Universal Report Server
User's Guide

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Chapter 1
About This Guide

1.1 Purpose

This User's Guide provides instructions for those persons who will be using the Universal Report Server (URS) software to view, schedule, and/or manage reports. A separate Universal Report Server Installation Guide document provides detailed instructions for getting the product installed and running in your system. This manual assumes the URS software is already installed and that system users have been identified to URS.

1.2 Audience

This Guide is intended for those who want to know how to use Universal Report Server (URS) to perform the tasks for which they have permission to run. These include viewing, scheduling, and/or managing reports.

1.3 How To Use This Guide

This manual is organized based on what you want to do, or what you are permitted to do, as a user. The sections of this User's Guide cover:

- An Overview of the Universal Report Server software product
- Instructions for those users who can view, schedule, and manage reports
- Instructions for those users who can view and schedule reports
- Instructions for those users who can view reports only

Universal Report Server accommodates basically three types of users. If you know what type of user you are, refer to the Table of Contents to locate the section and pages that apply to you. The following table summarizes these functions.

User Type (has permission to)	Description of function(s)	Documented on Page
View a Report	• Select from a list of reports that have been scheduled for you and view them	96
Schedule a Report – The above plus:	• Select from a list the report you want to schedule. The list includes only reports that the Administrator has given you permission to schedule. • Assign parameters (if any) for the report • Set the report schedule • Indicate the internal and external users who should receive the report • Set the report's default retention for all internal users	65
Manage Reports – All of the above plus:	• Register (define) report • Identify users who will be permitted to set schedules for a defined report and who may edit a defined report • Set the initial schedule for the report	33

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Chapter 2
Introduction to Universal Report Server

2.1 Product Overview

The Universal Report Server is the first web report server to support nearly ALL report designers, including SAP Crystal Reports, DevExpress XtraReports, Grape City/Data Dynamics ActiveReports, Telerik Reporting, and others.

The Universal Report Server provides the following:

- An easy-to-use, AJAX-based web interface that is very intuitive
- Work with any reporting package you want
- Schedule reports to run at any frequency
- Pass parameters to reports
- Distribute reports to other people inside and outside your organization
- Integrate with your security configuration
- Store reports in any format, including the native format of the report designer package
- Maintain old runs of your reports for as long as you want

Important Disclaimer: Universal Report Server operates with a number of third-party products. Those products are mentioned in this document or other marketing documents from VersaReports. However, those vendors own the copyrights and/or trademarks for their products. VersaReports documentation only mentions those products but does not endorse or imply any ownership in those products. Likewise, those third-party vendors do not endorse Universal Report Server, nor does VersaReports LLC – the creator of Universal Report Server – endorse any specific report designer or third-party product.

2.2 Product Features In-Depth

2.2.1 Work With Any Designer You Want

Universal Report Server is programmed to handle reporting packages that do not have a packaged web server, like DevExpress XtraReports, Telerik Reporting, or GrapeCity/Data Dynamics ActiveReports. If there is another report designer not currently supported, then if it works with .NET and has a way for a programmer to run the report from .NET code, VersaReports can show you how to easily integrate it into URS. You'll get all the same features for your integrated package — including scheduling, security, archival, and distribution — that are included with VersaReports URS.

2.2.2 Define Once, Schedule Lots of Times

Each report is defined once within VersaReports URS. Once the report is defined, it can be scheduled multiple times. The report definition includes where the report is located (uploaded into the database or stored on the web server's disk), the basic parameter information that the report accepts, and which users can schedule the report to run.

Users who are selected to be able to schedule this report can then define when the report will be run and the specific parameter values to supply for each scheduled run. So if you have been designated as a scheduler and you want a production report to be scheduled at different times for different production lines, you would define the production report once, but schedule it multiple times with a parameter value specifying the production line for the report. You also define who you want to receive the report by

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entering individual users, the e-mail addresses of external users, the name of a distribution list that you can define containing multiple users, and also file servers supporting FTP, Secure FTP, or FTP/SSL.

2.2.3 Schedule a Report to Run When You Want

URS has a very versatile scheduler that enables you to run your report once a day, once an hour, even once a minute! Whatever makes sense for your report, VersaReports URS can handle it. When you define a report's schedule, you can specify:

- When the report should first run;
- How often you want the report to repeat (by months, days, hours, or minutes);
- Which hours of the day, days of the week, or dates in the month you want the report to run

In other words, if you want to run a report once a month on the first of the month or every hour during the first shift of every Monday, Wednesday and Friday, VersaReports URS can accommodate this.

2.2.4 Pass Parameters to the Report

Many reporting packages support the idea that you can pass parameters directly into the report before you run it. With VersaReports URS, you can specify parameters as part of any scheduled report. Parameter types include:

- Integer and/or floating point numbers, limited by high and low values specified by the person defining the report that can be scheduled
- Any string of characters
- A date/time value, which can either be a specific date/time OR a relative date/time, like beginning of the hour, beginning of the day, beginning of the week, beginning of the month, beginning of the quarter, and beginning of the year.
- A string based on a set of choices (e.g., A, B, C, D) that are specified when the report is defined to VersaReports URS.
- Boolean logic for "Yes" or "No" values.

The Report Administrator who creates a report can:

- Lock a parameter for all schedulers, which sets a default value for the parameter and is not shown to a scheduler
- Lock a parameter and its value for some schedulers only, permitting other schedulers to change its value
- Leave a parameter unlocked to allow all schedulers to change its value

2.2.5 Integrate With Your Security

Unlike other packages that force a particular authentication/authorization scheme on you, authentication and authorization for VersaReports URS can come from any authentication/authorization scheme defined for your network.

VersaReports URS includes authentication/authorization for the primary Windows security schemes: Windows, Active Directory, and Forms Authentication. In addition, a special "no security" scheme is provided for sites that only need to allow any user to be able to view any report without requiring authentication.

2.2.6 Store Reports in Any Format

Most report designers support exporting a completed report to a variety of formats including PDF, Excel, RTF, Microsoft Word, and TIFF images. Additionally, some report designers have their own "native"

format that supports more complex report features — like table of contents and drill-down — and a native viewer.

VersaReports URS allows you to schedule a report to produce output in any format supported by the report designer package you select. For the native report formats, the site administrator can set up a special viewing page (examples for many common report designers are included in the base package). For other formats, the user is required to have the appropriate viewer (for example, Adobe Acrobat, Microsoft Word, Microsoft Excel, etc.) already loaded on their workstation.

2.2.7 Maintain Old Runs of Your Reports for as Long as You Want

When a report is scheduled, it is provided with a default retention policy, specifying the number of days before an old report expires or the number of successful runs that are retained for the user's viewing.

Additionally, every user that is permitted to view a scheduled report can also customize the default retention policy to create a personal retention policy for that scheduled report. In other words, if the report's scheduler defines the default retention policy to be 5 days and a user wants it to be only the last 10 copies of the report, that user can make that adjustment and it only affects the number of copies of this report that user will see. Other users can adjust their retention policy to best meet their business needs.

2.2.8 Other Features of VersaReports URS

- Multi-threaded report runner, so that more than one report can be scheduled to run at any moment (within the limits of your server's abilities)
- Time zone "normalization", so that the timestamps are displayed using the time zone in the user's location.
- A professional AJAX-driven web interface for all features.
- Easy integration of the VersaReports URS pages into an existing corporate portal via Master Pages (a default Master Page is provided and you can change that page and the "skin" on the controls within the main page to better integrate the look of VersaReports URS to match your corporate portal look).
- Store completed reports in the database for security or on disk for faster access and easier backup.
- Elect to be notified by e-mail or Twitter that reports have been added to your archive or that one has failed to complete.
- Add a Universal Report Server RSS feed to popular portals like My Yahoo!, iGoogle, and My MSN.
- Re-run a report in your archive using alternate parameter values and distribute to others or just run it for yourself.
- Add notes to reports listed in your archive, rename them, and route them to others if desired.
- Easily copy a report or schedule.
- Unparalled customer service and technical support.

2.3 System Requirements

Universal Report Server is a Microsoft Windows Server-based application. Users and administrators interact with the software via a browser; no Universal Reports Server software is loaded on the user's workstation to interact with this product.

Users and report administrators work with Universal Report Server via one of several popular browsers:

- Firefox 2.0+
- Internet Explorer 7.0+ (no support for Mac workstations)

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- Safari 3.0+
- Google Chrome 1.0+

For all browser types, JavaScript and cookies must be enabled. For Internet Explorer, browser scripting must be enabled.

In addition to the browser requirements, you may also need one or more of the following programs installed locally on your PC to view the reports.

- Microsoft Excel (for spreadsheet reports)
- Adobe Acrobat (for PDF reports)
- Microsoft Word (for RTF and Word-based reports)
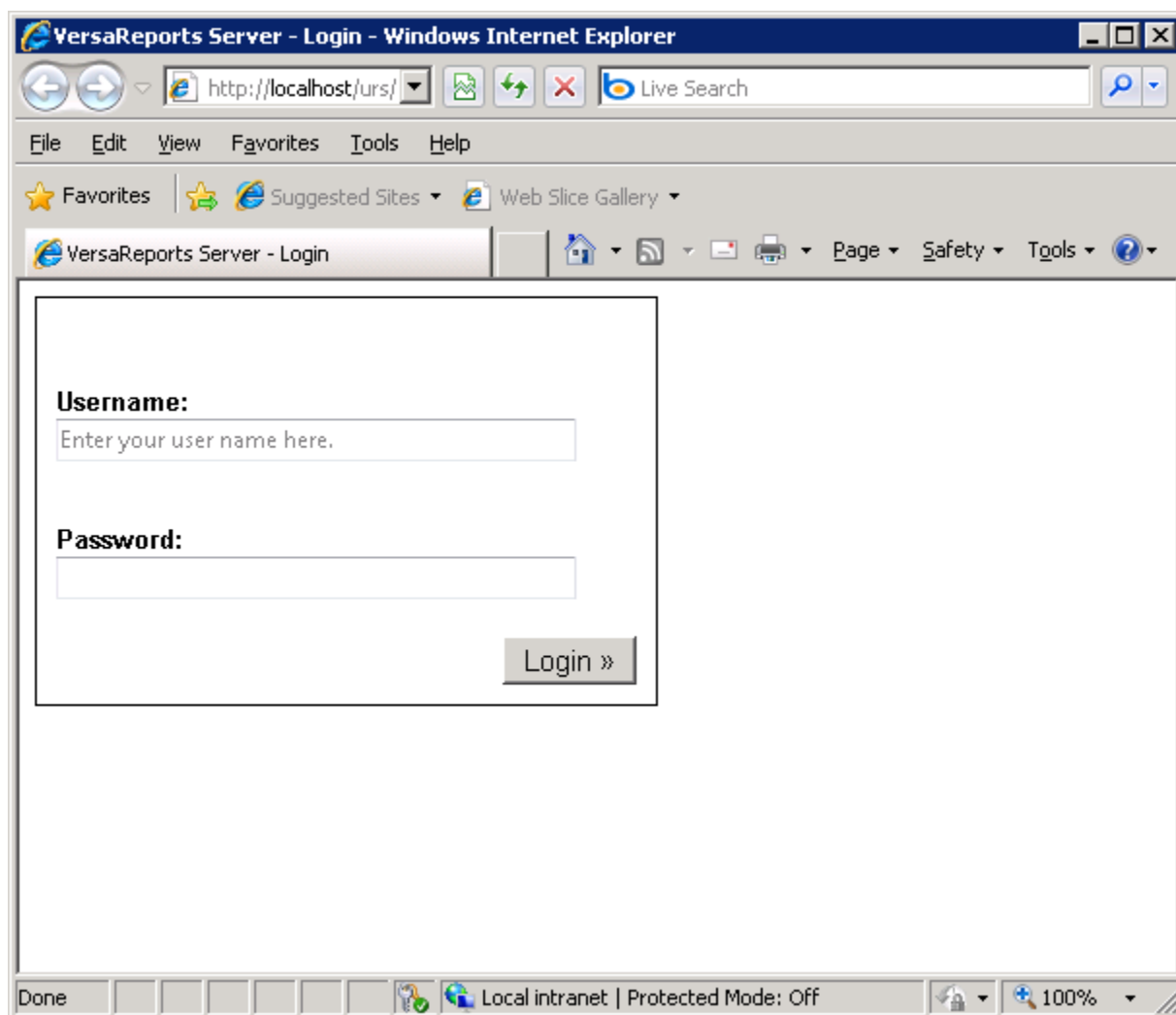
2.4 Universal Report Server – Basics

2.4.1 Logging In

All users must login to the Universal Report Server web site to use it. Obtain the URL for the login page from your system administrator or from the installer of VersaReports Universal Report Server.

Hint: Once you are on the login page, you can save it as one of your favorites, or even save it as an icon to your desktop.

For sites configured for Windows or ActiveDirectory authentication, your browser will prompt you for a login and password.

For sites configured for "No Authentication," you will see a page that only requires you to select the type of user you are from a drop-down list. No password is required.

For sites configured for Forms Authentication, the Login page that is displayed to you will look similar to that illustrated below.

1.   Enter your user name and password and click **Login**.

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The first page to display shows the contents of the **Reports Archive** tab. The default view for this information displays today's reports sorted by date/time.
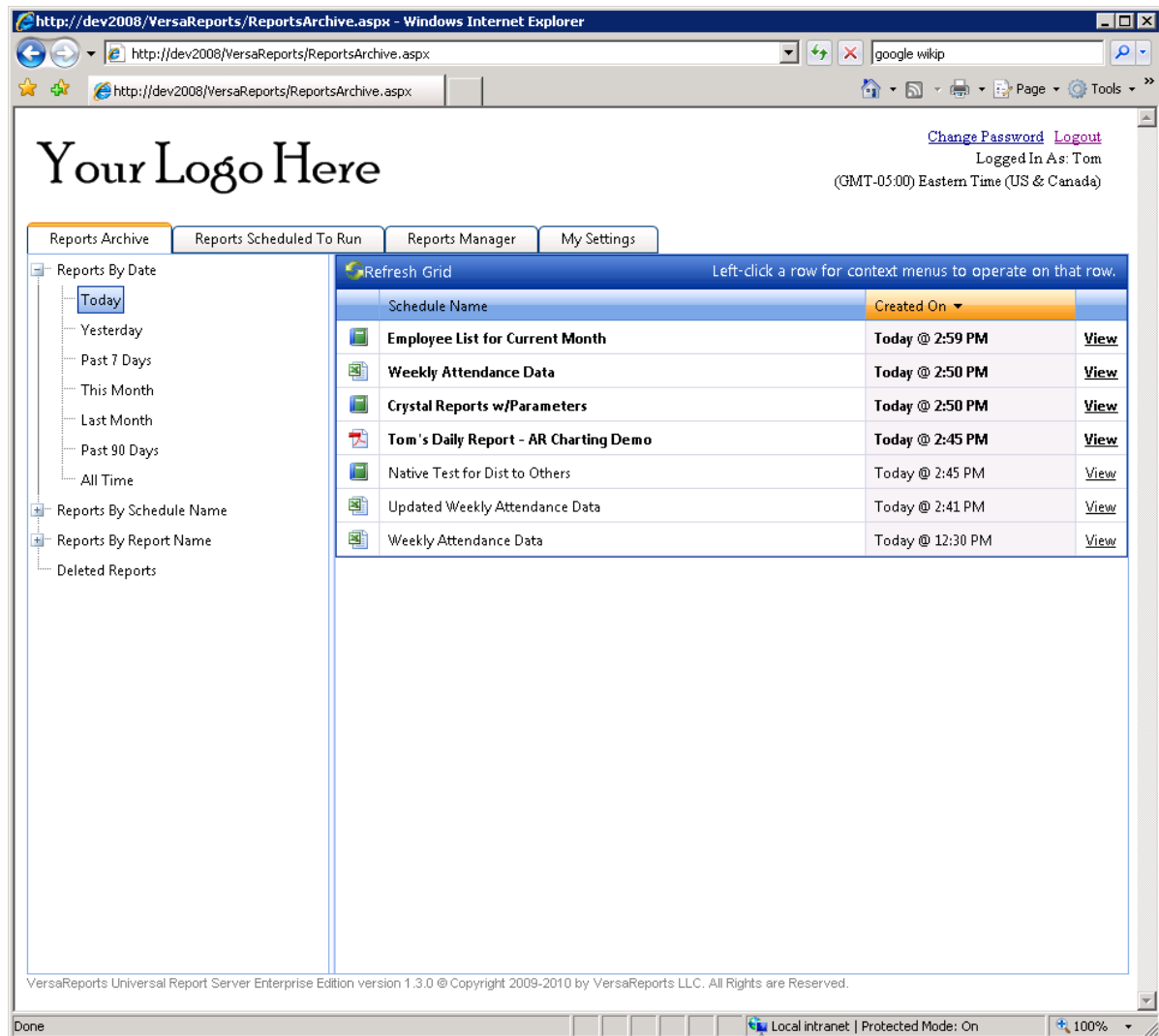
> **Note:**   Depending on the permissions you have been granted within URS, you may not see the **Reports Manager** tab.

2.   This page is the starting point for all actions within Universal Report Server. The permissions you have been granted may limit the actions you may take. Click the appropriate item on the page to initiate the function you want to perform.

2.4.2 URS Permissions

Depending on how your system administrator has set you up in the system, you may not have permission to perform all functions within the Universal Report Server. Your system administrator can advise you of your permissions. However, you will be able to tell if you do not have access to a function because either it will not be available to you or you will not be able to run it.

In general there are three permission levels. All users can view reports that they have received (those found under the **Archive Reports** tab).

The table below summarizes these three user permission levels.

Permission Level	Description
Report Administrator	You have the ability to add (register) reports to the system, edit these report definitions, schedule reports, and view reports.
Scheduler	You have been selected by a report's administrator to be able to schedule that report. You will not see the **Reports Manager** tab and therefore you cannot add reports.
Viewer	You can view reports that have been scheduled for you. You will not see the **Reports Manager** tab, and the **Reports I Scheduled** tab will be blank. Therefore, you cannot add, edit, or schedule reports.
	Note: If you have View-only type permissions, you *can* become a user with scheduling capabilities if the report's administrator grants that permission.

2.4.3 General Description of Tabs

The Universal Report Server web interface has four main tabs:

- **Reports Archive**
- **Reports Scheduled To Run**
- **Reports Manager**
- **My Settings**

In general, the first three tabs show different views of the reports. Regardless of view, the grid (right-hand area of the page) listing the report will refresh automatically every five minutes. A **Refresh Grid** link is provided at the top of the grid to allow you to refresh more often as desired.

Each of these tabs is briefly described in the table below, and described in more detail in the chapter section referenced in the table.

Tab	Brief Description of Tab	More Information
Reports Archive	This tab lists all the reports that were scheduled for you, that successfully ran, and that were delivered to you. You may view any of the reports on the lists in this tab.	Section 5.2 Reports Archive Tab on page 97

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Tab	Brief Description of Tab	More Information
Reports Scheduled To Run	This tab allows you to view and, if you have been granted permission, manage report schedules. The **Reports Scheduled To Run** tab contains three sub-tabs: • **Reports I Scheduled** – lists any reports you have scheduled, permits you to take certain actions on these schedules, and allows you to create new schedules. • **Reports Scheduled For Me** – lists reports that other users have scheduled for you to view. • **Reports to be Run** – lists a combination of the previous two tabs and and shows when the report last ran, and when it is scheduled to run next.	Section 4.2 Reports Scheduled To Run Tab on page 66
Reports Manager	This tab, available only to users who have been designated Report Administrators in Universal Report Server, permits those users to register (define) new reports and edit existing reports. If you are not a URS Report Administrator, you will not see this tab.	Section 3.2 Reports Manager Tab on page 34
My Settings	This tab allows you to set your preferences for certain functions within URS. The **My Settings** tab contains three sub-tabs: • **Notifications** – Select the report notifications you would like to receive and how you want to be notified (by e-mail or Twitter). Add the "My Universal Report Server" RSS feed to your My Yahoo, iGoogle, and My MSN accounts. • **Distribution Lists** – Create and maintain distribution lists. • **Personalizations** – Select your time zone, choose how you want time to be displayed (12/24 hour clock) within URS, and indicate your preferences for displaying report pop-up tool tips.	Section 2.4.4 My Settings Tab on page 13

2.4.4 My Settings Tab

The three sub-tabs under the **My Settings** tab are:

• Notifications (see page 14)
• Distribution Lists (see page 22)
• Personalizations (see page 29)

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2.4.4.1 Notifications Sub-Tab

The settings in this tab allow you to select what report notifications you would like to receive and how you want to be notified. It also lets you quickly add the Universal Report Server RSS feed to My Yahoo, iGoogle, and My MSN.

A page showing the **Notifications** sub-tab is illustrated below.

2.4.4.1.1 E-mail and Twitter Notification

You may receive notifications by e-mail or by Twitter. Select all the check boxes that apply. The table below describes these options in detail.

Notification Option	Description
New Report Added to Reports Archive	Select this option to notify you whenever a report is added to your Reports Archive area. This includes reports you have scheduled, reports scheduled for you, and any reports that were distributed to you via the **Distribute to Others** option. If e-mailed, the notification will indicate that a report was run on your behalf and it will show the report name, the date and time it was run, and provide a link to view the report. If Tweeted, the notification will simply indicate there is a new report and provide a link for viewing it. (See #1 and #4 in the Twitter illustration below.)
Report I Scheduled Failed To Complete	Select this option to notify you whenever a report that you have scheduled does not complete. This includes when it fails because one or more Report Recipients does not get the report. If e-mailed, the notification will indicate the report name, the time it was run, that it failed to complete, and then give the details of the failure. If tweeted, the notification gives the name of the report, that it failed to complete, and for you to return to the site for details. (See #2 in the Twitter illustration below.)
Report Scheduled For Me Failed To Complete	Select this option to notify you whenever you do not get a report that has been scheduled for you by someone else. That is, you have been designated as a Report Recipient on the schedule's Distribute step, but you failed to receive it. If e-mailed, the notification will indicate the report name, the time it was run, and that it failed to complete. If tweeted, the notification gives the name of the report, that it was scheduled for you, and that it failed to complete. (See #3 in the Twitter illustration below.)

