Smarten

Augmented Analytics

# Reports User Manual

Document Version: 1.0
Product Version: 5.2

| Document Information | |
|---|---|
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**Disclaimer**

This document is intended to support administrators, technology managers or developers using and implementing Smarten. The business needs of each organization will vary and this document is expected to provide guidelines and not rules for making any decisions related to Smarten. The overall performance of Smarten depends on many factors, including but not limited to hardware configuration and network throughput.

## Contents

# 1 About this Document

This document is designed to provide the administrator and authorized users with fundamental skills to print report. This guide provides step-by-step information on various features and attributes of creating and printing report.

This document contains topics relating to the scope and use of the Smarten Advanced Data Discovery Print Report User Manual Guide.

## 1.1 Intended Audience

- Power users: Power users can create and modify front-end objects like dashboards, crosstab, graphs, GeoMap, key performance indicators (KPI), and tabular. Power users can develop and modify various objects and perform advanced analytics and ad-hoc analysis.
- BI users: Depending upon their access rights, BI users can view and interact with front-end objects like crosstab, tabular, graphs, GeoMap, KPI, and dashboards. BI users can also perform basic drill-down, filtering, and other analytic functions.

## 1.2 Scope and Organisation of Topic Areas

The content in this manual is organised according to the tasks and operations performed on the report and are arranged in the following topics:

| | |
|---|---|
| Chapter 1 | About this Document |
| Chapter 2 | Introduction to Reports |
| Chapter 3 | Creating and Managing Reports |
| Chapter 4 | Operations on Reports |
| Chapter 5 | Product and Support Information |

## 1.3 Conventions used

This manual uses typographical conventions in the text to help you distinguish between the names of files, instructions and other important notes that are relevant during installation. For example:

- Field names are mentioned in the boldface font:
  Select the **Page Setup** tab under **Page Header/Footer Configuration**.
- Important notes are indicated in blue:

  > Note:
  > Currently, Smarten allows Crosstab and Tabular BI objects only.

- References to documents are highlighted as below:

Reference: **Working with Reports > Creating Report**

# 2 Introduction to Reports

Smarten provides print reports module for creating custom reports with complex layout or pixel-perfect reports. Users can create reports like Credit card statement, Invoice, Purchase orders or Annual report etc. Reports can be exported or published in PDF format through delivery and publishing agent built in Smarten.

Reports framework uses FreeMarker template engine to define report template.

Following are the basic steps to create reports:

- Create FreeMarker template file
- Upload template file
- Associate Smarten objects and data to the report template
- Preview report
- Define export parameters

# 3 Creating and Managing Reports

## 3.1 Create Report

You can generate and manage reports using interactive wizard in Smarten.

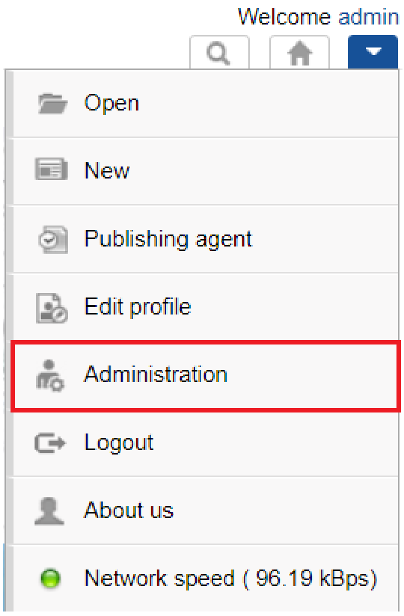
Reference: **Working with Reports >Creating report**

**About this task**

Use this task to create a report using Smarten.

**Procedure**

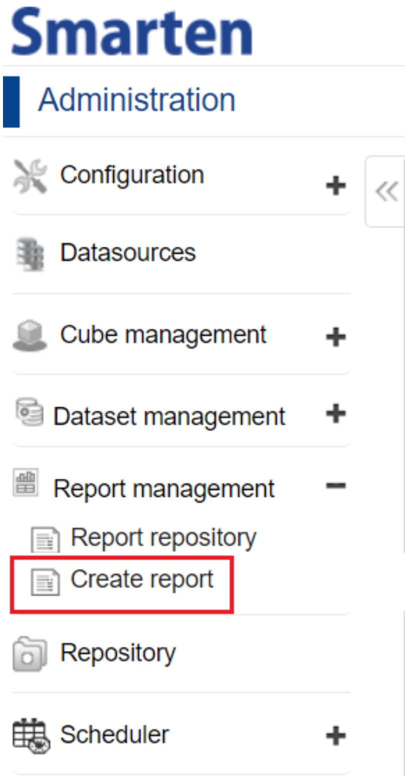
1. In the upper right-hand corner, click the **down arrow** icon.
   The system displays the Main Menu.
2. In the Main Menu, click **Administration.**




**SMARTEN –ADMINISTRATION**

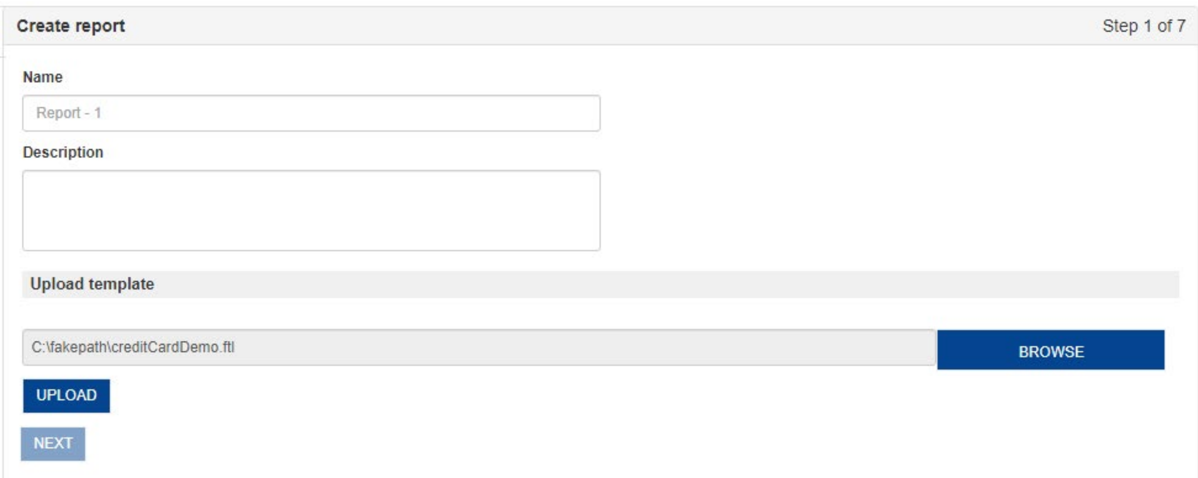
The system displays navigational panel of **Administration** interface on the left side of screen.

3. Click **Report management>Create report**




**ADMINISTRATION-REPORT MANAGEMENT-CREATE REPORT**

The system displays **Create report** screen.

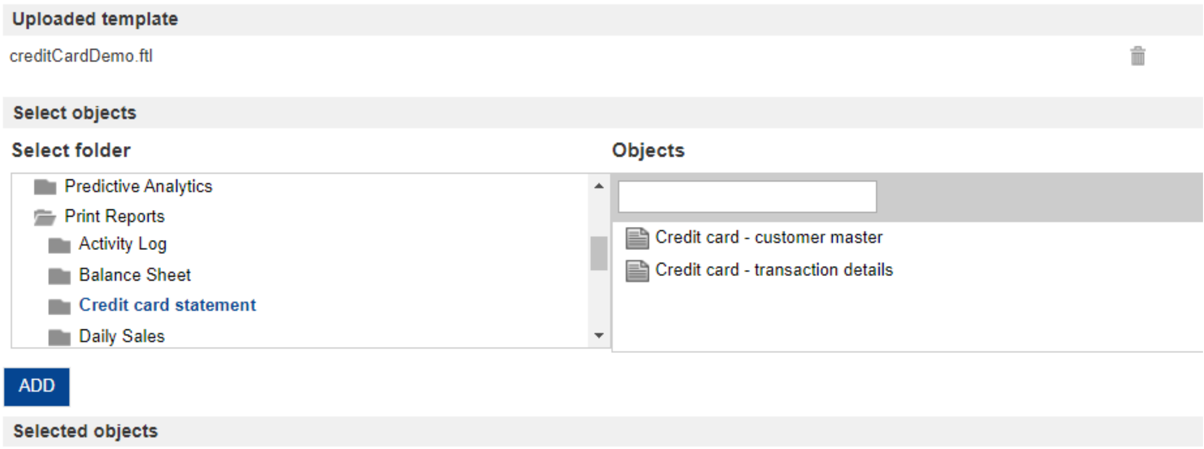



**CREATE REPORT**

4. In the **Name** field, enter the name of report.
5. In the **Description** field, user can opt to enter the description about the report.
6. **Browse** to choose the **report template** and click on **Upload**.

> Note:
> Only .FTL files can be uploaded to create report

7. On clicking **Upload Template>Upload** button, the system first uploads the report template file and validates it. If uploaded template is validated, the system displays **Select objects** pane.




**CREATE REPORT – SELECT OBJECTS**

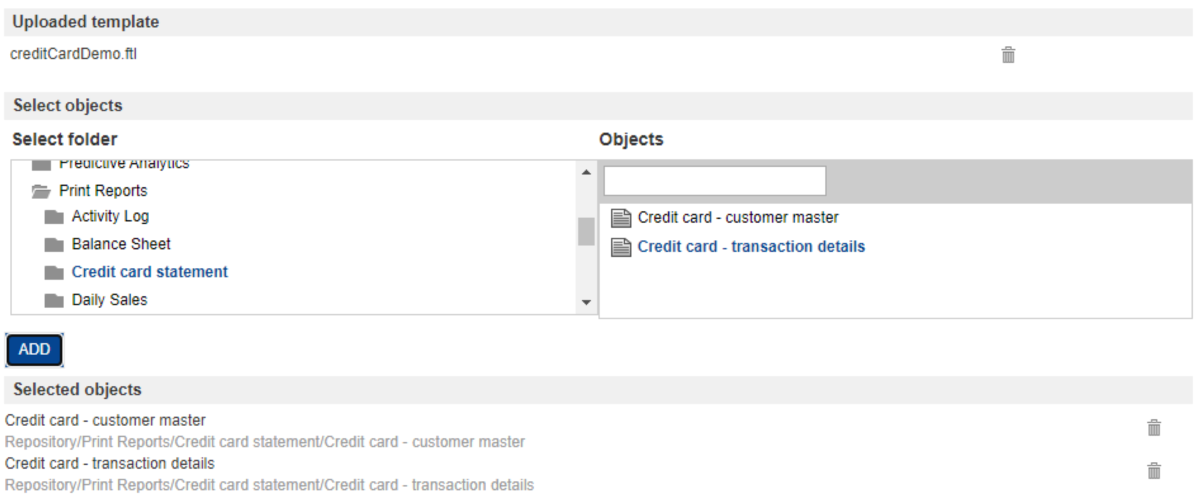
8. Once the report template is uploaded, the user needs to select Smarten BI objects, which are used in the report template script to fetch data. Based on the report template, the user can select and associate one or more BI objects for the report.

   There are three possible scenarios:
   1. User selects one BI object
   2. User selects multiple BI objects with no master-detail relationship
   3. User selects multiple BI objects with master-detail relationship

The below mentioned steps will show how to associate BI objects in the above mentioned scenarios.

### 3.1.1 Associate BI Objects

1. In **Select objects> Select folder** column**,** click on **Repository.**
2. Select the appropriate subfolder where your Smarten BI objects are located.
3. By selecting desired subfolder, related Smarten BI objects are displayed in **Objects** column.



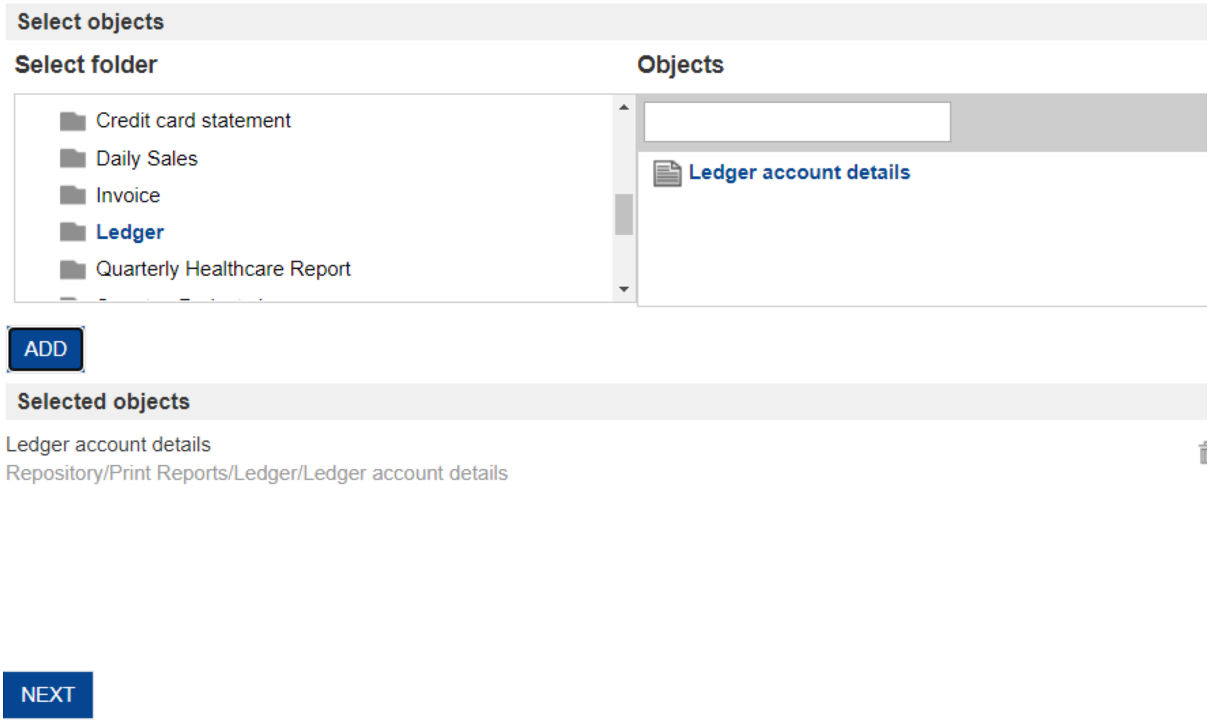

**CREATE REPORT-SELECT OBJECTS-SELECTED OBJECTS**

> Note:
> Currently, Smarten allows Crosstab and Tabular BI objects only.

4. In **Select objects>Objects** column, click the object you want to select.
5. Click **Add** button at the bottom of **Select folder** column.
   The system adds the object under **Selected objects**. The object folder path is also displayed at the bottom.
6. The user can **select more than one object by repeating the steps 9-13** as mentioned above.

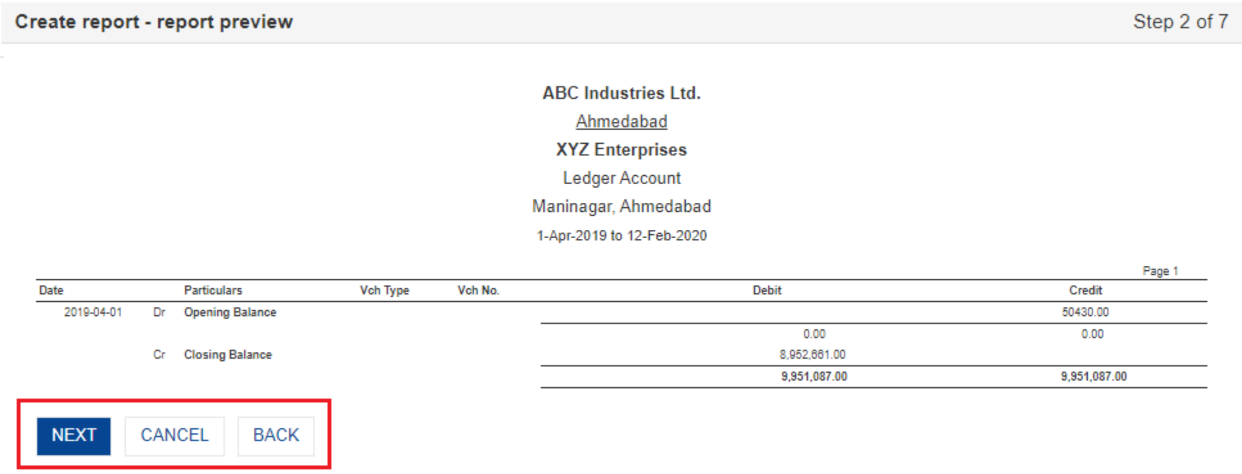
### 3.1.2 Selecting Only One BI Object

1. When the user **selects only one object from report template, the system will not display master-detail configuration section**. For example, let us take ledger report scenario. For this report, only one object is required – Ledger account details.




CREATE REPORT – SELECTED OBJECTS – SINGLE BI OBJECT

2. You can move to Step 2 of Create report Wizard by clicking **NEXT** button.
3. In Step 2, the user to get a **preview** of the desired report.

