Style Report Enterprise Edition

Welcome to Style Report Enterprise Edition!

Style Report is a report design and interactive analysis package that allows you to explore, analyze, monitor, report, and collaborate on business and operational data, all in real time. You will find Style Report to be agile, robust, and easy to use.

The initial sections of this Guide help you get started with reports. Work through these sections to become comfortable using Style Report:

User

1. *Using the Portal*

User

2. *Interacting with Reports*

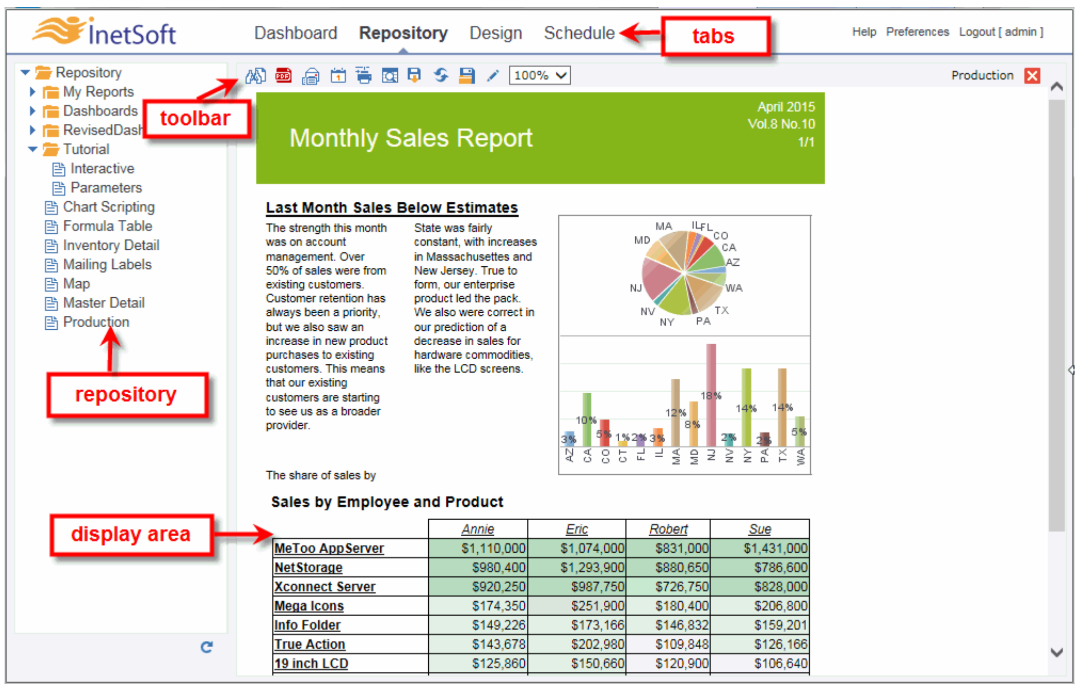
Style Report is produced by InetSoft Technology, the leader in innovative and scalable Business Intelligence software. Please feel free to contact us with any questions!

- Phone: +1.888.216.2353 (US) / +1.732.424.0400 (International)
- Email: info@inetsoft.com
- Web: http://www.inetsoft.com/

Using the Portal

The User Portal provides features for accessing and managing existing assets, such as reports and dashboards, and allows you to create new assets as well.

The User Portal is a web-based interface, so you do not need to install any special software on your computer. Your system administrator will tell you the correct address to use in your web browser.



There are three main areas of the User Portal:

- **Portal Tabs**: Provide quick access to dashboards, scheduling features, and design features.
- **Repository Tree**: Provides access to existing reports and dashboards.
- **Display Area**: Displays the requested reports and dashboards.

Starting the Server

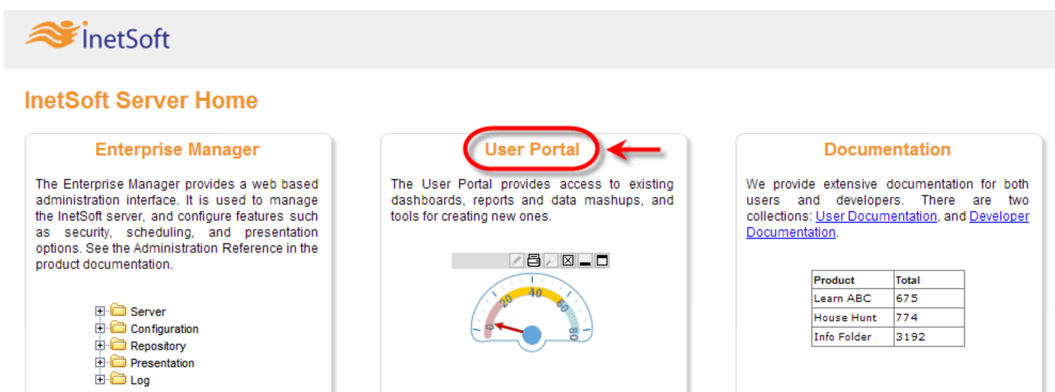
The Style Scope, Style Intelligence, or Style Report server must be running in order to access features of the User Portal and Enterprise Manager.

If the server is already running, simply enter the server URL in any browser. The default URL for a local server is `http://localhost:8080/sree/`.

If the server is not yet running, start the server as follows:

- On Windows, launch the server from the Windows *Start* menu by selecting ‘Style Scope Server’, ‘Style Intelligence Server’ or ‘Style Report Server’. This starts the server and opens the browser to the server home page.
- On Linux, run the *InetsoftServer.sh* file in the *bin* folder of the installation directory to start the server. In your browser, enter the URL `http://localhost:8080/sree/` to access the server home page.

Select the ‘User Portal’ link to view reports and dashboards. Select the ‘Enterprise Manager’ link to administer the server.

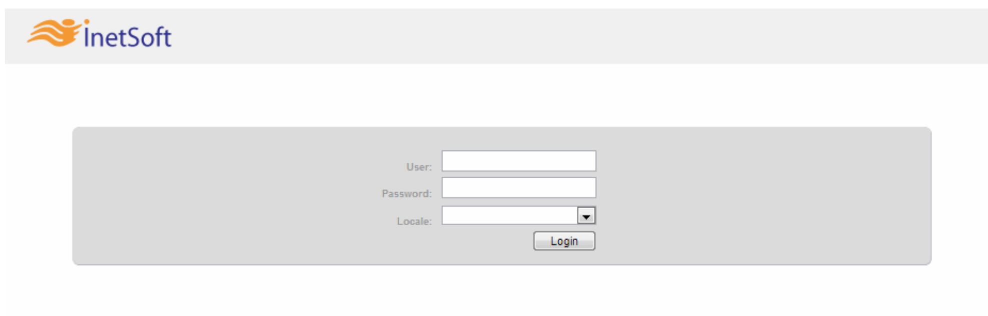


Logging into the Portal

If the server is already running, simply enter the server URL in any browser. Your administrator can provide this URL. (The default URL for User Portal on a local server is `http://localhost:8080/sree/Reports`.)

If the server is not running, see *Starting the Server*.

If security is enabled on the server, you must log in before you can use the Portal. Enter your username and password in the provided ‘User’ and ‘Password’ fields. (Ask your system administrator if you don’t know your username and password.) If you are prompted to enter a ‘Locale’, select the correct option for your location.

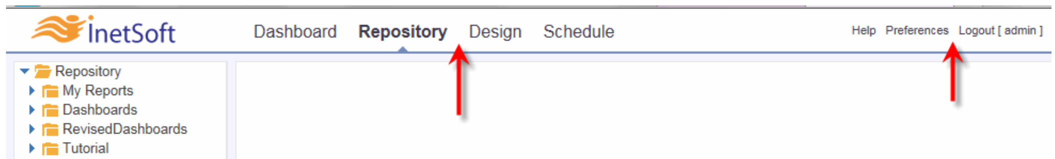


After you log in, select the desired Portal tab for the features you want to access or press the ‘Help’ link to get information about using the Portal. See *Accessing Portal Functions* for more information about the available features.

Note: For security reasons, login information expires after five minutes. If you receive a ‘Login Expired’ warning, simply re-enter your credentials.

Accessing Portal Functions

The User Portal contains tabs for viewing and creating assets. The options available will depend on what permissions you have been granted by the administrator.