Notes for Setting Up Twitter and Using bit.ly

If you want to be notified on Twitter, you must have a Twitter account. Enter your account name and password in the boxes provided. Click the **Test** button to verify URS can send you a Tweet. The "Success!" message indicates everything is working and the notifications you indicated will be sent to your Twitter account.
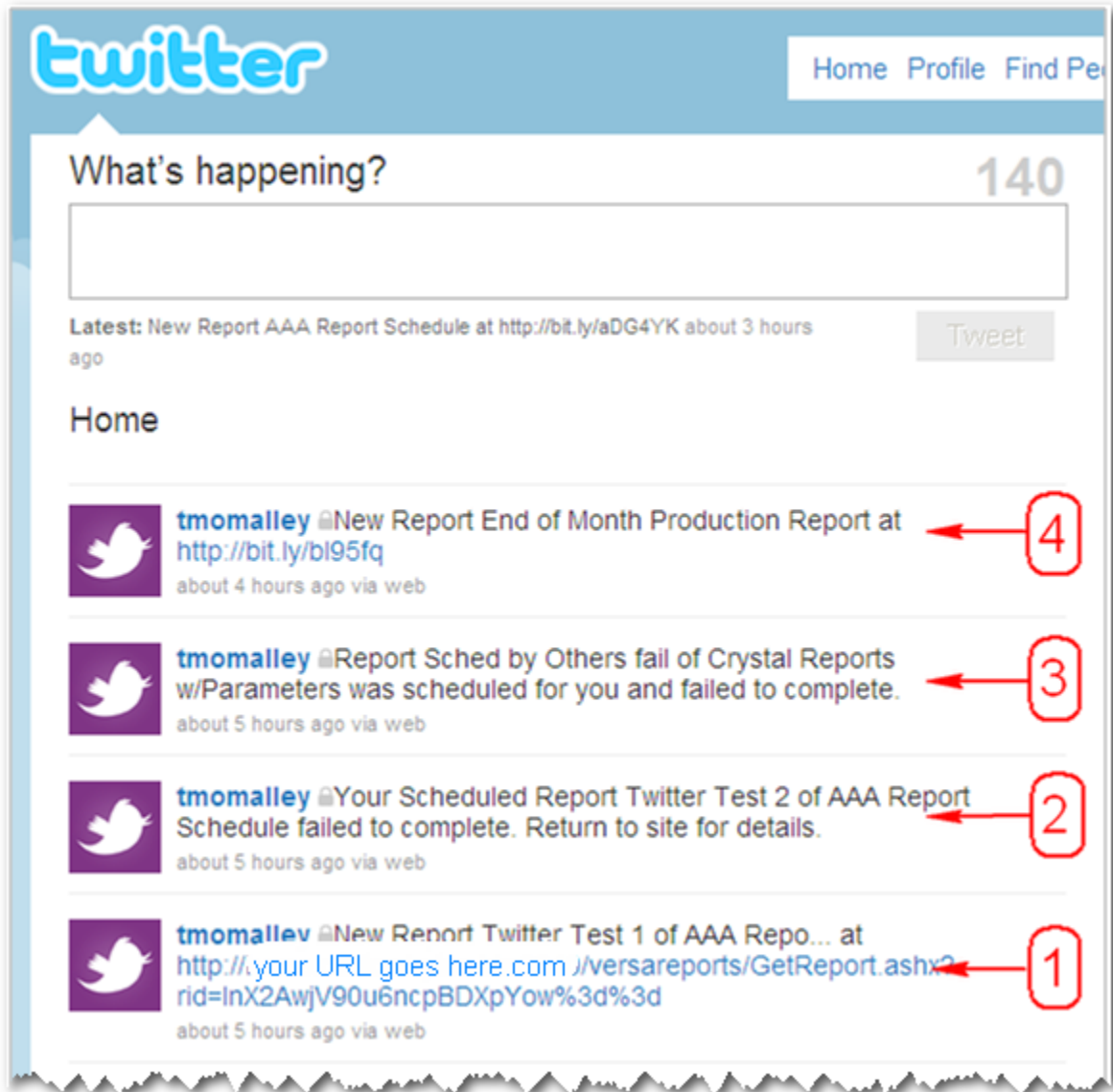

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
If you do not set up a bit.ly account, the Tweet from URS will have a full length URL (see the Tweet labeled "1" in the illustration below).

When you set up a bit.ly account, find the bit.ly web page that gives you your bit.ly API Key. Copy that key and enter it along with your bit.ly Account name in the boxes provided. Click the **Test** button to verify URS can shorten the URL links. The "Success!" message indicates it is working and your Tweets will use the bit.ly URL shortening (see the Tweet labeled "4" in the illustration below).

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2.4.4.1.2 RSS Feeds

The **Notifications** sub-tab provides a section for setting up one or more URS RSS feeds. The contents of the feed is the information available on your Reports Archive page. If you want to add the Universal Report Server feed to My Yahoo, iGoogle, or My MSN, you must have an account with that service. The RSS 2.0 Feed icon ( ) and the Atom 1.0 Feed icon ( ) are provided for you easily subscribe to these feeds, and for you to be able to copy and paste them into your RSS Readers.

The example below shows adding the URS feed to your iGoogle account home page. Before beginning, you should log in to your iGoogle account.
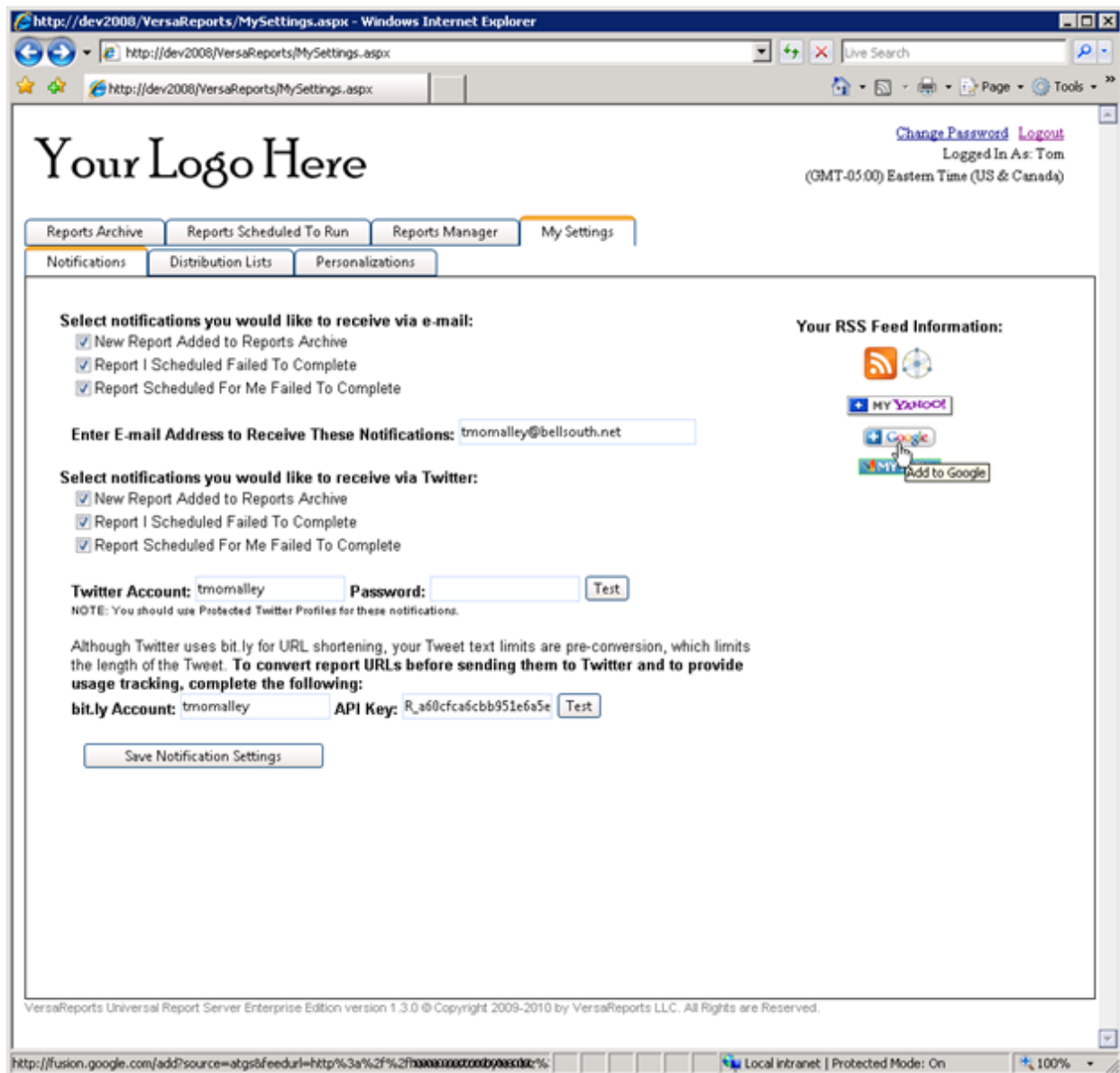
Click the **Add to Google** link.

On the **Add to Google** page, click **Add to Google homepage**.

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The Universal Report Server gadget is automatically added to your iGoogle home page.
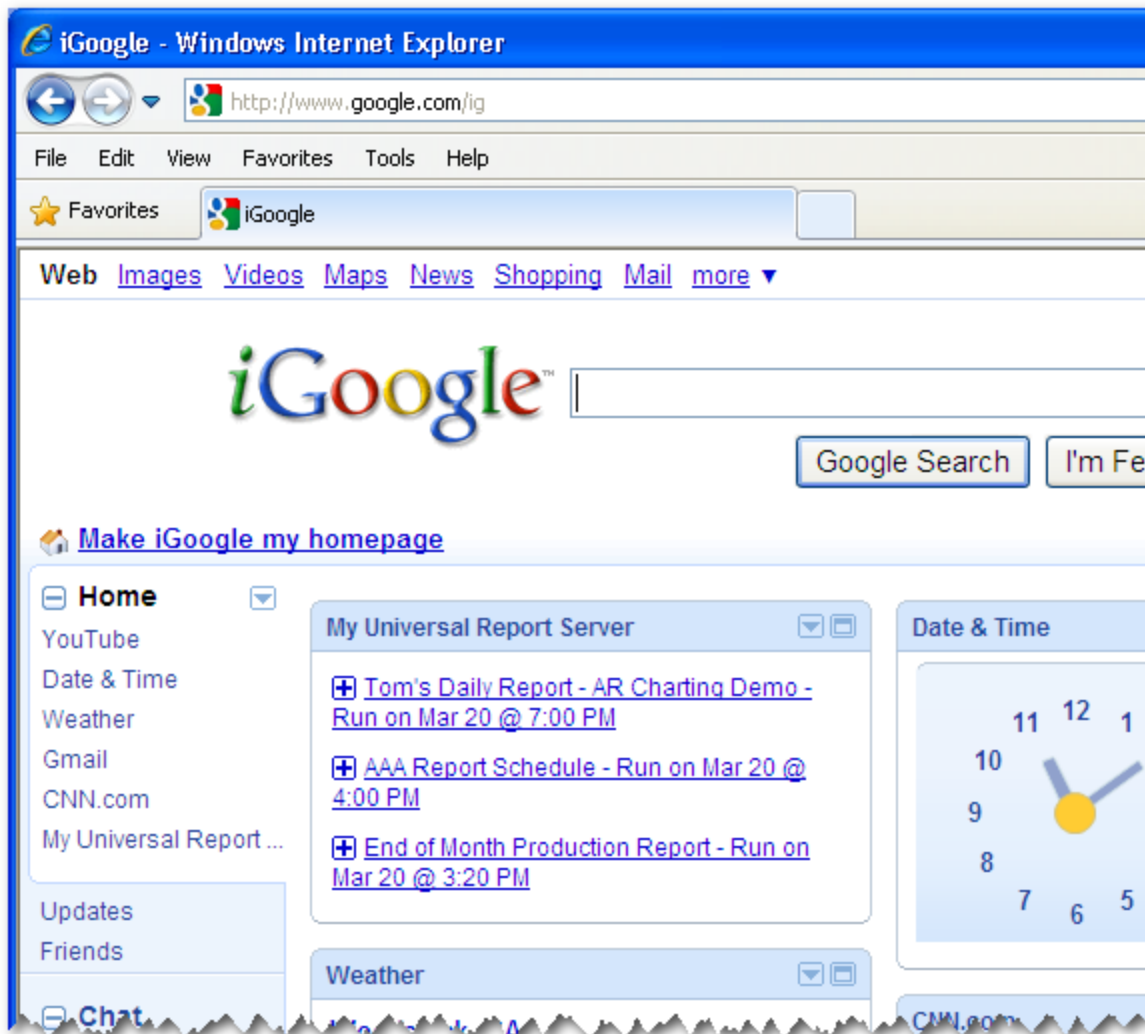
The following example shows you how to subscribe to the **My Universal Report Server** feed.

In the **Notifications** sub-tab under the **Your RSS Feed Information** section, click the **RSS 2.0 Feed** icon.

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On the subsequent page, click **Subscribe to this feed**.
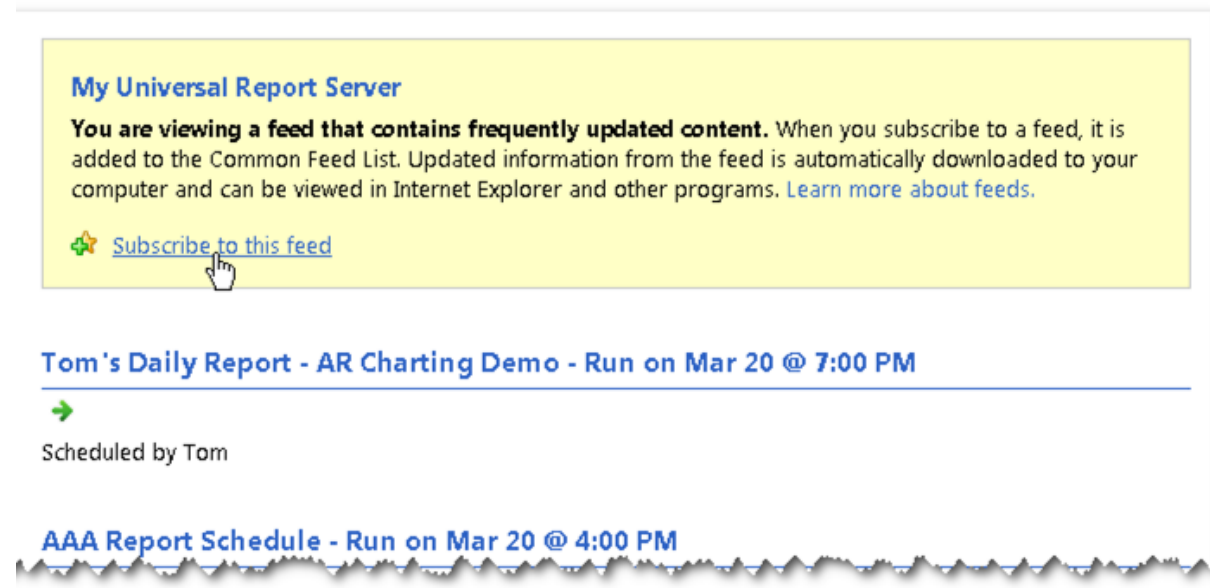
On the resulting dialog box, click **Subscribe**.

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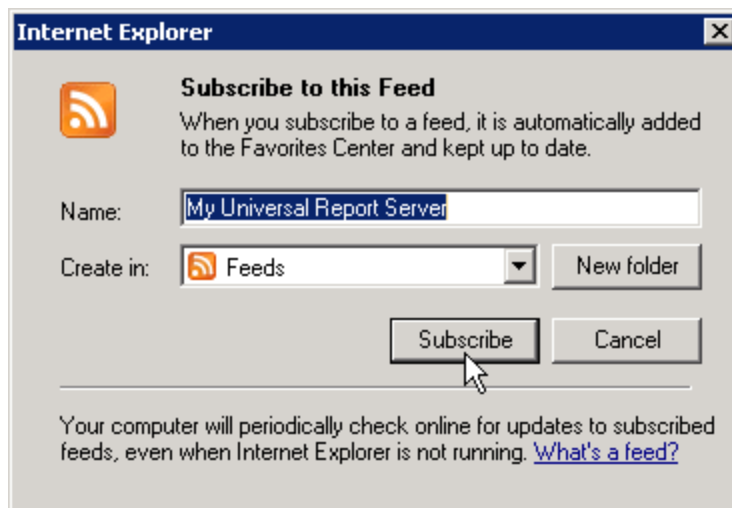
You have now subscribed to the URS feed and it has been added to you Favorites Center under the **Feeds** tab.
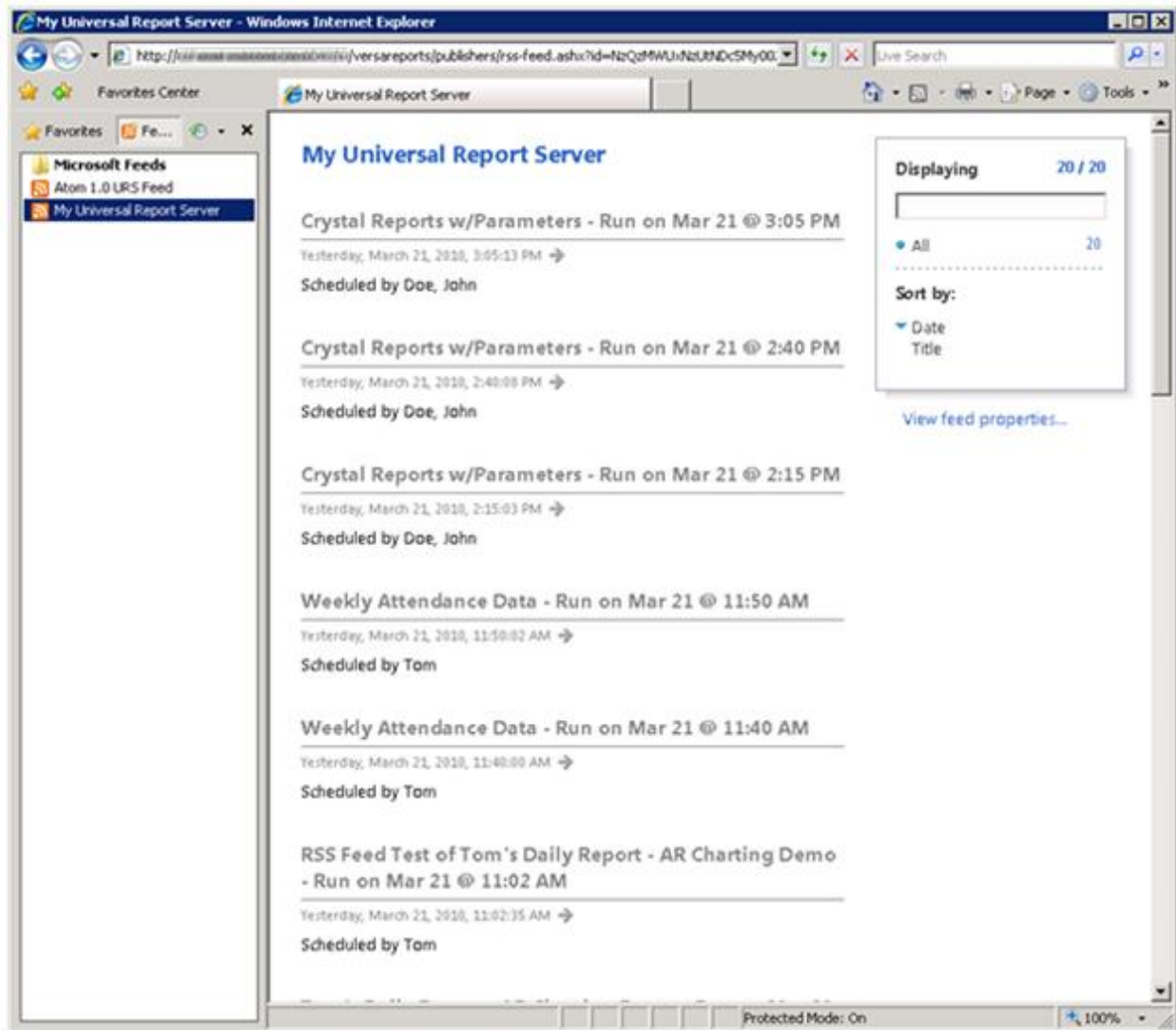
2.4.4.2 Distribution Lists Sub-Tab

A distribution list provides a shortcut when entering recipients for a report in the Schedule a Report wizard. A list can be comprised of user ids (internal users), e-mail addresses (external users), and other distribution list names. Two types of lists may be created:

- Personal lists can be created by any user and can be viewed, edited, and used only by that user.

    Note: A personal list *can* have the same name as a global list

- Global lists can be created only by Report Administrators. All users can view and use these lists, but only Report Administrators can edit them. Any Report Administrator can edit a Global list no matter who created it.

2.4.4.2.1 Creating A Distribution List

Start from the **Distribution Lists** sub-tab of the **My Settings** tab.
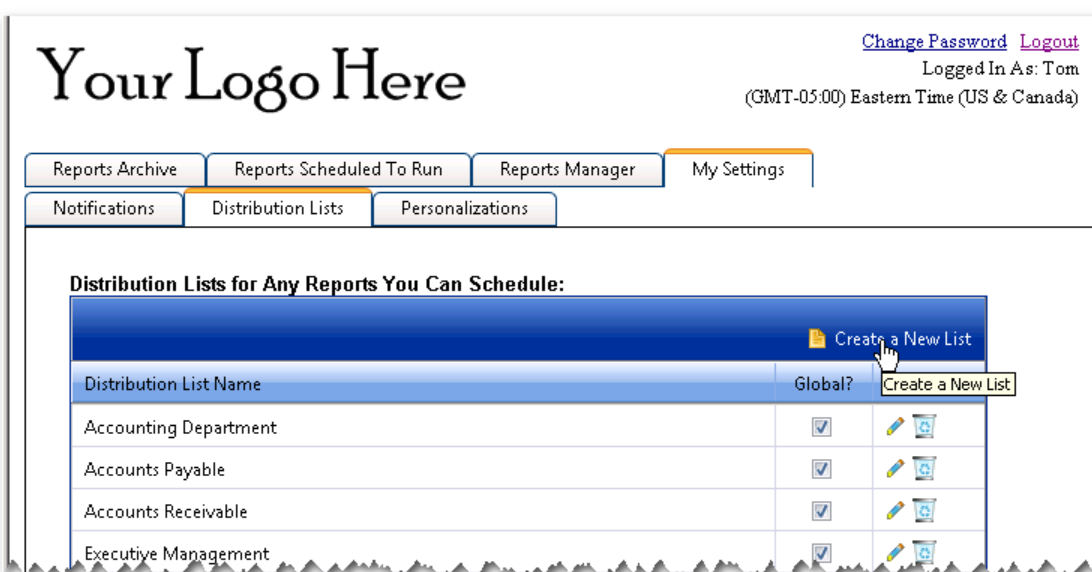
1. Click **Create a New List**.

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A section opens above any existing lists for you to name the list and define the users within it.


2. In the **Name** box, type a meaningful name for the distribution list.

3. If you are a Report Administrator, in the **Is Global** box, click **Yes** if you want all users to be able to view and use this list. If you are not a Report Administrator, **No** is always selected and you are not able to change it.

4. In the unlabelled user name entry box, type the user ids of internal users, e-mail addresses for external users, and/or other distribution list names, if desired. If you have more than one entry, type each one on a separate line (hit **Enter** after each entry).

