# HP Select Audit Software

for the Windows® and HP-UX® operating systems

Software Version: 1.1

# Report Center User's Guide

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# Contents

# 1 Overview

The Report Center is a web application that can be used to perform the following tasks:

- End users can upload, publish, run, and arrange their Select Audit reports (RDL files).
- Developers can manage reports and Catalog items in the Library, and create new reports from existing reports or new queries.

The Report Center consists of two sections:

- A Developers Center, where you can test-run your reports and run sample reports.
- A main page, where you can manage Library items.

## Who is This Guide For?

The Report Center is for Select Audit administrators, developers and end users. The *HP Select Audit 1.1 Report Center User's Guide* is addressed to developers, and describes what users other than administrators can do. The admin user can access parts of the Report Center that others cannot.

➤ Depending on your permissions, you may not have access to everything described in this guide.

## What's in This Guide?

The chapters in this guide are listed in the following table:

**Table 1 Chapter Summary**

| Chapter | Description |
|---|---|
| Chapter 1, Overview | Gives an overview of the *HP Select Audit 1.1 Report Center User's Guide*. |
| Chapter 2, The Developers Center | Describes how to test reports. |
| Chapter 3, User Interface | Describes the user interface of the main part of the Report Center. |
| Chapter 4, Permissions | Shows how to set permissions for Report Center users. |
| Chapter 5, Schedules | Shows how to schedule automatic report output. |
| Chapter 6, Ad Hoc Wizard | Shows how to adapt the look and feel of the Report Center to your organization's standards. |

➤ See the *HP Select Audit 1.1 Release Notes* (`SAudit_release_notes_1.1.html`) on the Select Audit installation CD for known installation issues at the time of this release.

## The Select Audit Documentation Set

This manual refers to the following Select Audit documents. These documents are available on the Select Audit CD.

- *HP Select Audit 1.1 Administration Guide*, © Copyright 2006 - 2008 Hewlett-Packard Development Company, L.P. (`administration_guide.pdf`).
- *HP Select Audit 1.1 Installation Guide*, © Copyright 2006 - 2008 Hewlett-Packard Development Company, L.P. (`installation_guide.pdf`).
- *HP Select Audit 1.1 User's Guide*, © Copyright 2006 - 2008 Hewlett-Packard Development Company, L.P. (`user_guide.pdf`).
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- *HP Select Audit 1.1 Report Designer's Guide*, © Copyright 2006 - 2008 Hewlett-Packard Development Company, L.P. (`rpt_design_guide.pdf`)
- *HP Select Audit 1.1 Report Developer's Guide*, © Copyright 2006 - 2008 Hewlett-Packard Development Company, L.P. (`rpt_devel_guide.pdf`)
- *HP Select Audit 1.1 LDAP Configuration Guide,* © Copyright 2006 - 2008 Hewlett-Packard Development Company, L.P. (`ldap_provisioning.pdf`)

Online help is available with the Audit Portal.

# 2 The Developers Center

The Developers Center is only available to members of the **Select Audit Report Developers** group, a pre-defined user group. In the Developers Center, you can do the following:

- Test run your reports on the Report Center without publishing them.
- Install the Report Designer.
- Link to the Report Center Library view.

## Opening the Developers Center

You can access the Developers Center in two ways:

- Login to Select Audit and click **Reports** → **Reports Library**.
- Type the following URL in your browser:

  `http://<host>:<port>/scopeserver/index.jsp`

  where `<host>:<port>` is the address and port of your Report server.

  ➤ You must be a member of the Select Audit Report Developers group to access the Developers Center.

## Publishing Reports

Using the Report Center, you can upload reports, Catalog files, and other files to the Library. Catalog files are automatically validated when you upload them and they are available in the Library without any further steps. Report files that have been uploaded require an additional step, called Publishing, before they can be run. Publishing validates the report files and makes them generally available in the Library.

### Testing Unpublished Reports

The Developers Center lets you test an uploaded report before making it visible to others.

To use the Report Center's Developers Center to test-run a report, you must first copy the report to the following directory in your Select Audit installation:

```
WEBAPPS_HOME\scopeserver\WEB-INF\rdl
```

➤ You can create subdirectories of the `rdl` directory and copy the report into one of the subdirectories, if you wish.

