HP OpenView Select Audit

For the Windows®, HP-UX®, and Linux® Operating Systems

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Report Center User's Guide

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Contents

1 Overview . . . 7
Who is This Guide For? . . . 7
What's in This Guide? . . . 7
The Select Audit Documentation Set . . . 8

2 The Developers Center . . . 9
Opening the Developers Center . . . 9
Testing Unpublished Reports . . . 9
What is Publishing? . . . 9
Test-running in the Developers Center . . . 10
Installing the Report Designer . . . 10
Sample Reports . . . 10

3 User Interface . . . 11
What Can You Do in the Report Center? . . . 11
Navigation Buttons . . . 12
Library . . . 12
My Reports . . . 12
Search . . . 12
Name . . . 13
Type . . . 13
Owner Name . . . 13
Keywords . . . 13
Query String . . . 14
Search expressions . . . 14
Property . . . 14
Operator . . . 15
Type property . . . 15
Query string examples . . . 16
Preferences . . . 16
Toolbar Buttons . . . 16
Manage . . . 17
Upload . . . 18
Run/View . . . 18
Publish . . . 18
Ad Hoc . . . 18
Schedule . . . 19
Add to My Reports . . . 19
Properties . . . 19
Properties section . . . 19

Publish section 20
Schedule section 20
Performance Statistics section 20
File Permissions section 20
Delete 20
Remove 21

4 Permissions 23

5 Schedules 25
Start Area 25
Recur Area 25
Parameter Options Area 26
Output Options Area 26
Email Notification Area 26

6 Ad Hoc Wizard 27
Who Can Use the Ad Hoc Wizard? 27
Configuring the Ad Hoc Wizard 28
Controls and Parameters 28
Changing the Date Format for Ad Hoc Reports 28
To change the date format 28

Index 31

1 Overview

The Report Center is a Web application that lets:

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

The Report Center consists of:

- 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 OpenView Select Audit 1.01 Report Center User's Guide* is addressed to developers, and describes what users other than `admin` 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 OpenView Select Audit 1.01 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.

The Select Audit Documentation Set

This manual refers to the following Select Audit documents. These documents are installed with Select Audit and are available in the <install_path>/docs folder where <install_path> represents the path where Select Audit is installed.

- *HP OpenView Select Audit 1.01 Installation Guide*, © Copyright 2006 Hewlett-Packard Development Company, L.P. (`installation_guide.pdf`)
- *HP OpenView Select Audit 1.01 Administration Guide*, © Copyright 2006 Hewlett-Packard Development Company, L.P. (`administration_guide.pdf`).
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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 predefined WebLogic group. The Developers Center lets you:

- 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**.
- Enter 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 WebLogic group to access the Developers Center.

Testing Unpublished Reports

You can use the Report Center's Developers Center to test-run a report before you publish it.

What is Publishing?

The Report Center lets you 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.

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

Test-running in the Developers Center

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, enter your report's complete filename in the **Select a File** field in the **Test Run** area, 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 OpenView Select Audit 1.01 Report Designer's Guide* for more information on 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 1.4 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 two ways:

- Login to Select Audit and click **Reports** → **Reports Library**.
- Enter 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:

- 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 choose.

What Can You Do in the Report Center?

Using the Report Center, you can:

- run reports (RDL files) and inline or referenced PopChart (PCXML files) inside an RDL file (see Run/View on page 18)
- view already-run scheduled report output (see Run/View on page 18)
- navigate through the Library (see Library on page 12)
- search the Library for reports and other Library items (see Search on page 12)
- upload and publish reports to the Library (see Upload on page 18 and Publish on page 18)
- create and edit report metadata (see Properties on page 19)
- 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 20)
- choose your own start page: 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 presents four views:

- Library on page 12
- My Reports on page 12
- Search on page 12
- Preferences on page 16

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

A small red arrow indicates the currently-selected view.

Icons may appear to the left of each report in the **Contents** view. These icons indicate whether a report has been published and whether it has schedules (see Chapter 5, Schedules).

Library

The **Library** view is modeled after file browsers like Windows Explorer. The left pane presents an expandable navigation tree, and the right pane displays 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 displays a single window listing the Library files that you have previously selected using the Add to My Reports button.

Search

The **Search** view helps you 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 on page 14 syntax.

The Search view, like the Library view, has two panes. The **Search By** pane contains the fields that define your search criteria, and the **Search Results** pane displays 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. To clear the fields, click **Clear**.

The Search view displays the following text fields:

- Name on page 13
- Type on page 13
- Owner Name on page 13
- Keywords on page 13
- Query String on page 14

Name

Enter the name of the report that you are searching for. If your entry is a substring of a report name, it matches. The search is case insensitive. Wildcard characters are not recognized.