    Note: If you have a personal list with the same name as a global list, to include the global list name within your list, prefix the name with "global:". (The personal list name will be used if the *global:* prefix is not used.)
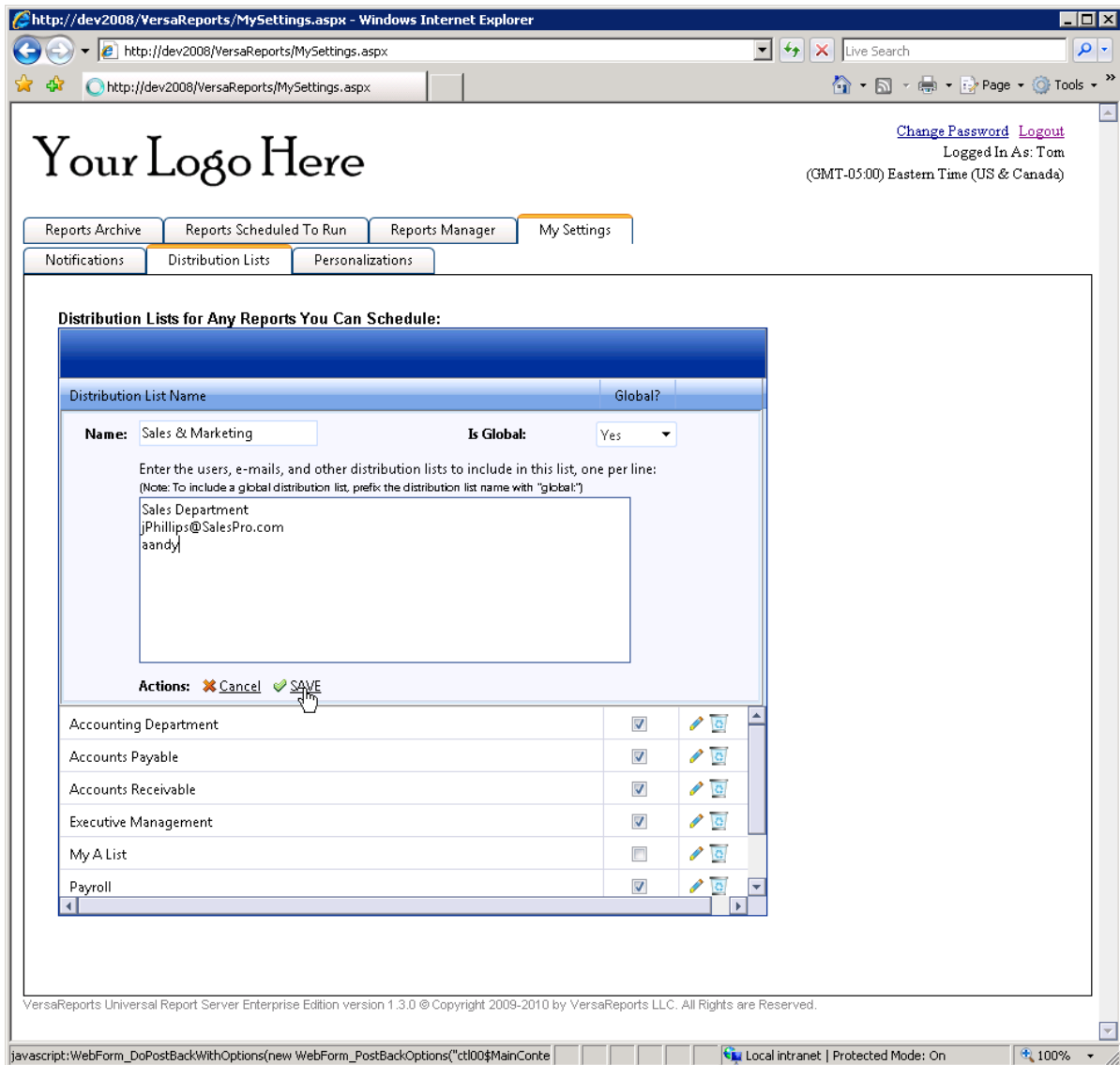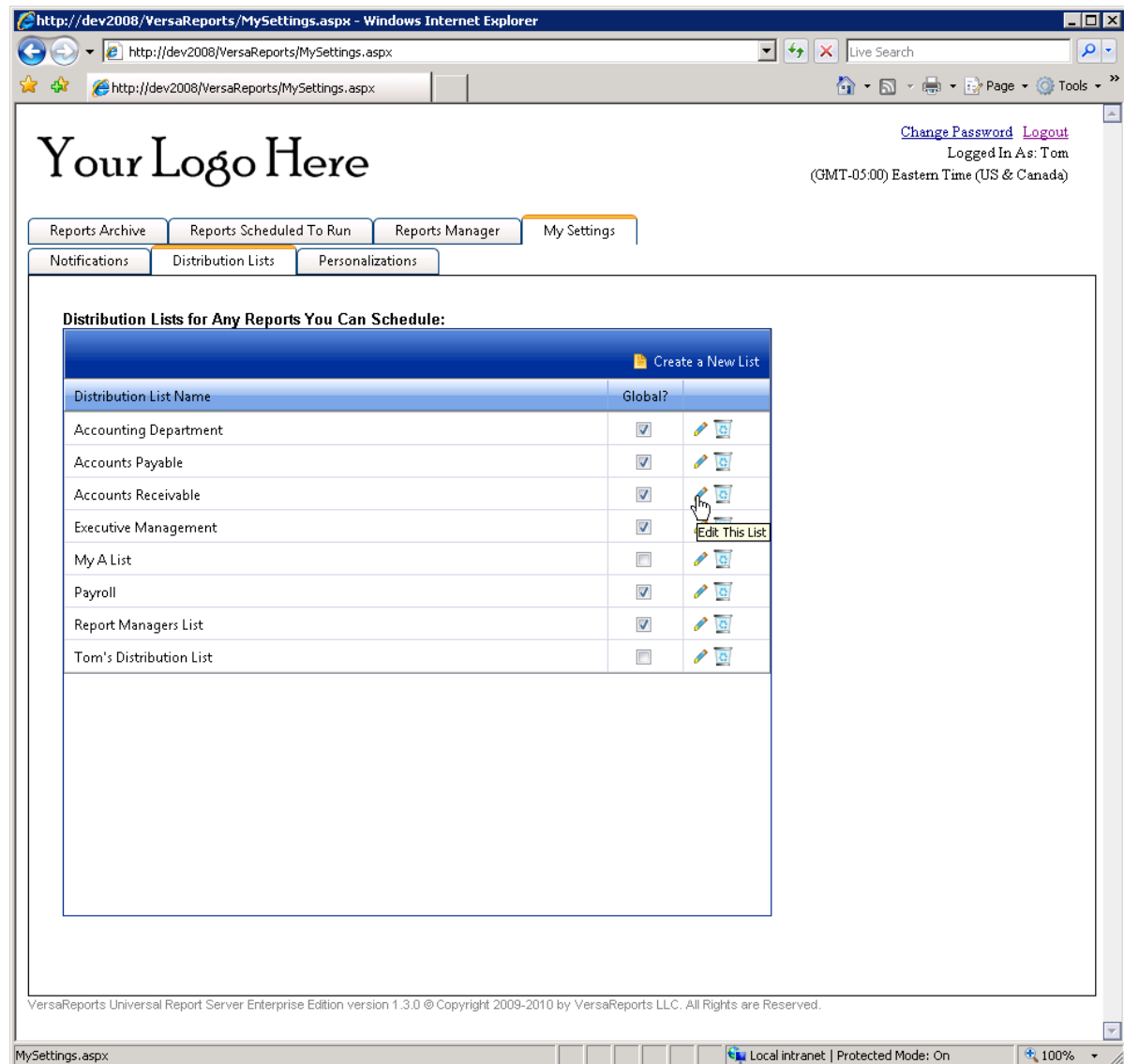
5. Click **SAVE** when you have completed your list.

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Invalid entries are reported to you through an error message.
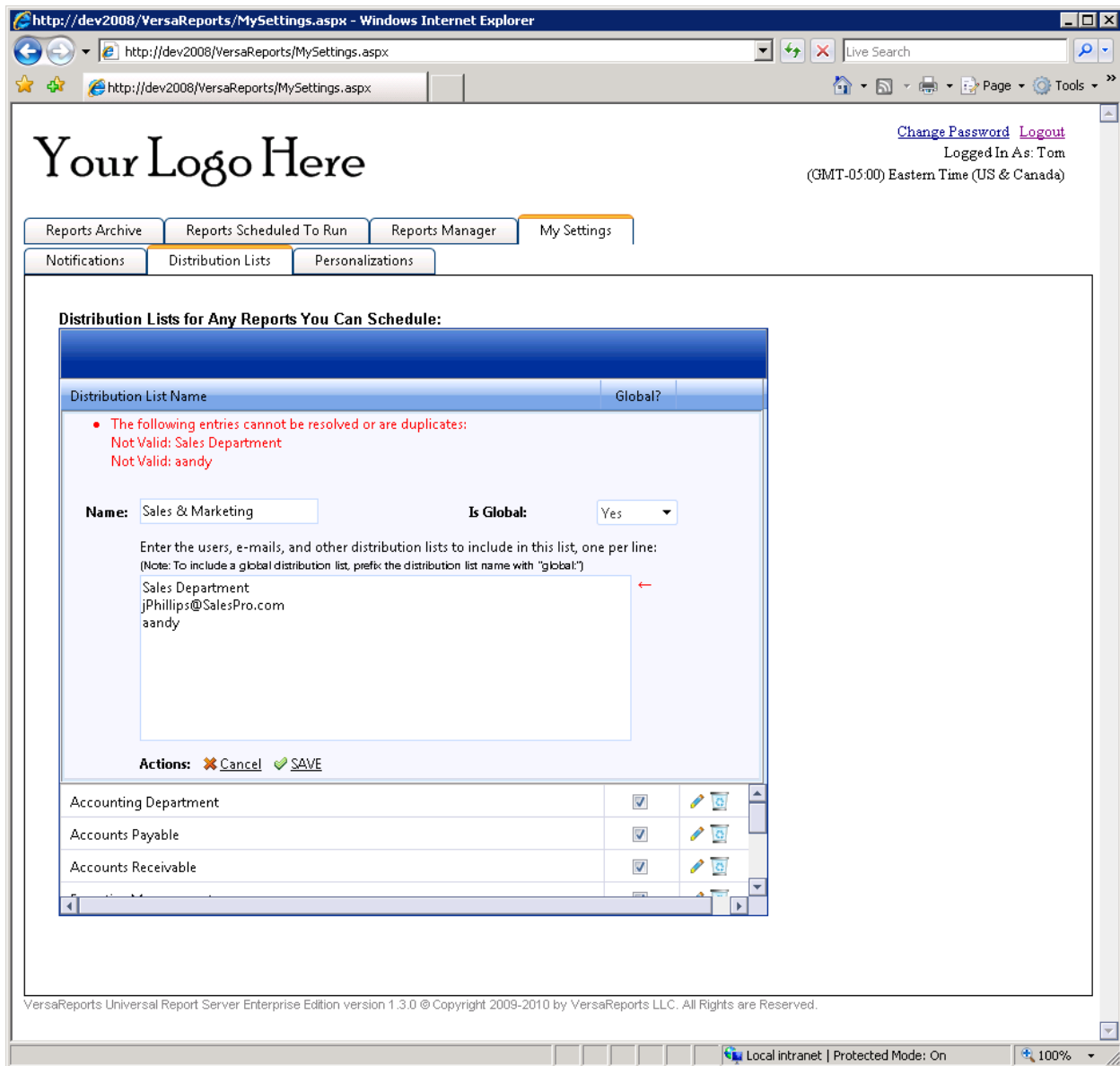
2.4.4.2.2 Maintaining A Distribution List

Once a list has been created, you can edit the recipients on the list or even delete a list.

Editing a List

1. To edit a list, click the pencil icon (✐) corresponding to the list name. A section opens for the existing list showing you the name of the list and the recipients previously defined for it.

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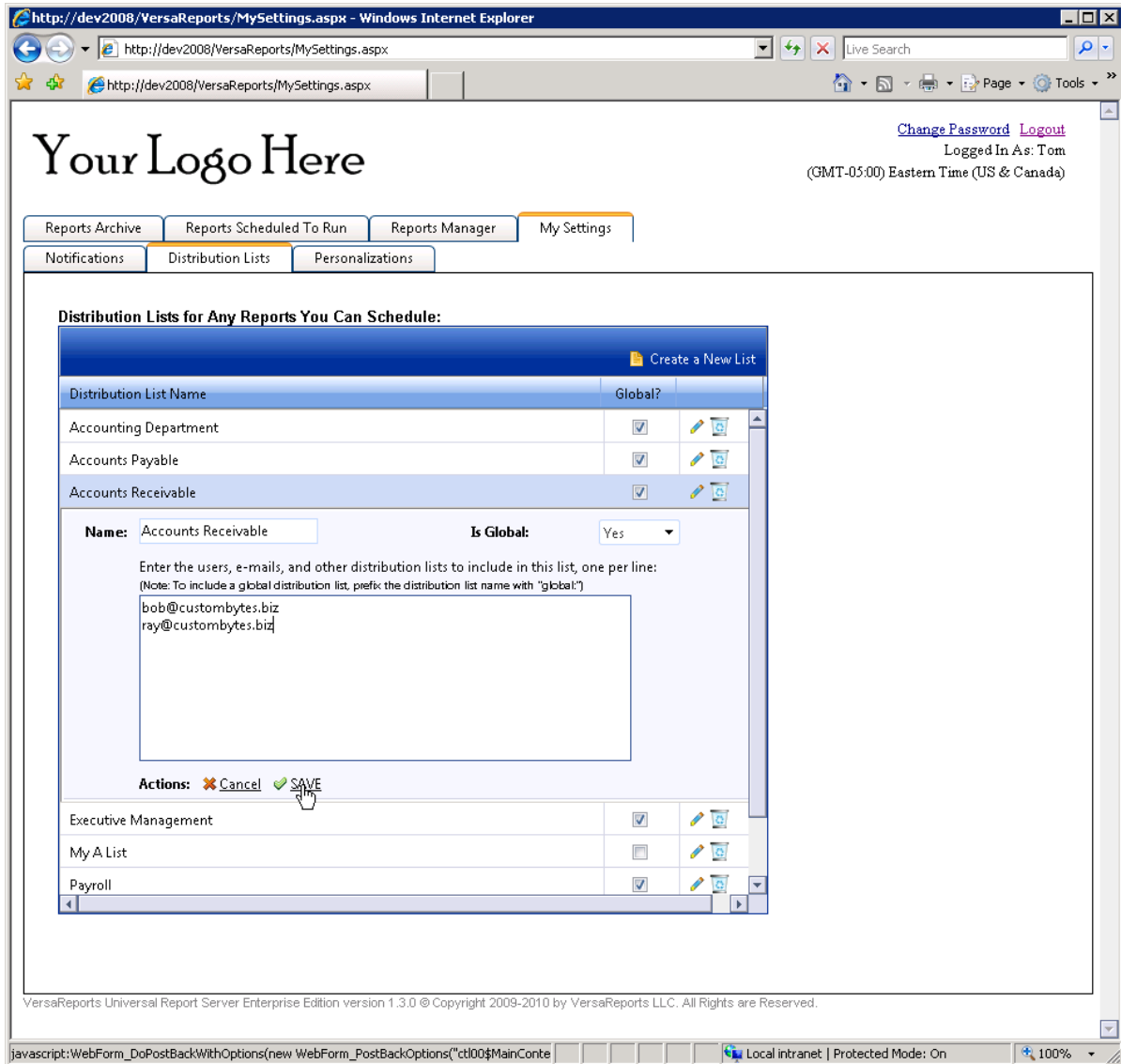
2. Make your changes to the list and click **SAVE**.

> **Note:** You may change the name of the list if you want. This name change will be reflected in any distribution lists and report schedules that include this list as a recipient.

Deleting a List
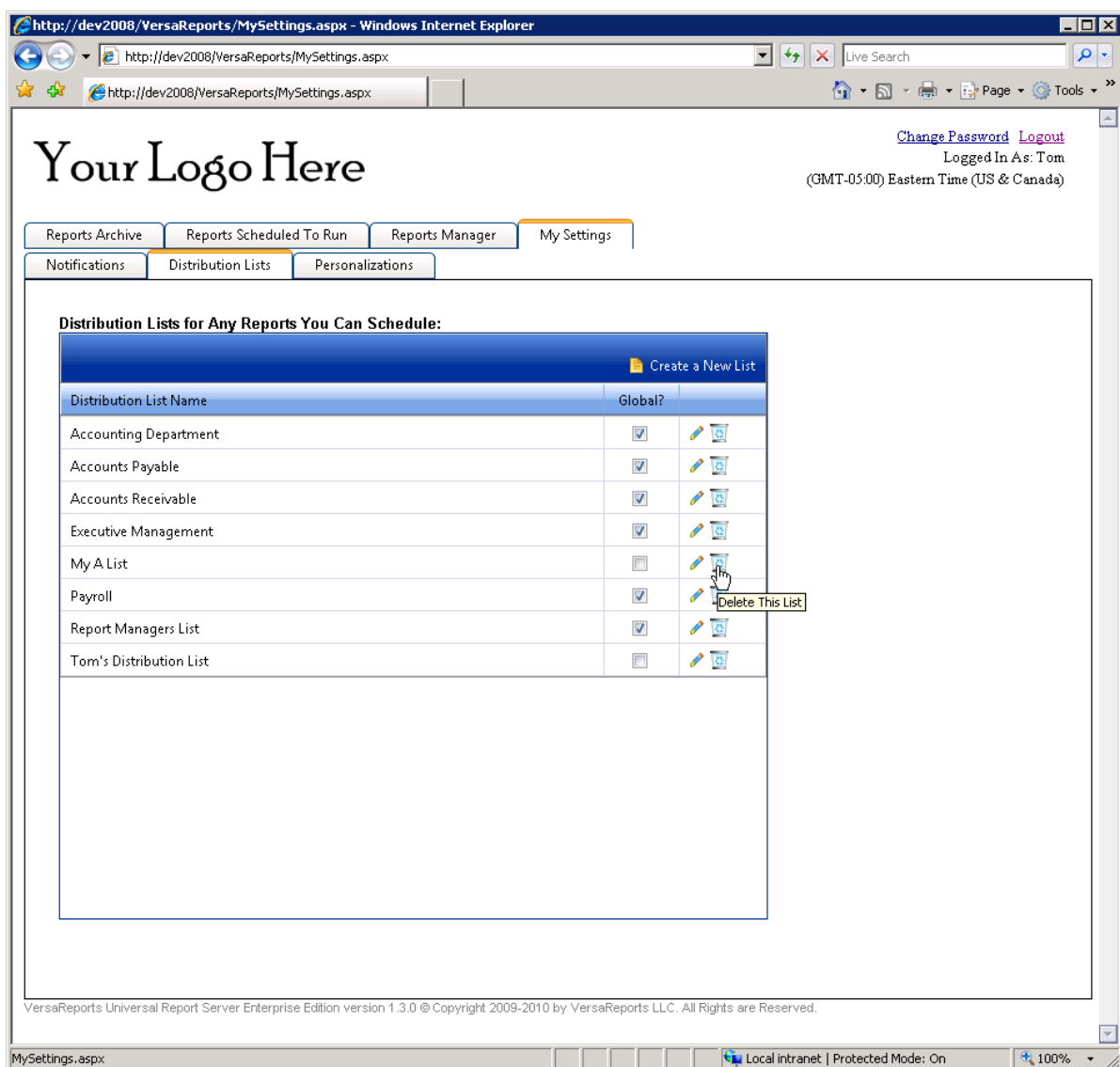
1. To delete a distribution list, click the wastebasket icon (🗑) corresponding to the list name. A warning dialog box displays informing you that if there are report schedules using this distribution list, those recipients in this list might not receive the report.
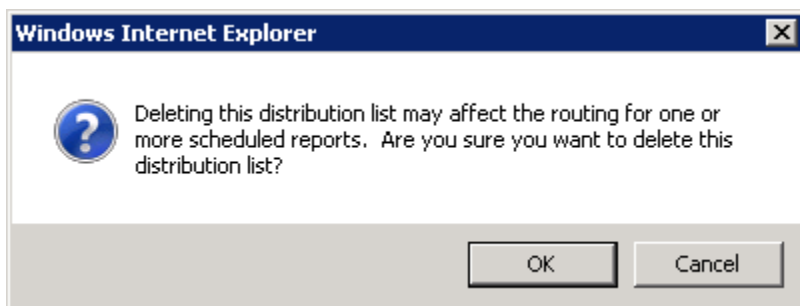
2. Click **OK** to confirm the deletion, or **Cancel** to abort.

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2.4.4.3 Personalizations Sub-Tab

The **Personalizations** sub-tab is used to establish certain individual settings including selecting your time zone, choosing how you want time to be displayed within URS (12 or 24 hour clock), and indicating your preferences for displaying report pop-up tool tips.

2.4.4.3.1 Setting Your Time Zone

The initial setting for your time zone will be the same as the time zone of the server. The **Personalizations** sub-tab permits you to change this setting to the correct one for your location.

1. In the **Select Time Zone for Where You Are** list, select the appropriate time zone for your location.
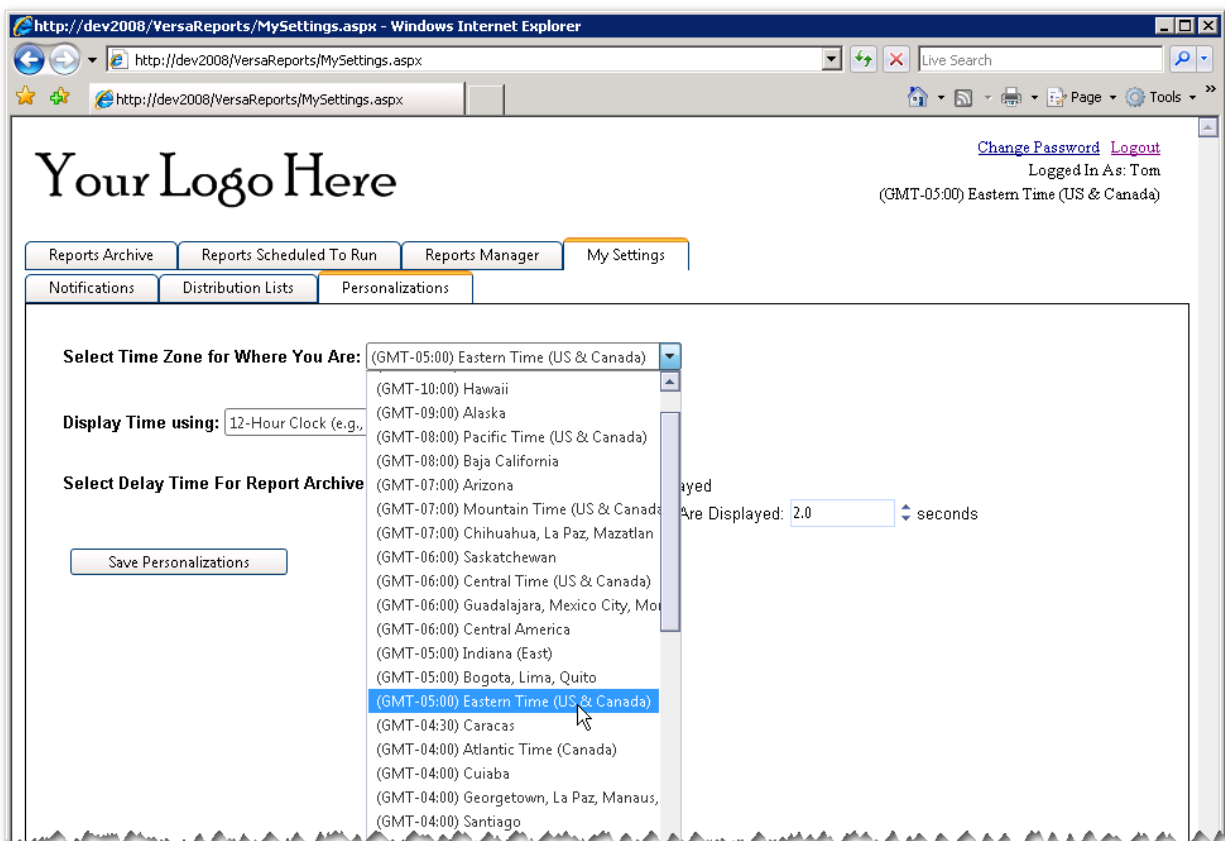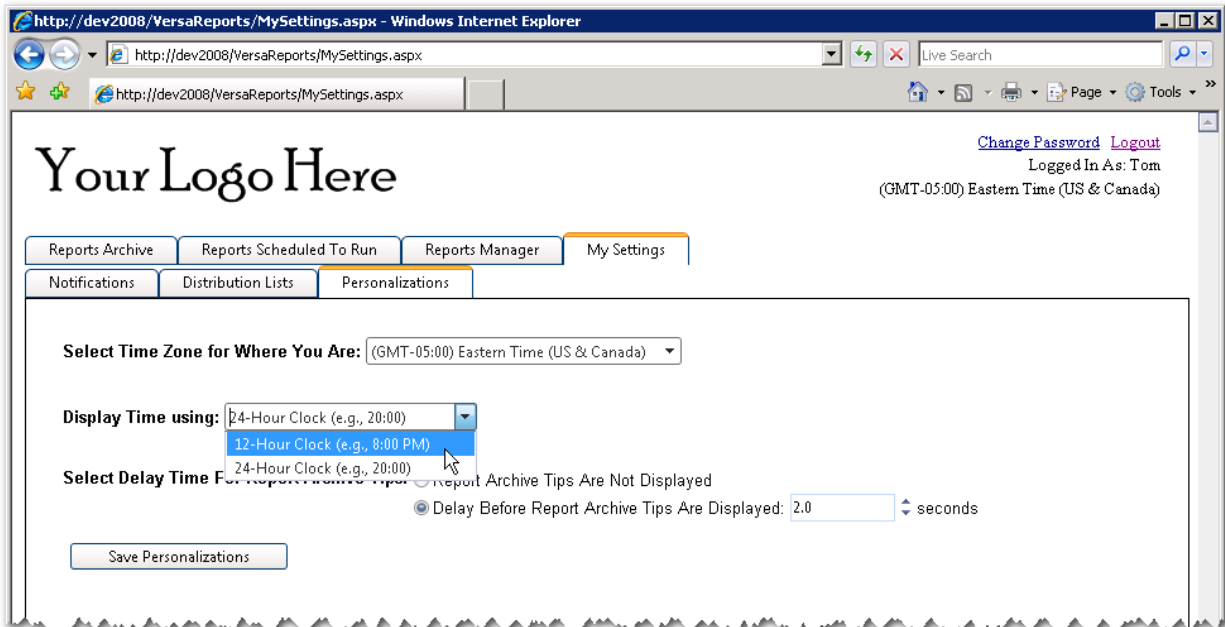

2. If you don't have any other changes on this tab, click **Save Personalizations**.
3. Click **OK** to the confirmation dialog when it displays.