You should always test run reports on a development server.

To test your report, type your report's complete filename in the **Select a File** field in the **Test Run** area and then click **Run**. If the report is in a subdirectory of `rdl`, use a relative path, for example:

```
my_sub_folder/myreport.rdl
```

You can also use a relative path on the file system, for example:

```
../my_folder
```

shares a common parent folder with the current directory.

# Installing the Report Designer

The Report Designer is a graphical Java-based tool that enables you to build and modify complete reports. See the *HP Select Audit 1.1 Report Designer's Guide* for more information about the tool.

To install the Report Designer, click **Install Report Designer** on the Developers Center page. The installer leads you through the installation process.

Make sure you have Java Web Start or JRE 1.5 installed before installing the Report Designer.

# Sample Reports

The Developers Center provides a number of sample reports. Click **View RDL** to see the RDL file associated with it.

# 3 User Interface

You can access the main Report Center page in three ways:

- Login to Select Audit and click **Reports** → **Reports Library**.
- Type the following URL in your browser:

  `http://<scopeserver>/scopeserver/servlet/scopecenter/`

  where `<scopeserver>` is the address of your Report server.
- If you are in the Developers Center, click **Back to Report Center**.

The Report Center main page consists of the following items:

- Navigation buttons.
- Toolbar buttons.
- A Folders view that lets you navigate through the Library file tree.
- A Contents view.

The **Toolbar** buttons and **Contents** view vary with the **Navigation** button you select.

## What Can You Do in the Report Center?

You can perform the following tasks using the Report Center:

- Run reports (RDL files) and inline or referenced PopChart (PCXML) files inside an RDL file. See Run/View on page 20.
- View already-run scheduled report output. See Run/View on page 20.
- Navigate through the Library. See Library on page 14.
- Search the Library for reports and other Library items. See Search on page 15.
- Upload and publish reports to the Library. See Upload on page 20 and Publish on page 20.
- Create and edit report metadata. See Properties on page 21.
- Create and edit report schedules. See Chapter 5, Schedules.
- Set permissions for reports and Catalog items. See Chapter 4, Permissions.
- Unpublish and delete reports from the Library. See Delete on page 22.
- Select your own start page as **Library**, **My Reports**, or **Search**.

➤ The administrator determines which tasks each developer and user can perform. Depending on the permissions that the administrator has set for you, you may not be able to perform some of the tasks listed above.

# Navigation Buttons

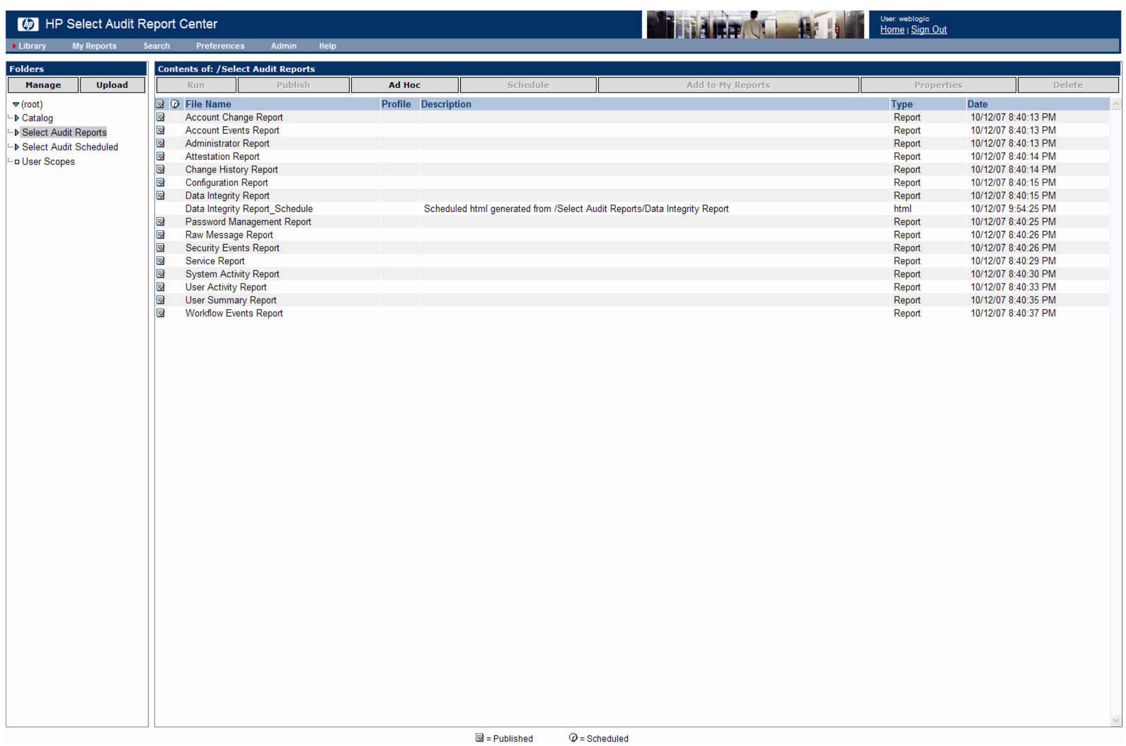
The **Navigation** buttons determine your view of the Report Center. The Report Center has four views:


