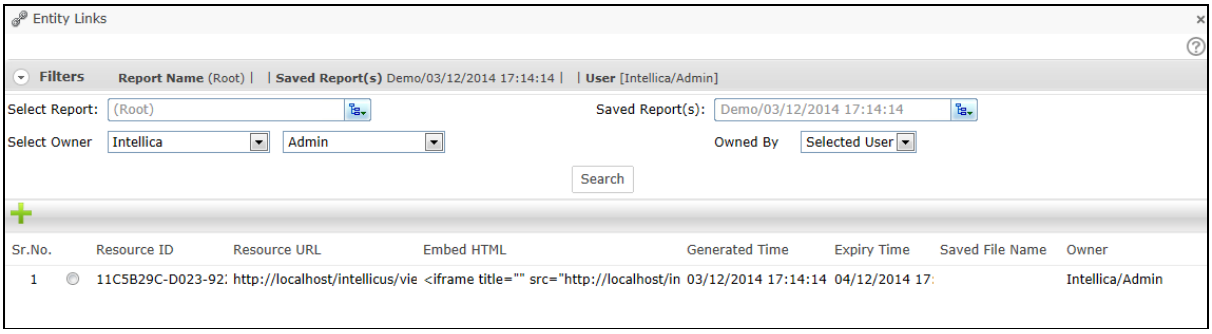


Figure 28: Filters that can be set on Entity Links page

The Entity Links screen is available to Super Administrators, Organization Administrators and a User with system privilege of Generate Links. A normal user with system privilege of view published reports can view the links but cannot update, delete or create a link. Using Entity Links you can either add a new link on a saved report or you can edit or delete the existing link on saved report.

You can also filter the existing links attached to a report. The filter can be applied on the following:

Select Report: You can select the report name placed in a category of which you want to view the linked report. You can navigate to the report by using object selector. You can also leave the Select Report option with its default value "Root" and provide some other criteria.

Saved Report(s): You can select the Saved Report placed in a category. You can navigate to the report by using object selector. You can also leave the Saved Report(s) option with its default value "Root" and provide some other criteria.

Select Owner: You can specify the Organization and User name who owns the job. For a normal user Select Owner is disabled with already selected values as organization name and user name.

Owned By: You can select Selected User to view the selected user's linked reports. You can select Selected Org to view linked reports of users belonging to the selected organization (in Select Owner) and ALL to view linked reports of all the users.

Search: Click search button to view the linked reports are specifying the filter criteria.

Steps to generate a link:

1. Select a published report.
2. The options when you click on radio button will also have "Links()" along with View, Show comments and Delete.
3. Click the Links() icon.
4. A new window would be displayed called "GenerateLink".
5. Fill in the details and click **Generate**.

Generate Entity Links

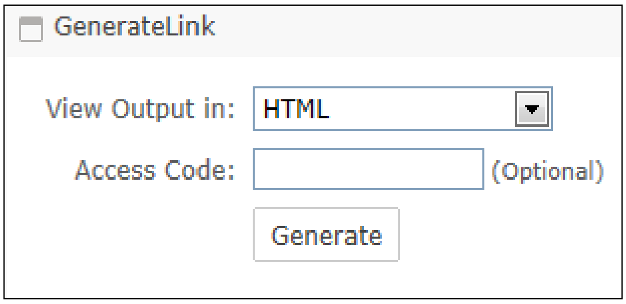


Figure 29: Steps to Generate Link

Link Options

View Output in: Select the output format in which you want the report to be viewable. The default value of output format is HTML. Other available formats are, Acrobat PDF, Comma Separated, Text, MS Word and MS Excel.

Access Code: You can mention an access code while creating a link. The access code has to be provided to the user who accesses the link. If wrong access code is provided, then report will not be available for viewing. This is an optional step.

Details of Saved Report

Resource Name: The name of the saved report from which link is created.

Generated On: The generated date and time of the saved report.

Expires On: The validity of the saved report. After the validity is over the saved report will cease to exit. While creating a saved report you can specify the expiry date and time of the report.

Figure 30: Steps to Generate Link

URL/Embed

Upon generating the link, when you click on **URL/Embed** tab, a URL or an html link will be formed. The URL or html link can be shared with the non Intellicus users so that they can view the report.

It is advisable to mention the correct IP and port of report server machine since the same will be used at the time of generating the URL.