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2.4.4.3.2 Choosing How to Display Time

All time pickers and time displays in URS are controlled by the same applet. You can choose whether you want the time displayed to you using the 12-hour clock or the 24-hour clock. This setting is only for you. Another user may choose a different time display.

1. In the **Display Time using** list, select your preference for displaying the time.
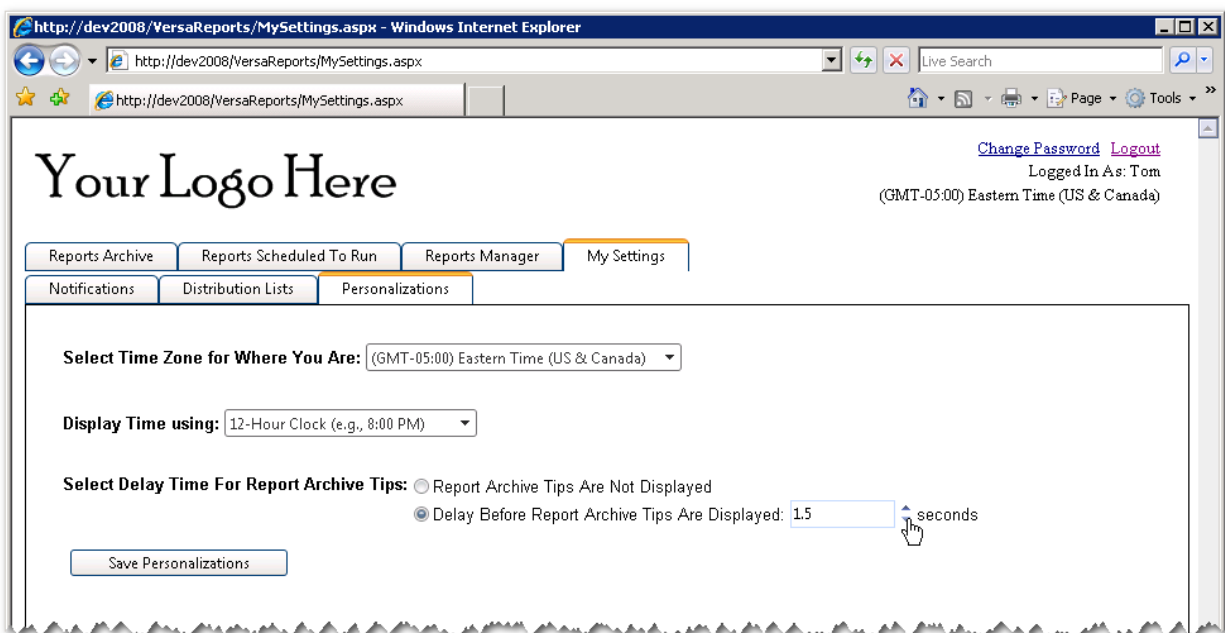

2. If you don't have any other changes on this tab, click **Save Personalizations**.
3. Click **OK** to the confirmation dialog when it displays.

2.4.4.3.3 Setting the Delay Time for Report Archive Tips

On the **Reports Archive** tab, you can hover over any report listed in the grid to see a pop-up tool tip that displays information about the report. (See Section 5.2.1.1 Report Details on page 98 for details.) Use this setting to choose whether you want to see the Report Details pop-up tool tip and to set the delay before it is shown to you.

1. Click the option to display the Report Archive tool tips or not to display them. If you choose to display them, then in the **Seconds** box type or select the number of seconds (to the tenth of a second) of delay you want before the tool tip is displayed. 5.0 seconds is the maximum delay permitted.

2. If you don't have any other changes on this tab, click **Save Personalizations**.
3. Click **OK** to the confirmation dialog when it displays.

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Chapter 3
Registering and Editing Reports

3.1 Overview

Before any reports can be scheduled for viewing, they must be "registered" (defined) within Universal Report Server. You can add any number of reports to the Universal Report Server that come from any number of report designers. The basic steps are:

1. Define the specific report information

2. Specify the parameter information needed to run the report

3. Indicate if the values for any of these parameters need to be locked for all schedulers, locked on a scheduler-by-scheduler basis, or unlocked for all schedulers

4. Define who can administer and schedule the report

5. Assign default values to parameters for individual schedulers for those parameters defined this way

All of these steps are handled in a single, easy-to-use Define a Report wizard that is started from the **Reports Manager** tab. You may register a report only if you are a Universal Report Server report administrator or have an equivalent administrative permission level. In fact, if you are not an administrator, the **Reports Manager** tab will not be available. The **Reports Manager** tab is described in detail in the next section of this chapter.

Once a report has been registered, it may be edited to make any necessary changes to it. Editing may only be done by the original Report Administrator who defined the report, or by other Report Administrators that have been added as an Administrator for this report in Step 4 of the wizard. Editing a report uses the same Define a Report wizard as its initial definition.

3.2 Reports Manager Tab

The **Reports Manager** tab is available only to users who have been designated Report Administrators in Universal Report Server. If you do not have this permission level, you will not see this tab.

The initial page displayed for the **Reports Manager** tab is illustrated below.
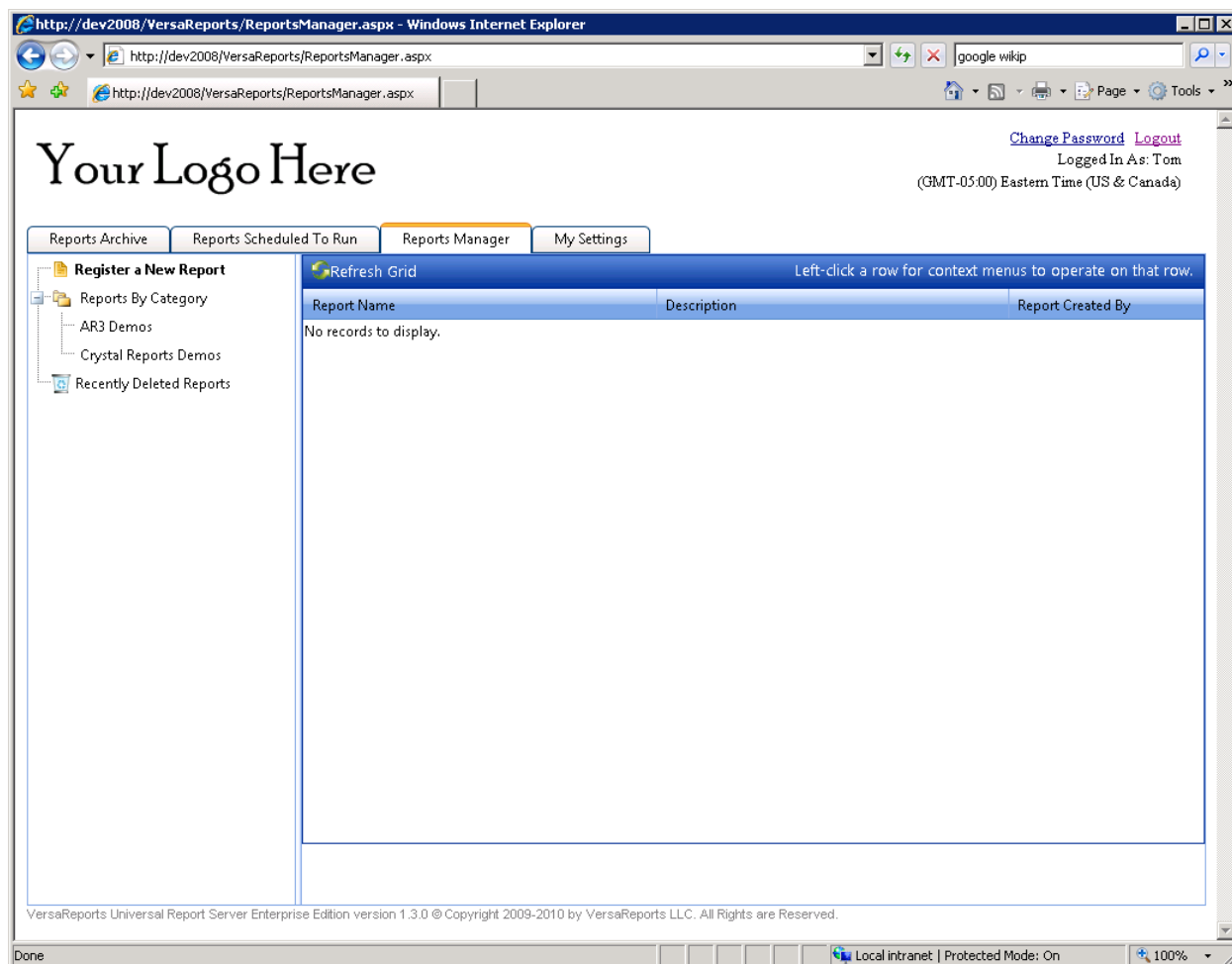
The **Reports Manager** tab permits you to:

- Register (define) a new report.
- Edit the definition of an existing report (left-click the report name and select **Edit Report**). This does not edit any report schedule that has been defined.
- Delete a report (left-click the report name and select **Delete Report**)
  - o If last report in a category is deleted, the category is deleted also (may have to refresh to see the category disappear)
- Create a schedule for a report (left-click the report name and select **Create Schedule For This Report**).
- Run a report immediately using values you supply in a mini-scheduler wizard (left-click the report name and select **Quick Run**)
- Copy the report (left-click the report name and select **Create New Report From This One…**)

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- View deleted reports and restore them if desired
  - o If deleted report is restored and it is the only report in its category, the category is restored as well (may have to refresh to see the category redisplayed)

Click an item in the left panel to initiate the actions listed below.

3.2.1 Register a New Report

Click **Register a New Report** to start the Define a Report wizard to add a new report to URS. Refer to Section 3.3 Registering Reports – the Define a Report Wizard on page 36 for this wizard's details.

3.2.2 Reports by Category

When a report is added to URS, the Report Administrator assigns it to a user-defined category. Those categories are listed here in an expanded tree format. (You can collapse the tree by clicking the ⊟.) This grouping helps you to identify any reports you might want to take action on.

When you click one of the categories, the grid area of the page is populated with the names of reports that were placed into that category. However, the only reports that will be displayed to you are either the ones you have defined yourself or ones that another Report Administrator has given you permission to administer.

The actions you can take on these reports include:

- **Edit Report**: Invokes the Define a Report wizard permitting you to make changes to the existing report definition. Refer to Section 3.4 Editing Reports on page 54 for instructions on editing a report.

- **Delete Report**: Removes the selected report from Universal Report Server and any associated schedules built for this report. If a user's Reports Archive list contains a scheduled copy of this report, the deleted report definition is placed in the Recently Deleted Reports list. Otherwise, it is deleted permanently with no recovery mechanism. Refer to Section 3.5 Deleting Reports on page 56 for instructions on deleting a report.

- **Create Schedule For This Report**: After you register (create) a new report, you may want to be able to create a schedule for it immediately. This action permits you to do that and eliminates your having to go to the **Reports Scheduled To Run** tab to create the schedule. This action invokes the Schedule a Report wizard, but the first step is abbreviated since you have already selected the report for which you want to create the schedule. Refer to Section 3.7 Create Schedule For This Report on page 59 for instructions on creating the schedule.

- **Quick Run**: Runs the report immediately using schedule-type information you enter into a short wizard (a schedule name, any parameters, and the report format). You will be the only recipient of the report. Refer to Section 3.8 Quick Run on page 60 for instructions on running the report.

- **Create New Report From This One…**: Creates a duplicate of an existing report by invoking the Define a Report wizard that contains all the information of the report being copied. Refer to Section 3.9 Create New Report From This One… on page 62 for instructions on creating a copy of the selected report.

3.2.3 Recently Deleted Reports

This section lists reports that have been deleted (see Reports by Category above) but copies of this report remain in one or more user's Reports Archive. Reports on this Recently Deleted Reports list will be automatically removed when the last report in users' Report Archive lists is gone, either by manual deletion or via the Retention Rules.

Click **Restore Report** to reinstate this report. Any schedules built for this report, however, will have been lost. Refer to Section 3.6 Restoring a Deleted Report on page 58 for instructions on restoring a report.

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3.3 Registering Reports – the Define a Report Wizard

The steps for registering a report are contained in the Define a Report wizard that is initiated from the **Reports Manager** tab.

1. Click the **Reports Manager** tab. The actions for this tab display in the left panel.
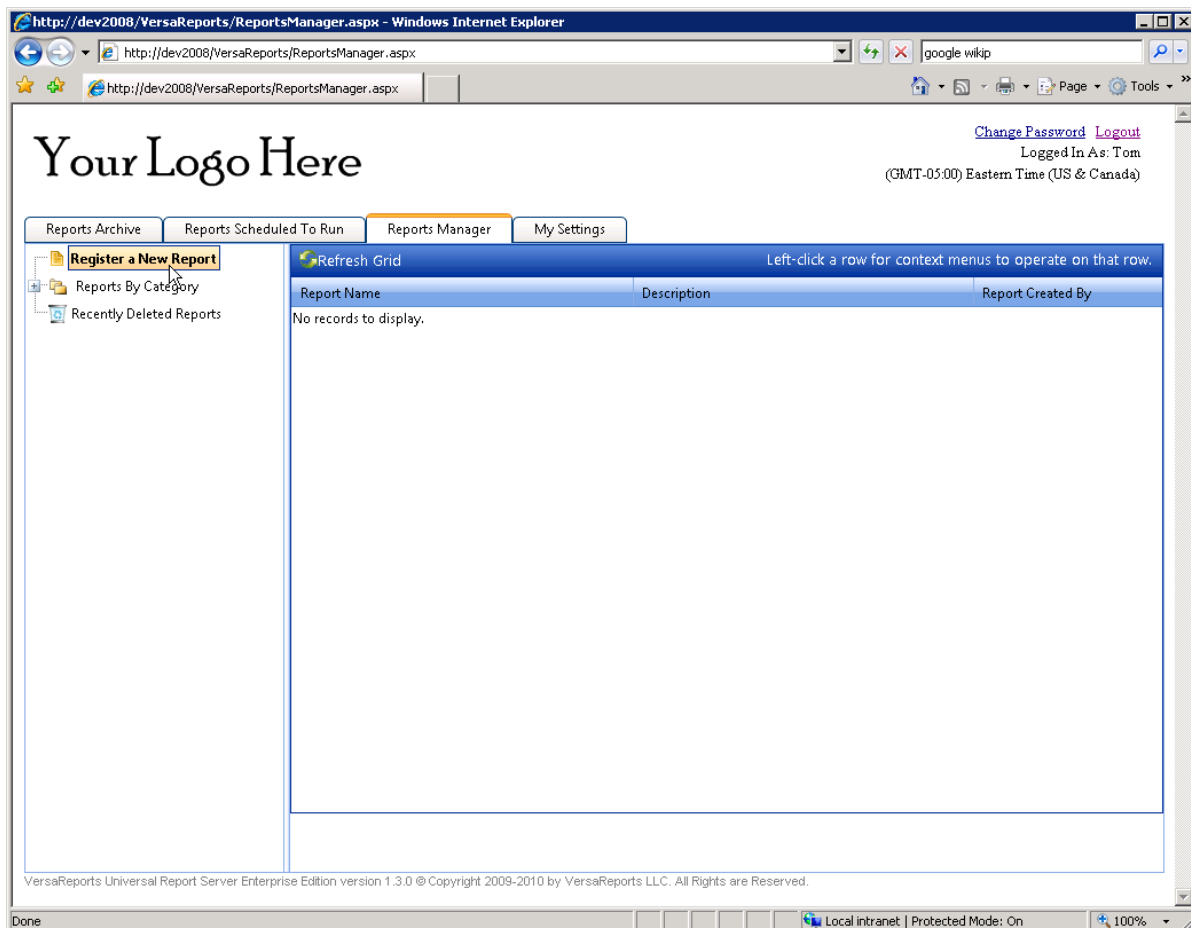
2. Click **Register a New Report**. This action invokes the five-step Define a Report wizard.

3.3.1 Step 1 – Basic Information

Use this Basic Information page to name the report and give it a description, group it into a category, and select the file on the server or to be uploaded.

Note: You can keep track of your progress through the wizard by observing the yellow bar's position in the left panel. When editing a report, you can click a tab in the left panel to jump to that step without having to "Next" your way through.

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When you click **Register a New Report**, the Define a Report: Step 1 - Basic Information page displays.

Fields and Elements (Buttons) on this page

Field/Element	Description
Report Name	The name that will be displayed in the grid for certain lists. It should be succinct, yet meaningful enough that the user knows what the report is about.
Report Description	The description entered here is used in conjunction with the **Report Name** when listing the report on the **Reports Manager** tab grid.
Report Group Category	A list of previously defined names provides a way to group similar reports, making it easier on the **Reports Manager** tab to find reports that have already been registered. You may type a new name into this field and it will be added to the list.
Report Type	Select the report type from the list. (**Note:** The options here are determined by the entries in the report_types.xml file, which is documented in the Installation Guide.) Based on your selection, the fields below this list may change to request different information.

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Field/Element	Description
Select File On Server	The file that will be used to run this report. Depending on the type of report, this file must either already be located on the server or can be uploaded from the user's workstation.
Class Name of Report	The fully-defined class name (namespace + the class name) for the report class within the DLL.
Select File To Upload	For some report types (for example, Crystal Reports) you need to upload the report file instead of selecting a file on the server. If this is the case, the **Select File On Server** box and **Class Name of Reports** box will not show up on this page. Click **Browse** to search for and upload the appropriate file. If you are editing the report, you will see a note above this box that "File Already Uploaded; Upload another to replace it (optional)". You do not have to browse for a new file unless you need to change it.
Send Exception E-Mails to	The e-mail address of a qualified report administrator who is able to evaluate any error messages that are passed due to a report's failure to run.
Cancel	Closes the wizard without saving any of the changes made to any of the pages during this session. You are returned to the **Reports Manager** tab listing of reports for the selected category.
< Back	This button is unavailable on this step.
Next >	Saves any changes you have made on this step and takes you to the next step if all required information has been entered on this page.
Finish >>	Closes the wizard and saves any changes you have made. You are returned to the **Reports Manager** tab listing of reports for the selected category.

Instructions

1. Enter, select, and browse for the requested information on this page.
2. Click **Next >** to proceed to Step 2 – Define Database Parameters, or click **Finish >>** to close the wizard saving your changes on this page and using default values for Steps 2-4.

3.3.2 Step 2 – Define Database Parameters

Some report designers (for example Crystal Reports) allow their reports to change from one database to another. For these reports the database information is often included in them. Use this step to define those database parameters.

Note that not all report types support using database parameters. If the report type does not support this feature, a message on this page will indicate this. In this case, click **Next >** to continue to the next step.
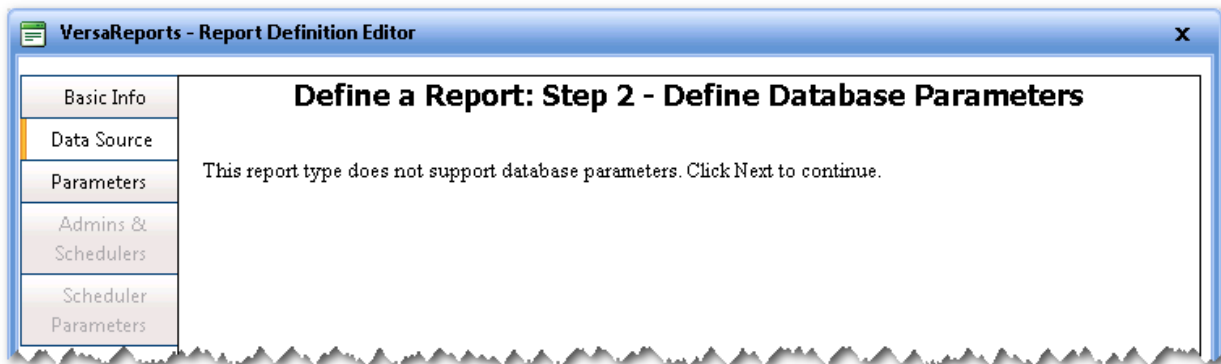
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If the report type does support using database parameters, the Define a Report: Step 2 – Define Database Parameters page displays as shown below.

Fields and Elements (Buttons) on this page

Field/Element	Description
Connection Info	This information is defined by the person who created the Report Connector for this particular report type. If you are using one of the standard Report Connectors included with Universal Report Server, check the Report Designer Integration section of the Installation Guide for that Report Connector's details on what to enter into this field (it will vary by report type). If this is left blank, the default connection information will be obtained from the report as it is defined.
User Name	The user name for authenticating the information for this data source.
Password	The user's password.