- Library on page 14
- My Reports on page 15
- Search on page 15
- Preferences on page 18


If you are the admin user, the **Admin** view is also shown.

A small red arrow indicates the currently-selected view. Icons to the left of each report in the **Contents** view indicate whether a report has been published and whether it has schedules (see Chapter 5, Schedules).

**Figure 1 The Report Center**




## Library

The **Library** view is modeled after file browsers like Windows Explorer. The left pane contains an expandable navigation tree. The right pane contains the list of available reports, report output, and other Library files. Each of the Library entries contains the following information (left to right):

- An icon in the left-most column if the report is published.
- An icon if indicating whether the report has scheduled output.

- The file name.
- A drop-down list of the report's profiles, if any have been created.
- The description of the Library item.
- The item type (for example, `Report`, `xml`, `html`, `pdf`).
- The timestamp of the last modification.

The Library always contains a folder called **Catalog**, which contains the parameter, query, permission, PCMXL (PopChart), and theme files available through the Select Audit client tools (Report Designer and Query Designer).

## My Reports

The **My Reports** view shows a single window listing the Library files that you have previously selected using **Add to My Reports**.

## Search

Use the **Search** view to find a report or other Library file without browsing through the Library hierarchy. The **Help** link near the **Search** button provides more information on Query String syntax.

Like the Library view, the Search view has two panes. The **Search By** pane contains the fields that define your search criteria and the **Search Results** pane shows the matching Library files.

If you enter values in multiple fields in the **Search By** pane, all fields must match the file's metadata for the search to succeed. Once you have filled in all the fields, click **Search** to begin the search. Click **Clear** to clear the fields.

The Search view has the following text fields:

- Name
- Type
- Owner Name
- Keywords
- Query String

### Name

Type the name of the report that you are searching for. If the name is a substring of a report name, it will be designated as a match.

For example, the following string in the **Name** field:

```
sAl
```

would retrieve a report named:

```
James_Sales
```

If you select the **Exact Match** check box, substrings do not cause a match.

➤ Wildcard characters are not recognized.

The search is case insensitive.

## Type

Select whether you are looking for report files (`Report`), already-run scheduled static output (`Output`), interactive views of static data (`Saved Results`), or all files (`all`).

`Saved Results` is called **isr** in the Report server.

## Owner Name

Type the name of the files' owner. The entry must be an exact match, although the search is case insensitive.

## Keywords

Type any number of keywords associated with the report that you are looking for. Separate keywords with commas. All reports using any of the keywords that you list are shown. The match must be exact, but the search is case insensitive.

## Query String

Type a string to filter the returned reports. This string consists of one or more search expressions optionally combined with the Boolean operators `AND` (`&&`), `OR` (`||`), and `NOT` (`!`). You can also specify the associativity of these Boolean operators using parenthesis.

For example, to find all items in the Library that meet the following conditions:

> A report with the owner name of John Smith, created in November of 2001 that contains the keyword `wireless`.

type the following string in the **Query String** field:

```
type='rdl' && owner='John Smith' && creationdate>='11/01/2001' &&
    creationdate<='11/30/2001' && keyword='wireless'
```

### Search Expressions

The syntax for a search expression is:

```
property operator 'value'
```

Values are always enclosed in single quotes (`'`).