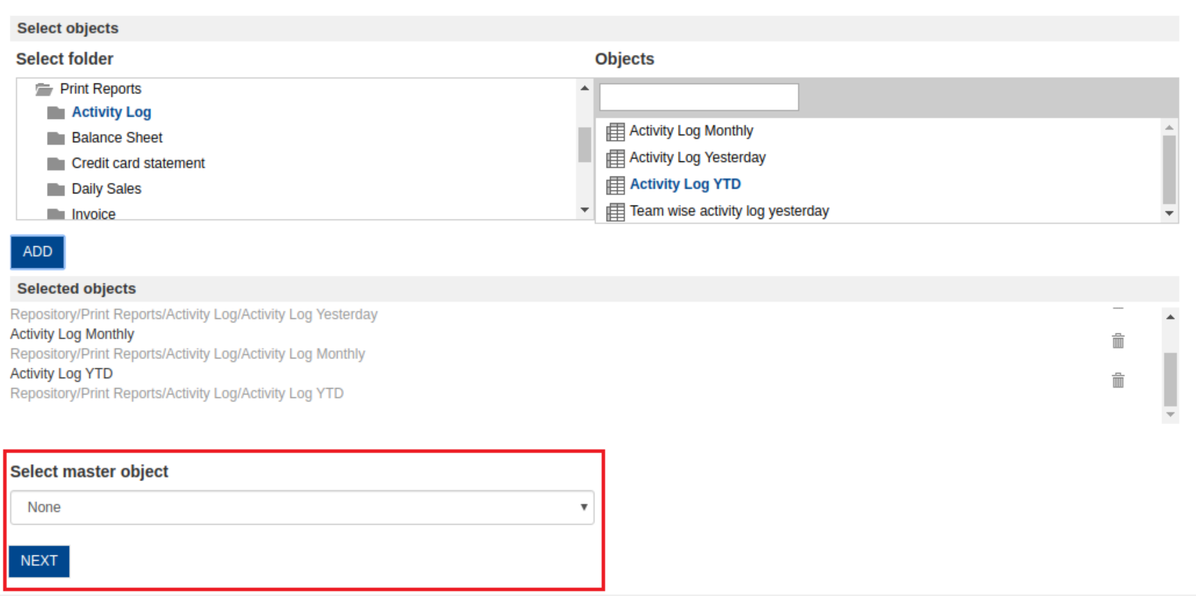



**CREATE REPORT – PREVIEW - SINGLE OBJECT SELECTION**

- Click **NEXT** to move to Step 3 of Create report Wizard.
- Click **CANCEL** to abandon the changes and cancel the operation.
- Click **BACK** to go back to Step 1 without saving any change.

### 3.1.3 Selecting Multiple BI Objects with No Master-Detail Relationship

1. If the user **does not want to define master-detail relationship between selected objects**, **None** can be selected from the drop-down list of **Select master object.** For example, let us take activity log report scenario. There is no relationship between different objects in this report, so there is no column mapping required. The system will read the individual object data and generate report as per the template logic.



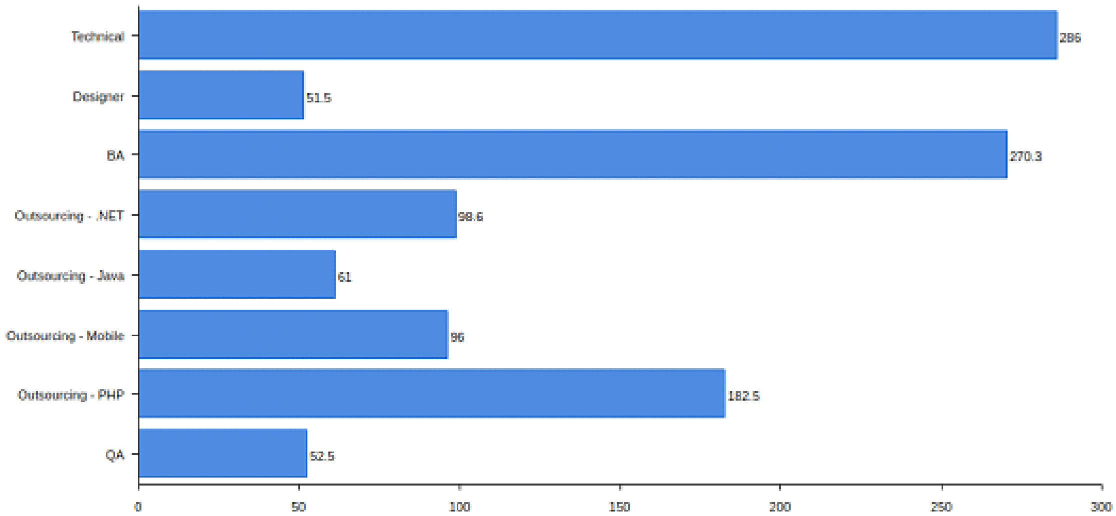

**SELECTED OBJECTS - SELECT MASTER OBJECT – NONE**

2. You can move to Step 2 of Create report Wizard by clicking **NEXT** button.

3. In Step 2, the user can get a **preview** of the desired report.

Create report - report preview Step 2 of 7

**aBc IT Technologies Ltd.** Team Member Activity Log(in hours) 20-May-2021




| Emplyee Name | YTD - 2021 | April | MTD - May | Previous Day |
|---|---|---|---|---|
| **Summary** | **724.00** | **628.00** | **96.00** | |
| **Outsourcing - PHP** | | | | |
| Ankit Suthar | 153.00 | 144.50 | 8.50 | |
| Jaspreet Chhabra | 174.50 | 149.00 | 25.50 | |
| NileshKumar Mehta | 168.50 | 144.50 | 24.00 | |
| Poojitha Srinivas | 153.00 | 127.50 | 25.50 | |
| Shweta Jahagirdar | 133.50 | 108.50 | 25.00 | |
| Swapnil Patel | 167.50 | 141.00 | 26.50 | |
| Taha Sethwala | 166.00 | 144.50 | 21.50 | |
| Uma Sharma | 173.50 | 147.50 | 26.00 | |
| **Summary** | **1289.50** | **1107.00** | **182.50** | |
| **QA** | | | | |
| Dhaval Oza | 182.30 | 155.30 | 27.00 | |
| Jainesh Patel | 177.00 | 151.50 | 25.50 | |
| Khushbu Babani | 153.00 | 153.00 | | |
| **Summary** | **512.30** | **459.80** | **52.50** | |
| **Grand Summary** | **8468.10** | **7369.70** | **1098.40** | |

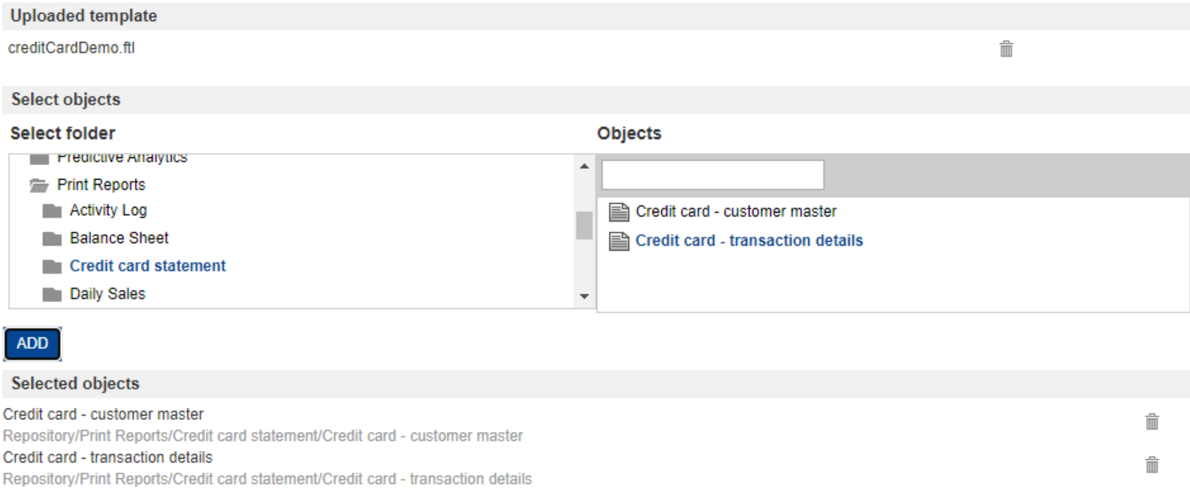
NEXT CANCEL BACK

**CREATE REPORT-PREVIEW-MULTIPLE OBJECTS WITH NO MASTER-DETAIL RELATIONSHIP**

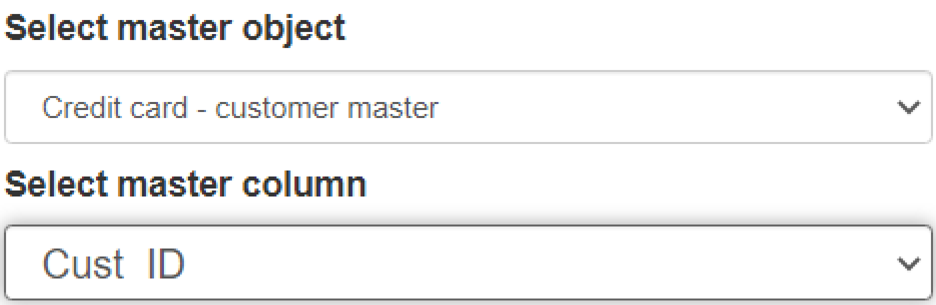
- Click **NEXT** to move to Step 3 of Create report Wizard.
- Click CANCEL to abandon the changes and cancel the operation.
- Click BACK to go back to Step 1 without saving any change.

### 3.1.4 Selecting Multiple BI Objects with Master-Detail Relationship

1. **When more than one object is selected, the system provides mechanism to set relationship between two objects for master-detail data kind of scenario.** For example, let us take Credit card statement report scenario. For this report, two objects will be required – one is customer master and the other one is transaction details. Customer master object will have customer specific master details and transaction details will have transactions done by customers.

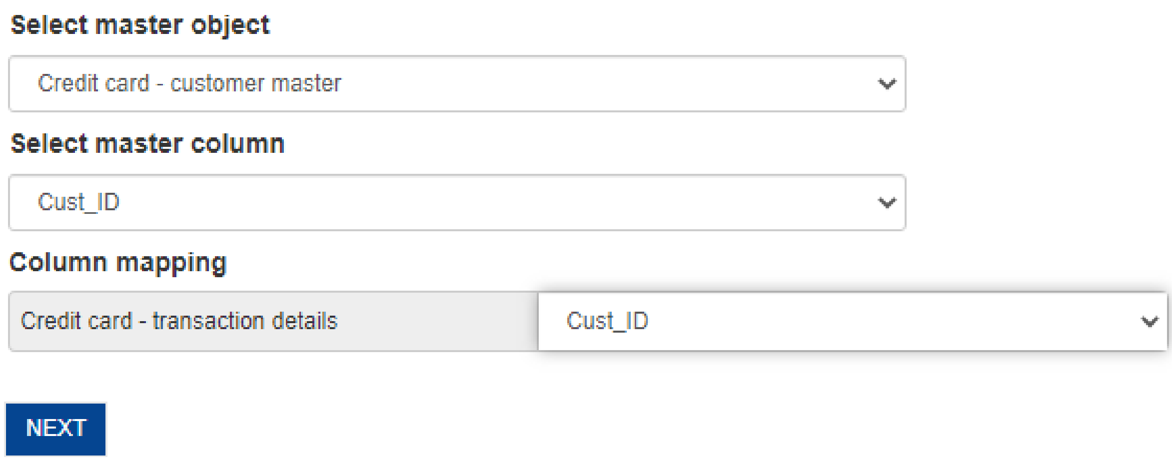



**CREATE REPORT – MULTIPLE BI OBJECTS**




**SELECTED OBJECTS-SELECT MASTER OBJECT-SELECT MASTER COLUMN**

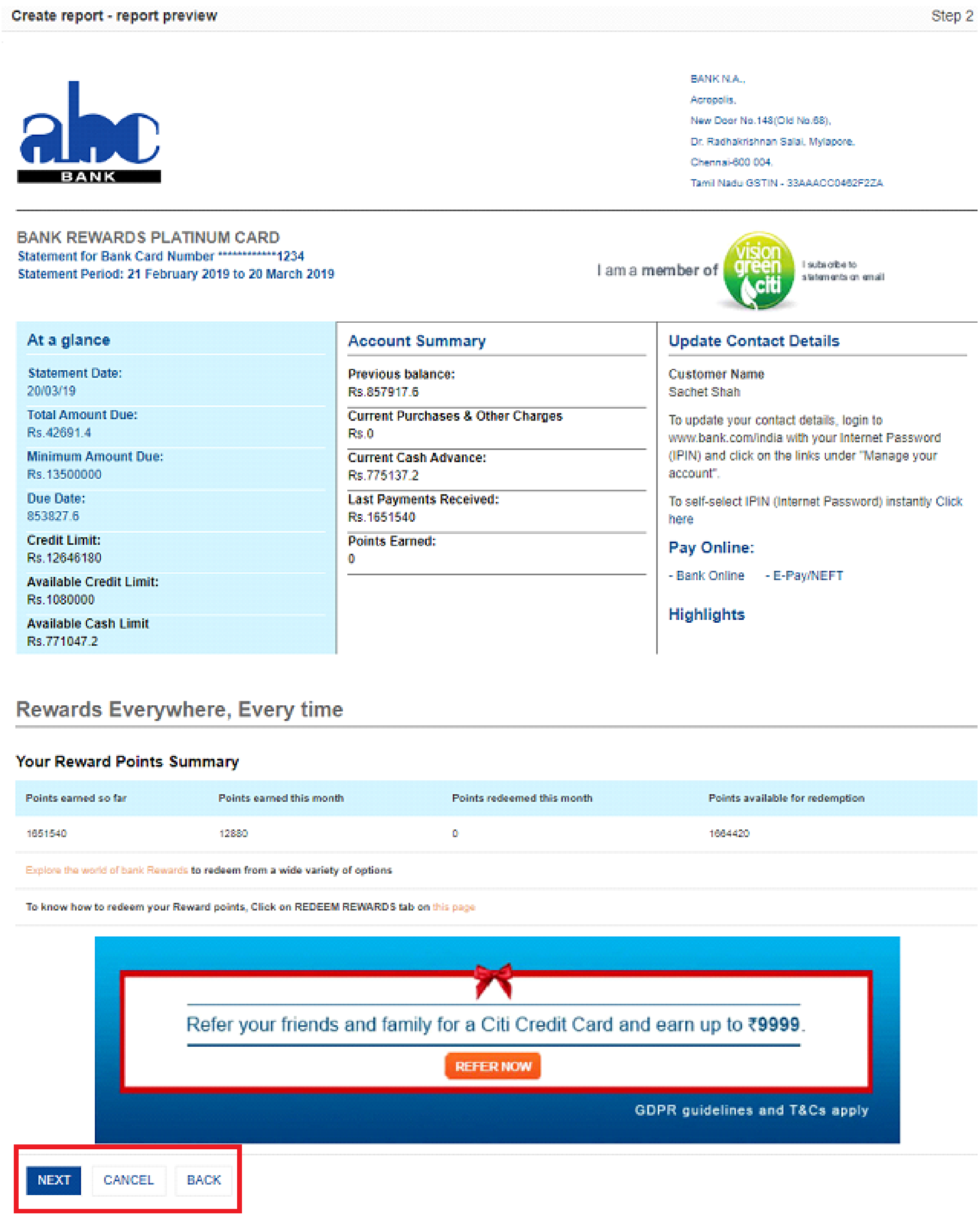
2. The system displays **Select master object.** The user can make any object as master object by choosing from the drop-down list. As mentioned in the above example, the user selects customer master as **master object.**
3. The system then, displays **Select master column** that reads data from selected master object. The user can make any column as master column by choosing from the drop-down list.
4. After selecting master column, the system displays **Column mapping** pane. The user can map **Master Object-Column** with **Detail Object-Column** to generate report based on data fetched from multiple objects.




CREATE REPORT - COLUMN MAPPING

> Note:
> Currently, Smarten allows mapping of only one key column. If you have multiple keys column scenario, you should combine key columns into one column into your dataset using SSDP.

5. After column mapping, the user can click on the **NEXT** button to move to next step. Step 2 of Create report Wizard provides the **preview** of the report based on uploaded template and associated BI objects.




**CREATE REPORT-PREVIEW-MULTIPLE OBJECTS SELECTION-MASTER-DETAIL RELATIONSHIP**

- Click **NEXT** to move to Step 3 of Create report Wizard.
- Click **CANCEL** to abandon the changes and cancel the operation.
- Click **BACK** to go back to Step 1 without saving any change.

> Note:
> It is recommended that associated BI object's metadata or column sequence should not be changed after creating report. This may lead to wrong reference of object data and column sequence, and may generate wrong print report.

### 3.1.5 Define Retrieval Parameters

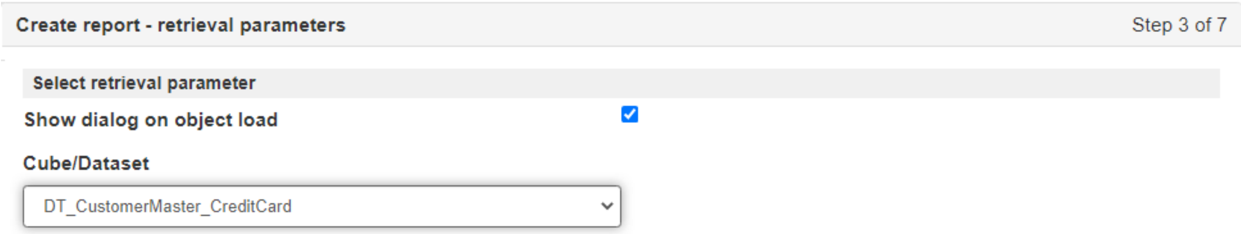
By default, Smarten reports are loaded with full data from the dataset. To load the reports with filtered views, retrieval parameters are required. These are run-time parameters for analysing the reports.

**About this task**

Use the following procedure to define retrieval parameters.