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Field/Element	Description
Allow Scheduler to Override Data Source Info	If this check box is selected, the data source info will appear beneath the parameter list in Step 2 – Report Parameters page of the Schedule a Report wizard. The scheduler is given the opportunity to change this data source information, or change the default data source information if the Connection Info was left blank.
Cancel	Closes the wizard without saving any of the changes made to any of the pages during this session. You are returned to the **Reports Manager** tab listing of reports for the selected category.
< Back	Saves any changes you have made on this step and returns you to the previous step.
Next >	Saves any changes you have made on this step and takes you to the next step if all required information has been entered on this page.
Finish >>	Closes the wizard and saves any changes you have made. You are returned to the **Reports Manager** tab listing of reports for the selected category.

Instructions

1. Enter the appropriate information on this page.
2. Click **Next >** to proceed to Step 3 – Define Report Parameters, or click **Finish >>** to close the wizard saving your changes on this page and using default values for Steps 3-4.

3.3.3 Step 3 – Define Report Parameters

Some report designers permit parameters to be passed in to qualify the output of the report. For example, you may want a report to include information that falls within a certain date range only, or information from a certain production line. This step allows you to define those parameters that will be passed to the report when it is run. Once those parameters are defined in this step, you can easily change their order using a drag-and-drop operation.

For a new report definition, the initial page of this step indicates no parameters are defined for the report.

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If your report does not require any parameters, click **Next** and continue with Step 4 – Admins and Schedulers on page 48. Otherwise, click either **Retrieve Parameters From Report** or **Add Parameter** (these are located in the bar above the grid).

If the Report Connector for your report supports parameters and these can be retrieved by URS, click **Retrieve Parameters From Report**. (Note that all the Report Connectors supplied with URS support this feature.) The page refreshes and now displays all the parameters for this report.

You may edit one or more of these to change the Description, set the Parameter Value Lock, or to enter Value Restrictions. Click the pencil icon (✏) to begin editing.

If you clicked **Add Parameter** or you clicked the pencil icon to edit one of the automatically retrieved parameters, the page displays fields for you to describe or edit the parameter.

The Value Restrictions column indicates the value and whether or not it is locked:

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Fields and Elements (Buttons) on this page

Field/Element	Description
Description	This entry is used in the Schedule a Report wizard to prompt the report scheduler to enter a value for the parameter you are defining here.
Parameter Type	The six types of parameters you can define are: - Boolean: Requires a Yes or No answer. - Integer: a positive or negative whole number limited by high and low values established here. - Float: a floating point number, limited by high and low values established here. - String: text consisting of any number of characters - Choices: A string based on a set of choices. Choices are entered one per line. - Date And Time: a specific date and time, right now, or a relative date and time: beginning of the hour, beginning of the day, beginning of the week (Saturday, Sunday, Monday), beginning of the month, beginning of the quarter, and beginning of the year.
Parameter Name in Report	The name of the parameter inside the report into which the scheduler's value will be passed. If you are adding the parameter yourself and you are not sure about this name, check with the report designer. The Parameter Name value you enter must exactly match the name of the parameter as it is defined in the report.

Field/Element	Description
Parameter Value Lock	There are times when you might want to restrict a scheduler (or all schedulers) from being able to enter a value for a particular parameter. As the Report Administrator, you want to be able to enter the parameter's value either for all schedulers, or for individual schedulers based on their User ID. In other instances you might want to restrict just some schedulers, but not all, from entering values for a parameter. These situations are accommodated by this **Parameter Value Lock** field. The choices for this field and their explanations are: • **Allow Scheduler To Change Value:** Select this option to permit the scheduler to enter or choose a value for this parameter. When the report is scheduled, this parameter will be included on the list of parameters in Step 2 – Report Parameters of the Schedule a Report wizard. • **Assign Default Value For All Schedulers:** Select this option to assign a single default value for all schedulers. The Default Value for All Schedulers field appears for you to enter that value. Parameters having this lock value will not be shown on the Step 2 – Report Parameters page of the scheduling wizard. • **Assign Default Value For Each Scheduler:** Select this option if you want to assign different parameter values to different schedulers (based on their User ID). If this option is selected, Step 5 – Scheduler-Specific Parameter Defaults is made available for you to assign those different default values all users defined as Schedulers in Step 4 of this wizard. If you don't assign a default value for a scheduler, the scheduler is prompted to enter or choose a value for the parameter. **Note:** This field is not available if the **Parameter Type** is Choices.
Default Value for All Schedulers	If the **Parameter Value Lock** is set to **Assign Default Value For All Schedulers**, then this field will appear. Type or choose the value to be used for all schedulers.
Actions	Click **OK** to save your definition. Click **Cancel** to end the definition of this parameter without saving it.
Cancel	Closes the wizard without saving any of the changes made to any of the pages during this session. You are returned to the **Reports Manager** tab listing of reports for the selected category.
< Back	Saves any changes you have made on this step and returns you to the previous step.
Next >	Saves any changes you have made on this step and takes you to the next step if all required information has been entered on this page.

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Field/Element	Description
Finish >>	Closes the wizard and saves any changes you have made. You are returned to the **Reports Manager** tab listing of reports for the selected category.

Instructions

1. Enter or change the required information to define the parameter.
2. Click the **OK** action to save these changes to this parameter for the report. The **Define Report Parameters** page now shows your new parameter on the list or shows the changes you made to the Description, Parameter Value Lock, or Value Restrictions.

3. To define another parameter, click **Add Parameter** again.
4. To edit a parameter, click the pencil icon ( ).

5. To delete a parameter, click the wastebasket icon ( ). The following message displays in a dialog box.
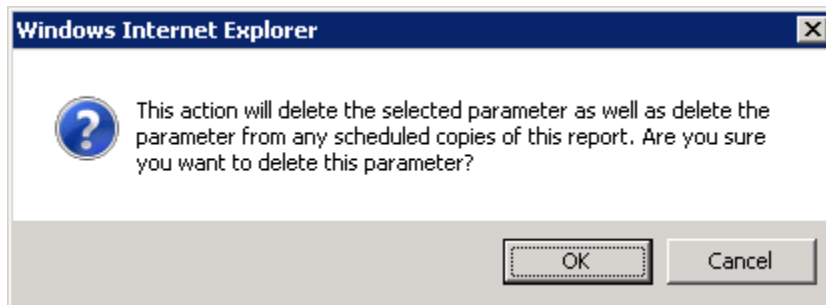
This applies only if you are editing an existing report definition and schedules have been defined for it. Observe caution when deleting an existing parameter. It may cause the scheduled report to fail if that parameter is expected/needed by the report.

6. When the report is run, those unlocked parameters are presented to the scheduler in the order in which they are listed in this step. This order can be easily changed by dragging and dropping selected parameters. Just point to the parameter you want to reposition and hold down the left mouse button as you drag the parameter up or down. Release the mouse button when the parameter is in its new position as indicated by the dashed line.
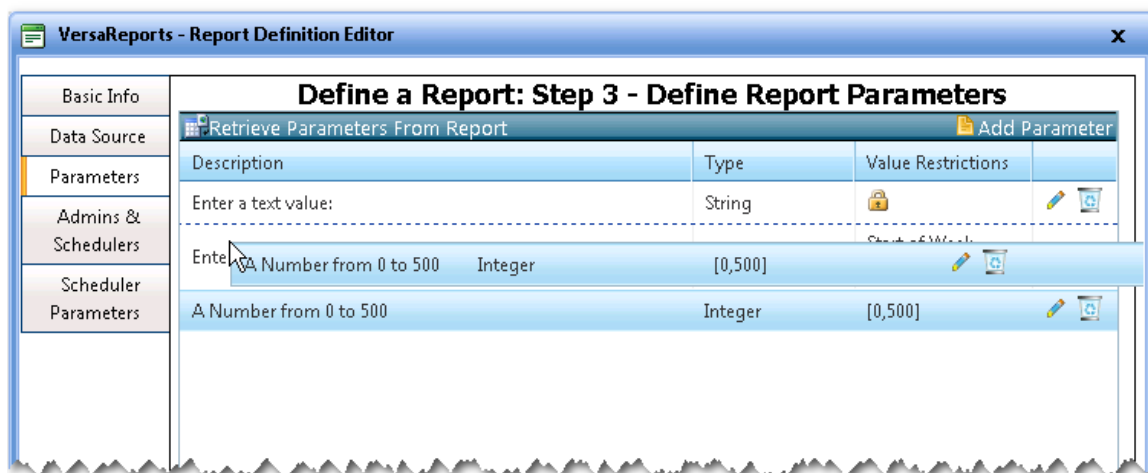
7. When you are finished defining all parameters, click **Next >** to proceed to Step 4 – Admins and Schedulers, or click **Finish >>** to close the wizard saving your changes on this page and using default values for Step 4.

3.3.4 Step 4 – Admins and Schedulers

For each report you register, you can specify the users you want to be able to administer the report (which includes editing it using this Define a Report wizard), and the users you want to be able to schedule the report.

Note: Report schedulers can be any valid user who can use URS.

Report administrators can only be users who are defined in Universal Report Server as a Report Administrator.

After you click **Next >** from Step 3 (or when you click **Admins & Schedulers** in the left panel), the Define a Report: Step 4 – Admins and Schedulers page displays.

If you are defining this report for the first time (as opposed to editing it), your name is automatically included in both the **Report Administrators** box and **Schedulers** box.

If you are the user initially defining this report, or if you are an administrator editing this previously defined report, note that you do not have the wastebasket icon (🗑) next to your name in the **Report Administrators** box, indicating you are not permitted to remove yourself from this role. (This ensures that at least one person is always an administrator/scheduler of every report in the system.)

Fields and Elements (Buttons) on this page

Field/Element	Description
Enter User ID for Administrators (one per line)	The login/user names of those persons you want to be able to manage this report definition. Only users who can login and use URS are permitted. These users must also be defined to URS as Report Administrators as described in the Installation Guide. This report will be available to these assigned Report Administrators in the Reports By Category listing, and they will have both the **Edit Report** and **Delete Report** options available to them.
	If you are entering more than one user, type each User ID on a separate line (hit **Enter** after each User ID).
Enter User ID for Schedulers (one per line)	The login/user names of those persons you want to be able to schedule this report. Only users who can login and use URS are permitted. Any user can be a scheduler. Adding a user as a scheduler will make the Schedule A Report menu pick available to them on the **Reports I Scheduled** sub-tab. This report will be available to them on the list of reports they have been given permission to schedule.
	If you are entering more than one user, type each User ID on a separate line (hit **Enter** after each User ID).
Add >	Looks up the User ID entered in the box to the left and, if it is valid, populates the appropriate **Report Administrators** or **Schedulers** box to the right with the names of those users.
	Invalid User IDs will cause a message to be displayed informing you of the error.
Cancel	Closes the wizard without saving any of the changes made to any of the pages during this session. You are returned to the **Reports Manager** tab listing of reports for the selected category.
< Back	Saves any changes you have made on this step and returns you to the previous step.
Next >	Saves any changes you have made on this step and takes you to the next step if all required information has been entered on this page.
Finish >>	Closes the wizard and saves any changes you have made. You are returned to the **Reports Manager** tab listing of reports for the selected category.

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Instructions

1. Enter User IDs for Administrators. If you are adding more than one user, hit Enter to place each on a separate line.
2. Click **Add >** to add these users to the **Report Administrators** box on the right.

3. Type the User IDs for users you want to be able to schedule this report. If you are adding more than one user, hit **Enter** to place each on a separate line.
4. Click **Add >** to add these users to the **Schedulers** box on the right.

5. To remove a Report Administrator or Scheduler from the list, click the wastebasket icon ( ) adjacent to the user's name. A confirmation dialog box displays asking you if you are sure you want to remove the user from the list. Click **OK** to continue. The name is removed from the list.

   Note: If you remove a scheduler and that user has already defined one or more schedules for this report, then if that scheduler attempts to edit the schedule, the following dialog box displays:

6. When you have completed adding and/or removing users as Administrators and Schedulers, click **Next >** to proceed to Step 5 – Scheduler-Specific Parameter Defaults, or click **Finish >>** to close the wizard and save your changes. Note that your **Next** button will not be available unless one or more of the parameters defined in Step 3 has the **Parameter Value Lock** set to **Assign Default Value For Each Scheduler**.

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3.3.5 Step 5 – Scheduler-Specific Parameter Defaults

If any of the parameters defined in Step 3 have the **Parameter Value Lock** set to **Assign Default Value For Each Scheduler**, then this step becomes available for you to assign those default values.

After you click **Next >** from Step 4 (or when you click **Scheduler Parameters** in the left panel), the Define a Report: Step 5 – Scheduler-Specific Parameter Defaults page displays.

Fields and Elements (Buttons) on this page

Field/Element	Description
[Schedulers and Parameter list]	Each user that was assigned as a Scheduler in Step 4 of this wizard will have a section on this page.
	Each parameter that was defined in Step 3 to have a **Parameter Value Lock** of **Assign Default Value For Each Scheduler** will be listed under the section for each Scheduler.
	For each Scheduler, assign an appropriate value for each parameter.
	Note: As the note at the top of this page indicates, you may leave a parameter's field blank if you want to allow that particular scheduler to be able to enter their own value.
Cancel	Closes the wizard without saving any of the changes made to any of the pages during this session. You are returned to the **Reports Manager** tab listing of reports for the selected category.
< Back	Saves any changes you have made on this step and returns you to the previous step.
Next >	This button is unavailable on this step.
Finish	Closes the wizard and saves any changes you have made. You are returned to the **Reports Manager** tab listing of reports for the selected category.

Instructions

1. For each Scheduler, assign an appropriate value for each parameter or leave it blank to allow the Scheduler to enter or choose the parameter's value.
2. When you have completed assigning values to each parameter for each Scheduler, click **Finish**. Your report definition is now listed on the **Reports Manager** tab listing of reports in the category specified in Step 1 of your definition.

3.4 Editing Reports

When editing a report you use the same Define a Report wizard as when registering a report. You can edit a report only if you are defined within URS to be a Report Administrator. This means you have been assigned to be in the Report Editors group or you have been set up in User Administration to be able to Add Reports. If you are a Report Administrator, the **Reports Manager** tab is available to you.

The reports available to you for editing are either those you registered originally in URS, or those in which you have been designated as an Administrator (Step 4 of the wizard) by another Report Administrator.

Changes made to the report name and description and to the **Admins & Schedulers** page are immediate. Changes to the rest of the report registration information take effect the next time the report is run.

Editing a report begins from the **Reports Manager** tab.

1. Click the **Reports Manager** tab. The actions for this tab display in the left panel.

2. Click **Reports By Category** to expand the list of categories that have been defined for all reports.

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3. Click the reports category name that contains the report you want to edit. A list of all reports in that category displays.
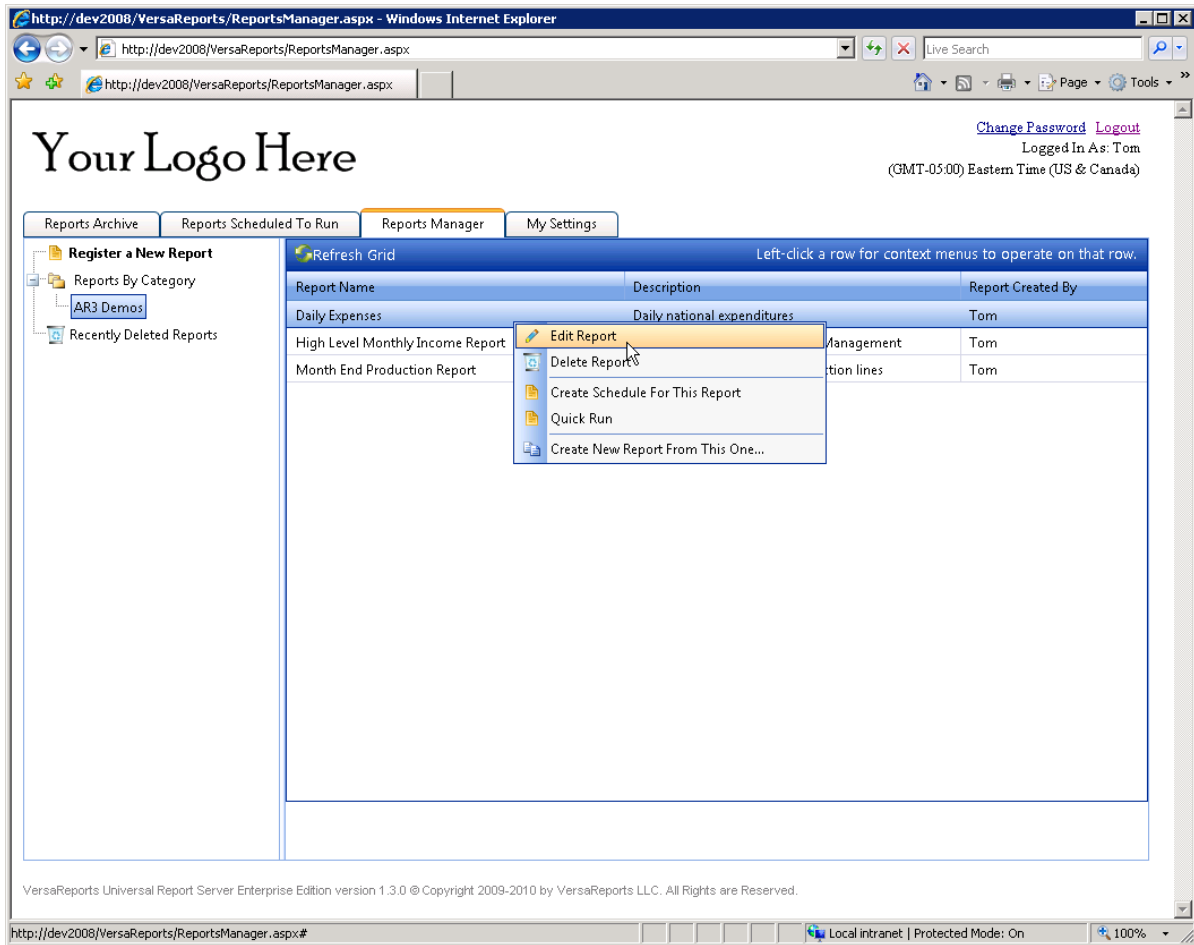
4. Click (left-click) the name of the report and click the **Edit Report** option. The first page (Step 1) of the Define a Report wizard displays.

5. If you know what step you want to edit, you may go directly to it by clicking the tab on the left-hand side of the wizard. For example, if you want to add a user as a scheduler of this report, click **Admin & Schedulers** in the left panel, as illustrated above.

Please refer to Section 3.3 Registering Reports – the Define a Report Wizard starting on page 36 in this chapter for detailed descriptions of the fields for each of the steps.

6. When you are done editing, click **Finish**. This will save the changes you have made on all pages (steps) of the wizard. There is a Finish button on every page of the wizard; you do not have to go to the last page (Step 4) to click it.

3.5 Deleting Reports

Although it is likely you will rarely use this feature, there are times and situations when a report needs to be deleted. Exercise caution when deleting a report. Not only will the report definition be deleted, but all schedules built for that report will be deleted as well. Archived report runs that users are retaining, however, are not immediately deleted.

The report is deleted immediately if there are no reports remaining in a user's Reports Archive list. In this case there is no chance of recovery. If a user's Reports Archive list contains a scheduled copy of this report, the deleted report definition is placed in the Recently Deleted Reports list. Reports are permanently removed from the Recently Deleted Reports list once all copies of the report have been deleted from all users' Reports Archive lists.

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Deleting a report begins from the **Reports Manager** tab.

1. Click the **Reports Manager** tab. The actions for this tab display in the left panel.

2. Click **Reports By Category** to expand the list of categories that have been defined for all reports.

3. Click the reports category name that contains the report you want to delete. A list of all reports in that category displays.
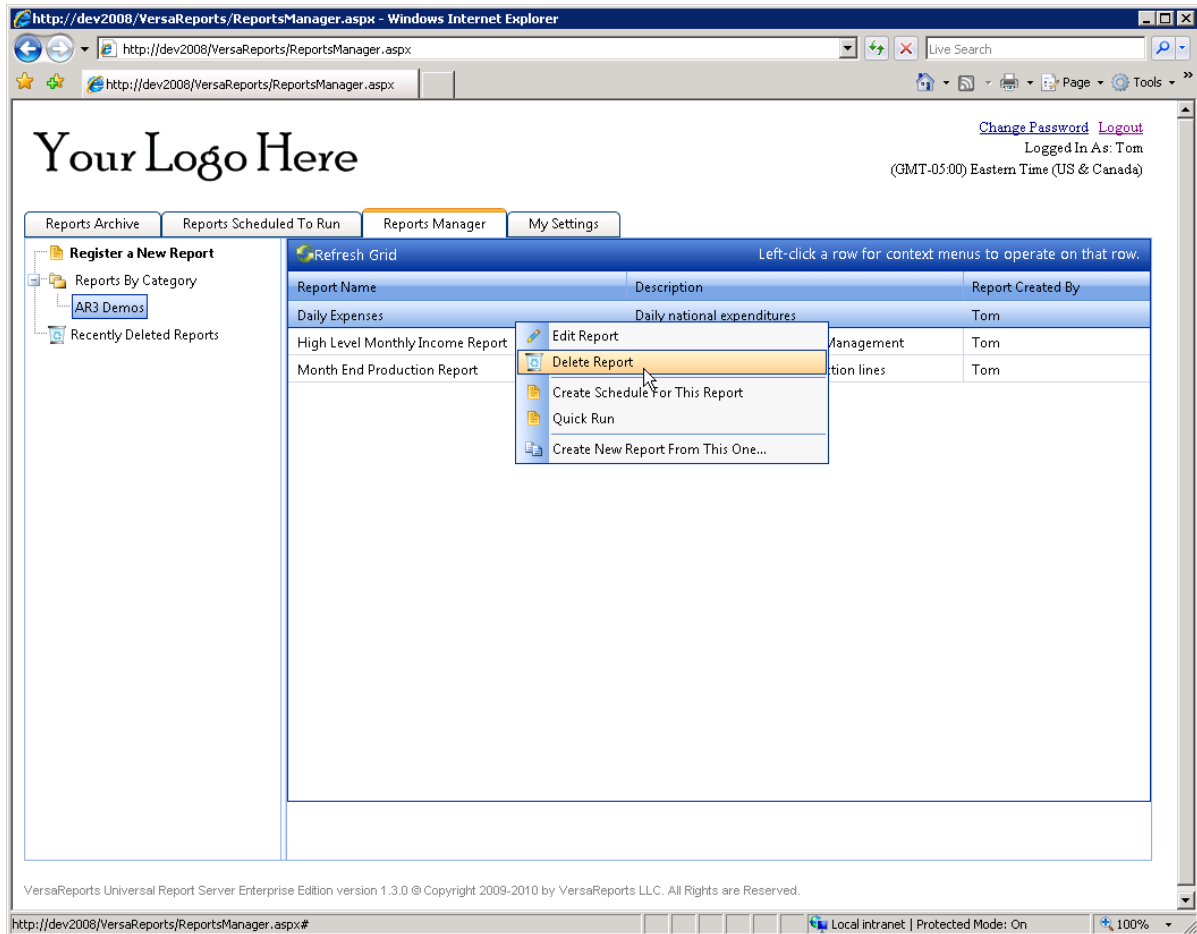
4. Click (left-click) the name of the report and click the **Delete Report** option. A warning dialog box displays.
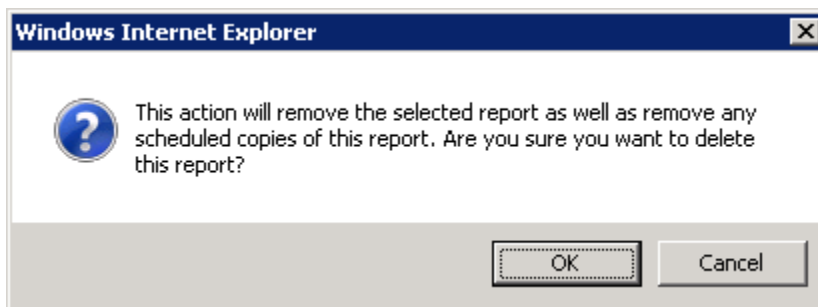
5. Click **OK**.