The valid properties are shown in Table 2:

**Table 2 Valid Properties**

| Property Name | Description | Example Values | Column in METADATA Database Table |
|---|---|---|---|
| `name` | Library object name. | myReport | `META_NAME` |
| `type` | Library type. | See Type Property on page 17. | `META_TYPE` |
| `creationdate` | Date library object was created. | 2002-07-22 09:29:35 | `META_CREATION_DATE` |
| `lastmodified` | Date library object was last modified. | 2002-07-22 09:29:35 | `META_LAST_MODIFIED` |
| `owner` | User that owns the library object. | RKing | `META_OWNER` |
| `description` | User-supplied description of the library object. | | `META_DESCRIPTION` |
| `contentlength` | The length in bytes of the library object. | 10488 | `META_CONTENT_LENGTH` |
| `contenttype` | MIME content type. Only used when `type='generic'`. | `text/html` `application/pdf` `text/xml` | `META_CONTENT_TYPE` |
| `keywords` | User-supplied keywords. | | |

Valid operators are shown in Table 3:

**Table 3 Valid Operators**

| Operator | Description |
|---|---|
| `<` | Less than. |
| `<=` | Less than or equal to. |
| `>` | Greater than. |
| `>=` | Greater than or equal to. |
| `=` | Equal to. |
| `!=` | Not equal to. |
| `like` | Same as the SQL `like` operator. Can be used for pattern matching using `%`. |
| `<` | Less than. |

### Type Property

The possible values of the `type` property are:

- `rdl`
- `generic`
- `collection`
- `rdd`
- `isr`
- `profile`
- `user`
- `parameter`
- `query`
- `theme`
- `permission`

`rdl` and `generic` are the most commonly used. All reports have type `rdl` and all generated report output has type `generic`. If the type is `generic`, then the MIME content type of the Library object is stored in the `contenttype` property.

Date properties (`creationdate` and `lastmodified`) must be in a format understood by your data source. Typically, this is `YYYY-MM-DD hh:mm:ss`.

For an exact date search (that is, one without a range of dates specified), you must use the complete timestamp. For example, the following entry might match:

```
creationdate='2002-07-22 09:29:35'
```

but the following entry never will:

```
creationdate='2002-07-22'
```

### Query String Examples

To list scheduled output, use the following query string:

```
description like 'Scheduled%'
```

To list all reports:

```
type = 'rdl'
```

To list all HTML output:

```
type = 'generic' AND contenttype = 'text/html'
```

To list all objects whose names contain the string `xtab`:

```
name like '%xtab%'
```

## Preferences

Use the **Preferences** view to set or change the following:

- Your home directory in the Library.
- Your display language.
- Your start page (the view that will appear when you launch the Report Center). `Library` is the default.
- Your password.

# Toolbar Buttons

The **Toolbar** buttons are underneath the **Navigation** buttons. The Report Center toolbar has two sets of toolbar buttons: one associated with folders and one associated with files.

## Folder Toolbar Buttons

The Folder toolbar buttons are **Manage** and **Upload**. They are over the Navigation pane in Library view.

### Manage

**Manage** opens a screen where you can manage the current folder and its subfolders. The **Manage** screen contains three areas:

- Properties
- Upload New File
- File Permissions

#### Properties

The **Properties** area contains the following items:

- The library path of the current folder. This is a hyperlink. If you click it, you return to the Library view.
- The name, creation date, last modification date, and owner of the current folder.
- A field that lets you create a subfolder.
- A button that deletes the current folder. (This field is not visible for the non-deletable folders: Catalog and root.)

#### Upload New File

The **Upload New File** area contains the following items:

- The destination folder to which the new file will be uploaded.
- A field to specify the name the file will have in the Library.
- a field to describe the file.
- A drop-down list to specify the file type (`Report`, `Query`, `Parameter`, `Theme`, `Permission`, `Other`).

  ➤ If you upload a `Query`, `Parameter`, `Theme`, or `Permission` file, make sure you specify the appropriate file type, rather than the default “`Report`” type, when you upload it.

- A field and browser button to specify the source file to upload from your local file system.
- a check box that lets you automatically publish a file on upload. (Only files of type `Report` with the extension `.rdl` can be published.)
- Buttons to upload the file or cancel (clear) the upload.