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

```
sAl
```

would retrieve a report named:

```
James_Sales
```

If you check the **Exact Match** check box, substrings do not cause a match, though case is still ignored.

Type

Choose 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

Enter the name of the files' owner. The entry must be an exact match, though it is case insensitive.

Keywords

Enter 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 displayed. The match must be exact, but is case insensitive.

Query String

Enter 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 via parenthesis.

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

- a report
- owner's name is John Smith
- created in November of 2001
- contains the keyword `wireless`

enter 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 (`'`).

Property

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 15.	`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`

Table 2 Valid Properties (cont'd)

Property Name	Description	Example values	Column in METADATA database table
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		

Operator

Valid operators are shown in below:

<	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 via %.
<	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

The **Preferences** view lets you set or change:

- 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 appear underneath the **Navigation** buttons.

The Report Center toolbar has two sets of toolbar buttons: one associated with folders, the other with files. The folder toolbar buttons appear over the Navigation pane in Library view. The **Report** toolbar buttons appear over the file list in the Library, Search, and My Reports views.

The folder toolbar buttons are:

- Manage on page 17
- Upload on page 18

The Report toolbar buttons (for the Library and Search views) are:

- Run/View on page 18
- Publish on page 18
- Schedule on page 19
- Add to My Reports on page 19
- Properties on page 19
- Delete on page 20

The Report toolbar buttons for the My Reports view are:

- Run/View on page 18
- Publish on page 18
- Schedule on page 19
- Remove on page 21
- Properties on page 19

Manage

The **Manage** toolbar button opens a screen that lets you manage the current folder and its subfolders. The **Manage** screen contains three areas:

- Properties on page 17
- Upload New File on page 17
- File Permissions on page 18

Properties

The **Properties** area contains:

- 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 does not appear for the non-deletable folders: Catalog and root.)

Upload New File

The **Upload New File** area contains:

- 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`, make sure to 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 displays the permissions on the current folder. To change the permissions, click **Edit Permissions**. The Edit Permissions view appears. See Chapter 4, Permissions for information on altering permissions.

Upload

The **Upload** toolbar button opens a screen that lets you:

- 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.

➤ For `Query`, `Parameter`, `Theme`, and `Permissions` files, you must set the type manually.

➤ You can also upload a file using the **Manage** toolbar button. See Upload New File on page 17.

Run/View

The **Run** toolbar button 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

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

Ad Hoc

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

Schedule

The **Schedule** toolbar button brings up the Schedule page. See Chapter 5, Schedules for details.

Add to My Reports

The **Add to My Reports** toolbar button adds the report to the My Reports view.

Properties

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

- Properties section on page 19
- Publish section on page 20
- Schedule section on page 20 (reports only)
- Performance Statistics section on page 20 (reports only)
- File Permissions section on page 20

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 are buttons to:

- Edit Properties on page 19
- Edit Content on page 19 (reports only)
- Run on page 19 (published reports only)
- Delete on page 20
- Configure Ad Hoc controls on page 20

Edit Properties

The **Edit Properties** button opens a window that lets you alter the description and keywords associated with the file.

Edit Content

The **Edit Content** button opens a window that lets you:

- upload a new file to replace the current one
- directly edit the `RDL` or `XML` code of the current file

Run

The **Run** button runs the report.

Delete

The **Delete** button 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.

Publish section

The **Publish** section displays:

- 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)

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 displays statistics for the current file, if statistics are enabled.

The statistics are:

# 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 displays permissions for the current file. The **Edit Permissions** button opens a page that lets you edit permissions. See Chapter 4, Permissions for details.

Delete

The **Delete** toolbar button removes the currently selected file from the Library.

Remove

The **Remove** button 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 this report as the starting point for the Ad Hoc Wizard. 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 checking and unchecking the boxes. To add groups or users to either the **Grant Permissions To** or **Exceptions** lists, click the **Add Groups** or **Add Users** buttons and select from the dialog that appears. To delete a group or user from either list, select the group or user, 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 completed filling 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 areas on the **Schedule** page are:

- Start Area on page 25
- Recur Area on page 25
- Parameter Options Area
- Output Options Area on page 26
- Email Notification Area on page 26

Start Area

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 enter the date by hand using the format `mm/dd/yyyy`.

Recur Area

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

Parameter Options Area

If the report that you want to schedule contains profiles, you can choose 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 does not appear.

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

Output Options Area

In the **Destination** field, enter the path to the **Library** folder where you want the automatic output to be placed. 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.

In the **File Name** field, enter the filename for the output files. 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 check **Overwrite files**, each automatically generated output file overwrites the previous one, and the output filename does not contain time information.

Email Notification Area

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

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

Select the **Link** button to send a hyperlink to an URL of the report output, or the **File** button 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 starting point of the Wizard is an existing report in the Library.