3.6 Restoring a Deleted Report

If a deleted report definition has reports remaining in a user's Reports Archive list, the deleted report is placed in the Recently Deleted Reports list. It will remain in this list until all archived reports have been removed by means of the Retention Rules or they have been manually deleted by the user.

Restoring a report will restore the report definition only. Any schedules that had been created for this report will have been deleted already and cannot be restored.

Restoring a report begins from the **Reports Manager** tab.

1. Click the **Reports Manager** tab. The actions for this tab display in the left panel.

2. Click **Recently Deleted Reports**. A list of deleted reports displays.
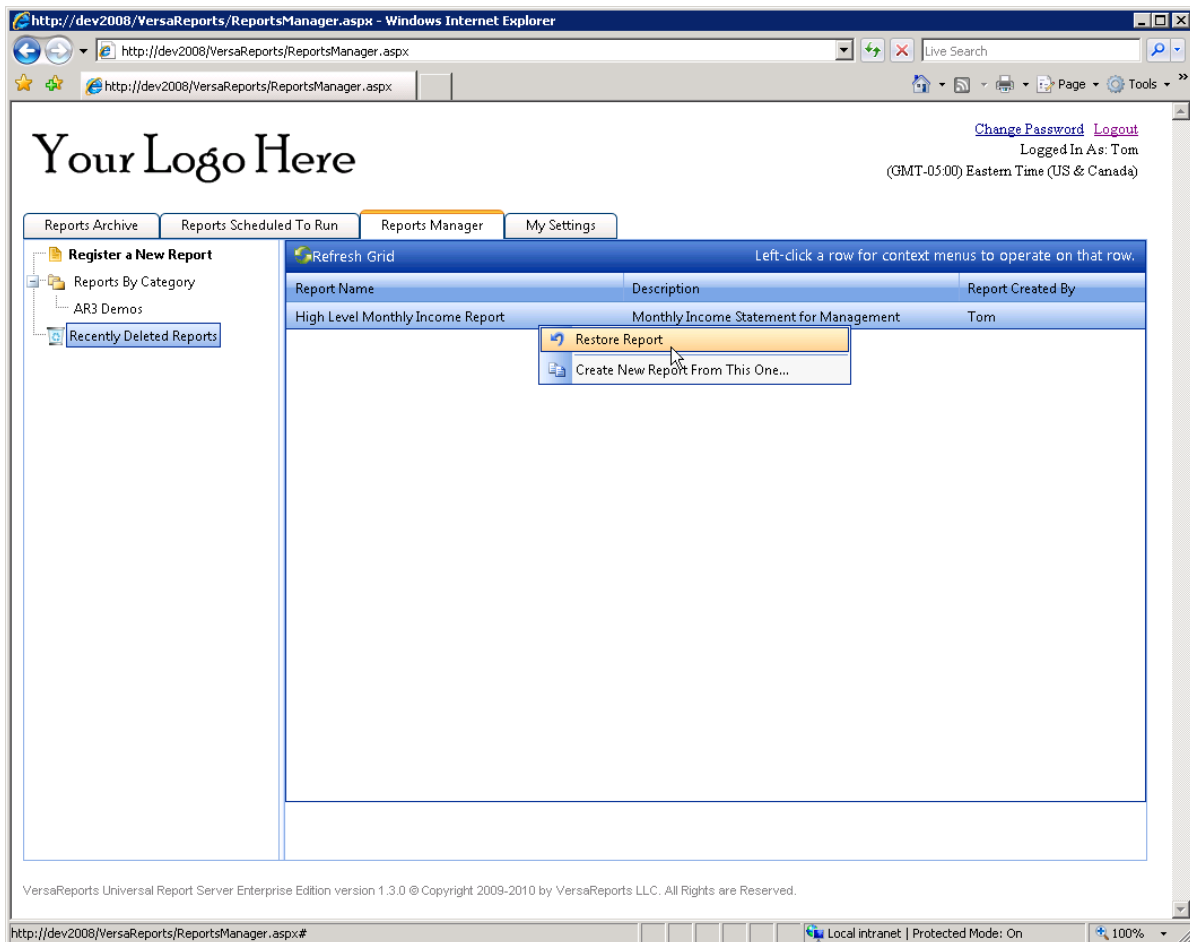
3. Click the name of the report and click the **Restore Report** option. An informational dialog box displays.

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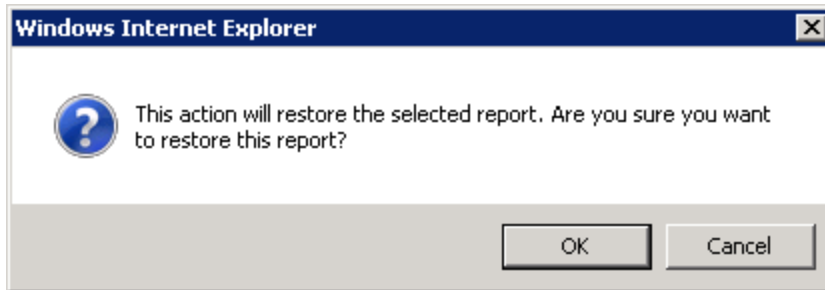
4. Click **OK**.

3.7 Create Schedule For This Report

As a convenience for creating a schedule for a report you have just defined, the **Create Schedule For This Report** option is included on the context menu. This option eliminates your having to go to the **Reports Scheduled To Run** tab to create the schedule if you are ready to create it immediately.

Creating a schedule for a report begins from the **Reports Manager** tab.

1. Click the **Reports Manager** tab. The actions for this tab display in the left panel.

2. Click **Reports By Category** to expand the list of categories that have been defined for all reports.

3. Click the reports category name that contains the report for which you want to create a schedule. A list of all reports in that category displays.
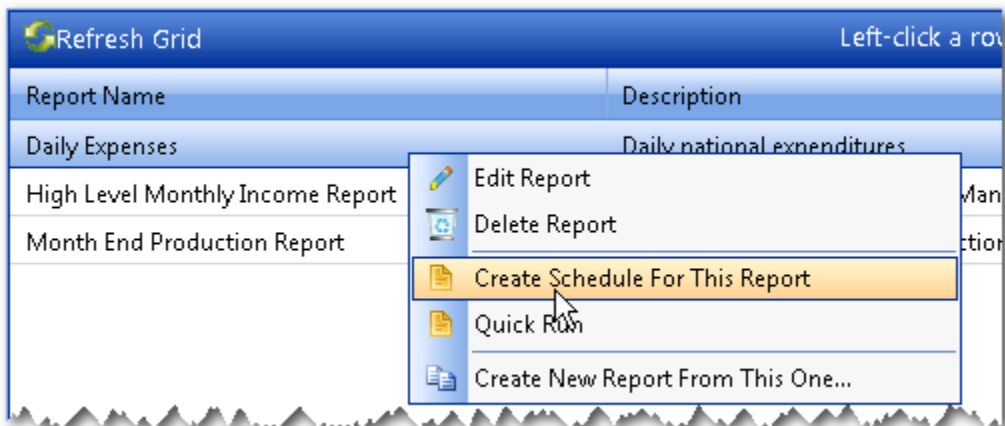
4. Click (left-click) the name of the report and then click the **Create Schedule For This Report** option. A modified Step 1 - Basic Information page displays. That is, since the report has already been selected, the **Select Report to Run** field simply shows the name of that report rather than you having to select it as in the original Step 1.

5. The **Schedule Name** field is already filled in with a suggested name, and you can change this. Also in this step, you may select the **Suspend Schedule** check box if you want to temporarily pause the schedule. Later, when you are ready to resume running the schedule, edit this schedule and clear the check box, or select the **Resume Schedule** option from the schedule's context menu.

6. Click **Next** to continue with the wizard. Refer to the discussion starting in Section 3.3.2 Step 2 – Define Database Parameters on page 38 for detailed information and instructions for completing the remaining steps in the wizard.

3.8 Quick Run

Use this feature to run the report immediately using information you enter into an abbreviated Schedule a Report wizard. You will need to enter a name for the schedule (so the report can be identified in your Report Archive), the report parameters (if any), and the format of the report. You will be the only recipient of the report, and the retention policy defaults to **Keep Until User Deletes It**.

Doing a Quick Run of a report begins from the **Reports Manager** tab.

1. Click the **Reports Manager** tab. The actions for this tab display in the left panel.

2. Click **Reports By Category** to expand the list of categories that have been defined for all reports.

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3. Click the reports category name that contains the report which you want to run. A list of all reports in that category displays.
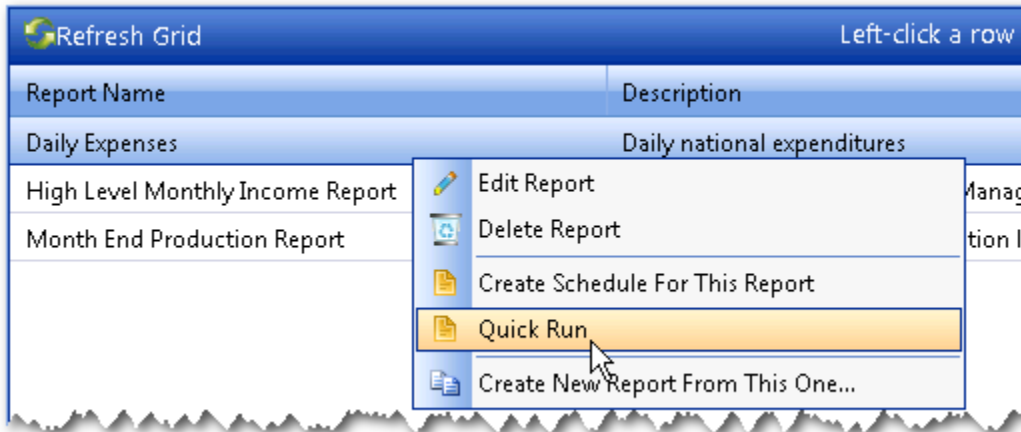
4. Click (left-click) the name of the report and then click the **Quick Run** option. A modified Step 1 - Basic Information page of the Schedule a Report wizard displays. Note that the **Schedule Name** field is defaulted to a suggested name (the name of the report prefaced by "Quick Run".

5. On the **Basic Info** tab (Step 1), change the name of the schedule if you want. Click **Next**.

6. On the **Parameters** tab (Step 2), if there are parameters you may enter or change their values if desired. Click **Next**.

7. On the **Distribute** tab (Step 3), the only field showing is the format for the report. Select the appropriate format for the report output.

8. When you are ready to run the report, click **Finish**. The report is run immediately and if successful will be placed in your Report Archives.

3.9 Create New Report From This One…

Use this option to create a duplicate of an existing report. This action invokes the Define a Report wizard that you will use to edit the duplicated information to create the new report.

1. Click the **Reports Manager** tab. The actions for this tab display in the left panel.

2. Click **Reports By Category** to expand the list of categories that have been defined for all reports.

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3. Click the reports category name that contains the report you want to copy to create the new report. A list of all reports in that category displays.
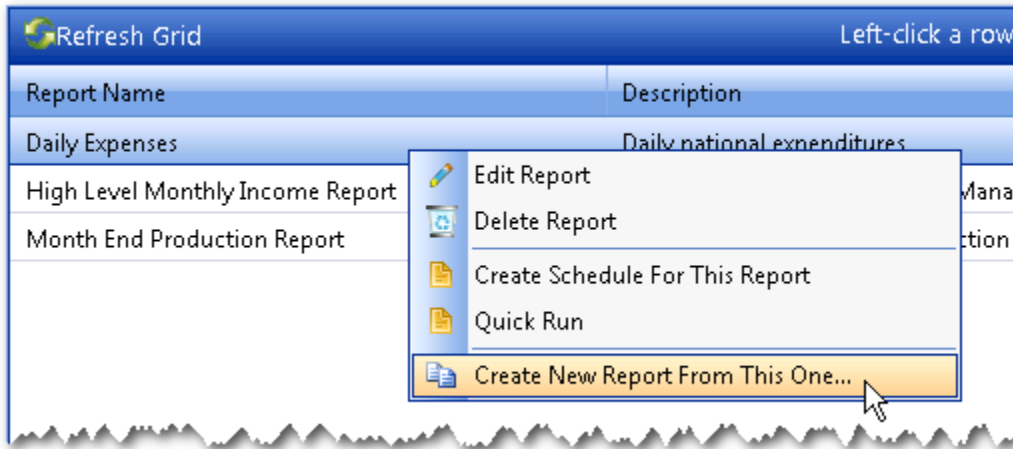
4. Click (left-click) the name of the report and then click the **Create New Report From This One…** option. The Define a Report: Step 1 - Basic Information page displays.

5. The **Report Name** and **Report Description** fields use the existing names prefaced with "Copy of". Change these to suit your requirement for the new report.

6. Every other field in the wizard uses the same information as the report being copied. Review each step and verify or change the information as necessary for your new report.

7. Click **Finish >>** when you are through. The report is added to the **Reports By Category** list in the Report Group/Category you designated in Step 1

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Chapter 4
Scheduling Reports

4.1 Overview

Once a report has been registered, it is available to be scheduled. Only those users who were added as Schedulers in the report's definition will have the ability to schedule that report. Contact your Report Administrator if you think you need to be added as a scheduler for a particular report. The scheduling options are all performed from the **Reports Scheduled To Run** tab. This tab is described in detail in the next section of this chapter.

The basic steps for creating a schedule for a report are:

1. Give a name to the schedule and select the specific report that the schedule will run

2. Supply values for any report parameters that have been defined for the report

3. Specify the times and dates that the report will be run

4. Define who should receive the report

5. Establish the default global retention rule

All of these steps are handled in a single, easy-to-use Schedule a Report wizard.

4.2 Reports Scheduled To Run Tab

The **Reports Scheduled To Run** tab is viewable to all users, but a scheduler will use this tab and its three sub-tabs more often than other users to create and edit report schedules. A page showing the **Reports to be Run** sub-tab is illustrated below.

The column headings are the same for all three tabs. You may sort the listed reports:

- Alphabetically by the name of the schedule – click the **Schedule Name** column
- Alphabetically by the name of the report – click the **Report Name** column
- By the date and time when the report was last run – click the **Last Time Run** column
- By date and time when the report will next run – click the **Next Time Scheduled** column

If you have clicked the **Reports I Scheduled** tab, you may have a **Schedule A Report** action on the bar directly below the tab (see the illustration below). This will be available to you if you have been designated to be a Scheduler for a report by the report's administrator. For detailed instructions on scheduling a report, please refer to Section 4.3 Scheduling Reports – the Schedule a Report Wizard on page 71.
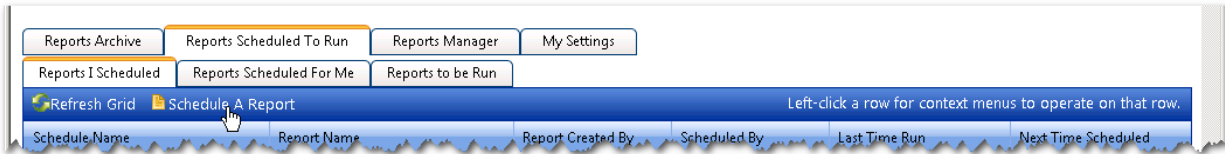
4.2.1 Actions You May Take on These Reports

When you click any of the report lines in the grid, a menu appears showing the actions you can take on that report. The possible actions you may see are described in the table below.

Action	Description
Adjust Your Retention Rule	Reports remain in your Reports Archive list until they meet the criteria of the Retention Rules for that report. A default set of Retention Rules is defined by the original scheduler of the report. However, each user can set a personal Retention Rule for each scheduled report. Use this action to display the dialog box that you use to change those rules. For a further explanation of Retention Rules, see Section 5.5 Adjusting Your Personal Retention Rule for a Scheduled Report on page 120.
View Event Log	The Event Log shows the recent event history for a scheduled report. An event is defined as the outcome of the ReportsRunner's attempt to run the report. The Event Log shows when the report was started, its status, when the report completed, and any error information. The status column indicates successful reports ( ), those that are currently in progress ( ), and any that have failed ( ). Failed reports usually include error information that can help report administrators debug the problem.

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Action	Description
Edit Schedule (**Reports I Scheduled** tab only)	This action initiates the Schedule a Report wizard. The fields are already filled in with information from the original schedule or from a previous edit. Use this action when you want to change one or more aspects of this report's schedule. Typical reasons for editing the schedule are to suspend the schedule, change how often the report runs, or to add or delete recipients of the report.
	This action is only available on this tab for the reports that you have previously scheduled.
	Refer to Section 4.3 Scheduling Reports – the Schedule a Report Wizard on page 71 for detailed information about the steps of the Schedule A Report wizard.
Delete Schedule (**Reports I Scheduled** tab only)	Use this action when you want to permanently stop the scheduled report from running and you never want it to run again. It is only the schedule that gets deleted, not the report that is registered in URS. Reports that have been delivered to users by this schedule will remain in the users' Reports Archive list until any time-based retention rule removes it, or until the user manually deletes the report from the archive.
	Note 1: If you just want to suspend a report from running for a while, select the **Suspend Schedule** check box in the first step of the Schedule a Report wizard.
	Note 2: If you delete a report schedule by accident, you cannot "undelete" it. You must recreate it using the Schedule a Report wizard.
	Refer to Section 4.5 Deleting Schedules on page 94 for instructions on deleting a schedule.
Suspend/Resume Schedule (**Reports I Scheduled** tab only)	This action provides a quick and convenient way to pause (suspend) or resume a schedule.
	• If a schedule is active and running, this action will read **Suspend Schedule**. Click this action to temporarily suspend the schedule. The report will remain in your list of reports that have been scheduled, but it will not run until the **Resume Schedule** action is executed.
	• If the schedule is currently suspended, this action will read **Resume Schedule**. Click this action to start the schedule running again.
Create New Schedule From This One… (**Reports I Scheduled** tab only)	Use this action to create a duplicate of the selected schedule. This will start the Schedule a Report wizard.
	In Step 1 (Basic Information) of the Schedule a Report wizard, the **Schedule Name** field uses the existing schedule name prefaced with "Copy of". In the **Select Report to Run** field, the current report name is selected, but you may change this if you want to create a similar schedule but for a different report.
	All the other fields in the wizard use the same information as the schedule being copied. Move through each step of the wizard so you can verify or change the information. Click **Finish** at any time to complete the creation of the new schedule.

4.2.2 Sub-Tabs Under Reports Scheduled To Run

The three sub-tabs under the **Reports Scheduled To Run** tab are used to group the report schedules into functional categories that make it easier for you to find a report and take action on it if you want.

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4.2.2.1 Reports I Scheduled

This tab lists the reports that you have scheduled. Because you are the scheduler, you have the option to take certain actions on the schedule. You may edit the schedule or even delete the schedule. If you see the **Schedule A Report** option in the bar above the grid, this means that a report administrator has designated you as a scheduler for one or more reports and you are allowed to create a new schedule.

If you have not been designated as a scheduler for any reports, not only will this list be empty, but also you will not have the **Schedule A Report** option in the bar above the grid.

4.2.2.2 Reports Scheduled For Me

This tab lists reports that other users have scheduled for you to view. The scheduler is identified in the **Scheduled By** column.

4.2.2.3 Reports to be Run

This tab lists a combination of the previous two tabs and shows when the last time was that the report ran, and when it is scheduled to run next. Note, however, that any suspended report schedules will not show on this list.

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4.3 Scheduling Reports – the Schedule a Report Wizard

The steps for scheduling a report are contained in the Schedule a Report wizard that is initiated from the **Reports I Scheduled** sub-tab.

1. Click the **Reports I Scheduled** sub-tab of the **Reports Scheduled To Run** tab. A listing of all reports that have been scheduled by you displays in the grid.

2. Click **Schedule A Report** on the bar above the grid. This action invokes the five-step Schedule a Report wizard.

4.3.1 Step 1 – Basic Information

Use this Basic Information page to name the schedule and pick the report that you want to create a schedule for. If you are editing a schedule, this first step is where you can suspend the schedule.

Note: You can keep track of your progress through the wizard by observing the yellow bar's position in the left panel. When editing a schedule, you can click a tab in the left panel to jump to that step without having to "Next" your way through.

When you click **Schedule A Report**, the Schedule a Report: Step 1 - Basic Information dialog displays.

Fields and Elements (Buttons) on this page

Field/Element	Description
Schedule Description	The name identifying the schedule within the grids of certain lists. It should be succinct, yet meaningful enough that the user knows what the report schedule is for.
Select Report to Run	Each report name is listed beneath the category it was placed in when it was defined. The only reports that will show on this list are ones for which you have been designated as a Scheduler by the Report Administrator who originally registered or later edited the report.

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Field/Element	Description
Suspend Schedule	If you are creating this schedule, you can select this check box to temporarily pause the schedule. Later, when you are ready to resume running the schedule, edit this schedule and clear the check box, or select the **Resume Schedule** option from the schedule's context menu.
	If you are editing the schedule and the report is running, select this check box to temporarily suspend the schedule. The report will remain in your list of reports that have been scheduled, but it will not run until the check box is cleared.
Cancel	Closes the wizard without saving any of the changes made to any of the pages during this session. You are returned to the **Reports I Scheduled** sub-tab of the **Reports Scheduled To Run** tab.
< Back	This button is unavailable on this step.
Next >	Saves any changes you have made on this step and takes you to the next step if all required information has been entered on this page.
Finish >>	This button is unavailable on this step.

Instructions

1. Enter a description for the schedule and select the report you want to make the schedule for.
2. Select the **Suspend Schedule** check box to keep the schedule from being implemented at this time.
3. Click **Next >** to proceed to Step 2 – Report Parameters.

4.3.2 Step 2 – Report Parameters

Some report designers permit parameters to be passed in to the report. These parameters were defined during the definition of the report. In this step you need to supply the values for those parameters to qualify the data presented on the report.

You can also use this page to specify or change the data source if the Report Administrator, when defining the report, permitted schedulers to do this.

If the report does not have any parameters defined for it, a message for this step will indicate this. If this is the case, click **Next >** to continue to the next step.
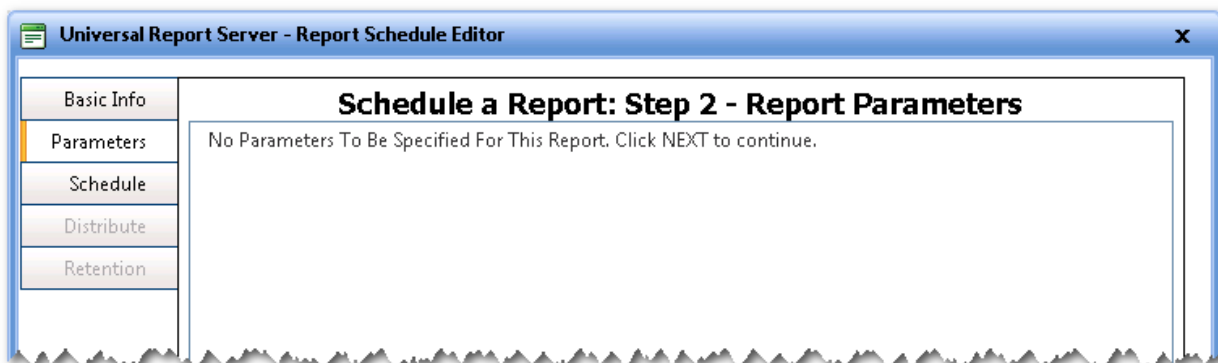
If the report type does support using database parameters, the Schedule a Report: Step 2 – Report Parameters page displays as shown below.