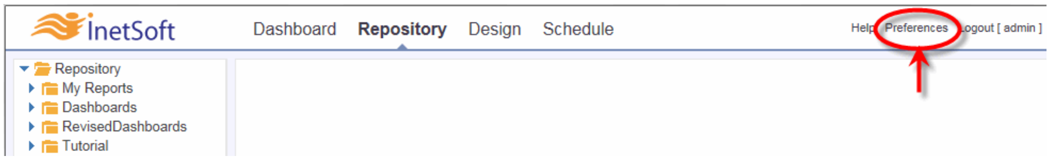


The table below explains the tabs and links that appear at the top of the Portal.

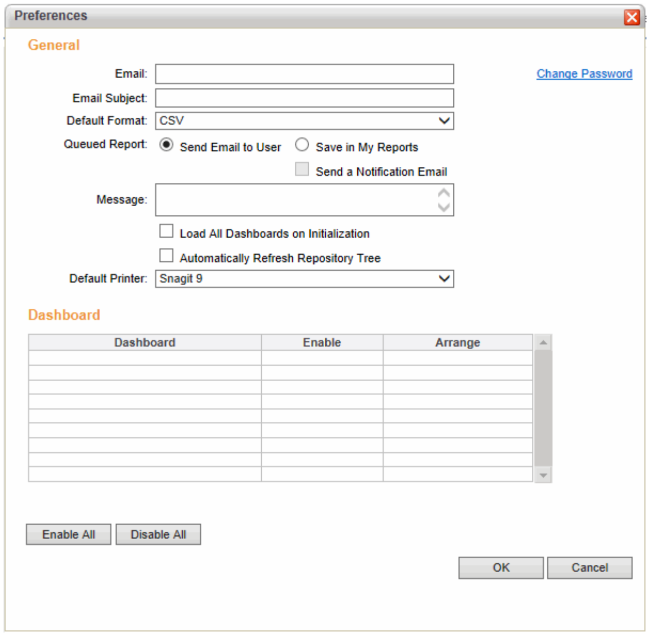
TAB	**FUNCTION**
Dashboard	Access your important dashboards. See *Deploying a Dashboard* for information on configuring dashboards.
Repository	View all available dashboards and reports in the repository. See *Visualizing with Dashboards* and *Interacting with Reports* for more details on using dashboards and reports.
Design	Create and deploy dashboards. See *Creating a Dashboard* and *Deploying a Dashboard* for more information.
Schedule	Schedule dashboards and reports to generate automatically, and monitor queued and completed scheduled tasks. See *Scheduling Dashboards and Reports* for more details.
LINK	**FUNCTION**
Help	Open the user documentation.
Preferences	Change personal settings and configure user dashboards. See *Configuring Portal Preferences* for more information.
Log Out	Log out of the Portal (when security is enabled).
Search	Search within reports. Logic (AND, OR) and wildcards (*, ?) are allowed. For example, “wee*” will find “week” and “weekly.” See *Searching Archived Reports* for more information about archiving. To search an open report, see *Searching a Report*.

Configuring Portal Preferences

To manage user preferences in the Portal, press the 'Preferences' link at the top of the Portal.

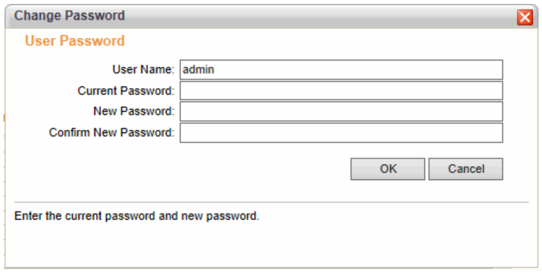


This opens the 'Preferences' dialog box.



The following preferences are available:

- **Change Password**: Press the 'Change Password' link to open the 'Change Password' dialog box. Enter your current password and a new password and press 'OK'.



- **Email**: Enter the email address to which queued reports and notifications should be sent.
- **Email Subject**: Enter the subject line to be used for queued report emails sent to the address specified in the 'Email' field. If nothing is specified for the 'Email Subject' field, the report name will be used as the subject text.
- **Default Format**: Select the default format in which queued reports should be emailed or saved.
- **Queued Report**: Select 'Send Email to User' to have queued reports delivered by email to the address specified in the 'Email' field. Select 'Save in My Reports' to save an archived version of the report in the 'My Reports' repository folder. (This requires archiving to be enabled by an administrator.) Enable 'Send a Notification Email' to receive a notification email when the report has finished generating. See *Running a Report* for information about queueing a report.
- **Message**: Enter a message to be displayed in the body of the email delivered to the address specified in the 'Email' field.
- **Load all dashboards on initialization**: Forces all enabled dashboards to reload when any dashboard is accessed. This is only needed when you have multiple dashboards that share a filter. (See *Sharing Filters* in the *Advanced Dashboard Design* for more information.) For all other cases, this option should remain disabled.
- **Automatically Refresh Repository Tree**: Allows the server to automatically update the listing of available reports and dashboards. You can also press the 'Refresh' button below the Repository panel to update the listing on-demand.
- **Default Printer**: Select the printer that you wish to use as your default Portal printer.

To enable and disable dashboards or to change the order of the dashboard tabs, follow these steps:

- In the 'Dashboard' table, select a checkbox in the 'Enable' column to make the corresponding dashboard visible in the **Dashboard** tab.
- Press the up-arrow and down-arrow buttons in the 'Arrange' column to change the order of the various dashboard tabs in the Portal.

See *Deploying a Dashboard* for information about adding a Viewsheet to the **Dashboard** tab.

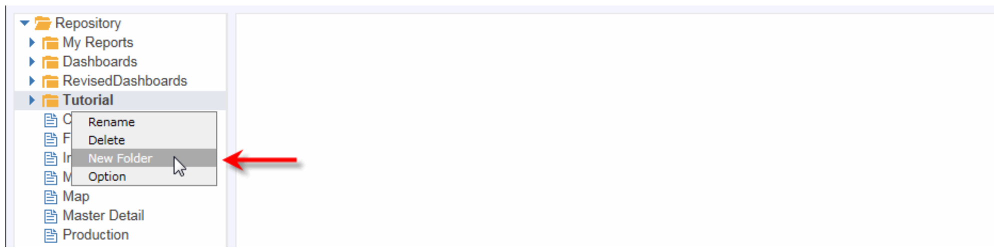
See Also

Scheduling a Dashboard, for information about emailing or saving a dashboard automatically.

Deploying a Dashboard, to create a new dashboard under the ‘Dashboard’ tab.

Organizing the Repository

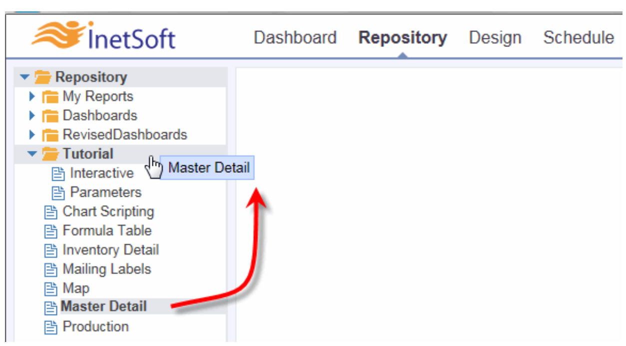
To create a new folder in the Repository, right-click on the folder that you want to contain the new folder, and select ‘New Folder’. This opens the ‘Create Folder’ page.



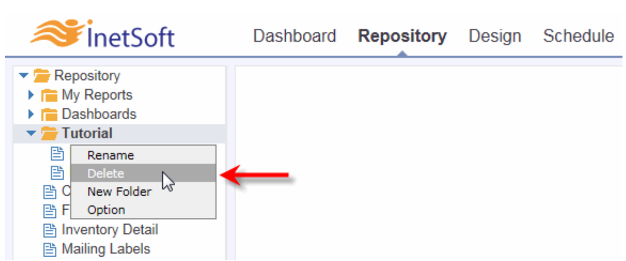
The ‘Alias’ is the name displayed in the Repository.

Enter the desired ‘Folder Name’, and (optionally) supply an ‘Alias’ and ‘Description’. Then press ‘Apply’. This creates a new folder in the specified location.

To move reports, dashboards, or folders from one Repository folder to another, simply drag the asset to the desired location.



To delete a report, dashboard, or folder from the Repository, right-click on the asset and select ‘Delete’.



To rename a report, dashboard, or folder, right-click on the asset and select ‘Rename’. Type the new name, and press ‘Enter’ on the keyboard or simply click somewhere else.