To launch the **Ad Hoc Wizard**, select the report in the Library or **My Reports** view, then click **Ad Hoc**.

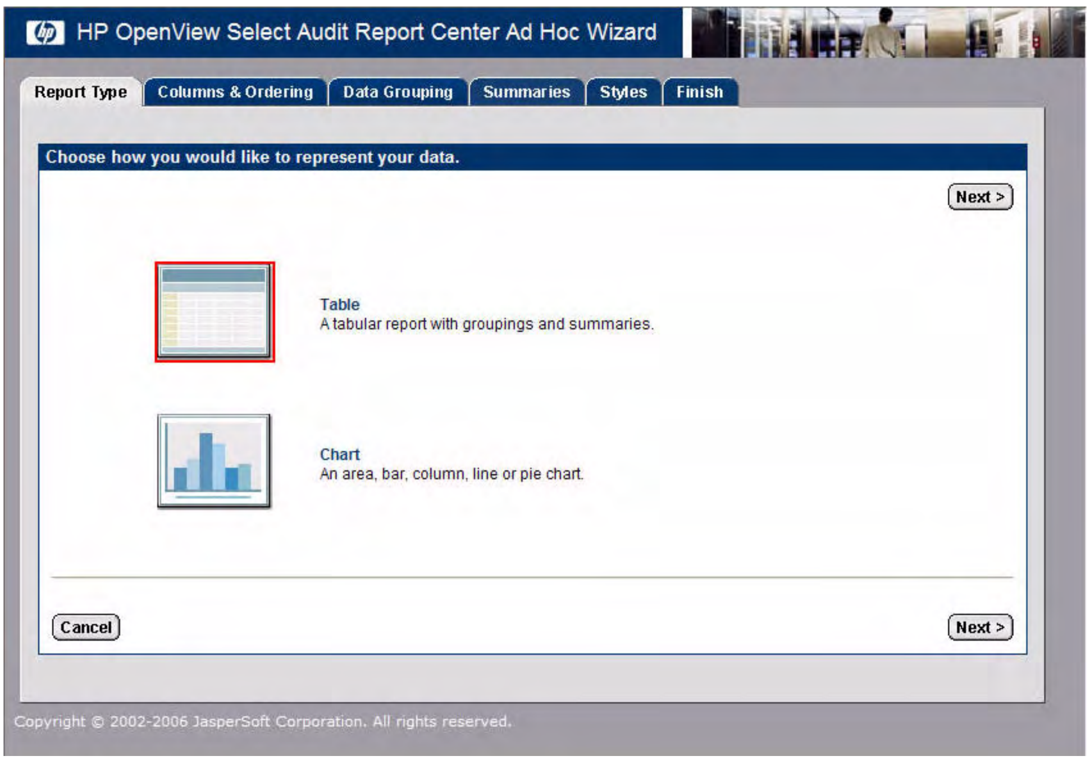

Figure 1 The Ad Hoc Wizard

The Ad Hoc Wizard lets an end user design the layout for the given report. The end user is led through a series of steps that lead to the desired layout. The end user can move back and forth between steps, or she can jump directly to the desired step. At any point in the Wizard, she can save the report or preview it in its current state.

Who Can Use the Ad Hoc Wizard?

The end user can launch the Ad Hoc Wizard from a report in the Report Center if he has both Execute and Ad Hoc permission on the report.

Configuring the Ad Hoc Wizard

This section shows 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.

To do this:

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 appears. 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 control types that you can (re)assign to the parameter are:

- 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.

Index

A

Ad Hoc button, 18

Ad Hoc Wizard, 27 to 29
- configuring, 28
- controls and parameters, 28
- date format, 28
- launching, 18
- using, 27

D

Developers Center
- defined, 9
- sample reports in, 10
- URL of, 9

I

isr in the Report Center

L

Library, uploading files to, 18

Library view, 12

M

main page of Report Center, 11

Manage button, 17

Manage screen, 17

MyReports view, 12

N

Navigation button, 12

O

output channel, setting in the Report Center, 26

P

PDF, creating output in the Report Center, 26

permission, 23

Preferences view, 16

publishing, defined, 9

R

Report Center
- defined, 7
- main page, 11
- URL of, 11

Report Designer, installing, 10

report output, scheduling of, 25

reports, ad hoc, date format, 28

Run button, 18

S

sample reports in the Developers Center, 10

Saved Results
- See isr

schedule
- for report output, 25
- in Report Center, 25

search for reports, 12

Search view, 12

statistics, 20

T

toolbar buttons, 16

U

Upload
- button, 18
- screen, 18

uploading RDL files to the Library, 18

URL
- of Developers Center, 9
- of Report Center, 11

V

View button, 18