This page shows only those parameters that the scheduler has permission to change. There may be additional parameters that will be passed to the report, but the Report Administrator may have restricted these by pre-assigning a value. For additional information about how parameters are restricted, refer to Section 3.3.3 Step 3 – Define Report Parameters on page 42, and Section 3.3.5 Step 5 – Scheduler-Specific Parameter Defaults on page 53.

Note: The lower portion of this dialog (Specify/Override Database Connection Information for this report) will only show if the Report Administrator (when defining the report) gave permission for schedulers to be able to change this information.

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Fields and Elements (Buttons) on this page

Field/Element	Description
[Parameters]	These parameters are defined during the initial registration or editing of the report. You may see up to six different types of parameters requiring you to: • Select a Yes or No answer (Boolean type) • Enter a specific date/time or select a starting period (Date and Time type) – these fields have two pieces: a drop-down box to let you specify that you want to enter either a date/time relative to the current start time of the report (e.g., Beginning of Day) or a specific date/time (in which case, you can enter the specific date/time value in the second part of the date/time parameter entry area) • Select one option from a list (Choices type) • Enter text (String type) • Enter a positive or negative whole number (Integer type) – these numbers are checked against a range defined when the parameter was defined for the report • Enter a decimal number (Float type) – these numbers are checked against a range defined when the parameter was defined for the report
Specify/Override Database Connection Information for this report	The scheduler is given the opportunity to change this data source information, or change the default data source information if the Connection Info was left blank. Failure to enter a value for the **Connection Info** field or the **User Name** field implies that the report will be run with either the data connection information specified when the report was registered (if present) or it will use the data connection information embedded in the report. Please contact the Report Administrator for this report to determine the correct values for the database connection fields. **Note:** This area will only display in this step if the Report Administrator (when defining the report) gave permission for schedulers to do this.
Cancel	Closes the wizard without saving any of the changes made to any of the pages during this session. You are returned to the **Reports I Scheduled** sub-tab of the **Reports Scheduled To Run** tab.
< Back	Saves any changes you have made on this step and returns you to the previous step.
Next >	Saves any changes you have made on this step and takes you to the next step if all required information has been entered on this page.
Finish >>	This button is unavailable on this step.

Instructions

1. Enter values for each of the parameters in this step. If a value for a parameter is required and you attempt to go to the next step, you are alerted that a value must be entered.
2. Click **Next >** to proceed to Step 3 – Report Schedule.

4.3.3 Step 3 – Report Schedule

Defining a schedule for a report is similar to specifying a schedule for a task in Windows: you indicate the start time, the repeat frequency, the days and dates when it can be repeated, and so on.

In addition to specifying the starting time for the report, you can specify when the report should and should not run, and when the report schedule should stop repeating altogether. For example, you can set the report to repeat every hour on just Monday, Wednesday, and Friday. Or you might want to schedule it to run once a month on the first day of the month. You could further limit the hours during the day when the report can run to the hours that you are running production. Combine the limits to create an overall schedule for when the report will repeat.

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Fields and Elements (Buttons) on this page

Field/Element	Description
Start Running At	The time you want the first report to be run. This field defaults to the time you started the wizard, however, you may change both the date and time by clicking the calendar and clock icons and selecting a new date and time. This field is editable as long as the date and time you enter pass the validity tests. For example, if you want a start time other than on the hour (which is all that can be selected when using the clock icon), you can type in the minutes. If you type "June 3, 2010 8:30 PM", it will reformat to "6/3/2010 8:30 PM".
	If you want this report to run only once at this time, make sure the **Repeat Task Every** check box is cleared.
Timezone	A list of all possible world time zones. Click the time zone that will be used as the basis for determining the true starting time. For example, if you schedule this for 9 AM in New York, the report will run at 6 AM in San Francisco. In this way, users across the world will see a normalized schedule regardless of where the Universal Report Server runs.
Repeat Task Every	Select this check box to enable the repeat interval and to make the **Additional Time/Day Limits** section available for input. The repeat interval expressed as a number (that you enter) of minutes, hours, days, weeks, or months (that you select from the list). The interval can be no faster than 1 minute (although for slow-running reports, running the report every minute will bog down the server).
	The repeat interval is always added to the **Start Running At** date and time to derive the next expected time to run the report.
Stop Repeating After	Select this check box to set the date and time when the report schedule should stop repeating altogether.
During These Hours	Select this check box and pick the hours between which you want the report to run.
Select Days of Week	Select this check box when you to specify on what week days you want the report to run. Select the check boxes next to those days of the week.
Select Days of Month	Select this check box to select the days of the month when you want the report to run. The default is that all date check boxes are selected. Clear those on which you don't want the report to run. The **Last** check box is to pick the last day of the month regardless of what day of the month that is.
	Use the **Select Odd**, **Select Even**, and **Clear All** actions to assist in selecting or clearing the check boxes.
Select Months	Select this check box to pick specific months in which you want to run the report.

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Field/Element	Description
Cancel	Closes the wizard without saving any of the changes made to any of the pages during this session. You are returned to the **Reports I Scheduled** sub-tab of the **Reports Scheduled To Run** tab.
< Back	Saves any changes you have made on this step and returns you to the previous step.
Next >	Saves any changes you have made on this step and takes you to the next step if all required information has been entered on this page.
Finish >>	This button is unavailable on this step.

Instructions

1. Use the descriptions of the fields in the table above to set a schedule for the report.
2. Click **Next >** to proceed to Step 4 – Distribute.

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4.3.4 Step 4 – Distribute

For every schedule you create you can specify a set of users you want to receive the report. This step is used for that purpose as well for as setting the distribution format of the report.

There are four categories of recipients to whom a report can be distributed. These are listed on the tabs to the left of the entry box. You need to type in or choose recipient information for each of the different categories. The recipient categories are explained in detail in the **Fields and Elements (Buttons) on this page** section. Examples are shown in the **Instructions** section.

Fields and Elements (Buttons) on this page

Field/Element	Description
Distribute the report in this format	Select the output format for the report to be distributed. The list is dependent on the report type. The possible choices you might see include: • Excel 2003 • Acrobat Reader (PDF)

Field/Element	Description
	• HTML Web Page
	• Rich Text File
	• Microsoft Word Document
	• Preview-Only Format (Native Report)
	Note 1: These choices are defined in the **report_types.xml** file for the type of report selected for this schedule.
	Note 2: The Preview-Only Format (the "native" format) for a report is one that requires a special web viewer and cannot be distributed to external users (either via e-mail or FTP). Only "Internal Users" (those who can login to the Universal Report Server site to view their reports) will receive and be able to view reports created in this report type.
Recipient Information Entry	This area of the page is for you to specify how the report is to be distributed. There are four tabs to the left of the information entry area that identify the recipient categories. Each of these is explained below.

Site Users	These are the internal users at your site. Enter each login id/user name on a separate line (hit **Enter** after each one). Click **Add Users** to move the entries to the **Report Recipient** list. Any invalid user ids will cause a message to be displayed informing you of the error.
E-mail Addresses	These are the e-mail addresses of the external users you want to receive the report. Enter each valid e-mail address on a separate line (hit **Enter** after each one). Click **Add Addresses** to move the entries to the **Report Recipient** list. Any malformed e-mail addresses will cause a message to be displayed informing you of the error. E-mail addresses that are not valid mailboxes are not detected until a report is sent to the address. **Note:** External users (e-mail addresses) cannot and will not receive "Native" reports, even though you are permitted to move them into the **Report Recipient** list when the format type is Preview-Only Format.
Distribution List	The distribution list names in this drop-down list are the ones that appear in your **Distribution List** sub-tab of the **My Settings** tab. (Refer to Section 2.4.4.2 Distribution Lists Sub-Tab on page 22 for more information about defining distribution lists.). In the **Distribution List** box, select the list that contains the recipients you want to send the report to. **Note 1:** If you have defined a personal distribution

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Field/Element	Description	
		list that has the same name as a global distribution list and you want to use the global list in this field, prefix the distribution list name with "global:"
	Note 2:	Do not specify security groups defined for your infrastructure as that feature is not available at this time.
	Note 3:	Once the list has been moved to the **Report Recipient** list, you can check the individual recipients included in the list by hovering over the **(View)** hotspot.
FTP Site	This tab allows you to specify the FTP, FTPS, or SFTP information where you want to send the report. The information to enter is described below:	
	Transport:	Choose FTP, or one of the secure transport mechanisms, depending on the requirements of the server.
	FTP Server:	The server to which you want to connect and that contains the folder where you will be dropping the report.
	Port:	Typically this is port 21 (the default for FTP and Secure FTP), but it needs to be set to the port that the server uses.
	Username/ Password:	The credentials required to access the FTP site.
	Remote Folder:	The location on the server where the report will be placed. This folder must exist on the server. (The Test button will verify this.)
	Test:	Allows you to verify that the connection can be made to the FTP server prior clicking the **Add Server** button.
	File Name:	This is the template for the format of the file name that will be created in the specified Remote Folder. You may add alphanumeric and certain punctuation characters to the variables in the template name to more uniquely identify it.
		The {Name} variable translates to the schedule name that created the report, and the {Ext} variable translates to the extension of the file

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Field/Element	Description
	format selected.
	There are two options for the date variable: {Date} will be the date/time the report was run in "G" format; {Date:FORMAT} will be the date in a format specified by you. The default file name format shown defaults to a date format of yyyyMMdd-hhmm. For example 20100315-0830 would indicate the report ran on March 15, 2010 at 8:30 AM. To learn more about the date formats you can use, visit the Microsoft Developer Network page http://msdn.microsoft.com/en-us/library/97x6twsz(VS.80).aspx.
	Click the 🔵 hover-over for assistance in filling out this **File Name** template
	Once you have tested the connection using the **Test** button, click **Add Server** to move the FTP Site to the **Report Recipient** list.
	Note: FTP sites cannot and will not receive "Native" reports, even though you are permitted to move them into the **Report Recipient** list when the format type is Preview-Only Format.
Report Recipients	Lists all valid internal users, external users, distribution list names, and FTP Servers that have been added from the **Recipient Information Entry** box above. An icon assists you in identifying each type:
	🟠 Internal user
	📧 E-mail address of external user
	👥 Distribution list name
	🌐 FTP site
	Distribution list names and FTP Sites are followed by a **(View)** hotspot. Hover over this hotspot to see the recipients defined for the distribution list, or the information entered for the FTP site.
	As the report scheduler, your name is automatically added to this **Report Recipients** list to receive a copy of the report when the schedule is first created. If you do not want to receive the report, simply delete your name from the list.
Cancel	Closes the wizard without saving any of the changes made to any of the pages during this session. You are returned to the **Reports I Scheduled** sub-tab of the **Reports Scheduled To Run** tab.

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Field/Element	Description
< Back	Saves any changes you have made on this step and returns you to the previous step.
Next >	Saves any changes you have made on this step and takes you to the next step if all required information has been entered on this page.
Finish >>	This button is unavailable on this step.

Instructions

An example Step 4 – Distribute page is illustrated below.

1. Select the format you want to use to distribute the report.

For this example instruction we will add one recipient for each of the Recipient Categories.

2. Click the **Site Users** tab and type the User IDs of those internal users you want to receive the report. Click **Add User**. The names are populated in the **Report Recipients** box.

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3. Click the **E-mail Addresses** tab and type the e-mail addresses of those external users you want to receive the report. Click **Add Addresses**. The e-mail addresses are populated in the **Report Recipients** box.

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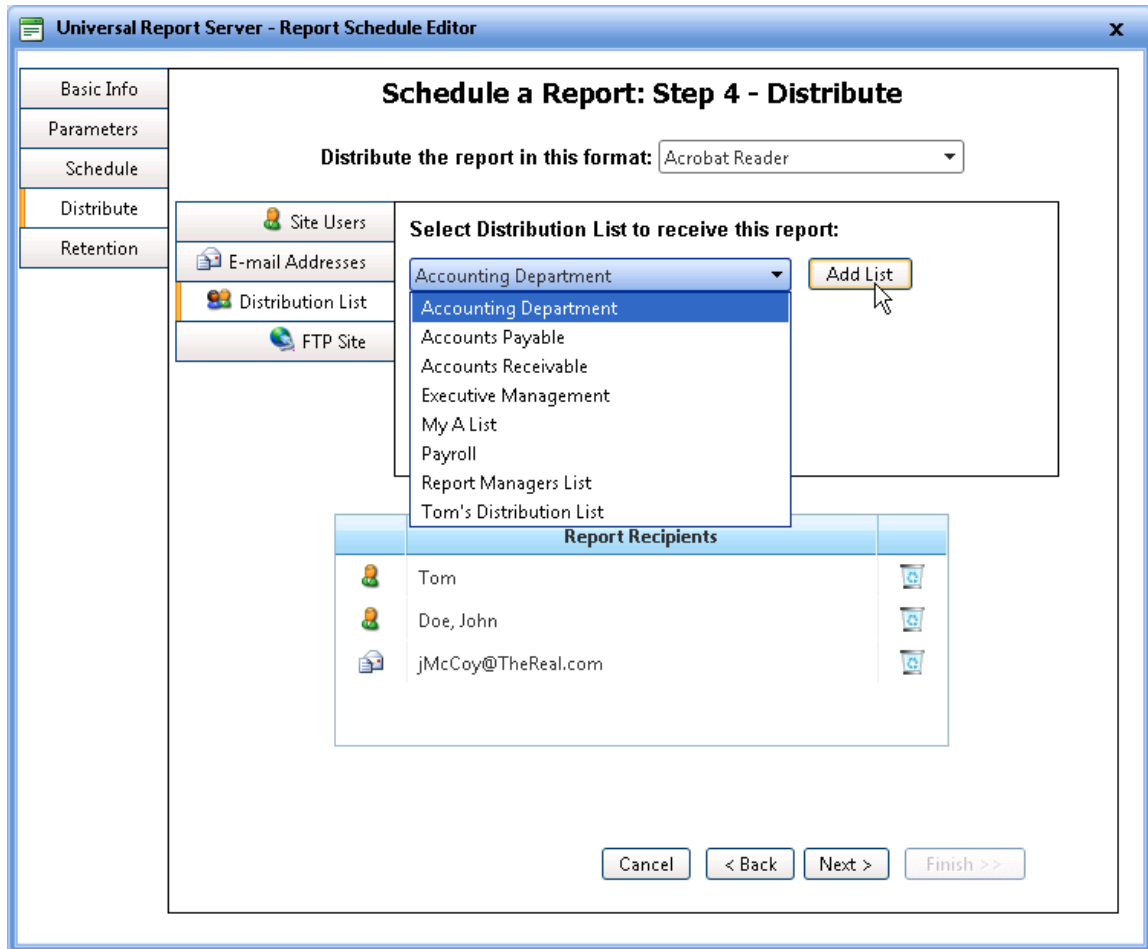
4. Click the **Distribution List** tab and select the list of those you want to receive the report. Click **Add List**. The distribution list name is populated in the **Report Recipients** box.

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5. Click the **FTP Site** tab and fill in the required information for the file transfer. Before clicking **Add Server**, it is good policy to test the connection. Click the **Test** button. The connection is tested and one of the following displays next to the Test button:

If the test is successful, click **Add Server**. The FTP Server name populates in the **Report Recipients** box.

6. To remove a recipient from the list, click the wastebasket icon (🗑) adjacent to the recipient's name. A confirmation dialog box displays asking you if you are sure you want to remove the recipient from the list. Click **OK** to continue. The name is removed from the list.

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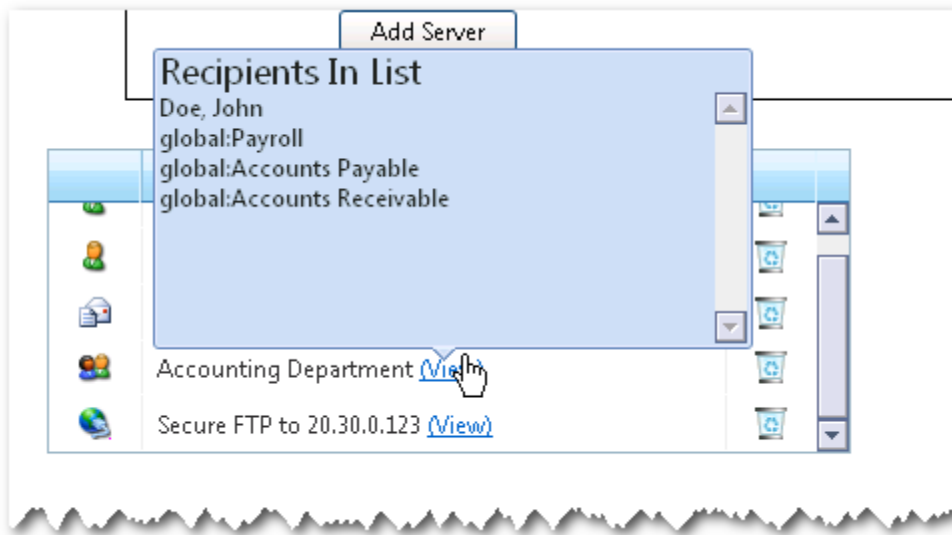
7. Distribution list names can be identified by the 👥 icon and a **(View)** hotspot following the name. Hover your mouse pointer over the hotspot to see the recipients defined for that list. FTP sites have a similar **(View)** hotspot for seeing more details about the FTP Server.

8. Click **Next >** to proceed to Step 5 – Global Retention Rules.

4.3.5 Step 5 – Global Retention Rules

When a report is put into a user's Report Archive, it remains there until deleted by the user or removed by the retention rules defined for the report schedule.

There are two levels of retention rules:

*   A default global retention rule for the schedule
*   A personal retention rule that a user can specify by left-clicking a report in one of the **Reports Scheduled to Run** views (either **Reports I Scheduled**, **Reports Scheduled for Me**, or **Reports to be Run**).

This step of the wizard sets the default global retention rule for the scheduled report. Essentially this rule dictates how long internal users will see this report in their Reports Archive list.

Fields and Elements (Buttons) on this page

Field/Element	Description	
Default Retention Options	The table below describes the four options available for setting the default global retention policy	
	Delete After:	Use this option when you want to delete the report on a certain date and time. All reports having this schedule will be deleted. Click the calendar icon to select the date; click the clock icon to select the time. This field is editable as long as the date and time you enter pass the validity tests. For example, you can type in "December 1, 2010 1:45 PM" and it will reformat to "12/1/2010 1:45 PM".
	Retain Report for:	Use this option when you want to delete a report after an elapsed time period. Type a number in the first box, then select Minutes, Hours, Days,

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Field/Element	Description
	Months, or Years from the list. As each report in the schedule reaches the time period specified here, it will be deleted. For example, if a report is scheduled to run daily and this retention rule is set to retain reports for five days, then you will only have the last five reports kept in your archive. As the oldest report reaches the fifth day, it will be dropped off the list.
Keep up to _____ Copies	Use this option when you want to keep only a specific number of copies of a report. Any reports that are outside of the number you specify here will be deleted. For example, if you specify you want to keep 10 copies, then when a new report is generated, the oldest one will be dropped from the list.
Keep Until User Deletes It	Use this option when you want the report recipient to set their personal Retention Rules. Universal Report Server will keep all reports in the readers' Reports Archive until they delete them.
Cancel	Closes the wizard without saving any of the changes made to any of the pages during this session. You are returned to the **Reports I Scheduled** sub-tab of the **Reports Scheduled To Run** tab.
< Back	Saves any changes you have made on this step and returns you to the previous step.
Next >	This button is unavailable on this step.
Finish	Closes the wizard and saves any changes you have made. You are returned to the **Reports I Scheduled** sub-tab of the **Reports Scheduled To Run** tab where your new schedule has been added to the list.

Instructions

1. Select one of the options for the default retention rule.

2. When you have completed this step of the wizard, click **Finish**. Your report schedule is now listed on the **Reports I Scheduled** sub-tab of the **Reports Scheduled To Run** tab. It is also listed in the **Reports to be Run** tab if the **Suspend Schedule** check box has not been selected.

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4.4 Editing Schedules

If you are the creator of a schedule, you are the only one who may edit it. When editing a schedule you use the same Schedule a Report wizard as when creating the schedule. The steps are already filled in with information from the original schedule or from a previous edit. A common use for this action could be to suspend the schedule, change how often the report runs, or to add or delete recipients of the report.

Editing a schedule begins from the **Reports I Scheduled** sub-tab.

1. Click the **Reports I Scheduled** sub-tab. The grid area lists all the report schedules you have defined.

2. Click (left-click) the name of the schedule and click the **Edit Schedule** option. The first step (Step 1 - Basic Information) of the Schedule a Report wizard displays.
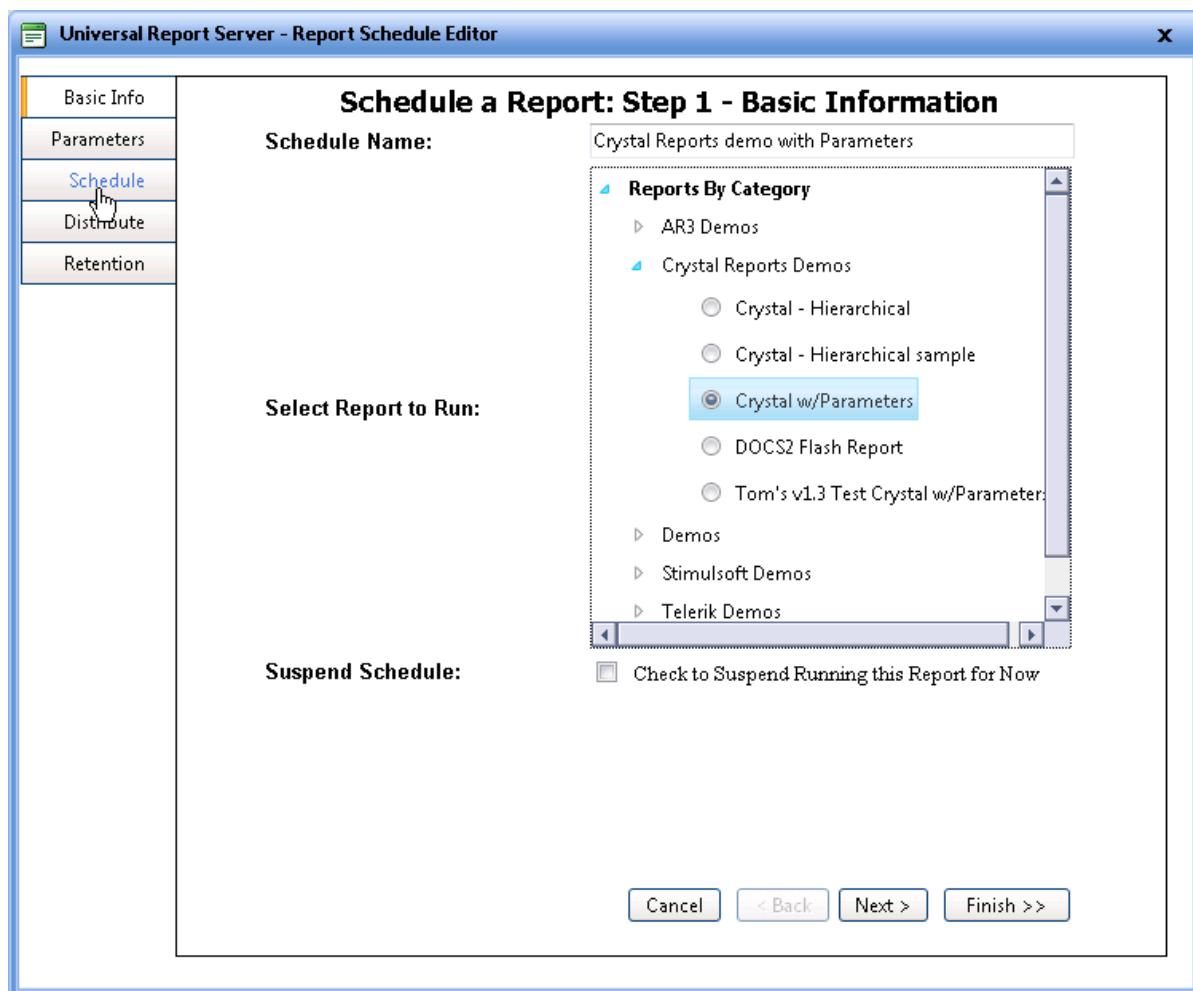
3. If you know what step you want to edit, you may go directly to it by clicking the tab in the left panel. For example, if you want to adjust the times and dates the report will run, click **Schedule** in the left panel, as illustrated above.