### File Permissions

The **File Permissions** area shows the permissions on the current folder. Click **Edit Permissions** to change the permissions. Make sure the permissions for your report are set to the same as the default report permission settings. The Edit Permissions view is shown. See Chapter 4, Permissions for information on altering permissions.

## Upload

Click **Upload** to open a screen where you can do the following:

- Browse for an RDL or PCXML file on your file system.
- Give it a name to be used by the Library.
- Give it a description.
- Assign it a file type (`Report`, `Query`, `Parameter`, `Theme`, `Permission`, `PCXML`, `Other`).
- Upload it to the current Library folder.

For an RDL or PCXML (PopChart) file, the default name of the uploaded item is the filename minus the extension, and the default file type is `Report`. For other files, the default name is the full filename including the extension.

➤ You must set the type manually for `Query`, `Parameter`, `Theme`, and `Permissions` files.

➤ You can also upload a file using the **Manage** toolbar button. See Upload New File on page 19.

# Report Toolbar Buttons

The **Report** toolbar buttons are over the file list in the Library, Search, and My Reports views. The following Report toolbar buttons are shown for all views:

- **Run/View**
- **Publish**
- **Ad Hoc**
- **Schedule**
- **Properties**

In addition, in the Library and Search views, the **Add to My Reports** and **Delete** buttons are shown. In the My Reports view, the **Remove** button is shown.

## Run/View

**Run** runs the selected report and displays the output in a separate browser window. When the selected item not of type `Report`, the button says **View** rather than **Run**. If the report is unpublished, the button is disabled.

When the **Run** button is active, you can hover over it to show and select the possible outputs for the selected item.

## Publish

**Publish** publishes the report. The **Publish** button is active only if the selected file is an unpublished RDL file.

## Ad Hoc

**Ad Hoc** launches the **Ad Hoc** Wizard in a separate browser window. See Chapter 6, Ad Hoc Wizard for more information.

## Schedule

**Schedule** opens the Schedule page. See Chapter 5, Schedules for details.

## Properties

The **Properties** button opens the **Properties** page. The Properties page consists of some or all of the following sections:

- Properties
- Publish
- Schedule (reports only)
- Performance Statistics (reports only)
- File Permissions

### Properties Section

The **Properties** section lists information about the current file. The information listed depends on the file type.

At the bottom of the Properties section there are the following buttons:

**Table 4 Properties Section Buttons**

| Button | Description |
|---|---|
| Edit Properties | Opens a window where you can alter the description and keywords associated with the file. |
| Edit Content (reports only) | Opens a window so you can do the following:<br>• Upload a new file to replace the current one.<br>• Directly edit the RDL or XML code of the current file. |
| Rename | Opens a dialog box where you can rename the file. |
| Run (published reports only) | Runs the report. |
| Delete | Removes the current file from the Library. |
| Configure Ad Hoc Controls | Maps parameters to control types and labels when this report is used to launch the Ad Hoc Wizard. See Chapter 6, Ad Hoc Wizard. |
| Download | Opens a dialog box to download the file to a different location. |

### Publish Section

The **Publish** section contains the following information:

- The status (published or unpublished) of the current file (reports only).
- The date the file was created.
- The date the file was last modified.
- A button that lets you publish or unpublish the file (reports only).

### Real-Time Optimization

Click the **Edit Real-Time Optimization** button to upload or add a new optimization descriptor.

### Schedule Section

The **Create New Schedule** button lets you schedule a report. See Chapter 5, Schedules for details.

### Performance Statistics Section

The **Performance Statistics** section contains statistics for the current file, if statistics are enabled.

The available statistics are listed below:

| | |
|---|---|
| **# of Runs** | The number of times the report has been run. |
| **Run Time** | The total, average, maximum, and minimum time for the entire process to create this report. |
| **Compile Time** | The average, maximum, and minimum time to compile the `RDL` file into Java code. |
| **Content Time** | The average, maximum, and minimum time to prepare and execute the **content** section of the RDL file. |
| **Layout Time** | The average, maximum, and minimum time to prepare and execute the **layout** section of the RDL file. |

### File Permissions Section

The **File Permissions** section shows the permissions for the current file. **Edit Permissions** opens a page that lets you edit permissions. See Chapter 4, Permissions for details.