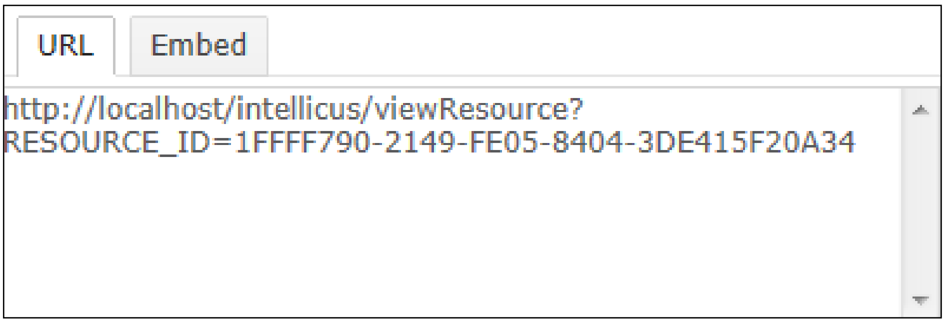


Figure 31: URL Tab

To work on report approval

To work on approvals for a report, you need to open the report and view it in HTML. Using Comments related icons on HTML Toolbar; you can work on report approvals.

Depending on the assignment type, you can approve the report for publishing, reject the report or provide your approval process comments for the report.

My Reports page

This page has following tabs:

- **Recent Reports:** It lists the reports that have been published recently. The number of reports listed in this tab depends on personal preferences that you have set.
- **Pending Reports:** It lists the reports that are pending for approval process.
- **Report Execution Status:** It lists status of reports that were run "in background" mode.

Recent Reports

The reports that you have recently run are listed on **Recent Report List** tab. To get recent report list, click Navigation > Inbox > Reports > [My Reports] Recent Reports tab.

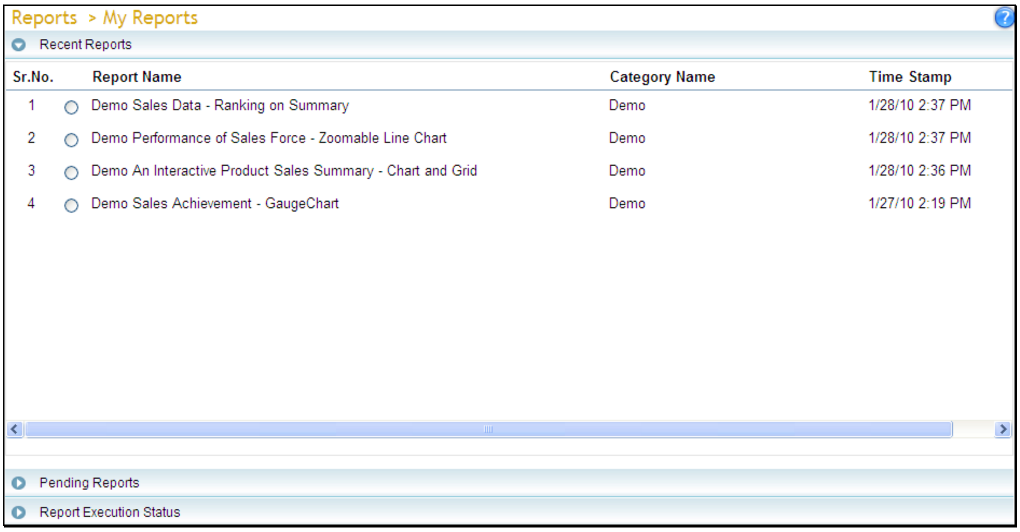


Figure 32: Recent Reports on Report Listing page

It contains list of reports that you recently executed. In addition to the report name, the each row has Category where the report is deployed and the time when the report was executed (time stamp).

You can run or re-run a report from here. To do this, click the option button on the left of the report. A toolbar will be displayed.

Click **Run**  when you want to execute a report with preferences other than those set during report deployment (for example, report output format).

When you need to re-run a report having multiple parameters, click **Re-Run**  (available if configured). This will open Input Parameter Form with values provided during previous run. You may continue using the same values or change if desired.