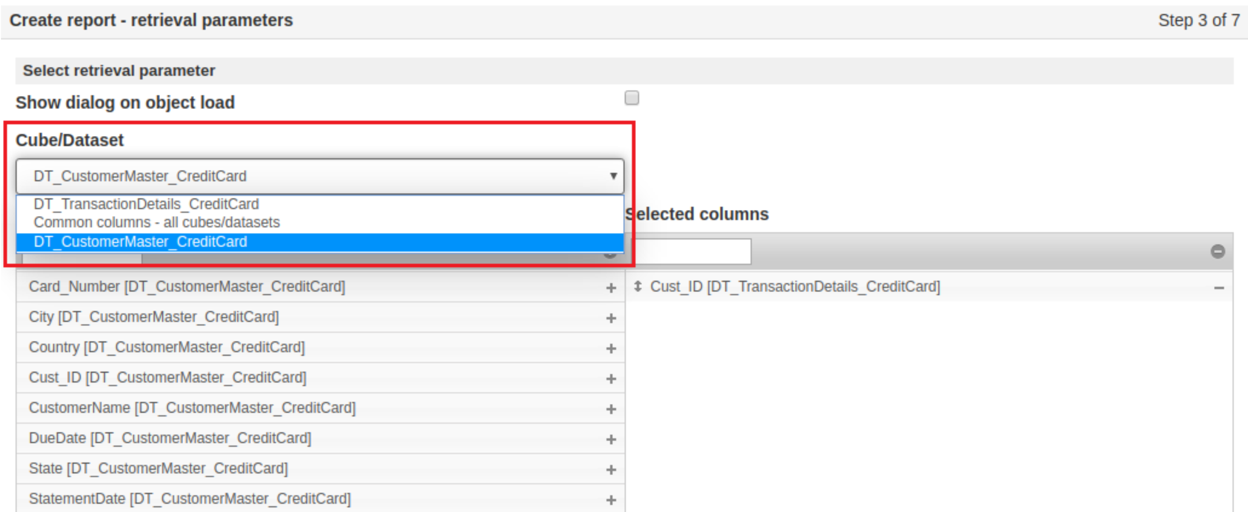
**Procedure**

1. Under **Select retrieval parameter** pane, in the **Show dialog on object load** field, check the checkbox to display retrieval parameters dialog on object load.



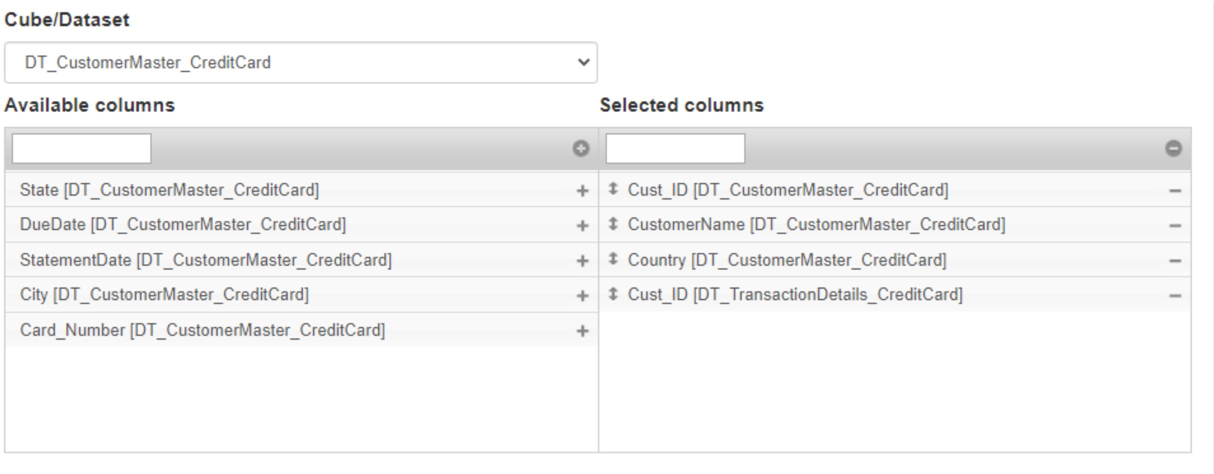

CREATE REPORT-RETRIEVAL PARAMETERS-SELECT CUBE/DATASET

2. Select the **Cube/Dataset** from the drop-down list. The user can choose any one of the cubes/ datasets mentioned in the list to define retrieval parameters. The system will fetch the column information from the selected cube or dataset and display in **Available columns**. If the user selects Common Columns – all cubes/datasets, the system displays the columns in Available columns that are common to all the cubes or datasets.




CREATE REPORT-RETRIEVAL PARAMETERS-SELECT CUBE/DATASET-AVAILABLE COLUMNS

3. User can drag and drop the columns from the **Available columns** section to the **Selected columns** section. The user can also move columns up and down to arrange the sorting order of Selected columns.

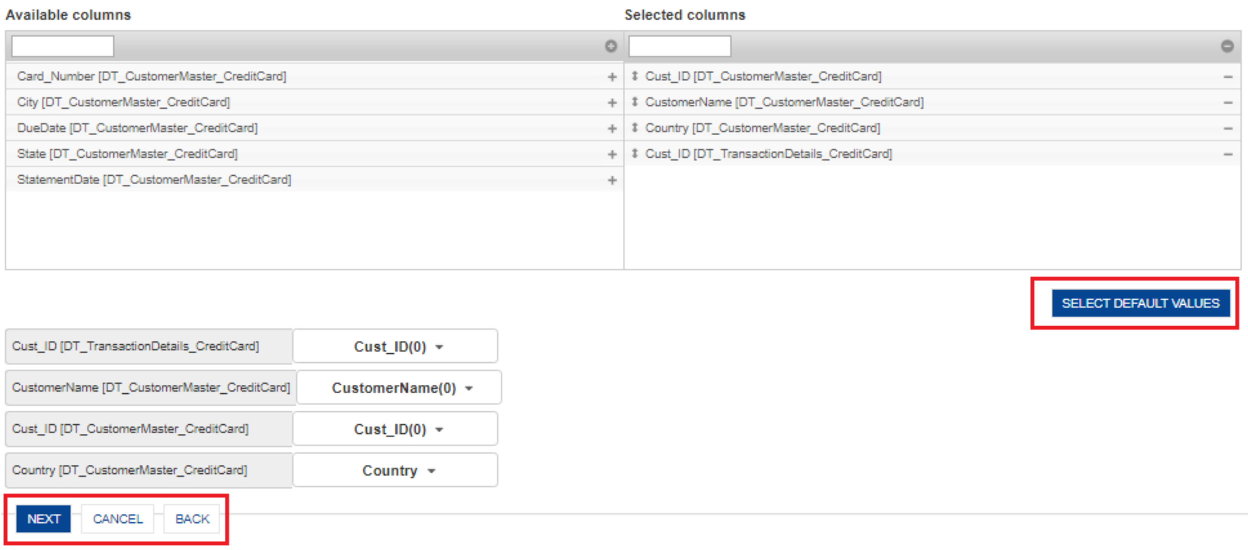



**CREATE REPORT-RETRIEVAL PARAMETERS-AVAILABLE-SELECTED COLUMNS**

4. When the user clicks **SELECT DEFAULT VALUES** button, the system displays the list of **Selected columns** at the bottom with the respective list of values assigned to each column.

5. After completing the above procedure of defining retrieval parameters, the user can opt to: -

   - Click the **NEXT** button to move to next step.
   - Click the **CANCEL** button to cancel and abandon the operations.
   - Click the **BACK** button to move back to previous step of Create report Wizard.




**CREATE REPORT–RETRIEVAL PARAMETERS-SELECT DEFAULT VALUES**

> Note:
> This step is optional. If the user does not want to define retrieval parameters, this step can be skipped by clicking on **NEXT** button.

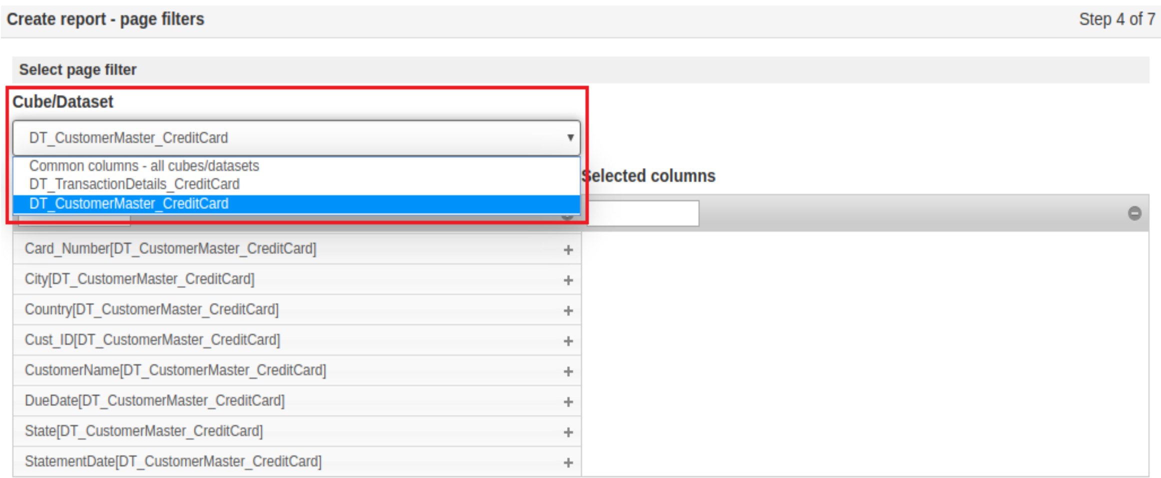
### 3.1.6 Define Page Filters

#### About this task

Use the following procedure to define page filters.

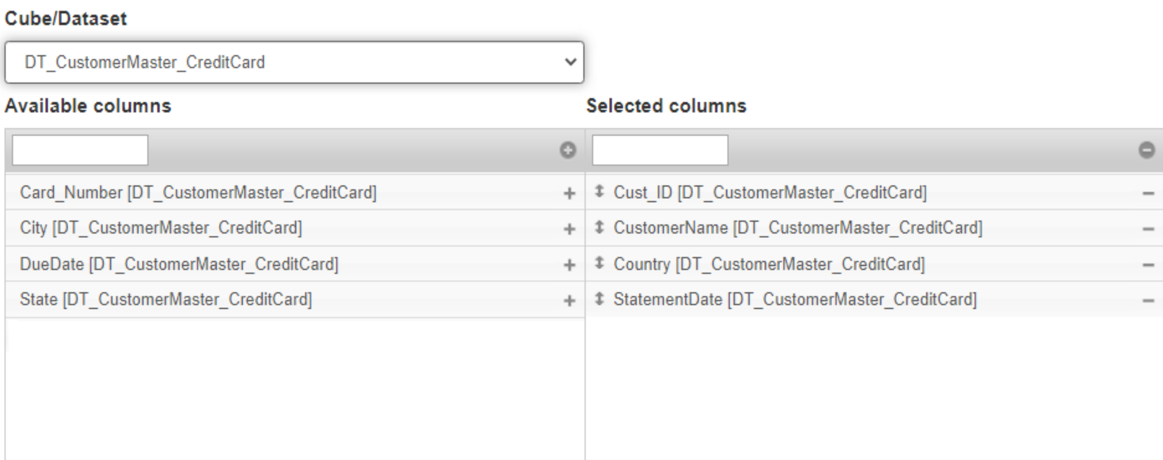
#### Procedure

1. Under **Select page filter** pane, select **Cube/Dataset** from the drop-down list. The user can choose any one of the values mentioned in the list to define page filters. The system will fetch the column information from the selected cube or dataset and display in **Available columns**. If the user has selected Common columns – all cubes/datasets, the system displays the columns in the Available columns that are common to all the cubes or datasets.




CREATE REPORT-PAGE FILTERS-SELECT CUBE/DATASET-AVAILABLE COLUMNS

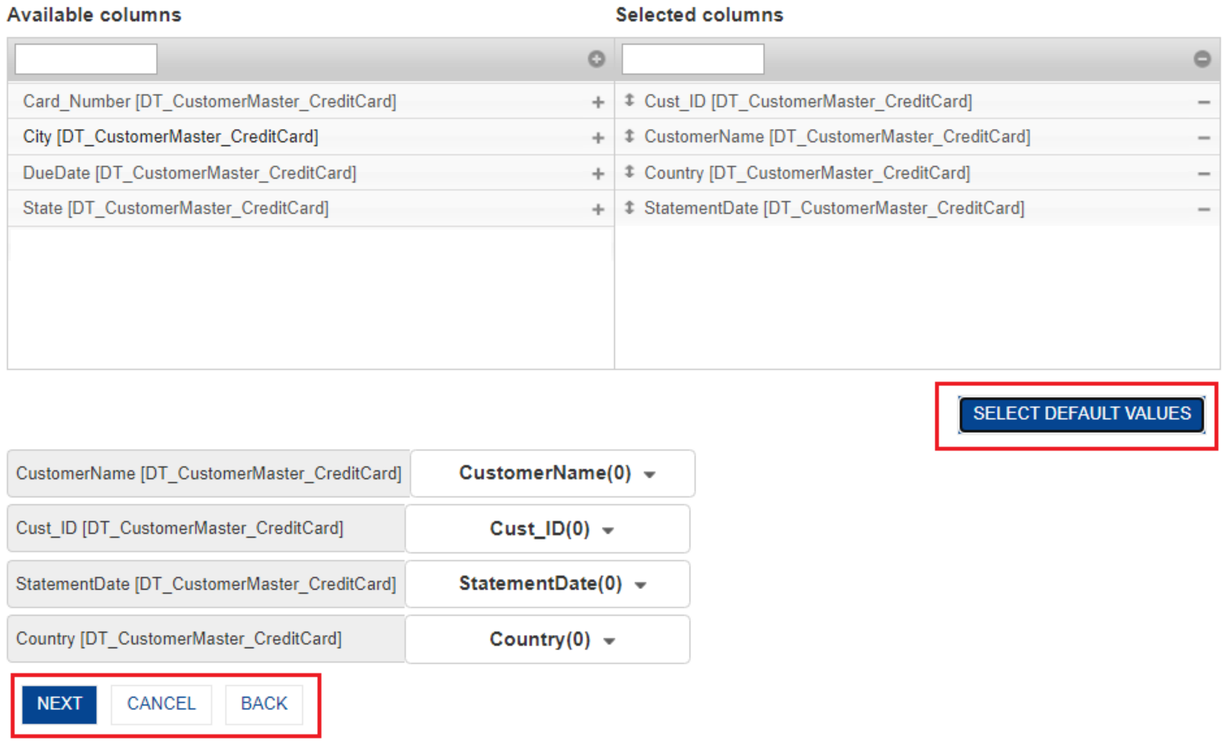
2. User can drag and drop the columns from the **Available columns** section to the **Selected columns** section. The user can also move the columns up and down to arrange the sorting order of Selected columns.




CREATE REPORT-PAGE FILTERS-AVAILABLE-SELECTED COLUMNS

3. When the user clicks **SELECT DEFAULT VALUES** button, the system displays the list of **Selected columns** at the bottom with the respective list of values assigned to each column.

4. After completing the above procedure of defining page filters, the user can opt to: -
    - Click the **NEXT** button to move to next step.
    - Click the **CANCEL** button to cancel and abandon the operations.
    - Click the **BACK** button to move back to previous step of Create report Wizard.




**CREATE REPORT-PAGE FILTERS-SELECT DEFAULT VALUES**

> Note:
> This step is optional. If the user does not want to define page filters, this step can be skipped by clicking on **NEXT** button.

### 3.1.7 Assign Report Permissions

After defining the retrieval parameters and page filters, the user can move to next step to assign permissions to other users for viewing the report. The report creator user can assign permissions to appropriate users. Permitted users will be able to see report in object repository along with other BI objects. They can open, filter and export report.

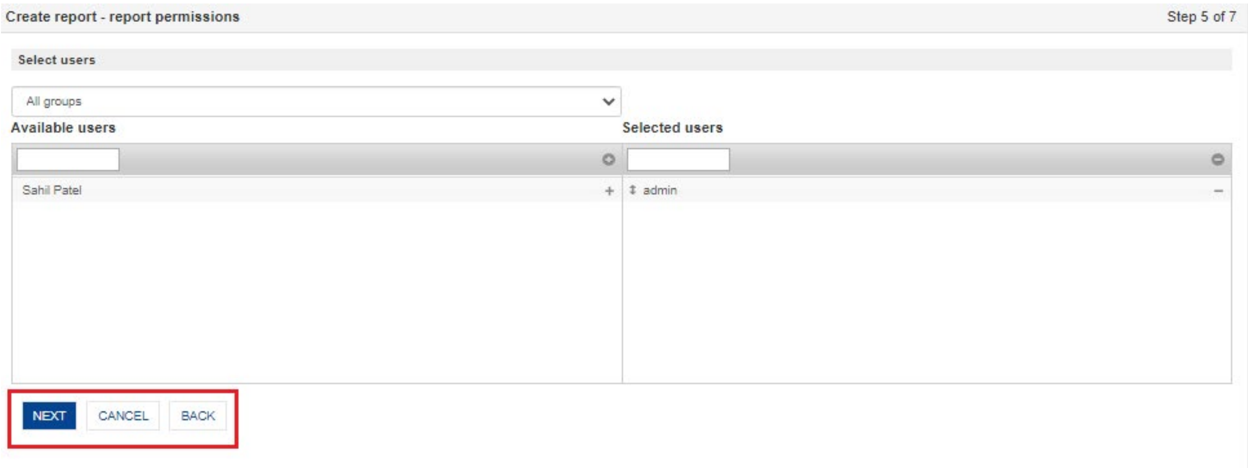
#### About this task

Use the following procedure to assign report permissions.

#### Procedure

1. The user can select users from the drop-down list of **Select users**. By default, the system displays **"All groups"**.
2. The system displays the list of names of **Available users** as per access rights policy defined by Administrator.