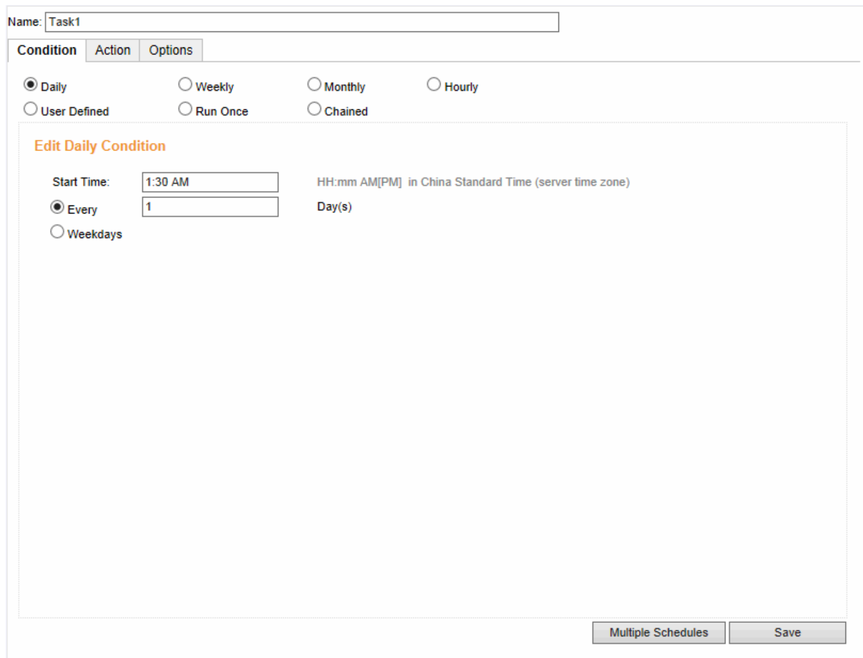
Scheduling Dashboards and Reports

To create a basic schedule, see *Scheduling a Dashboard* or *Scheduling a Report*.

To scheduled a report or a dashboard, follow the steps below.

1. Select the **Schedule** tab in the Portal.

2. Press the ‘New Task’ button below the Schedule table. This creates a new task with the name ‘Task1’, and opens the Editor.



Using the tabs at the bottom of the Editor, specify when the task executes, what actions it performs, and additional options. See *Setting Schedule Conditions*, *Setting Schedule Actions*, and *Setting Schedule Options* for more information.

3. Press ‘Close’ to exit the Editor.

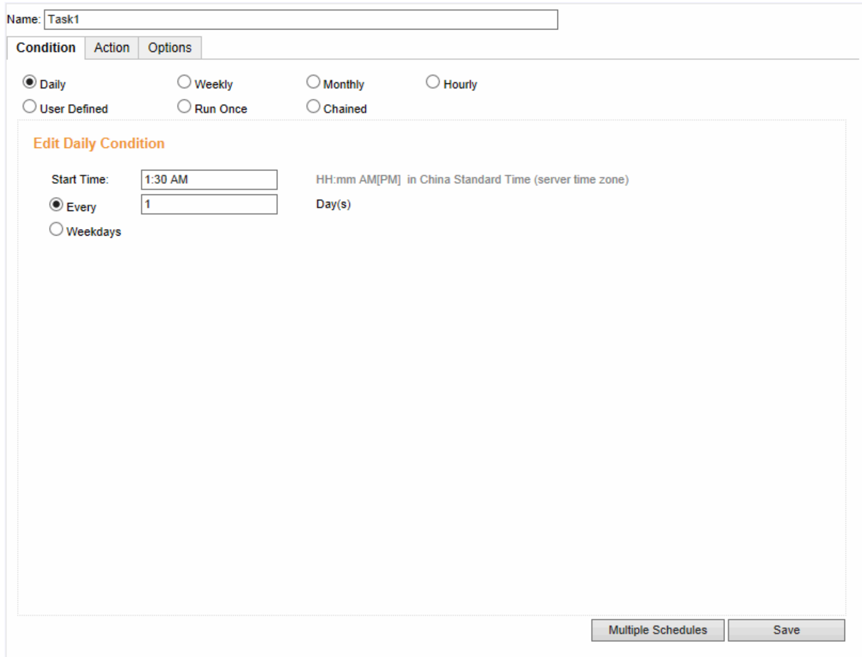
To modify an existing task, press the task’s ‘Edit’ button in the ‘Schedule’ table. This opens the Editor as described above.


Schedule

Task	Description	Status	Schedule	Action
Monthly Sales			TimeCondition: Day 1 of month January, February, March, April, May, June, July, August, September of year	
Task1			TimeCondition: 01:30:00, every 1 day(s)	

Setting Schedule Conditions

A schedule condition is used to determine when the schedule task executes.



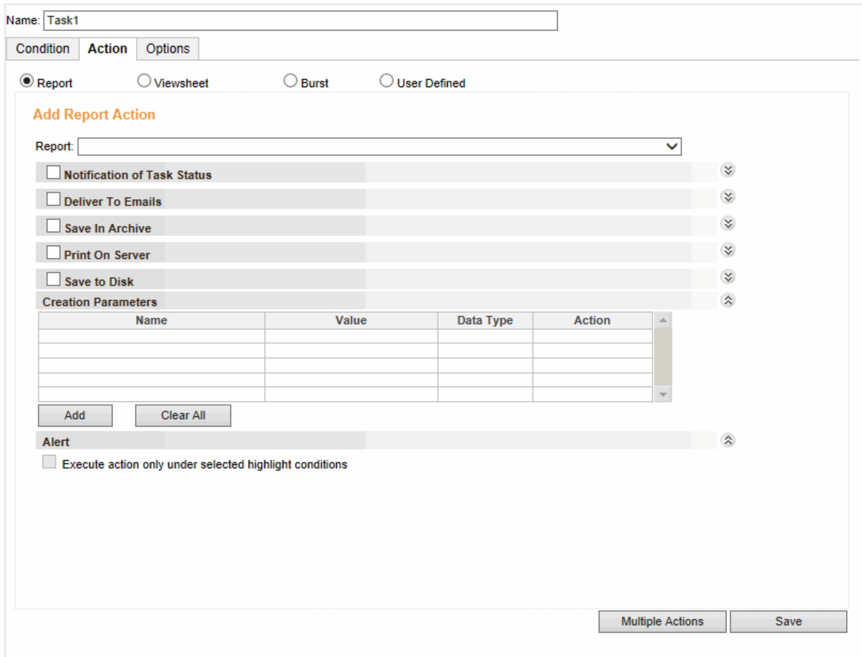
There are six types of conditions: Daily, Weekly, Monthly, Run Once, Chained, and User Defined.

- **Daily**: This task will execute every N days (every 1 day, every 5 days, etc.) at the specified time. The time is specified using the format HH:mm [am|pm], for example, “11:39 pm”. Select the ‘Weekdays’ option to execute the task at the specified time on weekdays only.
- **Weekly**: This task will execute every N weeks (every 1 week, 4 weeks, etc.) at the specified time and days of the week.
- **Monthly**: This task will execute every Nth day of the specified months (e.g., April 15) or every Nth day of the week of the specified month (e.g., 1st Sunday of May).
- **Run Once**: This task will execute once on a certain day at a specified time (e.g, Nov. 25, 2006 at 11:30 am).
- **Chained Condition**: This task will execute only if another specified task or cycle has successfully completed first.
- **User Defined Condition**: ‘User Defined’ conditions (if any) that have been created by a developer within your organization can be selected from the menu.

To specify multiple conditions, press the ‘Multiple Schedules’ button at the bottom right of the editing panel. This will display the schedule condition list to which you can add, delete or edit conditions.

Setting Schedule Actions

An “action” specifies the set of operations to be performed when the scheduled task runs. There are three types of actions: ‘Report’, ‘Dashboard’, ‘Burst’, and ‘User Defined’.



The **Report Action** executes a report and delivers or saves it. The options for report action are shown below.

OPTION	DESCRIPTION
Save in Archive	Save the generated report in the report archive. A report archive must be properly configured, and you must have proper permissions to save the report in the selected folder.
Print on Server	Print to a server printer.
Deliver to Emails	Send a report to other users via email. To embed the report within the email as HTML, select the ‘HTML Email’ option. To send the report as an attachment, select one of the other formats (PDF, Excel, etc.). If the attached file is too large, it will be split into multiple emails. The email subject line can include parameters for automatic insertion of report alias and time/date of report generation. See below for examples. The ‘Bundled as zip’ option allows you to zip the attachment and optionally specify a password to encode the archive with WinZip 256-bit AES encryption.