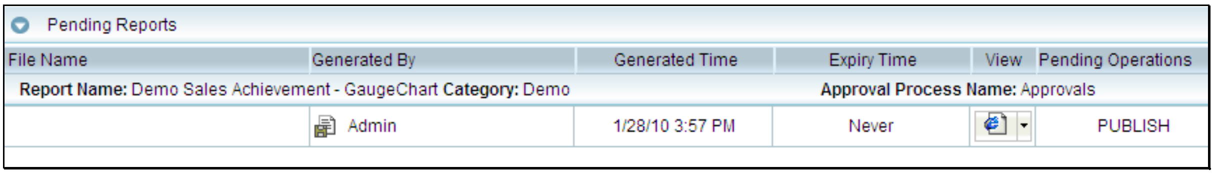
Pending Reports

This tab lists the reports

- That are yet to undergo approval process and
- For which you are one of the approvers or commenters

For each pending report, it lists

- File Name (The name by which report was published)
- Generated By
- Generated Time
- Expiry Time
- Approval Status


Pending Reports

File Name	Generated By	Generated Time	Expiry Time	View	Pending Operations
Report Name: Demo Sales Achievement - GaugeChart **Category:** Demo			**Approval Process Name:** Approvals		
	Admin	1/28/10 3:57 PM	Never		PUBLISH

Figure 33: Pending reports

For every pending report layout (file name), its report name (the name specified at the time of publish), category in which layout was deployed and associated approval process name is specified.

Depending on the assignment type, you can approve the report for publishing, reject the report or provide your approval process comments for the report. You can also view the approval process comments and view the report output in any of the available report outputs types.

Pending Operations

This column has the report output operations that are pending because the report is not approved.

Report Execution Status

This page lists reports that are being executed or are already executed. When the page opens, it lists reports you executed today. The latest report which is executed will have "RECENT" mark on left of the report name. List contains following details:

- Report Name
- Action (like view, save, email, etc.)
- Execution Type
- Completion Status
- Completion Date

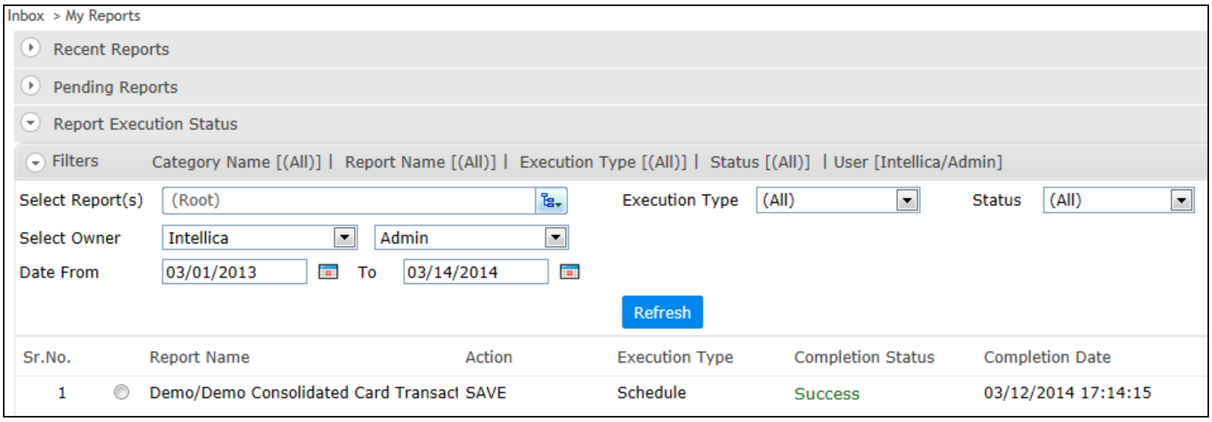


Figure 34: Report Execution Status tab

Viewing report output

To view output of a report, select a report to see a toolbar with all the available report output formats.

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 center of the toolbar header and drag. To close the toolbar, click Close icon on top right of the bar.

Applying filters

To filter the list entries, apply any of the below filters, and click **Refresh** button.

- **Select Report(s):** You may select a report or a folder. Click  to open Object Selector window. Refer to online help for more information on Object Selector window.

- **Execution Type:** Select *Run* for reports that were executed through direct run from report list page, *Schedule* for the reports executed through scheduled execution, *Run In Background* for the report which were run in background and *(All)* for reports executed through any type.
- **Status:** Select *Running* for reports that are still being executed, select *Completed* for the reports that are executed.
- **Select Owner:** Select organization and user who has created the report.
- **Date From** and **To:** Date range within which report execution was started. Refer to the online help for explanation of date formats.