3. The report creator user can drag and drop the users from the **Available users** section to the **Selected users** section. In other words, **Selected users** are assigned permission to modify or print the report.
4. After completing the above procedure of assigning permissions, the user can opt to: -
   - Click the **NEXT** button to move to next step.
   - Click the **CANCEL** button to cancel and abandon the operations.
   - Click the **BACK** button to move back to previous step of Create report Wizard.




**CREATE REPORT-ASSIGN PERMISSIONS**

> Note:
> It is recommended to give view only permission for associated BI objects to approved users in order to avoid any user from modifying the report.

### 3.1.8 Define Export Parameters

User can define export parameters like page setup, orientation, file name pattern and can choose to export report as a separate or single file.

#### About this task

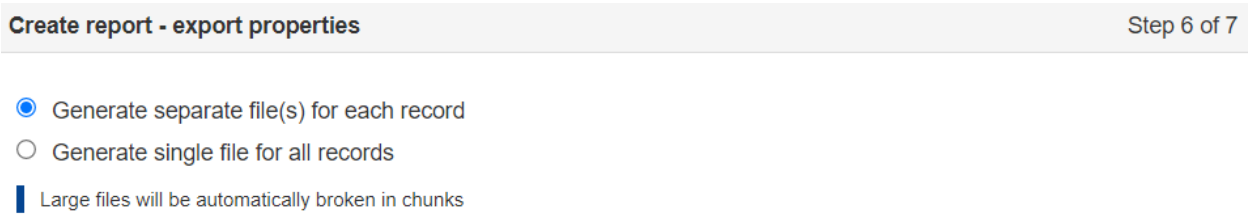
Use the following procedure to define export parameters.

#### Procedure

1. The system provides two options to export report file.
   a. **Generate separate file for each record**: - This option is provided for master-detail relationship based scenarios only. The system will generate a separate file for each master object record. For example, in case of credit card statement, it will generate a separate file for each customer.
   b. **Generate single file for all records:** – This option is provided for all scenarios. The system will generate a single file for all records. In a master-detail relationship scenario, each master object record will start from a new page. Continuing with the same example, credit card statements of all the customers will be exported in a single PDF file and each customer's statement will start from a new page. Similarly, in scenarios with

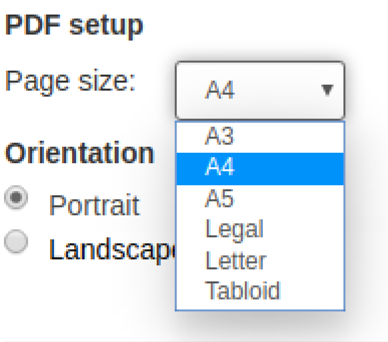
no master-detail relationship, for example, company's annual reports like profit and loss statement, balance sheet etc., records will be exported in a single file.

> Note:
> In case of a large file, the system will break the file into chunks. For example, if the company's ledger has records of a large number of transactions which uses thousands of pages, the system will generate multiple export files by breaking it on the basis of number of records per file.




CREATE REPORT-EXPORT PARAMETERS- GENERATE FILE

2. The user can select page setup as per requirement. Page size can be selected from the drop-down list of **PDF Setup>Page size**. By default, it is A4. Also, the user can select orientation as portrait or landscape as per requirement.



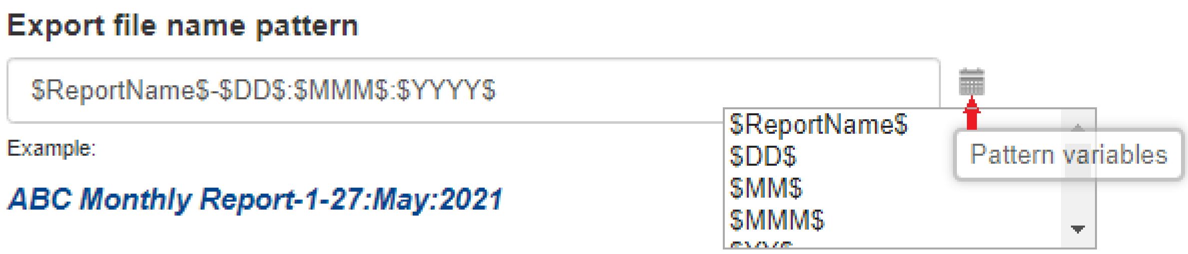

CREATE REPORT- EXPORT PARAMETERS-PAGE SETUP-ORIENTATION

3. User can define the export file name pattern as per requirement. The values or pattern variables can be selected/changed by clicking the **Pattern variables** icon located on the right side where the file name pattern is displayed. The system will display pre-defined tags as drop-down list and the user can decide the order by selecting each tag one at a time.

   For example, to generate export file name in a pattern like **$ReportName$-$DD$:$MMM$:$YYYY$**, the system will display the following pattern.

   **ABC Monthly Report-1-27:May:2021**

   Here, $ReportName$ is name of the report while $DD$- the day, $MMM$-the month and $YYYY$ is the year.




**CREATE REPORT-EXPORT PARAMETERS-FILE NAME PATTERN**

The below mentioned list of pre-defined tags can be used to create export file name pattern.

| **Tag** | **Description** |
|---|---|
| $ReportName$ | Returns the name of the report |
| $DD$ | Returns the day part of current system date. If system date is 01-Mar-2021, returns 01 |
| $MM$ | Returns the month part of current system date. If system date is 01-Mar-2021, returns 03 |
| $MMM$ | Returns the short form of month name of current system date. If system date is 01-Mar-2021, returns Mar |
| $YY$ | Returns the last 2-digit year part of current system date. If system date is 03-Mar-2021, returns 21 |
| $YYYY$ | Returns the 4-digit year part of current system date. If system date is 03-Mar-2021, returns 2021 |
| $HH$ | Returns the hour part of system date. If system date is 01-Mar-2021 10:30:50, returns 10 |
| $mm$ | Returns the minute part of system date. If system date is 01-Mar-2021 10:30:50, returns 30 |
| $ss$ | Returns the seconds part of system date. If system date is 01-Mar-2021 10:30:50, returns 50 |
| *$master-object-column-name$* | These tags are available only when master object is selected in report definition. All the master objects' dimensions are available as tags. For example, if it is CustomerMaster object and Cust_ID, CustomerName are its dimensions, then $Cust_ID$ and $CustomerName$ will be the tags. |

Here are few examples of export file name pattern based on pre-defined tags.

| **Input** | **Output** | **Description** |
|---|---|---|
| $ReportName$-$CustomerName$-$StatementDate$ | ABC Bank Report-Sam Smith-2019-03-20 | Report name – ABC Bank Report; Customer Name- Sam Smith; Statement Date(when the statement was prepared |

| | | |
|---|---|---|
| | | and issued)- 20th of March,2019 |
| $ReportName$-$Cust_ID$-$Card_Number$ | ABC Bank-1113333-************1234 | Report name – ABC Bank; Customer ID – 1113333; Card Number - ************1234 |
| $ReportName$:$State$-$City$-$DD$-$MM$-$YY$ | ABC Bank Report:Arizona-Cleveland-28-05-21 | Report name- ABC Bank Report; State- Arizona; City-Cleveland; DD- day; MM(month in 2 digits)-05; YY(last 2 digits of the year)-21 |
| $ReportName$-$DD$:$MMM$:$YY$ | ABC Ledger-28:Sep:21 | Report name – ABC Ledger; DD-day; MMM(first 3 alphabets of the month)-Sep; YY(last 2 digits of the year)-21 |
| ABC Pharma-$ReportName$-$YYYY$ | ABC Pharma-Annual Report-2021 | Report name – Annual Report; YYYY-2021 |

4. After completing the above procedure of export parameters, the user can opt to: -
    - Click the **NEXT** button to move to next step.
    - Click the **CANCEL** button to cancel and abandon the operations.
    - Click the **BACK** button to move back to previous step of Create report Wizard.

### 3.1.9 Save Report

In the final step of Create report Wizard, the user can select the appropriate folder to save the report.

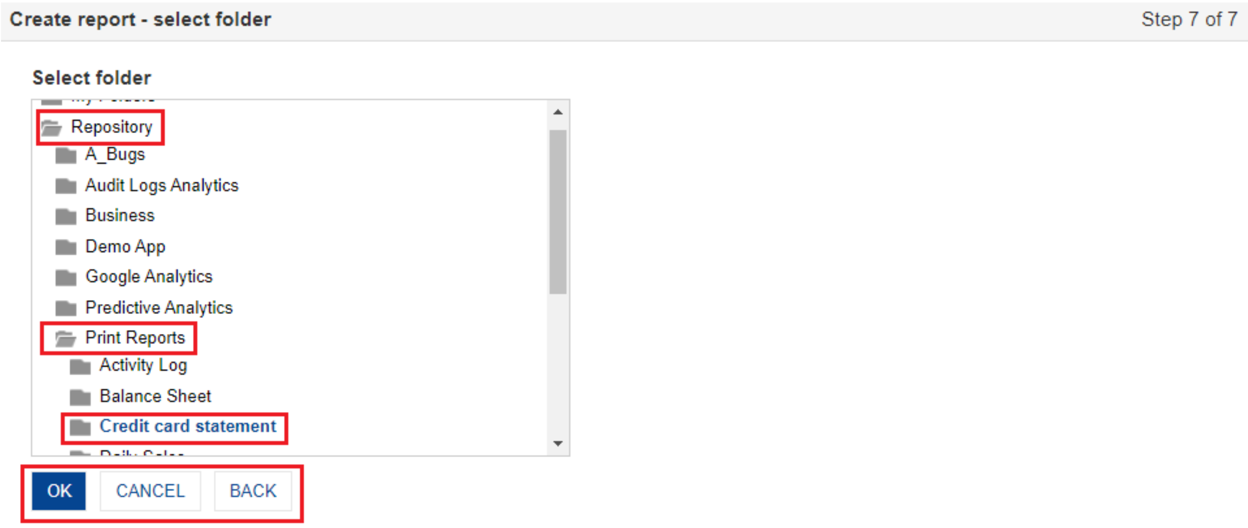
**About this task**

Use the following procedure to save the report.

**Procedure**

1. In this step, the system displays **Select folder** option with two folders namely, **My folder** and **Repository**. The user can select the folder and appropriate sub-folder to save the report.
   In the example of credit card statement, user can select the location for saving the report in the below mentioned manner.
   **Select folder>Repository>Print Reports>Credit card statement**
   And then, users who have access to this report will be able to load and view this report from this repository location.

2. After the selection of the location, the user can opt to: -
    - Click the **OK** button to save the report.
    - Click the **CANCEL** button to cancel and abandon the operations.
    - Click the **BACK** button to move back to previous step of Create report Wizard.




**CREATE REPORT – SAVE REPORT – SELECT FOLDER**

## 3.2 Report Management

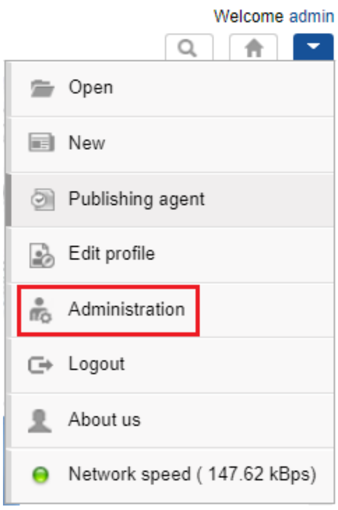
Administrator users can perform various Report management operations on the reports displayed in Report repository. Any administrator user can create, edit, delete, manage permissions etc. from report repository.

### About this task

Use the following procedure to perform required operation in the Report repository i.e. the list of reports saved in the system.

### Procedure

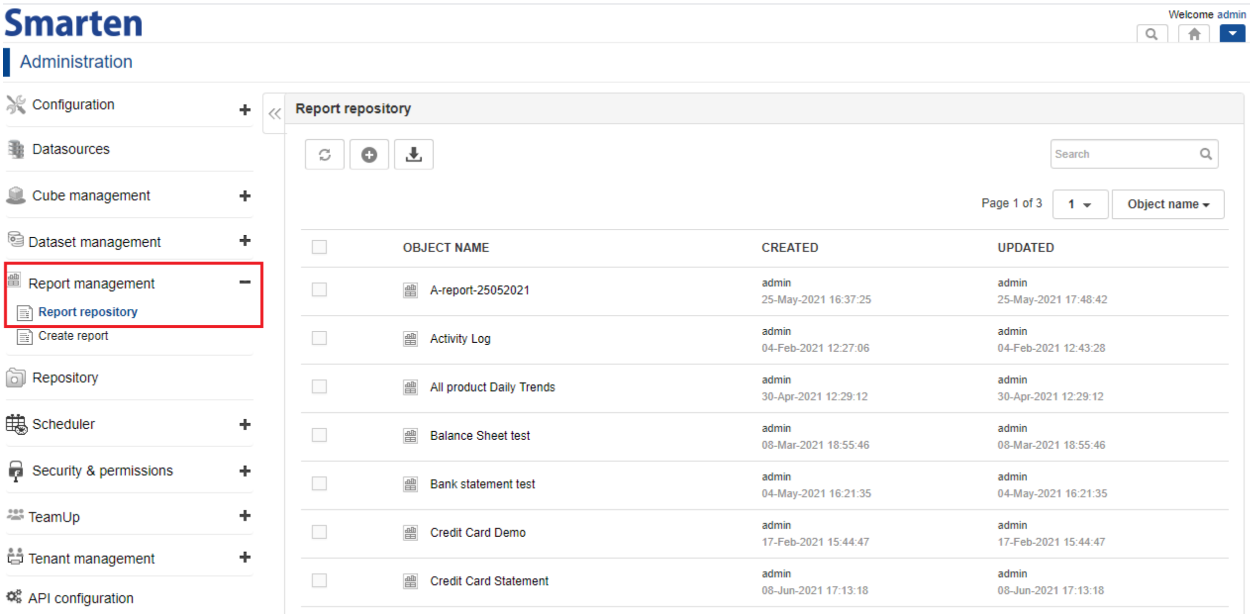
1. The administrator user can click on **down arrow** icon in the upper-right corner to select **Administration** in the Main menu.




**SMARTEN-ADMINISTRATION INTERFACE**

2. On the left navigation pane, click on **Report management>Report repository**.

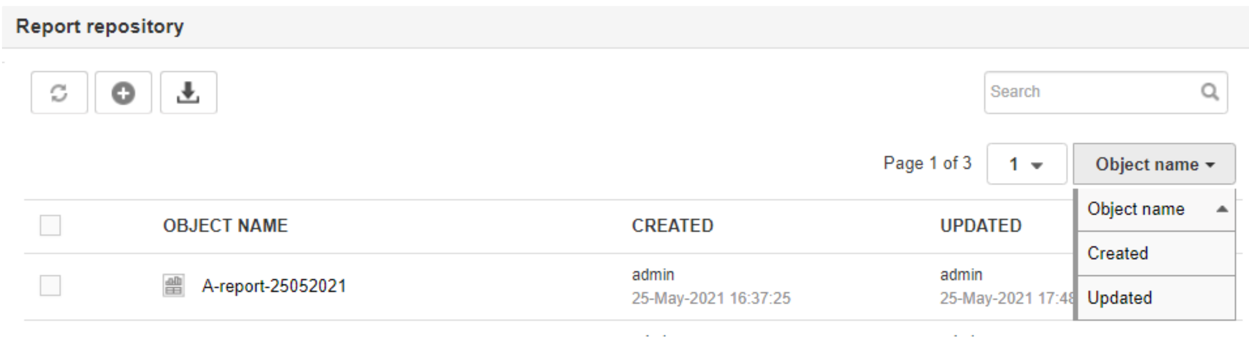
   The system will display the following page.




**ADMINISTRATION-REPORT MANAGEMENT-REPORT REPOSITORY**

The administrator user can move between pages that display list of reports, search for any report or view the created or updated reports.

- If the administrator user wants to search a report from a long list of reports, name of that report can be typed in **Search** field located on upper-right corner.
- From the **Page** list, select an option to navigate to the selected page number.
- Sort the objects based on the object name, the date they were created, and the date they were last modified by selecting an option from the list adjacent to the **Page** list.




**REPORT REPOSITORY OBJECT DETAILS**

## 3.2.1 Refresh

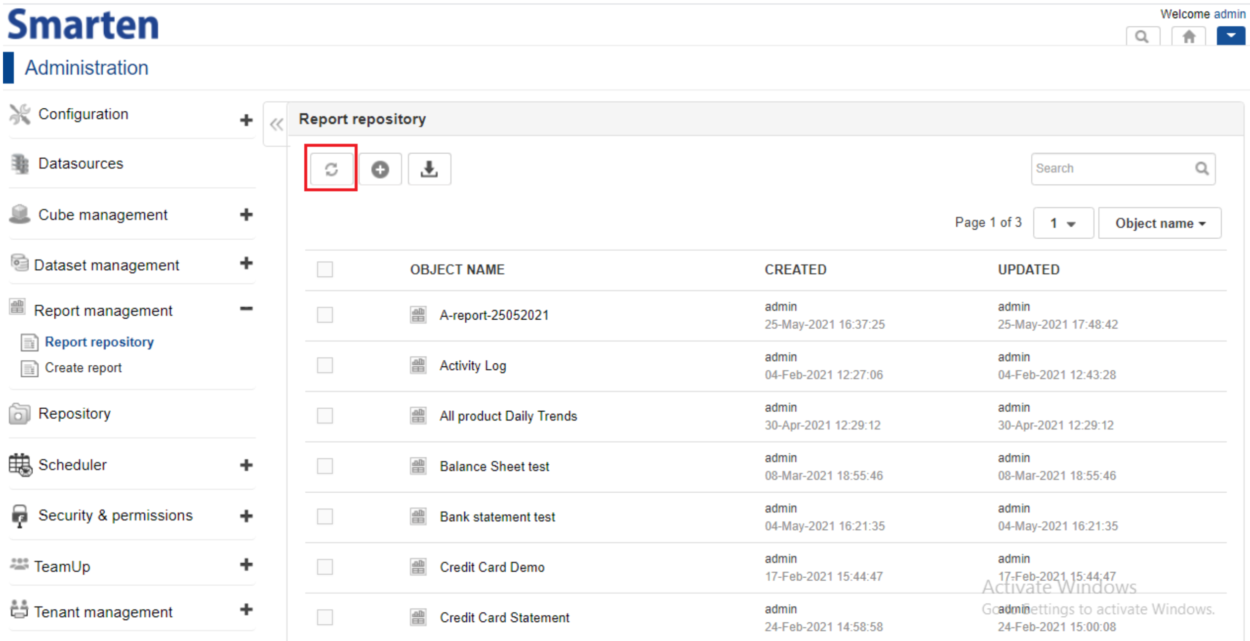
This feature enables administrator user to refresh report list or Report repository with the latest status.