OPTION	DESCRIPTION
Save to Server	Save the report on the file system or FTP server in any of the following formats: PDF, HTML, Excel, PowerPoint, RTF, SVG, CSV, Text, XML. To save to file system, ‘Path’ should specify a valid absolute path, including filename. (The filename extension is added automatically.) To save to FTP server, ‘Path’ should specify a valid URL in the following format: `ftp://<username>:<password>@<hostname>:<port>/<filename>`, where `password` and `port` are optional. The filename can include parameters for automatic insertion of report name and time/date of report generation. See below for examples.
Notify when Completed	Send users an email notification about the task completion status. Optionally you can check ‘Notify only if failed’.

The ‘Deliver to Emails’ subject line uses the java.text.MessageFormat syntax with two properties. The first (index 0) is the report alias and the second (index 1) is the date and time of report generation. For example, the ‘Subject’ specification

```
Report named {0}, generated at {1,time} on {1,date}
```

would produce (for a report with alias ‘testReport’) an email subject line such as the following:

```
Report named testReport, generated at 10:34:54 AM on Nov 5,
2007
```

See below for some examples of date formatting using the java.text.SimpleDateFormat. The report alias is set by an administrator, and may often be the same as the report name.

The filename for the ‘Save to Disk’ action and the attachment name for the ‘Deliver to Emails’ action can include the same parameters as the email subject line. However, because of filename restrictions, you cannot use the “`{1,time}`” syntax. Some examples of automatically generated filenames are shown below.

SPECIFIED FILENAME	GENERATED FILENAME
myRep_{1,date}.pdf	myRep_Nov 14, 2007.pdf
{0}_{1,date}.pdf	“report alias”_Nov 14, 2007.pdf
myRep_{1,date,MMM-dd}.pdf	myRep_Nov-14.pdf
myRep_{1,date,EEE-h-mm a}.pdf	myRep_Wed-11-49 AM.pdf
myRep_{1,date,yy-MM-dd-HH-z}.pdf	myRep_07-11-14-11-EST.pdf

The **Dashboard Action** allows you to schedule the execution of a Viewsheet (dashboard), and email a notification or an exported copy of the dashboard to specified users. See ‘Report Action’ above for more details about these actions.

The **Burst Action** delivers multiple versions of a specified report, tailoring each version to the particular recipient. To do this, the report must first be configured for bursting. See *Report Bursting* in *Advanced Report Design* for more details.

The **User Defined Action** allows a you to use a custom action class, if one exists.

To specify multiple actions, press the ‘Multiple Actions’ button at the bottom right of the editing panel. This will display the schedule action list to which you can add, delete or edit actions.

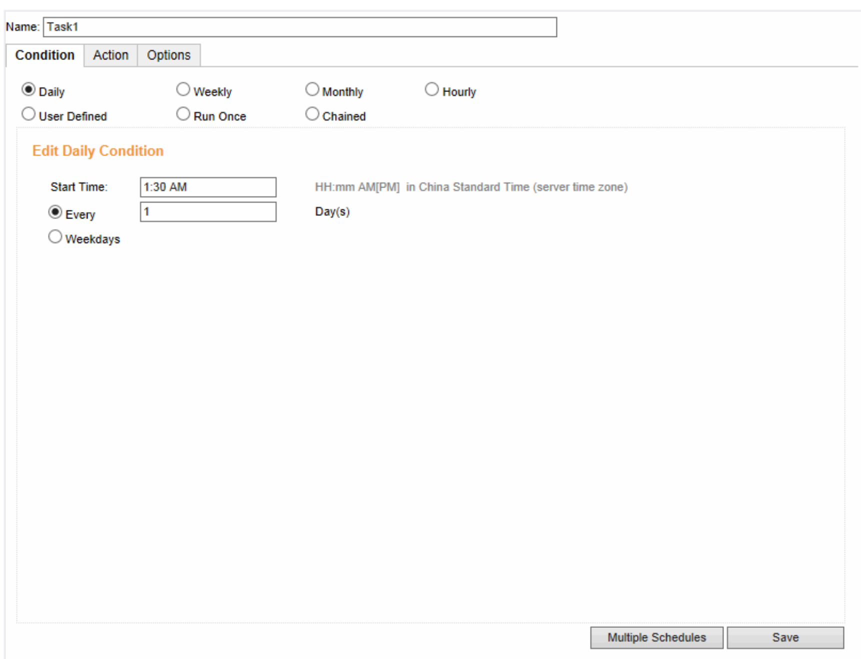
Setting an Alert

An alert is a notification that a specified event has occurred, for example, that total sales have fallen below some critical level. You can set an alert based on highlight conditions in a report or Viewsheet, or based on Viewsheet Output component ranges.

To configure an alert for a report or Viewsheet, follow the steps below:

1. Select the **Schedule** tab in the Portal.

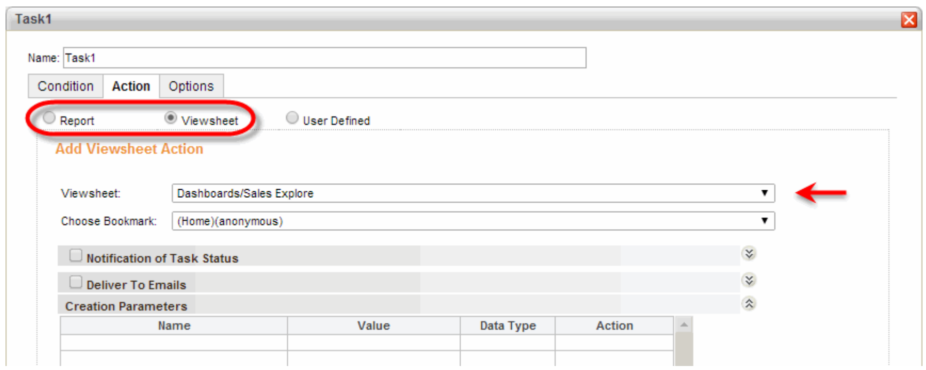
2. Press the ‘New Task’ button below the Schedule table. This creates a new task with the name ‘Task1’, and opens the Editor.



3. Change the task name as desired in the 'Name' field.

4. On the **Condition** tab, set the frequency with which the alert conditions should be tested. (See *Setting Schedule Conditions* for more details on the available day and time conditions.) For example, if you want to test a report highlight condition every day, specify a 'Daily' condition.

5. On the **Action** tab, specify the report or Viewsheet that contains the alert condition you want to test.

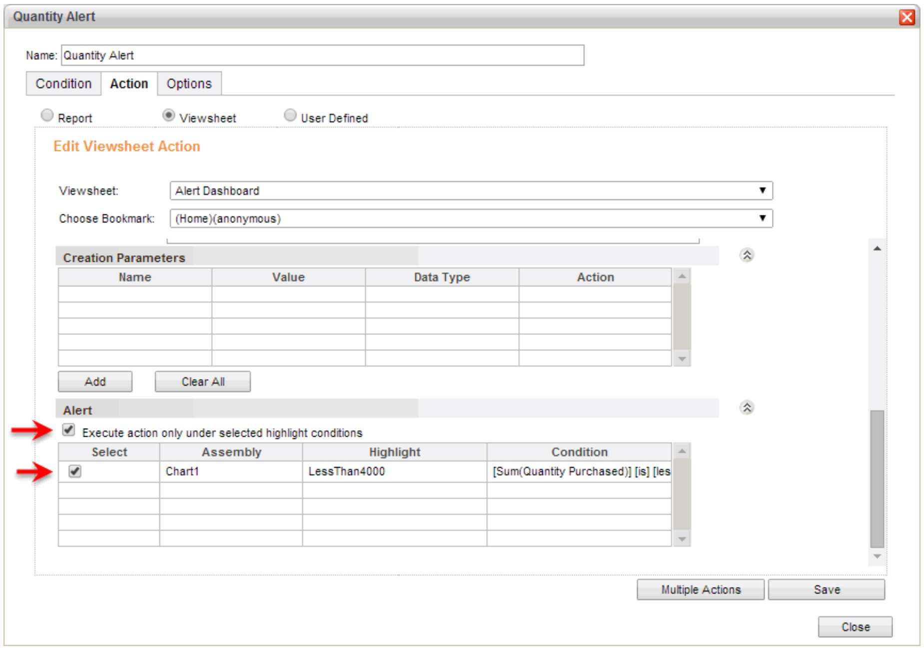


6. Select the actions that you want to perform if the alert is triggered. Generally, you will at least select the 'Deliver To Emails' option. (See *Setting Schedule Actions* for more about the available actions.) Enter a 'Subject' and 'Message' appropriate for the nature of the alert.

The table lists highlight conditions for all chart, table, image, and text components, as well as range conditions for Viewsheet Output components.