## Add to My Reports

**Add to My Reports** adds the report to the My Reports view.

## Delete

**Delete** removes the currently-selected file from the Library.

## Remove

**Remove** removes the selected file from the **My Reports** view without removing it from the Library.

# 4 Permissions

The **Permissions** page grants permissions to users and groups to view the contents of folders or files in the Library. If you reach the page through the **Manage** toolbar button, the permissions are on the folder. If you reach it through the **Properties** button, the permissions are on the selected file.

Files inherit their folder's permissions. Any additional permissions assigned to the file override the folder permissions. The exception is that when the folder permissions make the file inaccessible, the file permissions do not apply.

The Permissions page has two parts: **Grant Permissions To** and **Exceptions**. The **Exceptions** entries override the **Grant Permissions To** entries. In each part you can set the following permissions:

| | |
|---|---|
| **Read** | See the Library item. |
| **Write** | Alter the Library item. |
| **Run** | Run the report. |
| **Schedule** | Create a schedule for the item. |
| **Ad Hoc** | Create a new report using the Ad Hoc Wizard, either from scratch or using the currently selected report as the starting point. See Chapter 6, Ad Hoc Wizard for more information. |

The list of groups and users to whom you can assign permissions appears in both parts of the Permissions page. (This list comes from the directory provider, and may be derived from an LDAP server, a local database, an XML file, or some other data source.) Add or remove `Read`, `Write`, `Run`, or `Schedule` permissions by selecting and clearing the check boxes. To add groups or users to either the **Grant Permissions To** or **Exceptions** lists, click **Add Groups** or **Add Users** and select from the dialog that opens. To delete a group or user from either list, select the group or user, and then click **Delete**. To save permissions changes, click **Submit**.

➤ You may not have access to all settings in this page, depending on your own permissions.

# 5 Schedules

A **Schedule** determines the frequency with which the Report server creates static report output. The Report Center lets you create report output automatically from published reports according to a schedule of your choosing. This is the meaning of schedule used in this chapter.

You can schedule reports to create output at a set time or at regular intervals, and you can designate recipients to receive email notification when new output is available. You can configure where in the Library you want scheduled output to appear.

Once you have filled in the fields on this page, click **Submit**, or **Cancel** to leave the page without submitting. To see what the automatically-generated output looks like, click **Preview Report**.

The **Schedule** page has the following areas:

- Start
- Recur
- Parameter Options
- Output Options
- Email Notification

## Start

Use the **Start** area of the Schedule page to choose a date and time for the first scheduled running of the report, or you can have the schedule start immediately. You can use the calendar icon to choose the date and the spin buttons to choose the time. You can also type the date using the format `mm/dd/yyyy`.

## Recur

Use the **Recur** area to choose whether you want the report to automatically create output more than once. To generate only one output instance, select the **None** radio button. To generate output automatically at regular intervals, select the **Every** radio button, type an integer and select a time interval from the drop-down list.

## Parameter Options

If the report that you want to schedule contains profiles, you can select the profile to use for the scheduled output. To do this, select the profile from the **Execute pre-defined parameter profile** list. If you don't want to specify a profile for the output, select **None** from the list. If no profiles have been created for this report, this list is not shown.

All schedules are saved to the same folder: `<filename><profilename>[timestamp]`. If **Overwrite files** is checked, the timestamp is not shown in the filename.

## Output Options

Type the path to the **Library** folder where you want the automatic output to be placed in the **Destination** field. To browse for the folder, click the folder icon to the right of the **Destination** field. The folder containing the report file is the default.

Type the filename for the output files in the **File Name** field. The time information for each occurrence is appended to the filename of the output.

From the **Output Format** list, select the output file format: `HTML`, `XML`, `PDF`, `CSV`, `Saved Results` (an interactive HTML report with static data), or `Excel`. `HTML` is the default.

➤ `Saved Results` is called **isr** in the Report server.

If you select **Overwrite files**, each automatically-generated output file overwrites the previous one and the output filename does not contain time information.

## Email Notification

To automatically send email notification each time an output file is created, type a comma-delimited list of email addresses in the **Recipients** field.

Type the text of the email message in the **Message Text** area.

Click **Link** to send a hyperlink to an URL of the report output or **File** to send the report output as a file attachment. If you send a hyperlink, the recipient must log into the Report server to view the report and will need the permissions required to do so.