### About this task

Use the following procedure to refresh the Report repository.

### Procedure

1. In **Report Repository**, click the **Refresh** icon on the top of report list.



REFRESH ICON IN REPORT REPOSITORY

## 3.2.2 Edit Reports

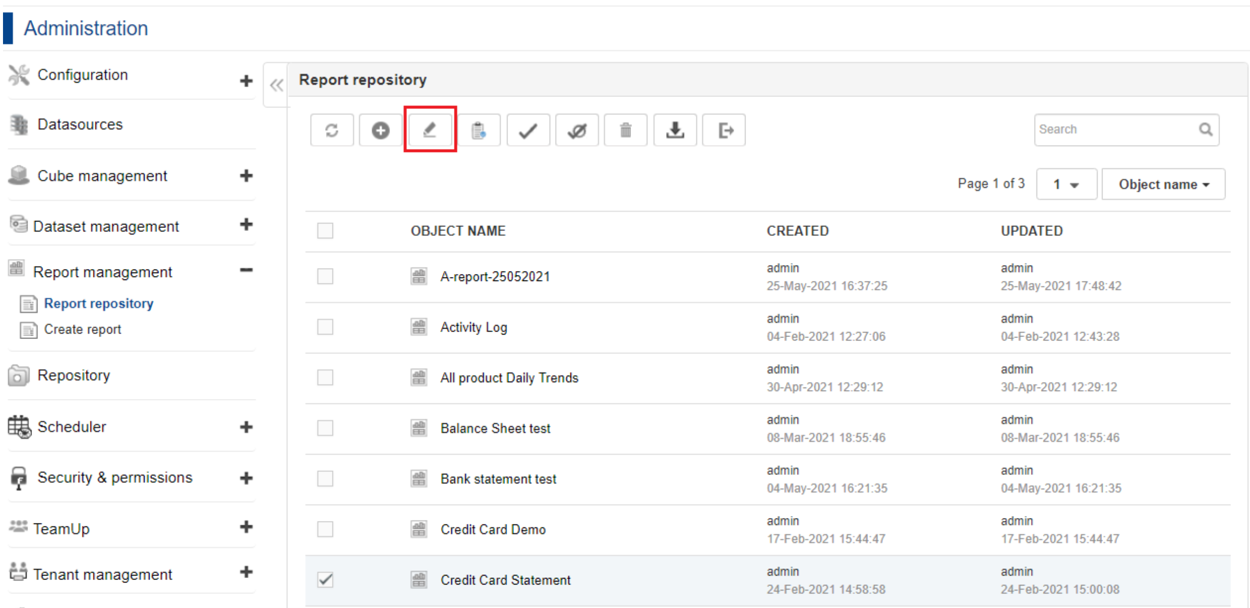
This feature enables administrator user to edit Report. The administrator user can change the name, description, and other attributes of the report.

### About this task

Use the following procedure to edit Report repository.

### Procedure

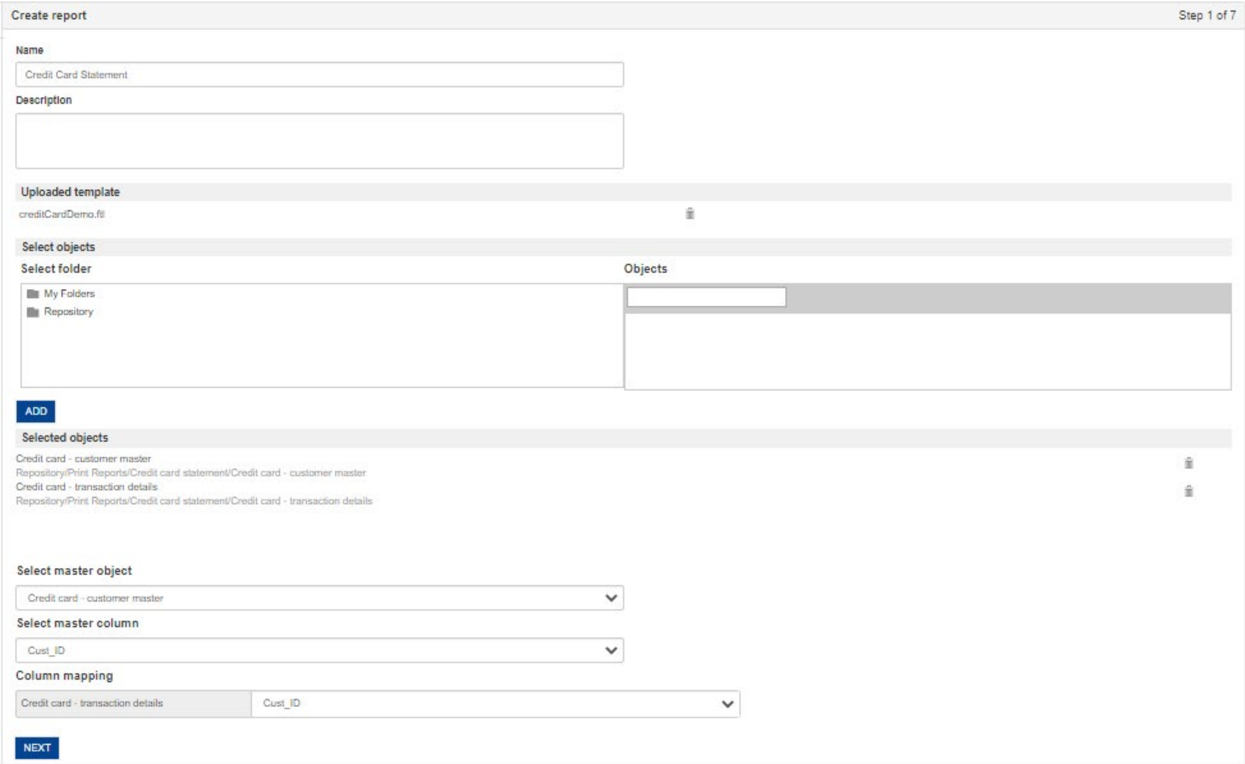
1. In the **Report repository**, select the check box adjacent to the report which you want to edit.
2. Click the **Edit** icon.



EDIT ICON IN REPORT REPOSITORY

3. The administrator user can provide a new name and description for the report in the **Name** and **Description** boxes of the selected report.

4. The remainder of the fields can also be edited as per requirement.




EDIT DIALOG BOX IN REPORT REPOSITORY

### 3.2.3 Permissions for the Reports

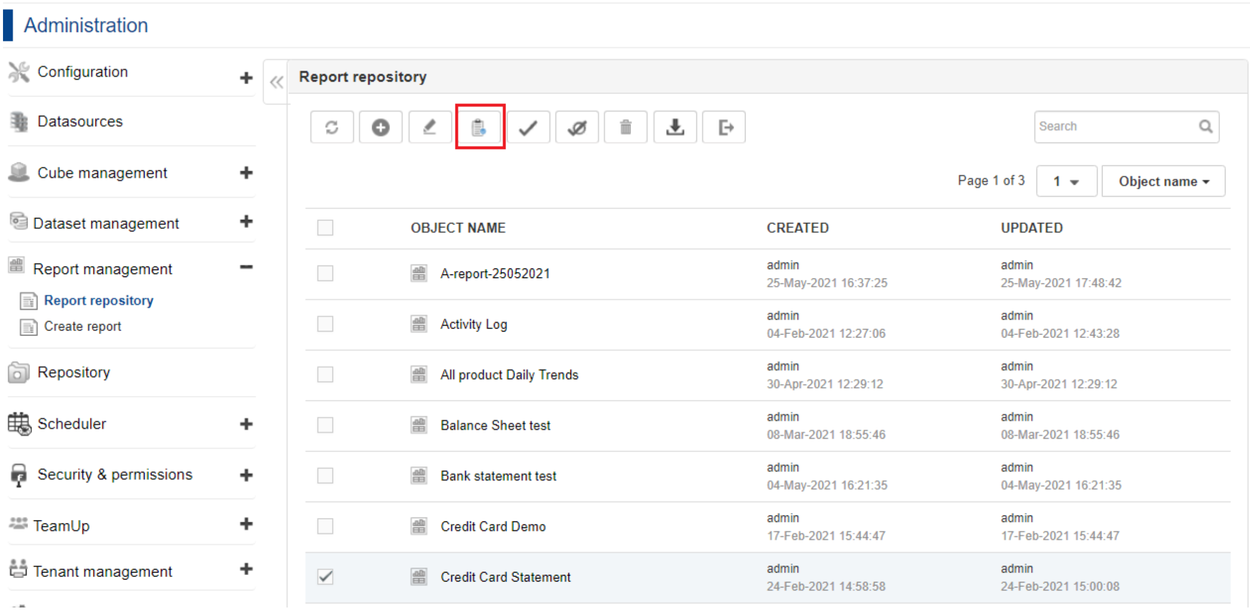
This feature enables administrator user to provide access rights for a report.

#### About this task

Use the following procedure to give access rights to admin or other users.

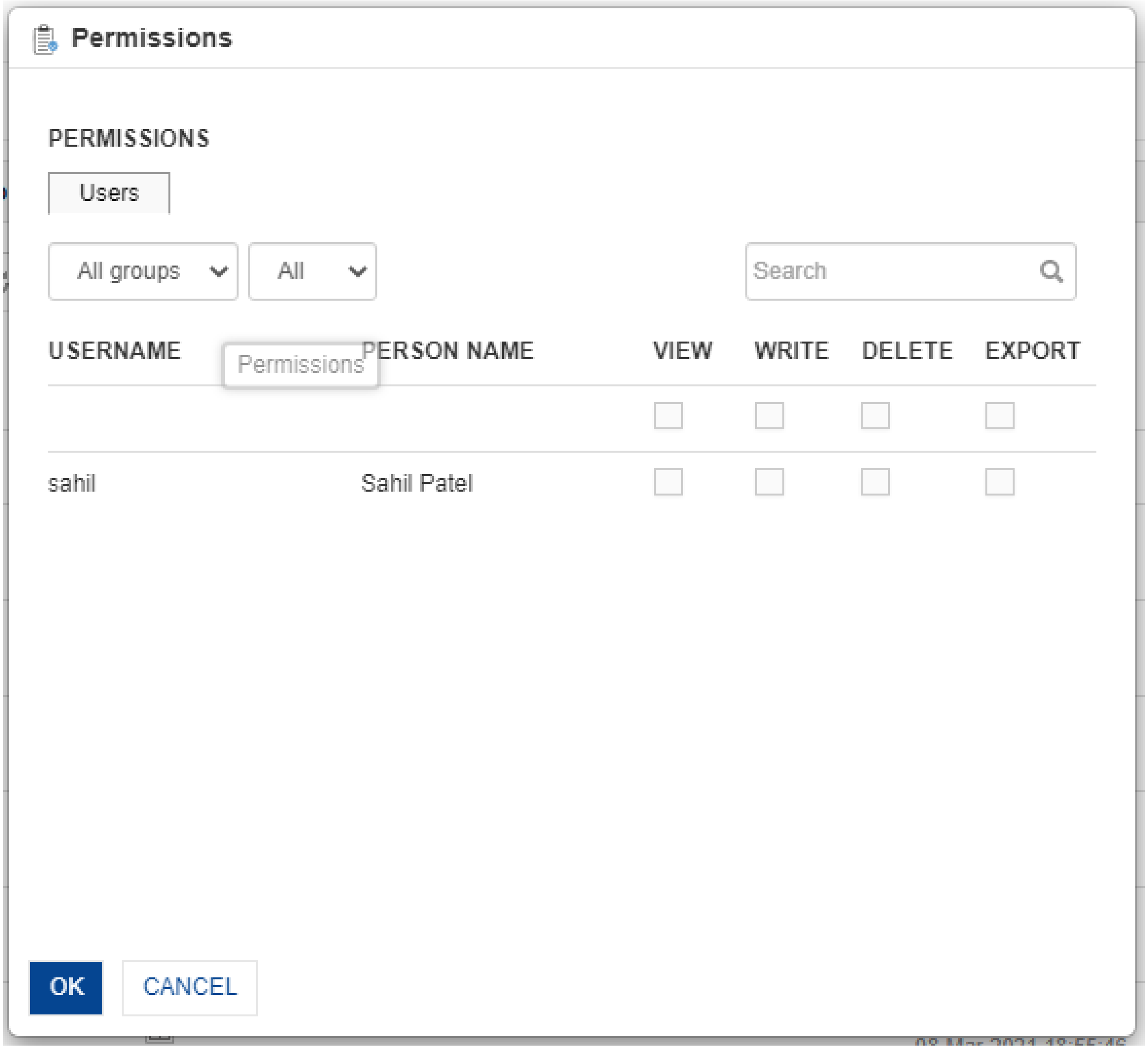
#### Procedure

1. In the **Report repository**, select the check box adjacent to the report for which you want to manage access rights.
2. Click the **Permissions** icon.




**PERMISSIONS ICON IN REPORT REPOSITORY**

3. The system will display the **Permissions** Dialog box.
4. In the **Users** tab, assign access rights to different users or group of users. By default, it is “All groups”.
5. Select the box under the **VIEW**, **WRITE**, **DELETE**, and **EXPORT** permissions columns to assign access to a user.
6. Click **OK** to confirm the permissions or click **CANCEL** to abandon the operation.




PERMISSIONS DIALOG BOX IN REPORT REPOSITORY

### 3.2.4 Mark Reports as IT Approved

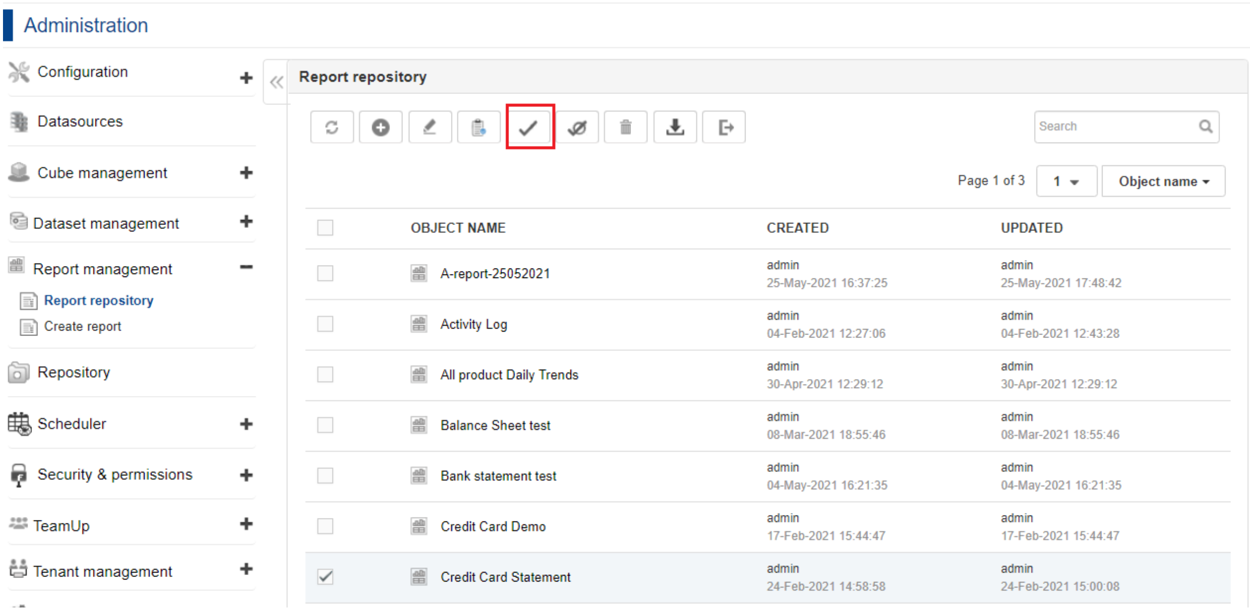
This feature enables administrator user or authorized IT staff to approve a report. Marking a report as IT approved certifies it for report quality and helps users in identifying quality report.

#### About this task

Use the following procedure to mark the report as IT approved.