7. In the 'Alert' panel at the bottom of the **Action** tab, check the 'Execute action only under selected highlight conditions' option. This displays a list of the available highlight and range conditions for the selected Viewsheet or report.

8. In the table, select the highlight or range conditions that you want to trigger the alert. When *any* of the selected conditions test true, the actions you specified above (e.g., emailing) will be performed.



9. Press ‘Save’ to save the scheduled task. Then press ‘Close’ to close the dialog box.

See Also

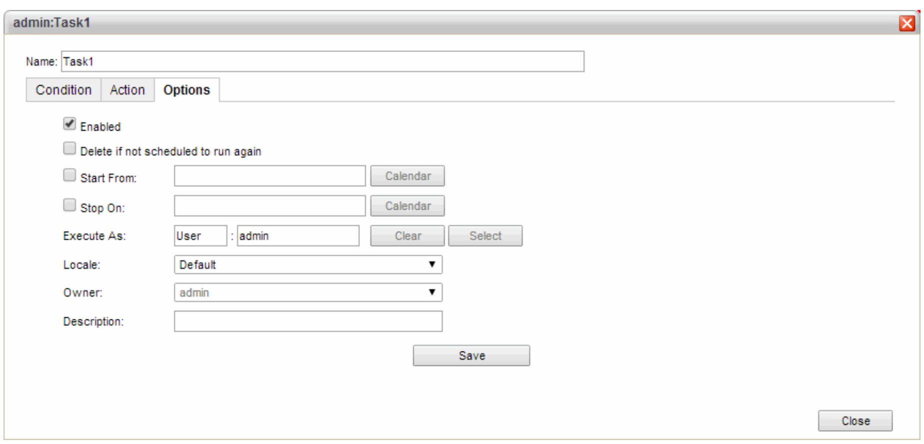
Highlights, in *Advanced Dashboard Design*, for information on creating Viewsheet highlights.

Highlighting, in *Advanced Report Design*, for information on creating report highlights.

Gauge Properties: Advanced Tab, in *Advanced Dashboard Design*, for information on adding ranges to Output components.

Setting Schedule Options

There are several options available when modifying a schedule task.

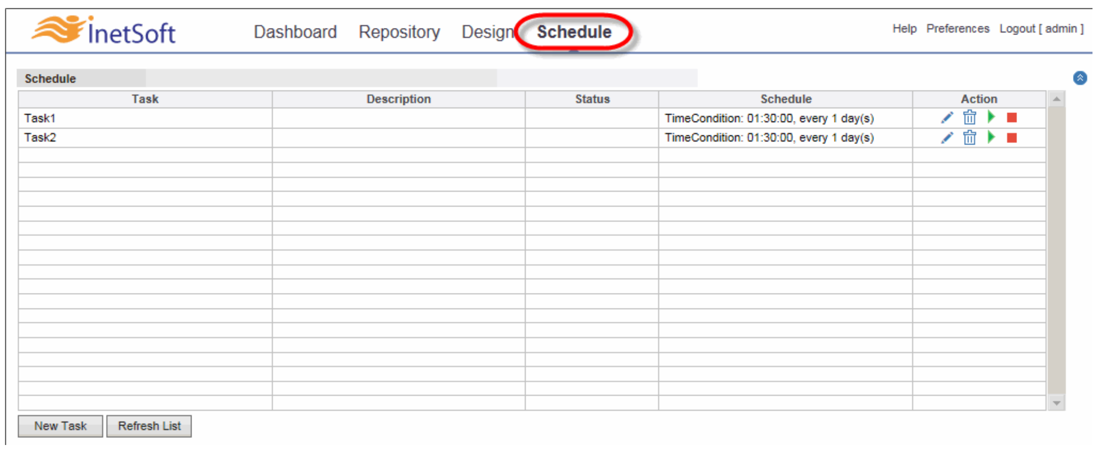


- **Enabled**: Temporarily enables or disables a task.

- **Delete if not scheduled to run again**: For a task that is scheduled to run only once, deletes the task from the system upon completion.
- **Start From and Stop On**: Execute the task only within the specified date range.
- **Execute As**: Execute the task as a particular user so that user permissions (e.g., VPM filtering) can be applied during task execution. Any user who has permission to use the Scheduler can be selected from the menu.
- **Locale**: Sets the locale for the scheduled task, which configures language and formatting.

Managing Scheduled Tasks

You can view and monitor all of your scheduled tasks from the **Schedule** tab.



This tab displays a list of the schedule tasks, showing start time, end time, status of the last run, and start time for the next run.

- Press the ‘Edit’ button to modify the task specifications. See *Setting Schedule Conditions*, *Setting Schedule Actions*, and *Setting Schedule Options* for more information.
- Press the ‘Run Now’ button to execute the task immediately.
- Press the ‘Stop Now’ button to stop the task immediately.
- Press the ‘Delete’ button to delete the task.

To temporarily disable a task, deselect the ‘Enabled’ checkbox on the **Options** tab. See *Setting Schedule Options* for more information.

Interacting with Reports

The following sections explain the basics of using reports.

Running a Report

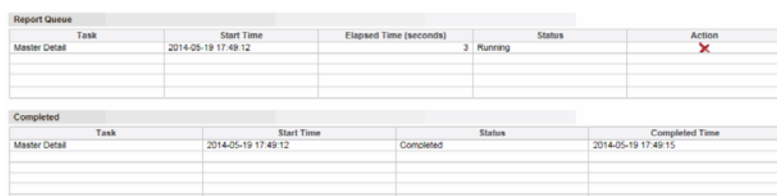
To run a report in the User Portal, follow the steps below:

1. Log into the User Portal. (See *Logging into the Portal* for instructions.)
2. In the Portal, select the **Repository** tab.
3. In the left panel of the Portal, expand the 'Repository' tree.
4. Click on the desired report in the Repository Tree. Small reports will load immediately, while large reports may display a loading screen.

Note: If the report is almost finished generating when you press 'Add to Queue', it will not be added to the cue, but will rather display normally in the Portal.

You can either wait for the report to load or press 'Add to Queue' to queue the report for later viewing. To cancel the report, press 'Cancel'.

5. (Optional) If you choose to queue the report, you can check the report's status under the **Schedule** tab of the User Portal.

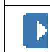
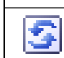
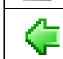
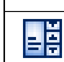
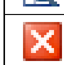


When a queued report has finished processing, a copy of the report is either emailed to you or saved into your 'My Reports' folder, based on the preferences that you have specified. See *Configuring Portal Preferences* for more information about queued report settings.

Report Toolbar

The figure below shows a sample toolbar.

Different reports may provide different sets of buttons from the list below.

BUTTON	FUNCTION
	Go to first page.
	Go to previous page.
	Go to next page.
	Go to last page.
Page 1 of 3	Go to specified page (page number in the field).
	Searches within the current report.
	View/Save-As PDF.
	Refresh the current report. (This differs from the browser Reload function, as 'Refresh' regenerates the report on the server.) For a "pre-generated" report, the 'Refresh' option re-executes the pre-generation cycle, saving the updated report.
	Export report.
	Returns to the parent report from a drill-down report.
	Mail report.
	Print report using a local printer via PDF. (May not be available on certain platforms. See below.)
	Server-side printing.
	Default printing. Prints to the default printer configured in the 'Preferences' dialog box.
	Customize report parameters.
	Save the report. This overwrites the existing template. Unsaved changes are denoted by an '*' next to this button.
	Save As. This allows you to copy the template or save an archived copy.
	Pop-up menu. This provides a customizable drop-down list.
	Report Explorer.
	Close Report.

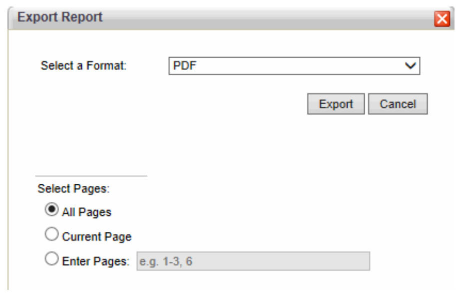
The 'Print' button in the browser toolbar only prints the single page that is currently displayed in the Portal.

Note that there is both a 'Server Print' and a regular 'Print' button. The regular 'Print' button will load a PDF in the background so that every page can be printed. Most browsers will launch the Adobe Reader plug-in to complete the printing operation. This client-side print feature is only available on platforms that fully support Adobe Reader.