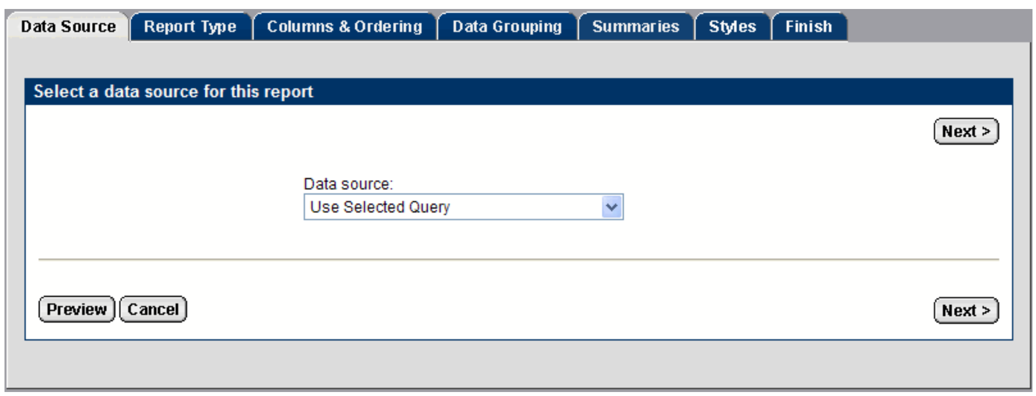
# 6 Ad Hoc Wizard

The **Ad Hoc Wizard** is a report-authoring tool that enables an end user to create new reports quickly and easily. The wizard lets an end user design the layout for the given report. The user is led through a series of steps that lead to the desired layout. You can move back and forth between steps, or jump directly to the desired step. At any point in the wizard, you can save the report or preview it in its current state.

You can create a report either from scratch or from an existing report in the Library. To create a report from scratch using the Ad Hoc Wizard, click **Ad Hoc**. To use an existing report as the basis for a new report, select the report in the Library or My Reports view and then click **Ad Hoc**.

➤ The Ad Hoc Wizard can be launched from a report in the Report Center if the user has both Execute and Ad Hoc permission on the report.

**Figure 2 The Ad Hoc Wizard**




## Configuring the Ad Hoc Wizard

This section describes how to prepare a report to launch the Ad Hoc Wizard and how to handle the report's controls and parameters.

### Controls and Parameters

If the report contains parameters and controls, the Ad Hoc Wizard automatically produces a layout with the specified parameters and labels bound to the right controls. However, if the report lacks controls, or if you want to change the report's control bindings for end users who will be using the Ad Hoc Wizard to create new layouts, you can specify these bindings in the Report Center.

1 Select the report in the **Library** or **My Reports** view.

2 Click **Properties**.

3 Click **Configure Ad Hoc Controls**.

The Ad Hoc Wizard **Admin** window opens. This window lists each parameter in the report along with a drop-down list of **Control Types** and a text field for the **Label**.

The following control types can be assigned to the parameter:

- check boxes
- text box (for single, free-form values only)
- radio buttons
- single select menu
- multiple select menu

## Changing the Date Format for Ad Hoc Reports

The default date format for reports created using the Ad Hoc Wizard is `mm/dd/yyyy` (U.S. format). You can change the date format to the international standard sortable date format `yyyy/mm/dd (yyyy-mm-dd).`

The `defaultscope.xml` file in the `scopeserver/WEB-INF/conf` directory contains all the default settings for Ad Hoc reports. The property that controls the date format is `dateFormat` and the value is empty by default. This means that the date will be displayed in the Java default date format. For the syntax of the property's value, please refer to the Java documentation for `class java.text.SimpleDateFormat`.

### To change the date format

1 In the `scopeserver/WEB-INF/conf` directory, open the `defaultscope.xml` file.

2 Find the following line in `defaultscope.xml`.

```
<Property name="dateFormat"></Property>
```

3 Set the required format in this line, for example to make the date display in a standard format, use the following line:

```
<Property name="dateFormat">yyyy-MM-dd HH:mm:ss Z</Property>
```

This will render the date and time as `2006-06-25 16:30:47 -0400`.

4 Restart the Report server after modifying the `defaultscope.xml` file.

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