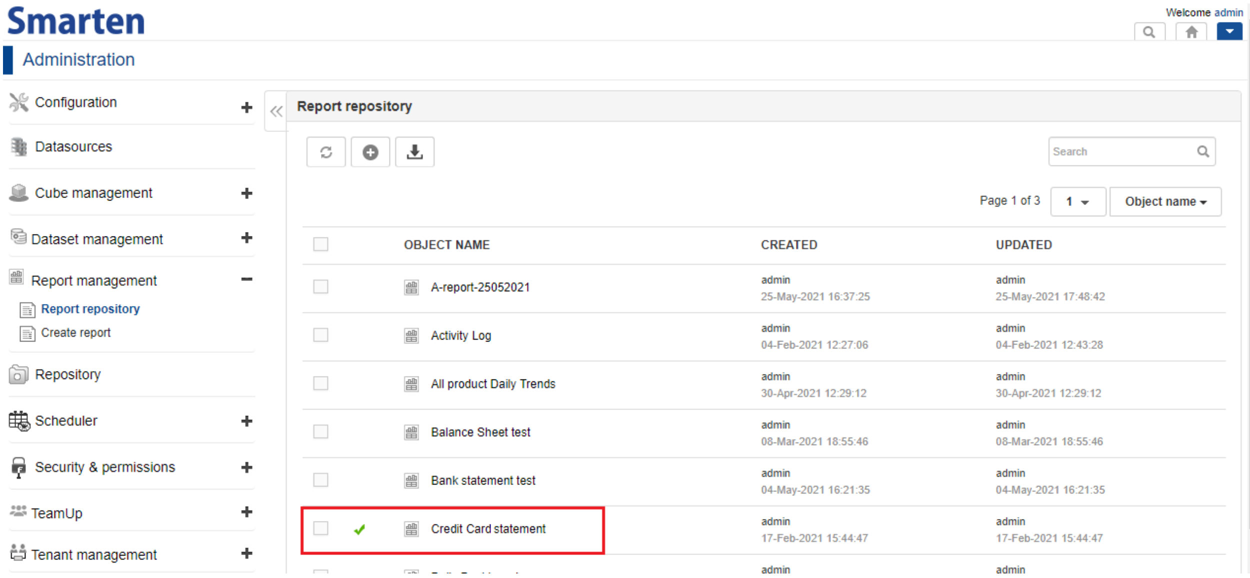
#### Procedure

1. In the **Report repository**, the authorized user (IT staff) can select the check box adjacent to the report to mark for approval.
2. Click the **Mark IT Approved** icon.




MARK IT APPROVED ICON IN REPORT REPOSITORY

The system marks the report as IT approved and displays a check symbol adjacent to the report.




MARK IT APPROVED REPORT IN REPORT REPOSITORY

## 3.2.5 Unmark Reports as IT Approved

This feature enables administrator user or authorized IT staff to unmark the reports that are marked as approved.

### About this task

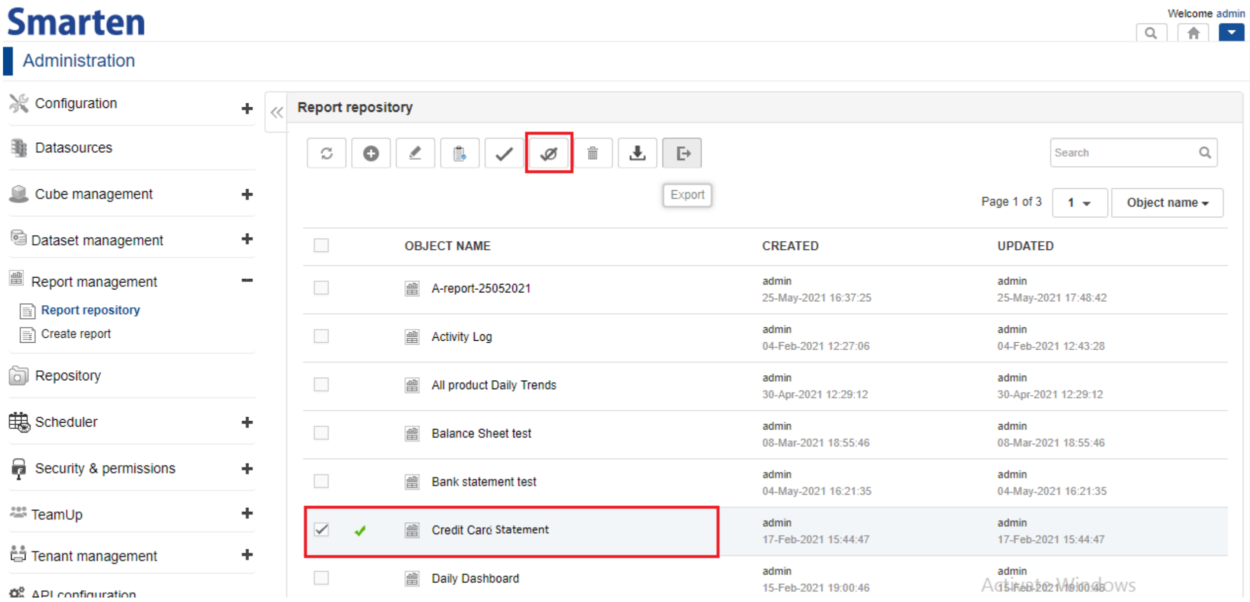
Use this task to unmark a report that is marked as IT approved.

### Procedure

1. In the **Report repository**, the authorized user (IT staff) can select the check box adjacent to the report to unmark for IT approval.

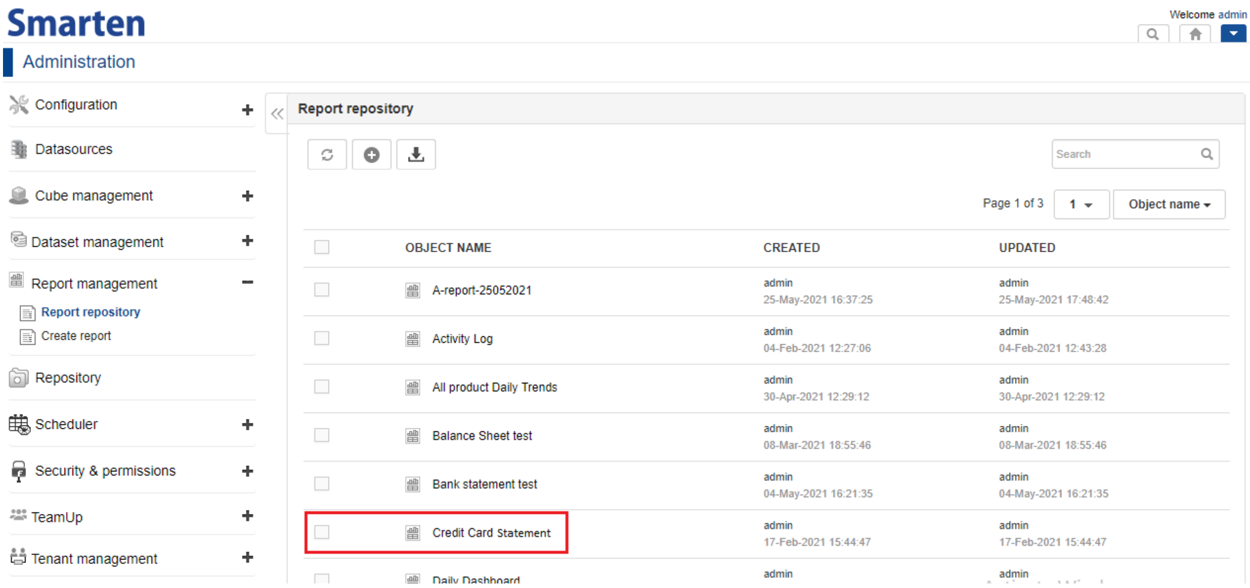
2. Click the **Unmark IT Approved** icon.

> Note:
> The user can only unmark the reports that are marked as IT approved.




**UNMARK IT APPROVEDICON N REPORT REPOSITORY**

The system unmarks the report as IT approved, and the check symbol adjacent to the report is no longer available.




**UNMARK IT APPROVED REPORT IN REPORT REPOSITORY**

### 3.2.6 Delete Reports

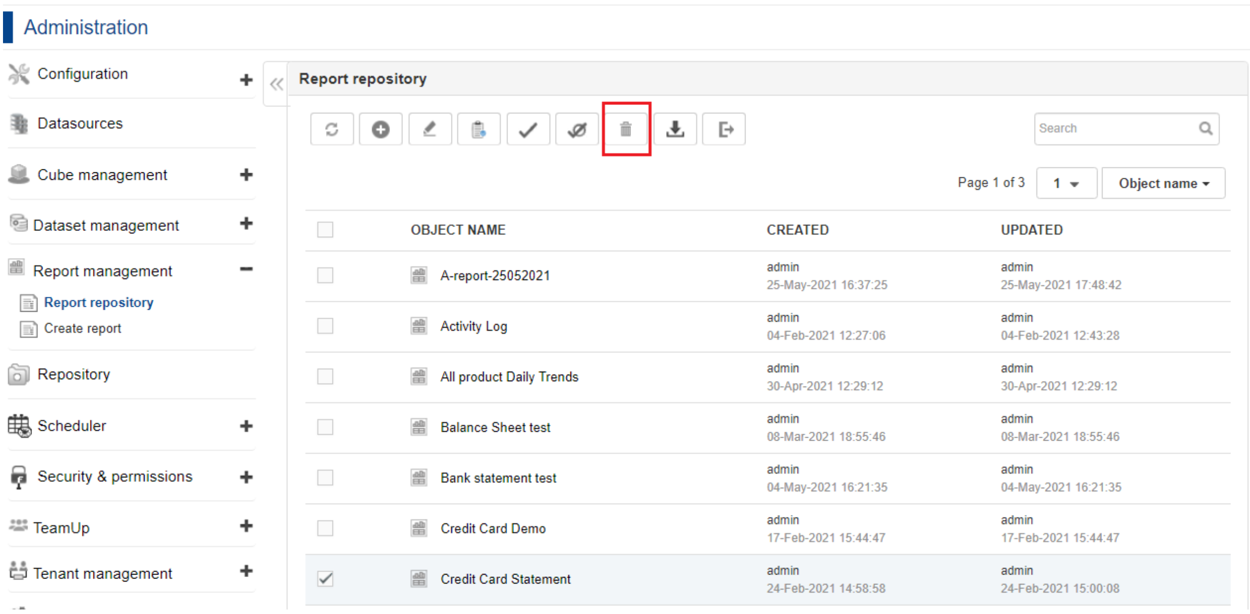
This feature enables the administrator user to delete a report. A deleted report is no longer available in the system.

#### About this task

Use the following procedure to delete a report.

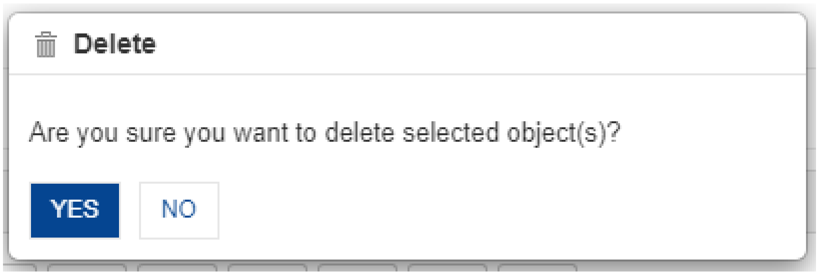
#### Procedure

1. In the **Report repository,** select the check box adjacent to the report which you want to delete.
2. Click the **Delete** icon.




**REPORT REPOSITORY-DELETE REPORT**

3. The system displays the **Delete** Confirmation Dialog box.
4. Click **YES** to delete the selected report.




**DELETE DIALOG BOX IN REPORT REPOSITORY**

### 3.2.7 Import

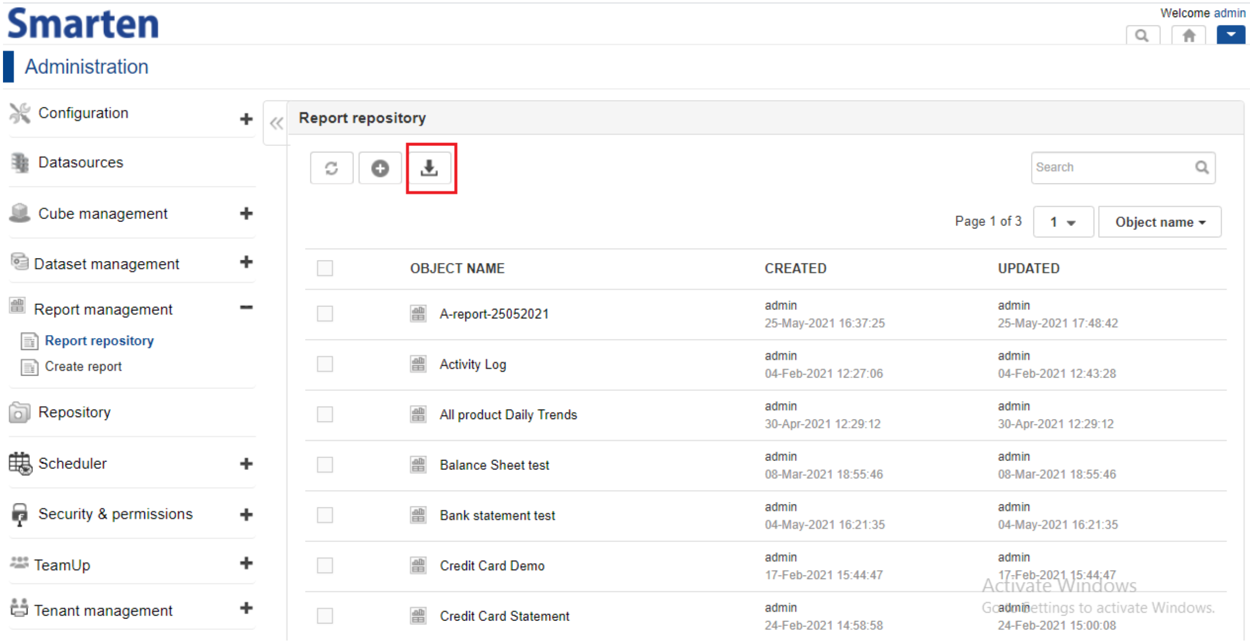
The administrator user can import an exported report file in XML format from the same instance or another instance of Smarten.

#### About this task

Use the following procedure to import a report.

**Procedure**

1. In **Report Repository**, click the **Import** icon on the top of report list.




**IMPORT ICON IN REPORT REPOSITORY**

2. The system displays the **Import object** Dialog box.
3. Click the Browse button.
4. The system displays the Open Dialog box.
5. Select the report file that has been exported and then, click Open.
6. If a report with the same name as of the imported report exists in the system, you can select the **Overwrite** checkbox, to allow the system to overwrite report in the system with the imported report.
7. If the **Overwrite** option is not selected, the system retains the existing report and adds the imported report with a new name. The new name of the report is appended with a numeric value in increasing order. For example, if you import ABC report and a report with the same name already exists, the system will rename the imported report as ABC_1. Similarly, if report with name ABC_1 exists, the system will rename the imported report as ABC_2.
8. Click **OK** to proceed or **CANCEL** to abandon the operation.


**IMPORT DIALOG BOX IN REPORT REPOSITORY**

> Note:
> After importing the report, the user needs to edit report and upload report template file.

### 3.2.8 Export Reports

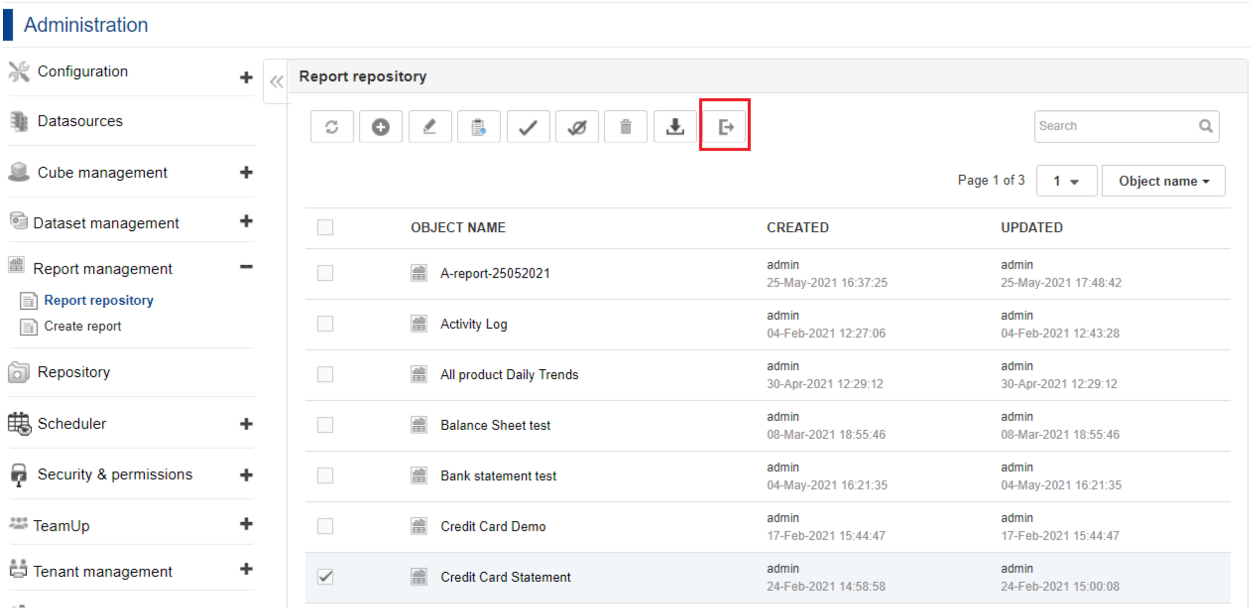
This feature enables the administrator user to export a report in XML format.

**About this task**

Use the following procedure to export a report.

**Procedure**

1. In the **Report repository,** select the check box adjacent to the report which you want to export.
2. Click the **Export** icon. The system will export the file in XML format.