Exporting a Report

To export a report, follow the steps below:

1. Press the ‘Export’ button in the toolbar. This opens the ‘Export Report’ dialog box.



2. In the ‘Select a Format’ menu, choose the desired export format.

3. (Optional) For PDF and HTML formats, select the page range that you want to export.

4. Press ‘Export’.

Reports can be exported to local files in any of the following formats:

Table 1. Export formats

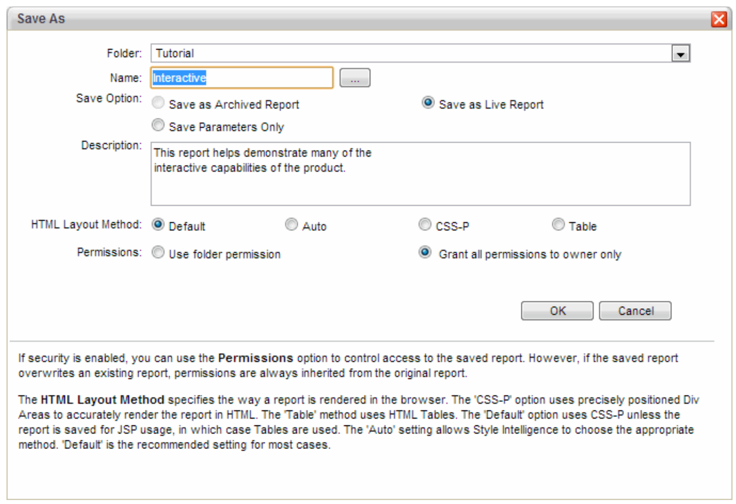
FORMAT	DESCRIPTION
PDF	Portable Document Format.
Excel (match exact layout)	Microsoft Excel worksheet preserving the report layout.
Excel (no pagination)	Same as ‘Excel (match exact layout)’ except that page breaks are eliminated for easier data manipulation.
Excel (best data editing)	Microsoft Excel file with two sheets. The version of the report on the first sheet is the same as the ‘Excel (match exact layout)’ version, while the version of the report on the second sheet attempts to preserve the report layout without using any cell spanning.
RTF (editable document)	Rich Text Format, readable and editable by most word processors.
RTF (match exact layout)	Same as RTF except presentation is more similar to the actual report. Block layout may make data manipulation more difficult in some cases.
HTML (match exact layout)	Standard HTML, preserving the report layout.

HTML (no pagination)	Same as HTML (match exact layout) except page breaks are eliminated for easier data manipulation.
HTML (bundled as zip)	Creates a zip file containing the HTML report as well as all associated image files.
HTML (no pagination, bundled as zip)	Same as HTML (bundled as zip) except that the page breaks are eliminated to produce a single page HTML report for easier data manipulation.
CSV	Delimited text file, readable by most spreadsheets. Only table data is exported.
SVG	Scalable Vector Graphics, an XML-based language for web graphics.
Text	Text file representing the report as closely as possible.
PowerPoint	Microsoft PowerPoint presentation.
XML	Well-formed XML file, intended for data analysis, including data from Text elements, Tables, Charts, and Sections. Crosstab and Chart data are represented in flattened form. Section data appears without group or band delimitation.

Saving a Report

To save a report under a different name or location in the repository, or to create an archived version of the report, follow the steps below:

1. Press the 'Save As' button in the toolbar. This opens the 'Save As' dialog box.




```
You must possess "write" permission for a folder in order to save
the report in that location.
```

2. In the 'Folder' menu, select the repository folder into which you want to save the report.

3. In the 'Name' field, enter the desired name for the saved report.

4. Select a desired 'Save Option'. The following three choices are available:

   a. Select 'Save as Archived Report' to save the report *together with* its current data. The archived report will subsequently always display this same dataset, and will never be updated with any new data. An archived report represents a "snapshot" of the data at a particular moment in time.

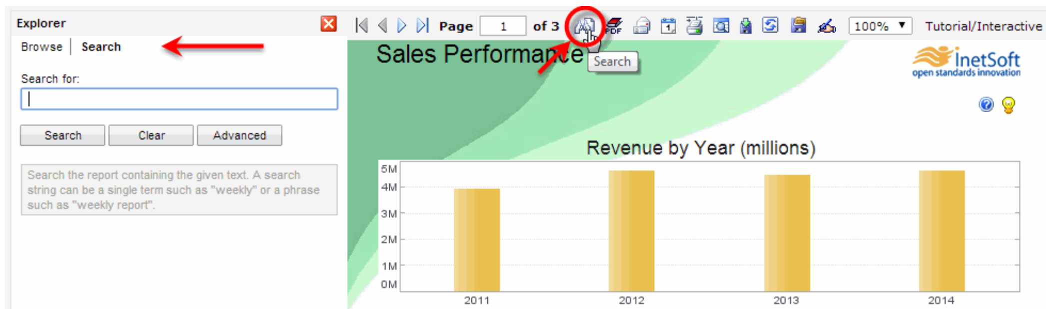
   b. Select 'Save as Live Report' to save the report *without* archiving its data. A *live report* is a report that draws its data from the data source at runtime and always displays "fresh" data. (This is the default way that reports are saved.)

   c. Select the 'Save Parameters Only' option to save the values of all input parameters that you have previously entered. The report will apply these same parameters (to fresh data) the next time it runs.

5. Press ‘OK’ to close the dialog box and save the report.

Searching a Report

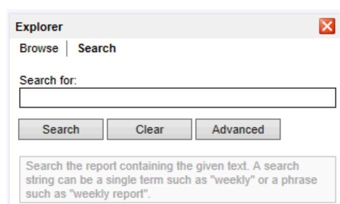
To search within a report, press the ‘Search’ button on the report toolbar. This opens the **Search** tab in the left-side ‘Explorer’ panel.



For example, follow the steps below to search the sample ‘Interactive’ report.

1. In the User Portal, open the ‘Tutorial’ > ‘Interactive’ report.

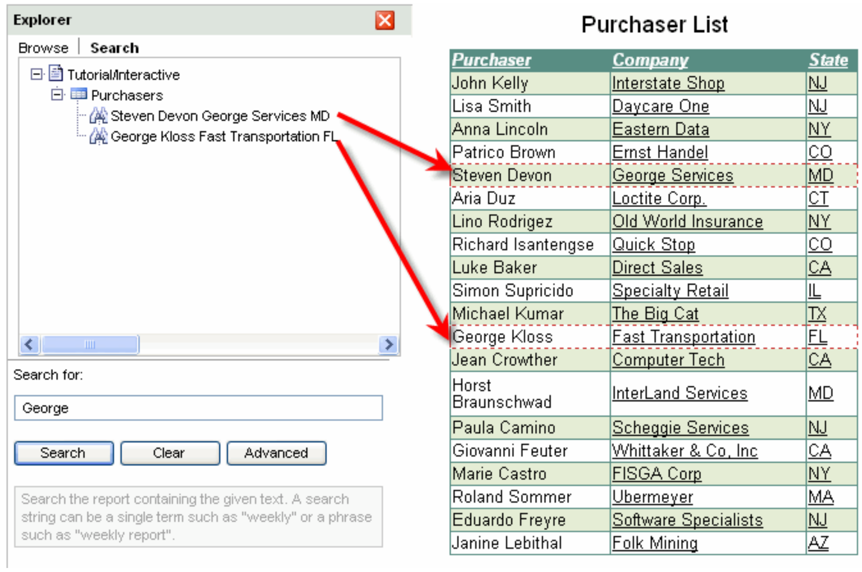
2. Press the ‘Search’ button in the report toolbar to open the **Search** tab of the ‘Explorer’ panel.



3. Enter “George” in the ‘Search for’ box, and press ‘Search’ to find all occurrences in the report.

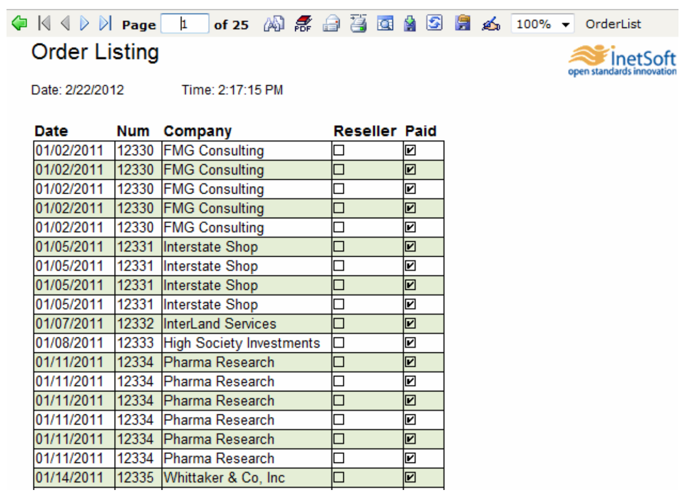
   The **Search** panel lists the locations of the searched term, and all results are outlined in a red dotted line in the report.

4. Click an instance in the search list to jump to the appropriate page in the report.



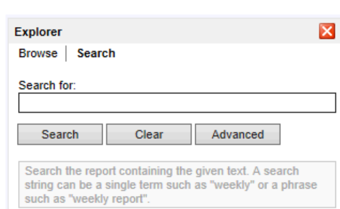
Purchaser	Company	State
John Kelly	Interstate Shop	NJ
Lisa Smith	Daycare One	NJ
Anna Lincoln	Eastern Data	NY
Patrico Brown	Ernst Handel	CO
Steven Devon	George Services	MD
Aria Duz	Loctite Corp.	CT
Lino Rodrigez	Old World Insurance	NY
Richard Isantengse	Quick Stop	CO
Luke Baker	Direct Sales	CA
Simon Supricido	Specialty Retail	IL
Michael Kumar	The Big Cat	TX
George Kloss	Fast Transportation	FL
Jean Crowther	Computer Tech	CA
Horst Braunschwad	InterLand Services	MD
Paula Camino	Scheggie Services	NJ
Giovanni Feuter	Whittaker & Co, Inc	CA
Marie Castro	FISGA Corp	NY
Roland Sommer	Ubermeyer	MA
Eduardo Freyre	Software Specialists	NJ
Janine Lebithal	Folk Mining	AZ

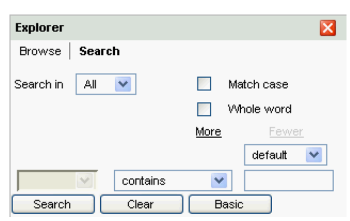
5. Now do an ‘Advanced Search’: First, click on the bar for 2011 in the ‘Revenue by Year’ chart. This drills down to the orders for 2011.



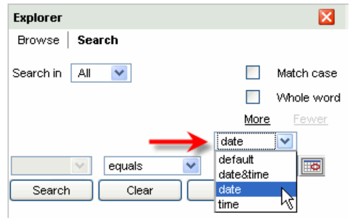
Date	Num	Company	Reseller	Paid
01/02/2011	12330	FMG Consulting	☐	☑
01/02/2011	12330	FMG Consulting	☐	☑
01/02/2011	12330	FMG Consulting	☐	☑
01/02/2011	12330	FMG Consulting	☐	☑
01/02/2011	12330	FMG Consulting	☐	☑
01/05/2011	12331	Interstate Shop	☐	☑
01/05/2011	12331	Interstate Shop	☐	☑
01/05/2011	12331	Interstate Shop	☐	☑
01/05/2011	12331	Interstate Shop	☐	☑
01/07/2011	12332	InterLand Services	☐	☑
01/08/2011	12333	High Society Investments	☐	☑
01/11/2011	12334	Pharma Research	☐	☑
01/11/2011	12334	Pharma Research	☐	☑
01/11/2011	12334	Pharma Research	☐	☑
01/11/2011	12334	Pharma Research	☐	☑
01/11/2011	12334	Pharma Research	☐	☑
01/11/2011	12334	Pharma Research	☐	☑
01/14/2011	12335	Whittaker & Co, Inc	☐	☑

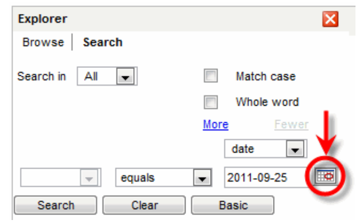
6. Press the ‘Search’ button to open the **Search** panel, then press the ‘Advanced’ button to open the advanced search options.



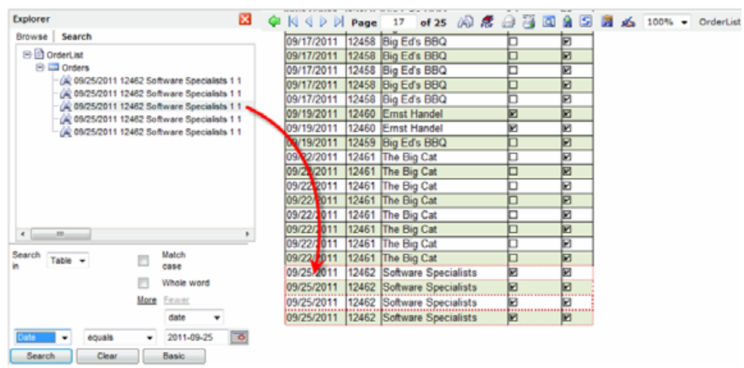


7. Search for a specific date. Select the ‘Date’ option in the ‘Type’ menu. Press the ‘Calendar’ button below the menu, and select the following date: September 25, 2011.



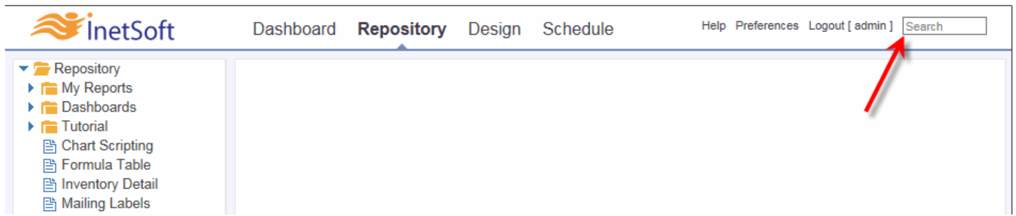


8. Press the ‘Search’ button to list the results Click an entry in the list to jump to the corresponding location in the report.



Searching Archived Reports

To search through archived reports, enter a term in ‘Search’ box at the top of the Portal, and press ‘Enter’ on the keyboard.



This displays a list of search results in the left panel. Click on the desired archived report to open it.

Scheduling a Report

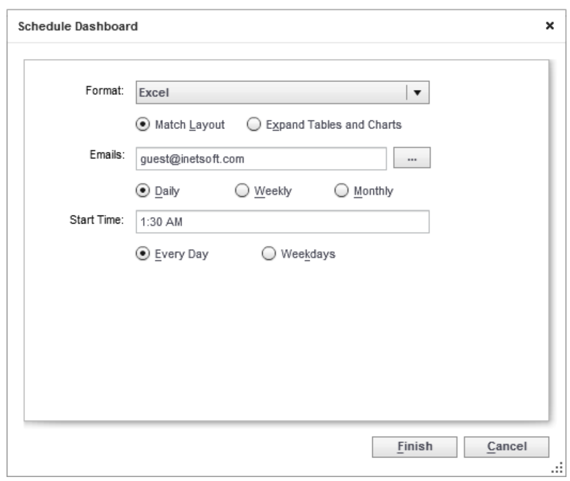
To easily schedule a report for automatic generation and delivery, follow the steps below:

1. Press the ‘Schedule’ button on the toolbar. This opens the ‘Schedule Report’ dialog box.

2. In the ‘Format’ menu, select the format in which the report should be delivered.

3. In the ‘Emails’ field, enter a comma-separated list of email addresses to which the report should be delivered.

4. Select a ‘Daily’, ‘Weekly’, or ‘Monthly’ option and enter the desired date specifications for when the report should be generated.



5. Press ‘Finish’ to close the dialog box.

This creates a new scheduled task that will automatically generate and email the report on the schedule that you specified. The automatically generated report will use the same parameter values that you entered when you originally opened the report.

To view your scheduled tasks or make modifications to a scheduled task, select the **Schedule** tab in the Portal. See *Managing Scheduled Tasks* for more information.