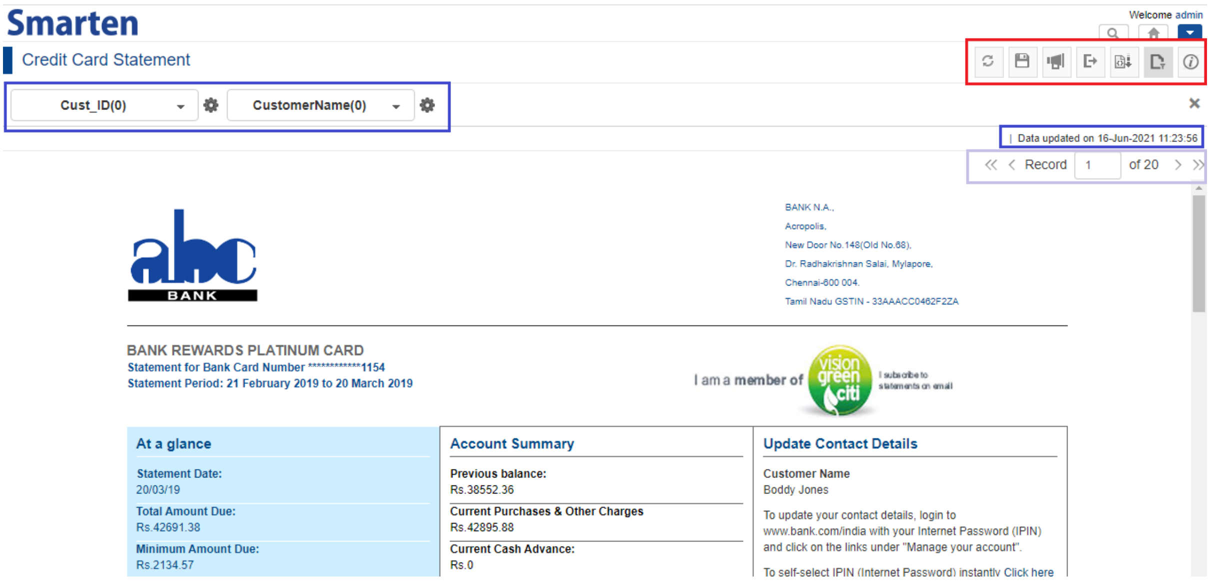

**EXPORT ICON IN REPORT REPOSITORY**

# 4 Operations on Reports

Once the report is saved, the user can open or view report from the repository and perform different operations using **Report Toolbar** to refresh, save, export or apply retrieval parameters and page filters.

## 4.1 Becoming Familiar with Reports

The system provides various panels and tools on the report.




**BECOMING FAMILIAR WITH REPORT**

1. **Report Toolbar**: - User can carry out various operations on the report with Report Toolbar.

**REPORT TOOLBAR**

| Icon | Icon name |
|---|---|
|  | Refresh |
|  | Save |
|  | Publish now |
|  | Export |
|  | Retrieval Parameters |
|  | Page filter |
|  | Object information |

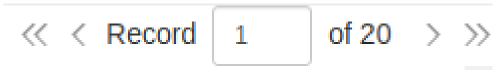
2. **Report Data updated on Bar**: - The Data updated on bar displays date and time according to the date and time of the latest data updated object.


**DATA UPDATED ON- BAR**

3. **Report Pagination Panel**: - The user can use Pagination panel for report navigation.

   - In a master-detail relationship based scenario, the system will display Pagination panel according to the master object data. In the example here, in a Credit card statement report, the Pagination panel displays records according to the master object – CustomerName. The user can navigate 20 customer records.

- In a scenario with no master-detail relationship, for example, a company ledger where a single object is u sed, the system will display Pagination panel according to the number of records in that object.
- In scenarios where multiple objects are selected and there is no master-detail relationship between the objects, the system will not display Pagination panel.




**REPORT PAGINATION PANEL**

4. **Report Page Filter Panel**: - After the Page filters are configured by the administrator user while creating the report, any authorized user can apply page filters with Page filter panel later.


**REPORT PAGE FILTER PANEL**

## 4.2 Refresh Reports

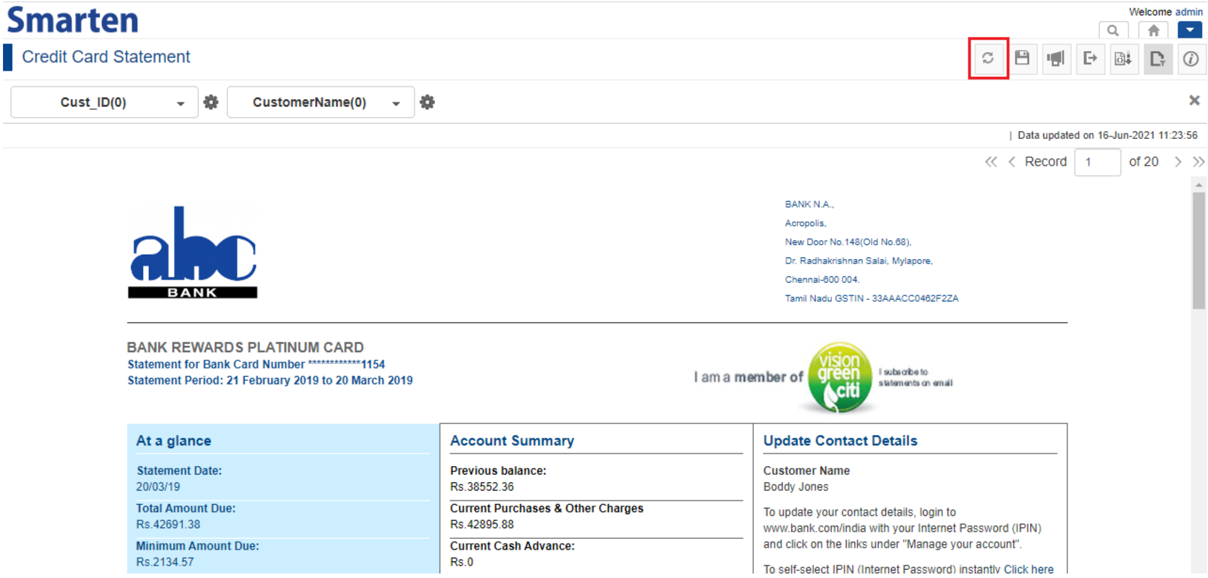
This option is used to refresh the report with latest data from the dataset.

### About this task

Use the following procedure to refresh the report with latest data from dataset.

### Procedure

1. In the **Repository**, open the desired report.
   For example, click **Repository>Print Reports>Credit card statement**
   The system displays the selected report.
2. In the Report Toolbar, click the **Refresh** icon.




REFRESH ICON IN REPORT

## 4.3 Save Reports

This option is used to save applied filters in the report. Whenever the user opens the report the next time, the system will display the saved report with applied filtered values.

### About this task

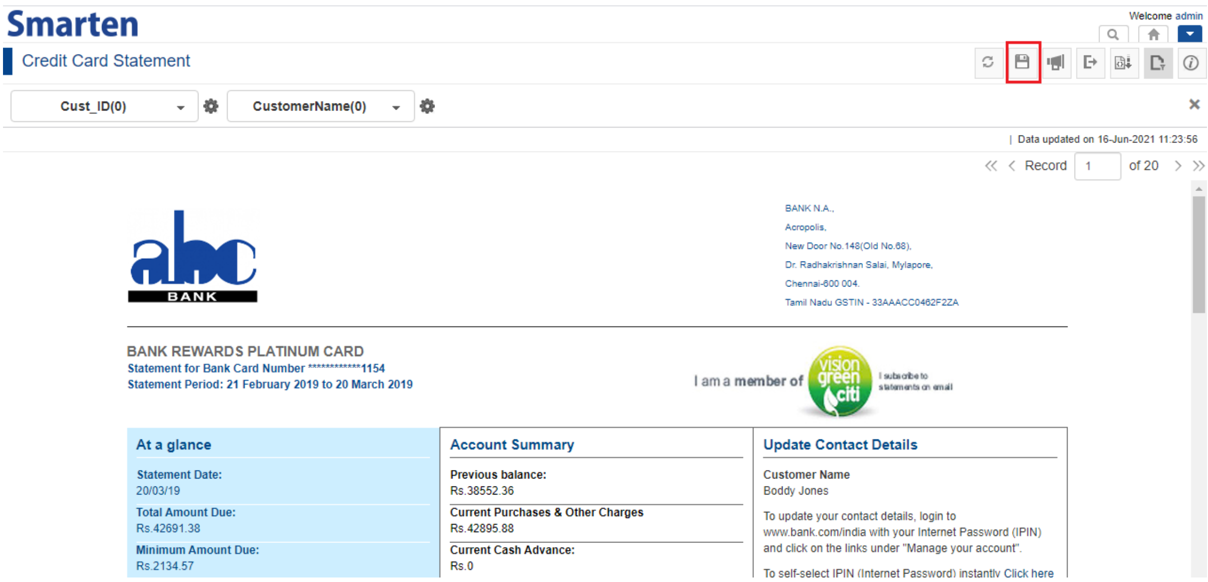
Use the following procedure to save the report with applied filters.

### Procedure

1. In the **Repository**, open the desired report.

   For example, click **Repository>Print Reports>Credit card statement**

   The system displays the selected report.
2. In the Report Toolbar, click the **Save** icon.




SAVE ICON IN REPORT

## 4.4 Publish Reports

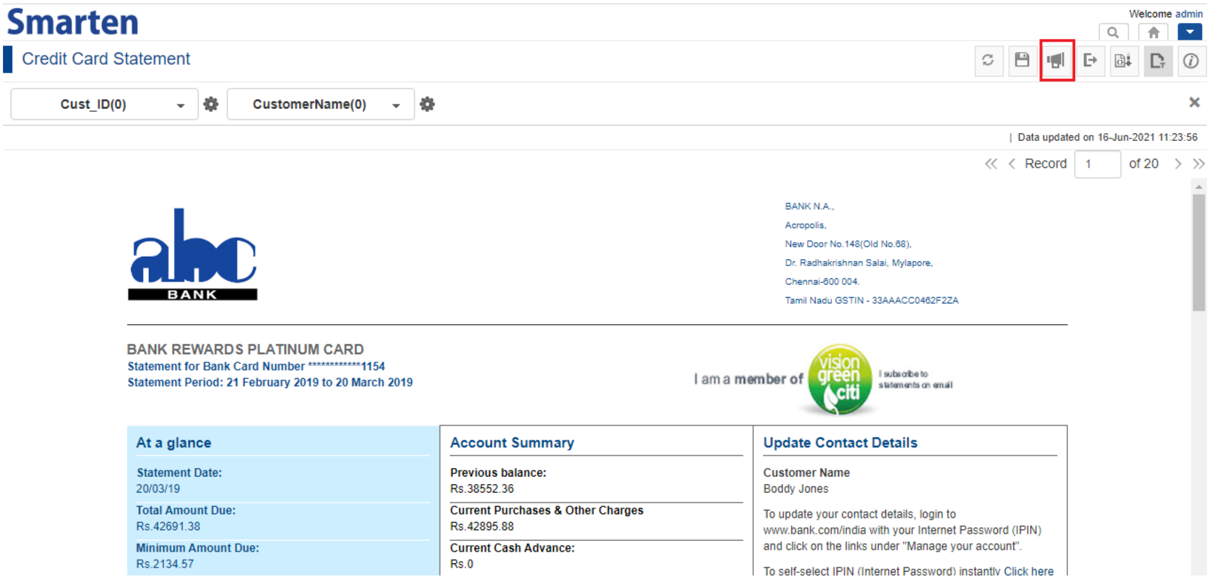
The user can publish report on the fly with the use of **Publish Now** option. This option is used to publish report via email or/and in the folder (as defined under administrator settings).

### About this task

Use the following procedure to publish the report via email or/and save in the appropriate folder (as per administrator setting).

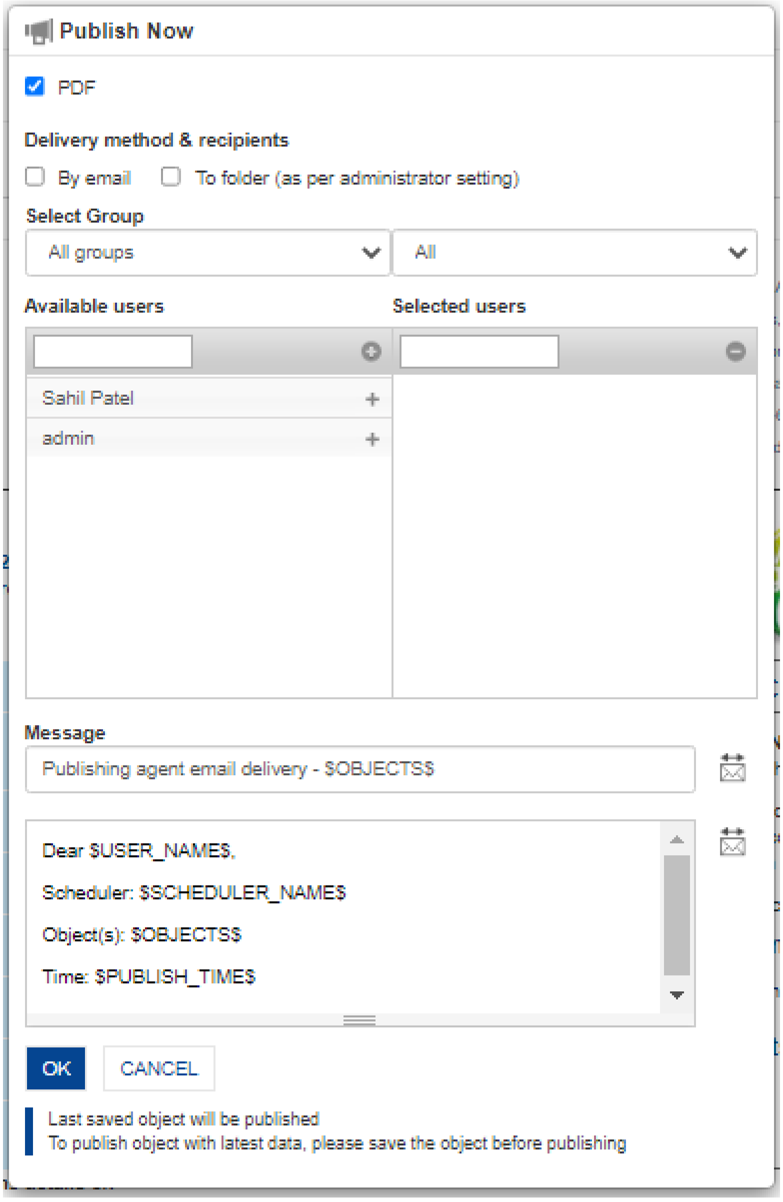
### Procedure

1. In the **Repository**, open the desired report.
   For example, click **Repository>Print Reports>Credit card statement**
   The system displays the selected report.
2. In the Report Toolbar, click the **Publish now** icon.




**PUBLISH NOW ICON IN REPORT**

3. In the **Publish now** Dialog box, the system will display PDF format by default.
4. In the **Delivery method & recipients** section, select the checkbox(es) (by email and to folder).
5. In the **Select group** section, select the group from the drop-down list. By default, it is “All groups”.
   The system displays the list of active users in the **Available users** column according to the group selected. This list is displayed as per access rights policy defined by Administrator.
6. In the **Available users** column, select the users.
   The system displays the selected users in the **Selected users** column.
7. In the **Message** box, enter the message.
8. Click **OK** to proceed or **CANCEL** to abandon the operation.




PUBLISH NOW SETTINGS IN REPORT

## 4.5 Export Reports

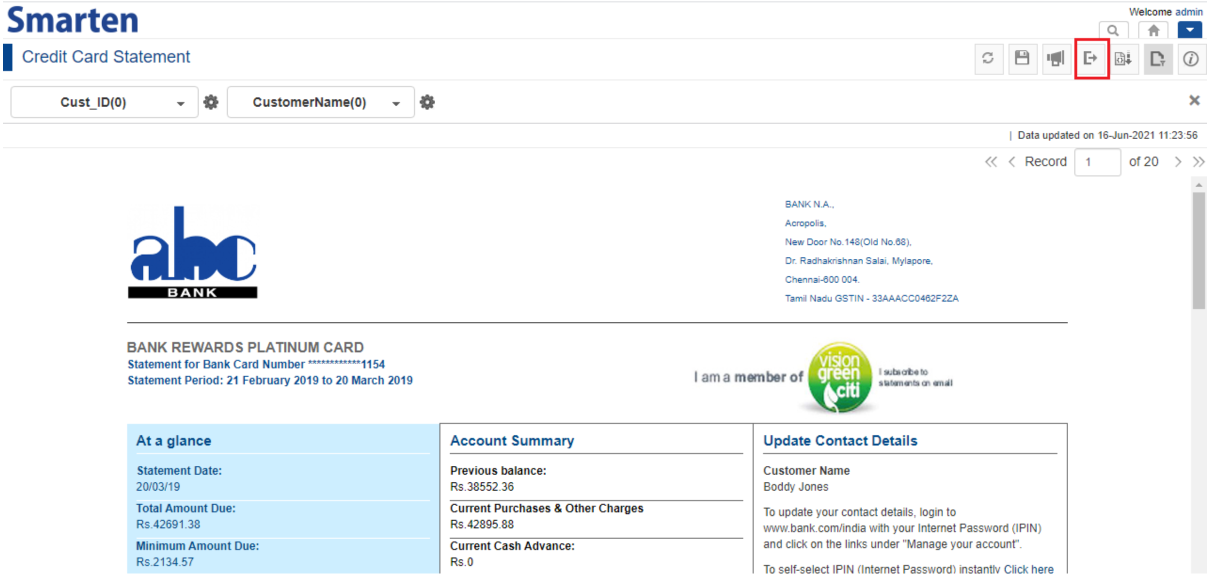
User can export report in PDF format as per requirements.