Sorting a Table

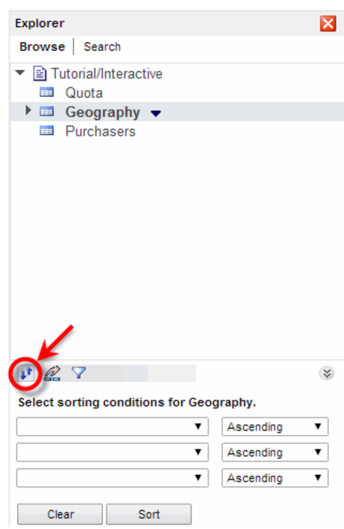
You can sort a table with the Report Explorer tool. The following example illustrates this approach:

1. In the User Portal, open the 'Tutorial' > 'Interactive' report.

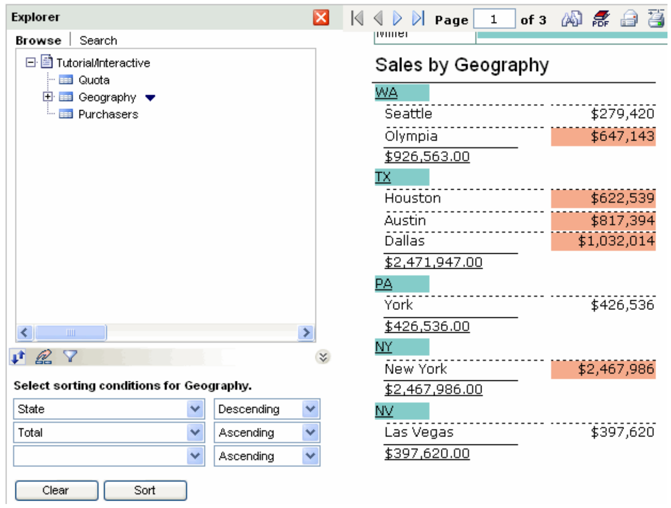
2. Press the 'Report Explorer' button in the report toolbar. This opens the 'Explorer' panel.

   Report Explorer is a tool that allows you to modify a report for purposes of viewing, emailing, archiving, or exporting. Report Explorer does not *change* the original report, but only manipulates the way the information in the report is displayed. Note that complex formula tables cannot be manipulated within Report Explorer, and Section elements do not permit column rearrangement and/or hiding.

3. Select the 'Geography' element in the tree, and press the 'Show Sorting Options' button below.

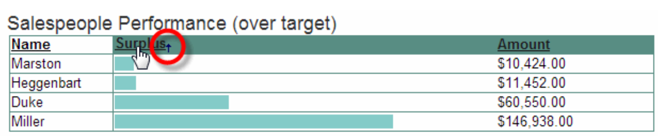


4. Select the fields you want to sort from the provided menus, and indicate whether each field should be sorted in 'Ascending' or 'Descending' order.



5. Press the ‘Sort’ button to implement the specified sort order.

Note that if the report designer has enabled the ‘Sort On Header’ feature for the report, you can also sort a table by clicking a column header. Click once to sort the data in ascending order. Click again on the same column to sort the data in descending order.



A small up-arrow or down-arrow indicates the current sort order.

Filtering a Report Element

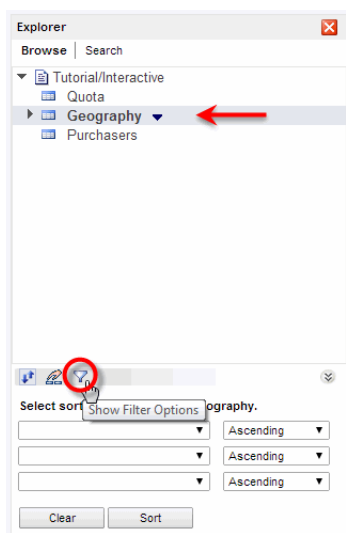
You can filter report elements using the Report Explorer. The following example illustrates this approach.

1. In the User Portal, open the ‘Tutorial’ > ‘Interactive’ report.

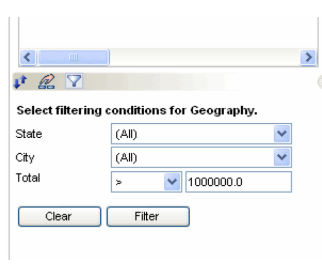
2. Press the ‘Report Explorer’ button in the report toolbar. This opens the ‘Explorer’ panel.

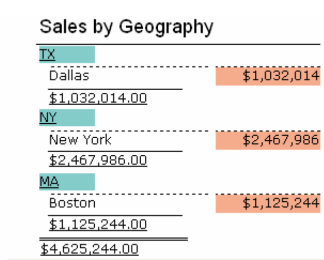
   Report Explorer is a tool that allows you to modify a report for purposes of viewing, emailing, archiving, or exporting. Report Explorer does not *change* the original report, but only manipulates the way the information in the report is displayed. Note that complex formula tables cannot be manipulated within Report Explorer, and Section elements do not permit column rearrangement and/or hiding.

3. Select the ‘Geography’ element in the tree, and press the ‘Show Filter Options’ button below.



4. In the menu next to ‘Total’, select ‘>’ and type “1000000” in the text box. Press ‘Filter’.





The ‘Geography’ table is filtered to display only sales greater than $1,000,000.

Hiding Table Columns

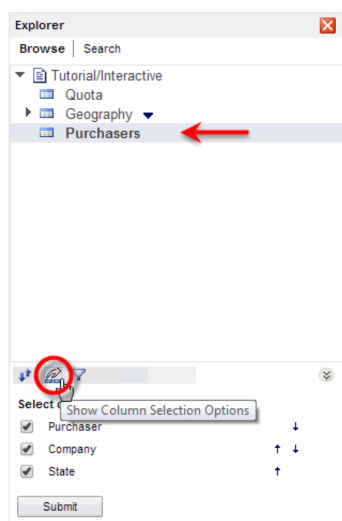
You can hide columns of a table using the Report Explorer. The example below illustrates this approach.

1. In the User Portal, open the 'Tutorial' > 'Interactive' report.

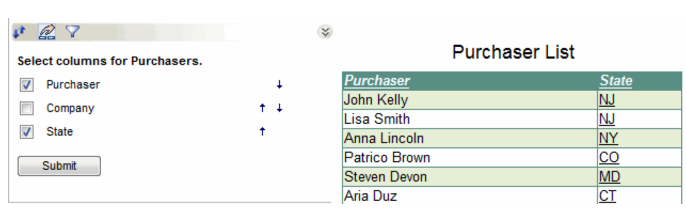
2. Press the 'Report Explorer' button in the report toolbar. This opens the 'Explorer' panel.

   Report Explorer is a tool that allows you to modify a report for purposes of viewing, emailing, archiving, or exporting. Report Explorer does not *change* the original report, but only manipulates the way the information in the report is displayed. Note that complex formula tables cannot be manipulated within Report Explorer, and Section elements do not permit column rearrangement and/or hiding.

3. Select the 'Purchasers' element in the 'Explorer' panel. Press the 'Show Column Selection Options' button below.



4. Uncheck 'Company'. Press 'Submit' to generate the report.



Note that the 'Company' column has been removed from the table.

Hiding Table Rows

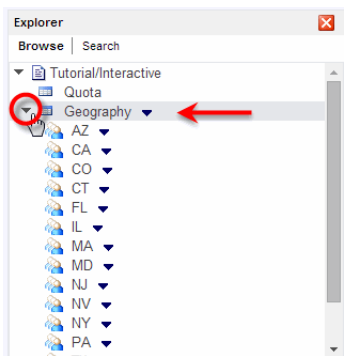
You can hide detail rows of a grouped table using the Report Explorer. The example below illustrates this approach.

1. In the User Portal, open the 'Tutorial' > 'Interactive' report.

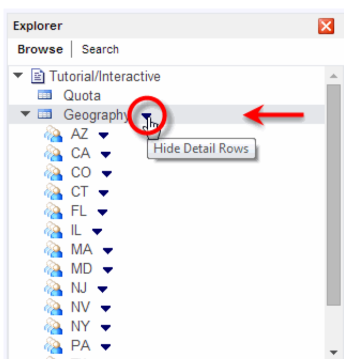
2. Press the 'Report Explorer' button in the report toolbar. This opens the 'Explorer' panel.

   Report Explorer is a tool that allows you to modify a report for purposes of viewing, emailing, archiving, or exporting. Report Explorer does not *change* the original report, but only manipulates the way the information in the report is displayed. Note that complex formula tables cannot be manipulated within Report Explorer, and Section elements do not permit column rearrangement and/or hiding.

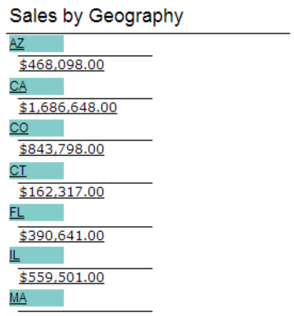
3. Expand the 'Geography' node in the 'Explorer' tree.



4. Press the 'Hide Detail Rows' button next to 'Geography'.



This hides the detail rows in the 'Sales by Geography' table.


Sales by Geography
AZ
$468,098.00
CA
$1,686,648.00
CO
$843,798.00
CT
$162,317.00
FL
$390,641.00
IL
$559,501.00
MA

Copyright

Please visit www.inetsoft.com for technical support, software updates, and new releases.