### About this task

Use the following procedure to export a report.

### Procedure

1. In the **Repository**, open the desired report.
   For example, click **Repository>Print Reports>Credit card statement**
   The system displays the selected report.
2. In the Report Toolbar, click the **Export** icon.




**EXPORT ICON IN REPORT**

3. In the **Export** Dialog box, click **OK** to proceed or **CANCEL** to abandon the operation.


**EXPORT DIALOG BOX IN REPORT**

3.1. If the file is small i.e. the file has few records, for example, a company ledger or profit and loss statement, the system will download the exported file in PDF format.

3.2. If the system: -

- generates a file for each record in a master-detail kind of scenario, for example, Credit card statement
- generates a file for all records (if large in number) in all kinds of scenarios
- automatically breaks a very large file into chunks.

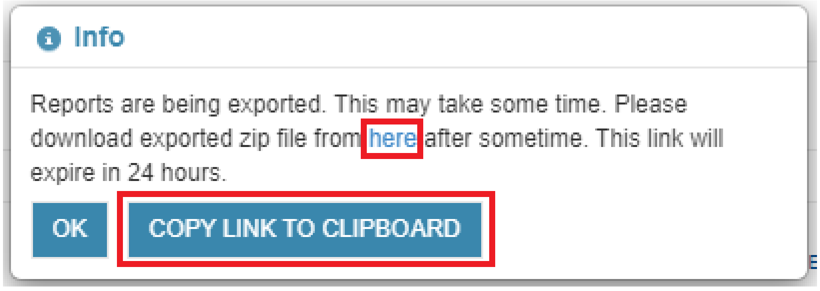
Then, in such scenarios, the system displays a Dialog box on clicking **OK** in the **Export** Dialog box. It guides the user to download the link to view the exported file(s).

3.2.1. Click **COPY LINK TO CLIPBOARD**. User can paste the link on another browser window to download the zip file and view information.

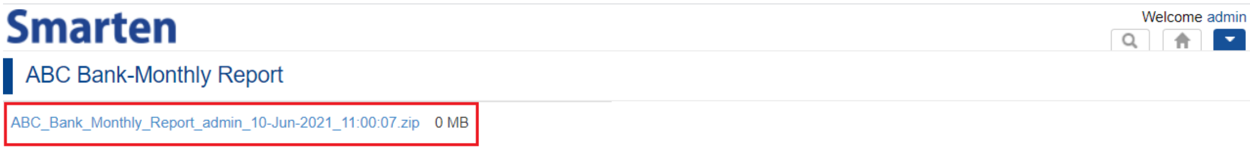
3.2.2. The user can directly open the browser window from this Dialog box by clicking on "**here**" link, and then, download the zip file and view information.

Once the file is exported and ready to download, the system sends an email to notify the user about the download link.

3.2.3 Click **OK** to hide the Dialog box.




DIALOG BOX TO DOWNLOAD LINK




LARGE FILE EXPORTED IN ZIP FORMAT

## 4.6 Apply Retrieval Parameters

Once the retrieval parameters are configured by the administrator user, any authorized user can filter the report by applying retrieval parameters later.

### About this task

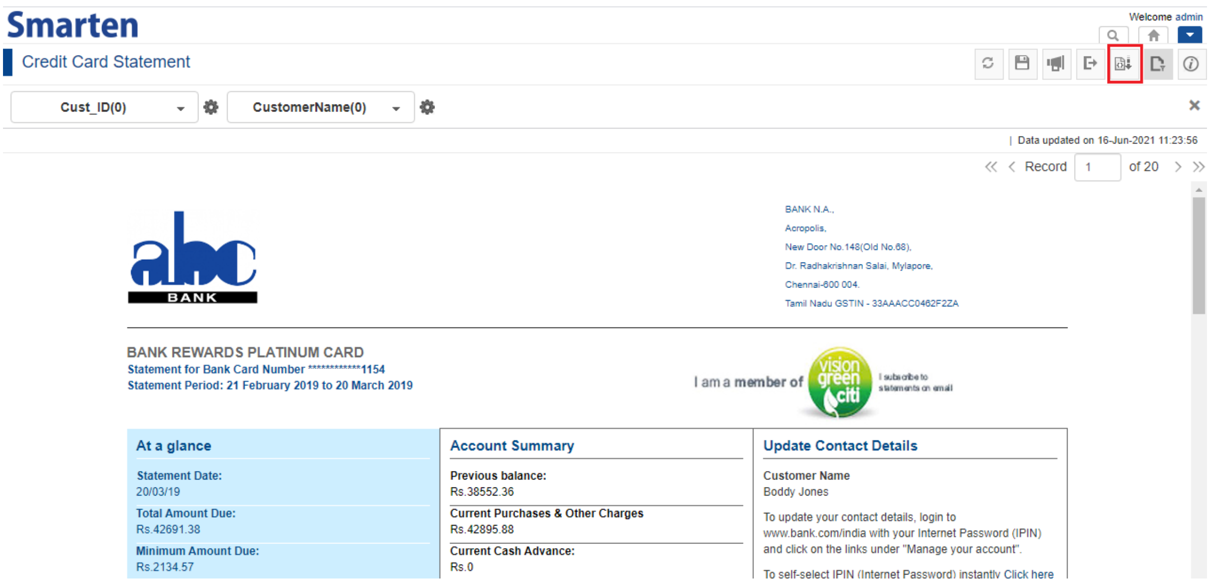
Use the following procedure to apply retrieval parameters for the report.

### Procedure

1. In the Repository, open the desired report.

   For example, click **Repository>Print Reports>Credit card statement**

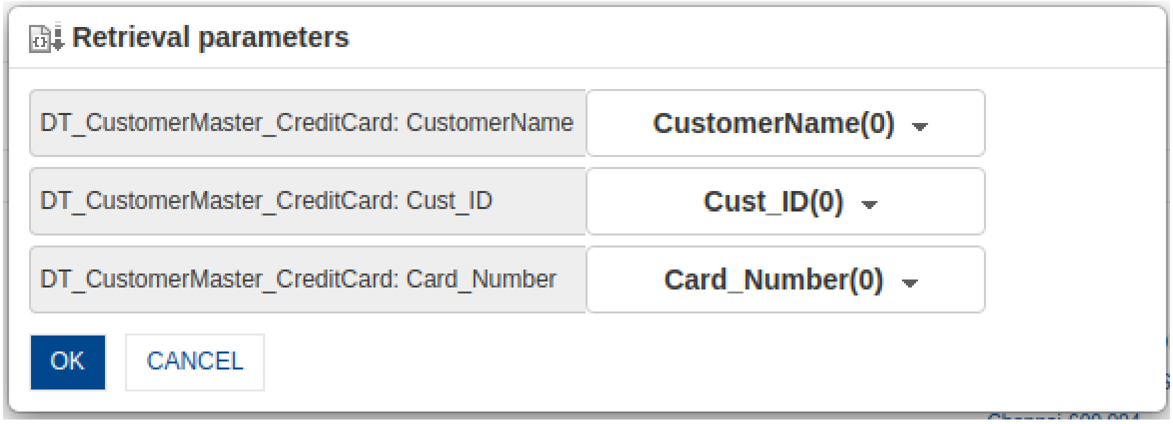
   The system displays the selected report.
2. In the Report Toolbar, click the **Retrieval parameters** icon.




RETRIEVAL PARAMETERS ICON IN REPORT

The system displays **Retrieval parameters** Dialog box**.**

3. Select the value of retrieval parameters as per requirement.
4. Click **OK** to proceed or **CANCEL** to abandon the operation.




RETRIEVAL PARAMETERS DIALOG BOX IN REPORT

## 4.7 Apply Page Filters

Once the page filters are configured by the administrator user, any authorized user can apply page filters to filter the report later.

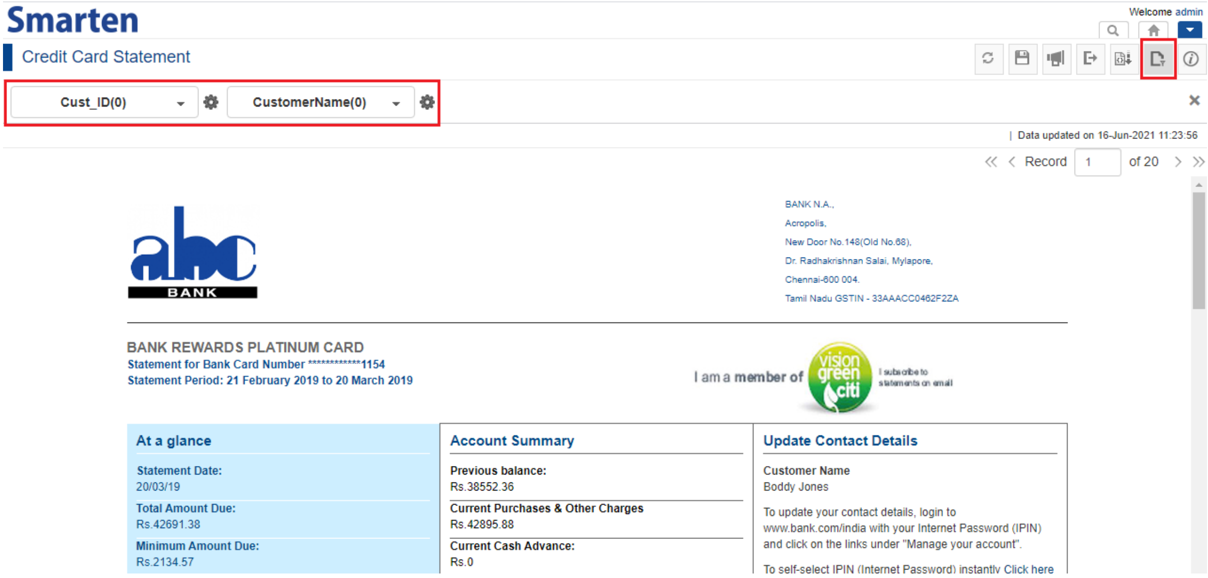
### About this task

Use the following procedure to apply page filters for the report.

### Procedure

1. In Repository, select the desired report.

   For example, click **Repository>Print Reports>Credit card statement**
   The system displays the selected report.
2. The system will display page filters on the topmost part of report. If the page filter panel is not visible, click the **Page filter** icon on the toolbar. It is a toggle icon and will show / hide page filter panel.

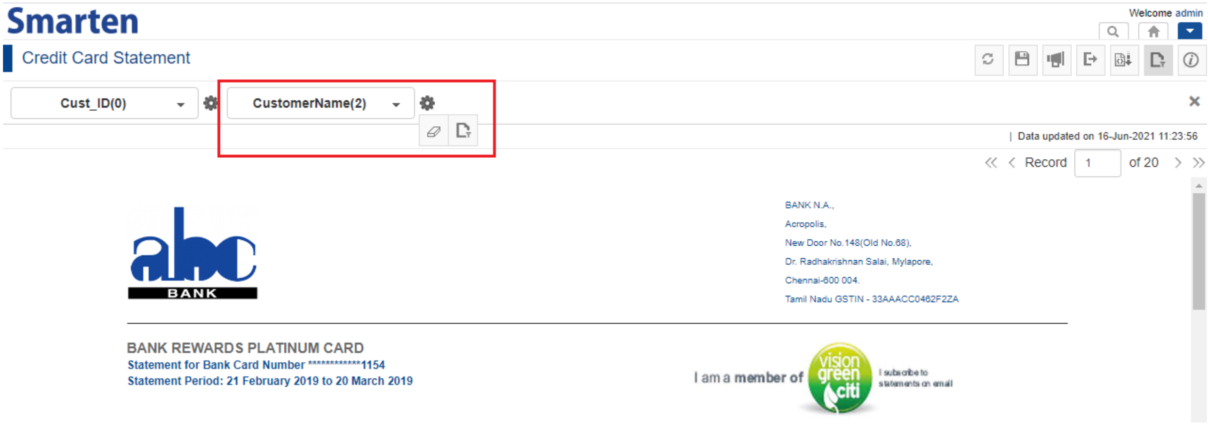



**PAGE FILTER PANEL AND PAGE FILTER ICON IN REPORT**

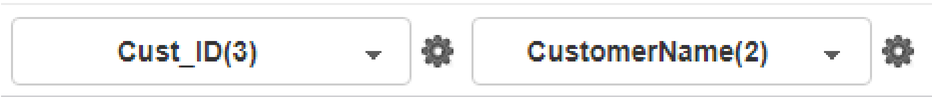
3. To apply page filter, simply enter values in the text fields of page filter. Here, two filters namely, Cust_ID and CustomerName are provided. The user can make changes in both or any one of the filters as per requirement.


**PAGE FILTER-SELECTING FILTER CRITERIA**

4. Beside the page filter text box, click the **Setting** icon
   The system displays two icons: **Clear** and **Advanced**.
5. Click **Clear** to remove the page filter values.
6. Click the **Advanced** icon.
   The system displays the **Advanced filter** Dialog box based on column data type.




REPORT: PAGE FILTER IN THE PAGE FILTER PANEL BEFORE APPLYING FILTER CONDITION




REPORT: PAGE FILTER IN THE PAGE FILTER PANEL AFTER APPLYING FILTER CONDITION

## 4.8 Object Information

Object information displays general information about objects used in the report.

### About this task

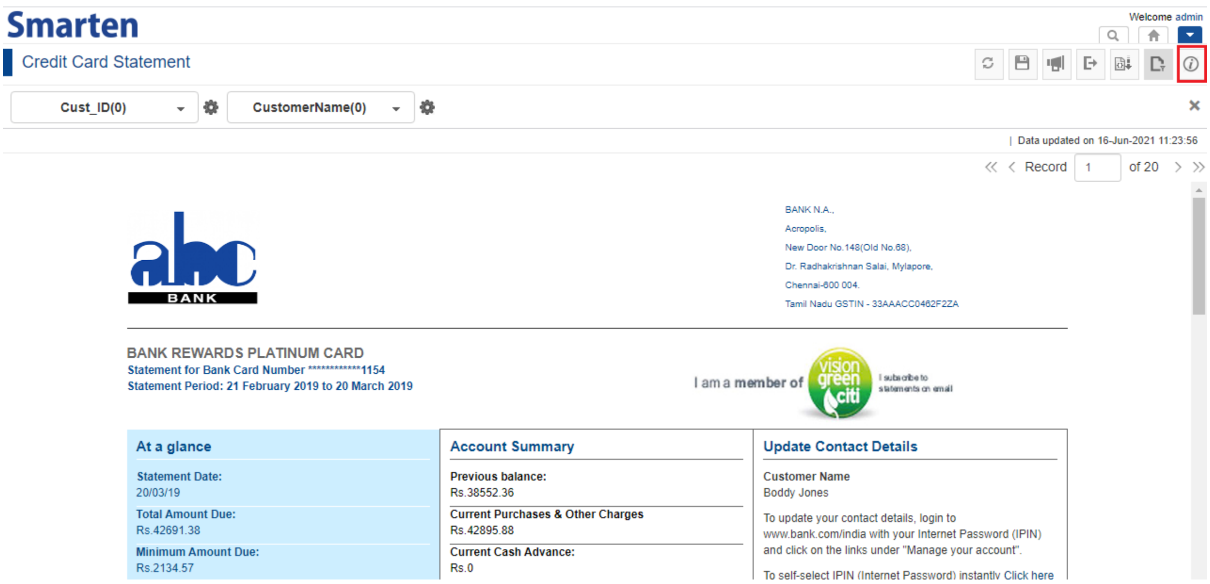
Use the following procedure to know about object information.

### Procedure

1. In Repository, select the desired report.

   For example, click **Repository>Print Reports>Credit card statement**

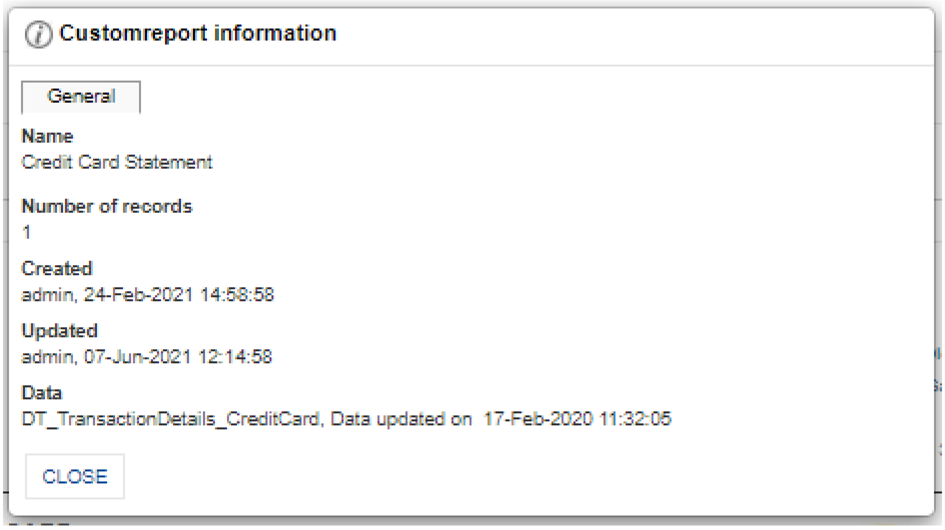
   The system displays the selected report.
2. Click the **Object Information** icon.




OBJECT INFORMATION ICON IN REPORT

The system displays the **Object information** Dialog box with information about the object displayed in **General** tab.

3. Click **Close** after viewing the information.




**OBJECT INFORMATION IN GENERAL TAB IN REPORT**

## 5 Product and Support Information

Find more information about Smarten and its features at www.smarten.com
Support: support@smarten.com
Sales: sales@smarten.com
Feedback & Suggestions: support@smarten.com
Support & Knowledgebase Portal: support.smarten.com