   Please refer to Section 4.3 Scheduling Reports – the Schedule a Report Wizard starting on page 71 in this chapter for detailed descriptions of the fields for each of the steps.

4. When you are done editing, click **Finish**. This will save the changes you have made on all pages (steps) of the wizard. There is a Finish button on every page of the wizard; you do not have to go to the last page (Step 5) to click it.

4.5 Deleting Schedules

Use this action when you want to permanently stop the scheduled report from running and you never want it to run again. It is only the schedule that gets deleted, not the report that is registered in URS. Reports that have been delivered to users by this schedule will remain in the users' Reports Archive list until any time-based retention rule removes it, or until the user manually deletes the report from the archive.

If you delete a report by accident, you cannot "undelete" it. You must recreate it using the Schedule a Report wizard.

Note: If you just want to suspend a report from running for a while, select the **Suspend Schedule** check box in the first step of the Schedule a Report wizard.

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Deleting a schedule begins from the **Reports I Scheduled** sub-tab.

1. Click the **Reports I Scheduled** sub-tab. The grid area lists all the report schedules you have defined.
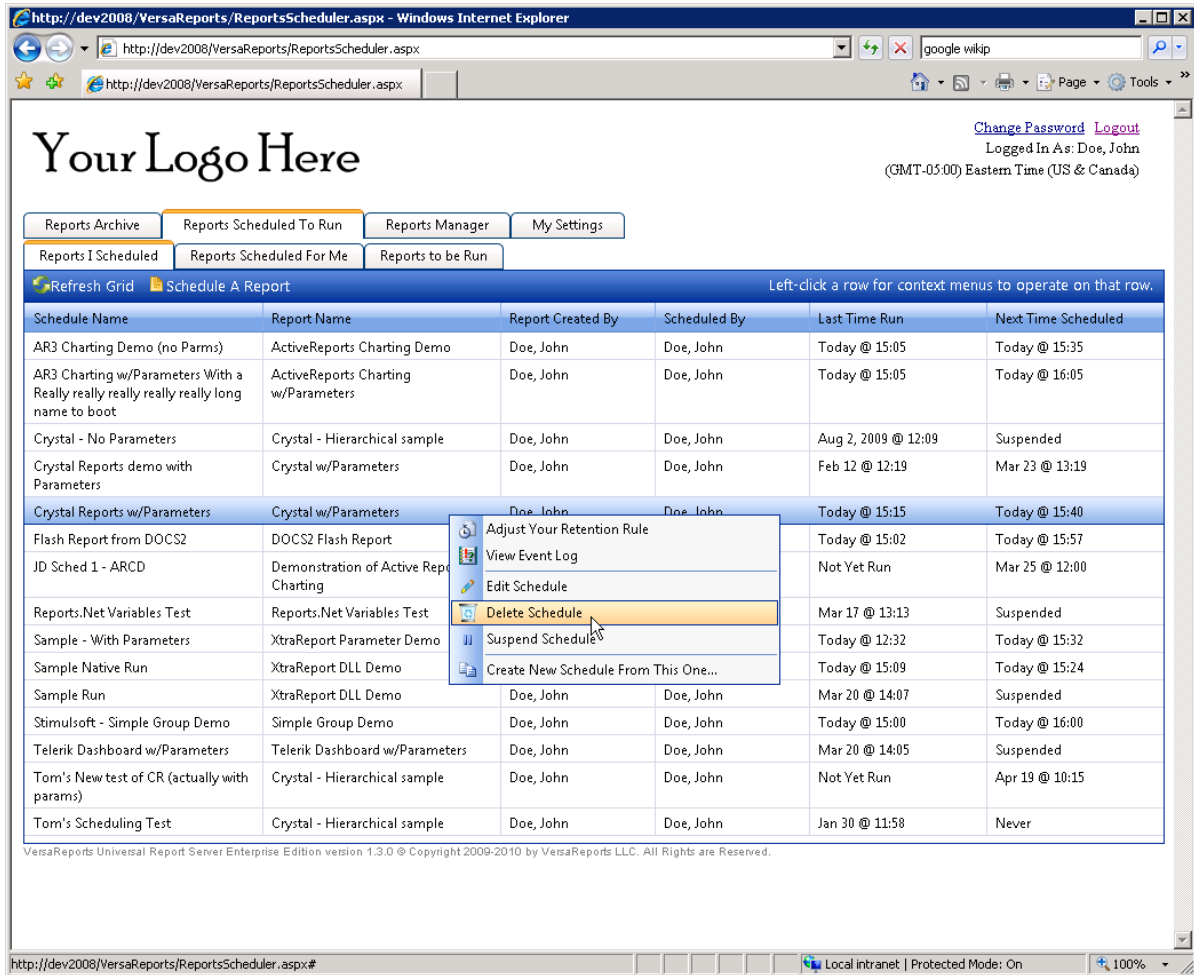
2. Click (left-click) the name of the schedule and click the **Delete Report** option. A confirmation dialog box displays.
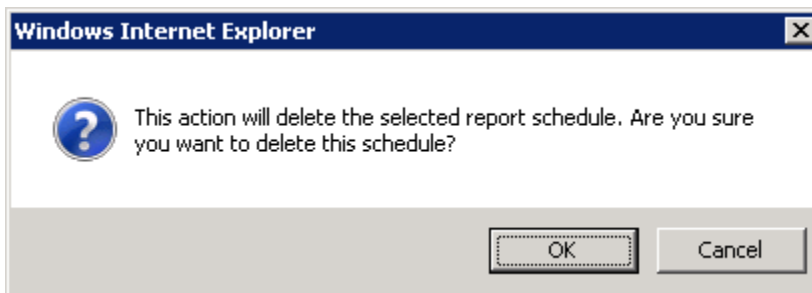
3. Click **OK**.

Chapter 5
Viewing Reports

5.1 Overview

VersaReports Universal Report Server provides easy access to reports that have been placed in your archive. Viewing them is a simple as locating the report and clicking the **View** link. Your reports are organized on the **Reports Archive** tab. This grid shows you the reports that have been successfully run for you and that have been retained (via the default and personal Retention Rules). The tree list in the left panel of this tab lets you select the view of the reports you want to see: either by date, by the scheduled report's description/name, or by deleted reports. The **Reports Archive** tab is described in detail in the next section of this chapter.

Reports are automatically deleted from your Reports Archive when the retention rule criteria are met. Once reports are removed by the retention rule, they cannot be recovered.

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5.2 Reports Archive Tab

A page showing the **Reports Archive** tab is illustrated below.

The **Reports Archive** tab lists all the reports that were scheduled for you, that successfully ran, and that were delivered to you. You might compare this to an Inbox where the reports you have received are sorted by date and by schedule name.

You may sort the listed reports:

- Alphabetically by the report schedule's name – click the **Schedule Name** column
- By the date and time when the report was run and delivered to you – click the **Created On** column

5.2.1 Actions You May Take on These Reports

5.2.1.1 Report Details

If you point your mouse to a report and hover over it, a Report Details pop-up tool tip appears.

Note: There is an option in the **Personalizations** sub-tab of the **My Settings** tab that controls whether you want to see the Report Details pop-up tool tip and to set the delay before it is shown to you. Refer to Section 2.4.4.3.3 Setting the Delay Time for Report Archive Tips starting on page 32 for more information and instructions for setting these options.
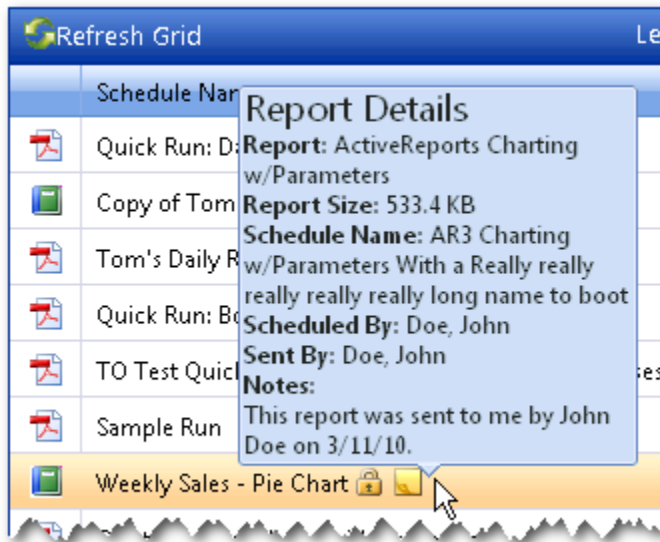
The Report Details pop-up tool tip shows the following information:

- **Report:** The actual name of the report as defined by the Reports Administrator
- **Report Size:** The amount of space taken by this report in storage
- **Schedule Name:** The original name of the schedule for this report as defined by the person who scheduled it. Note that this may be different that the name of the report you are hovering over if you have changed its name.
- **Scheduled By:** The user who scheduled the report.
- **Sent By:** If this report was sent to you via the Distribute to Others option, this is the user who sent it.
- **Notes:** Shows any notations you have added

5.2.1.2 Options Menu Actions

When you click any of the reports, an options menu appears showing the actions you can take on that report. The possible actions you may see, and the page they are documented on, are:

- View Report (see page 101)
- Add Notes (or View/Edit Notes) (see page 101)
- Rename Report (see page 103)
- Distribute to Others (see page 105)
- Re-run/Refresh Now (see page 110)
- Quick Run (see page 113)
- Delete Report (see page 115)

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- Keep Until I Delete (see page 116)
- Restore Report (see page 119)

Note: You will only see the Re-run/Refresh Now or Quick Run actions if you are the one who scheduled the report. Also, the Restore Report action is only available for deleted reports.

Each of these is described in detail in Section 5.3 Taking Actions on Reports in the Archive on starting on page 100.

5.2.2 Reports Archive Categories (in the left panel)

5.2.2.1 Reports By Date

Select one of the seven groupings to see the reports that you have received within that time period.

5.2.2.2 Reports By Schedule Name

Select one of the reports by its schedule name to view all those reports that fall within the default retention period or the retention period you have assigned for this report. (See page 120 for more information about Retention Rules.)

5.2.2.3 Reports By Report Name

Select one of the reports by its report name (as it was defined by a Report Administrator) to view all those reports that fall within the default retention period or the retention period you have assigned for this report. (See page 120 for more information about Retention Rules.)

5.2.2.4 Deleted Reports

Lists those reports that you have removed (deleted) from the other three sections and that are still within the bounds of the retention period.

5.3 Taking Actions on Reports in the Archive

After logging in, your initial page will show Today's reports in the **Reports Archive** tab. These are sorted by the **Created On** column showing the most recent report at the top of the list. You can change this sort order, or change the category of the sort, by clicking the column heading.

The actions available for a report on this list are **View Report**, **Add Notes**, **Rename Report**, **Distribute to Others**, **Re-run/Refresh Now, Quick Run**, **Delete Report**, and **Keep Until I Delete**. Each of these is described in detail in the sections that follow.

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5.3.1 View Report

Two methods can be used for accessing and viewing a report:

- From the grid on the right, click the **View** link for the report you want to examine.
- Click the report and then click the **View Report** option.

In either case, the report is opened in a new browser window.

The viewing format of the report is determined by the person who scheduled the report. Each report in the list is preceded by an icon that indicates the viewing format. Some of the standard icons and report formats are shown in the table below.

Icon	Viewing Format
	Excel
	Word
	PDF
	HTML
	Preview Only (Native Report)
	RTF

Other icons or report formats may be defined by the system administrator as part of the Universal Report Server configuration, as described in the Installation Guide.

5.3.2 Add Notes (or View/Edit Notes)

Use this feature to store a comment that is displayed in the Report Details pop-up tool tip. The note is limited to 1024 characters.

Click the report and then click the **Add Notes** option.

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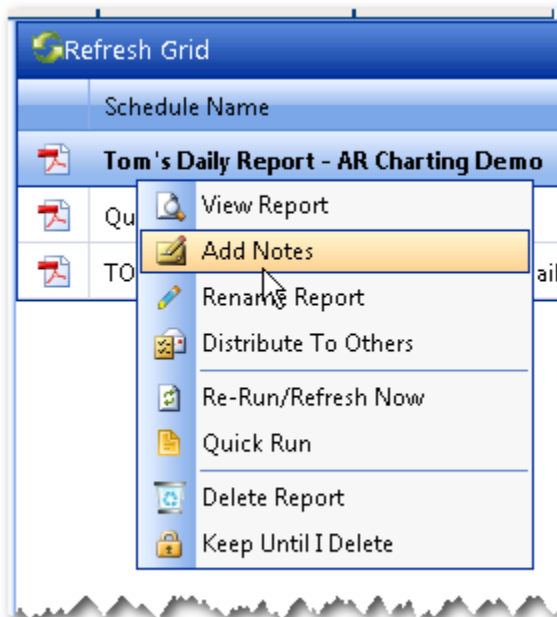
The **Report Notes** dialog box appears.
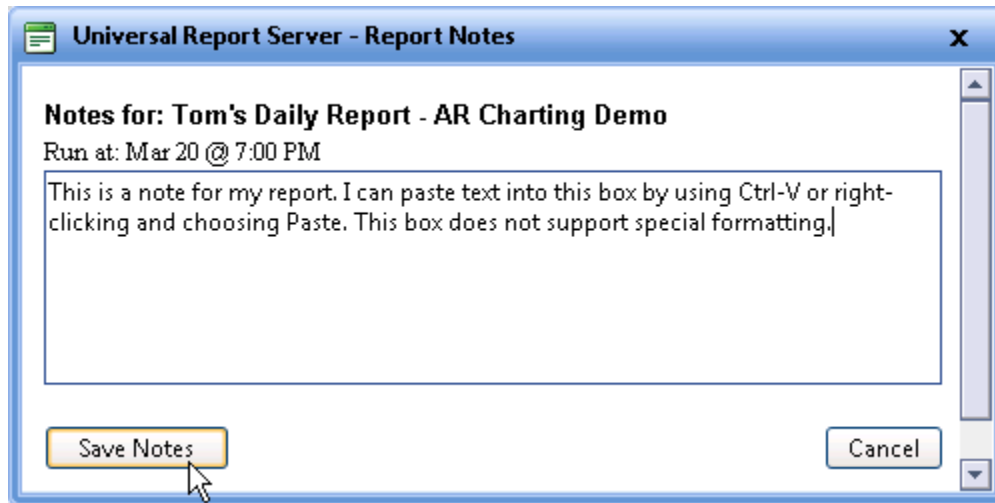
Type your text into the box and click **Save Notes**. If you want, you can copy text from outside the program and paste it into this box by using Ctrl-V or right-clicking and choosing **Paste**. Special formatting (such as bold) is not supported.

Once a note has been added, the report is listed in the grid with a Notes icon ( ) to the right of its name. The Report Details pop-up now shows these notes and the action on the context menu changes to **View/Edit Notes**.

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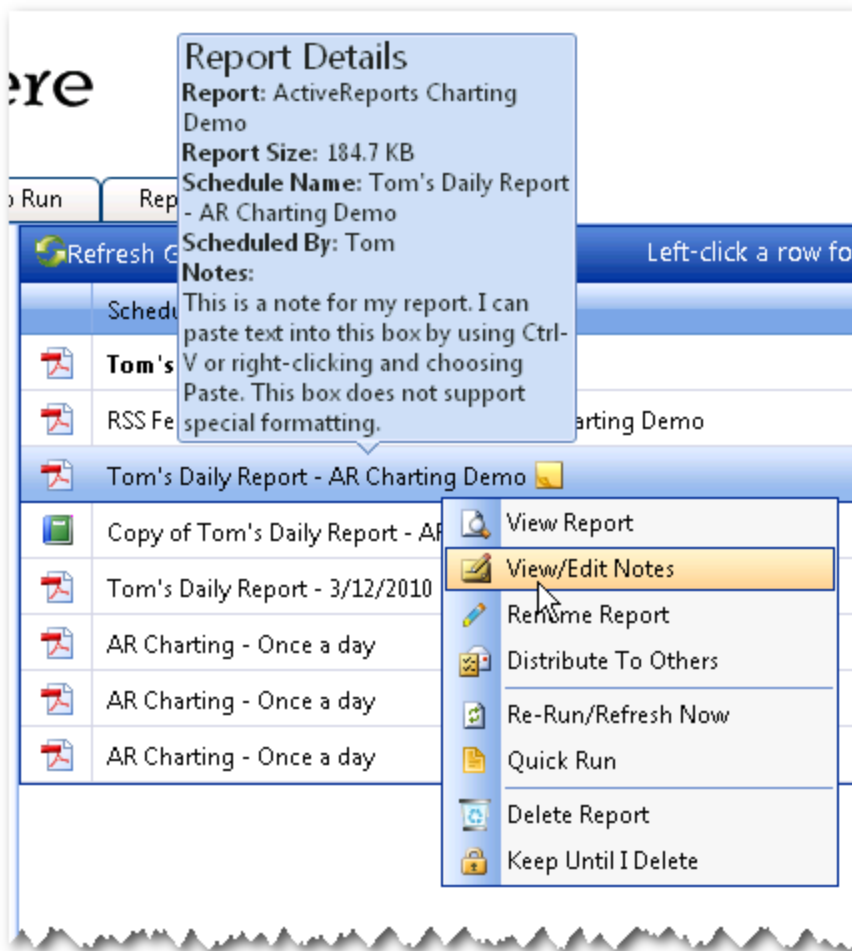
View or edit the notes by clicking the **View/Edit Notes** option, or click the Notes icon (![notes icon]) to the right of the name. To remove notes from a report, simply edit the notes and in the **Report Notes** dialog box delete all the characters. Once saved, the Notes icon disappears and the Report Details no longer shows a Notes section.

5.3.3 Rename Report

Use this feature to rename any report in your Reports Archive view. The new name may have up to 255 characters. This name will be used in your Reports Archive only, and only for the one report. The report will retain that name until you change it again or until the report is deleted.

Click the report and then click the **Rename Report** option.
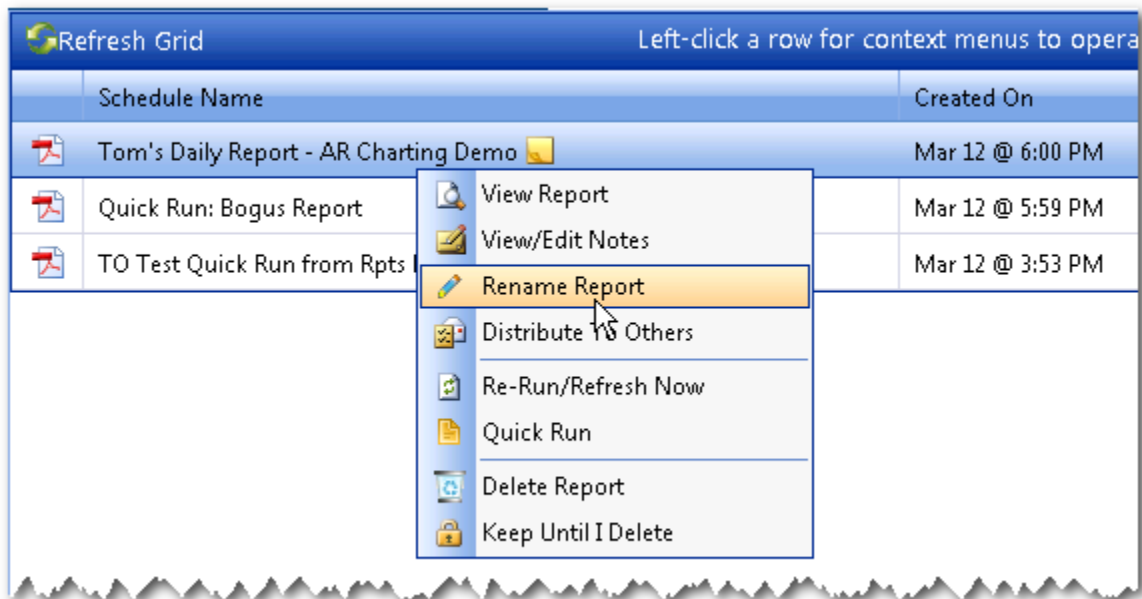
The **Report Rename** dialog box appears.
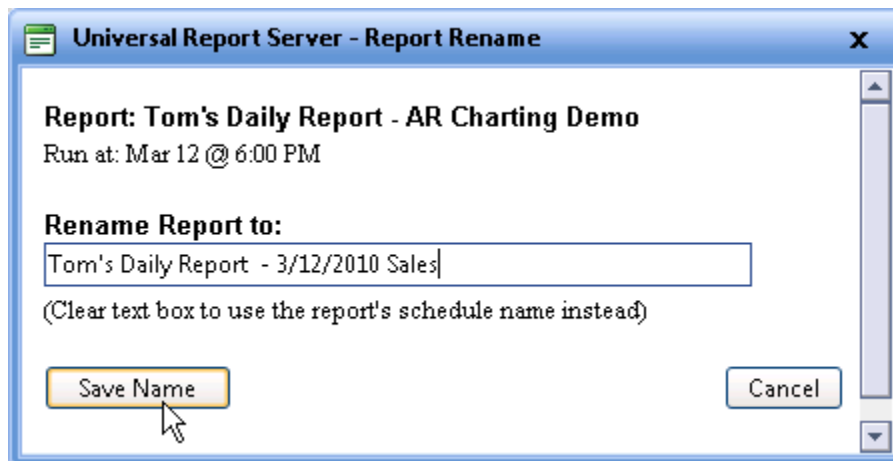
The current name of the report is displayed in the **Rename Report to** box. Type the new name and click **Save Name**. If you want, you can copy text from outside the program and paste it into this box by using Ctrl-V or right-clicking and choosing **Paste**. Special formatting (such as bold) is not supported.

If you have already renamed the report and you want to revert to the report's original schedule name instead, just clear the **Rename Report to** box and save.

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Note that the Report Details pop-up will always show the Report Name and Schedule Name as they were originally defined.
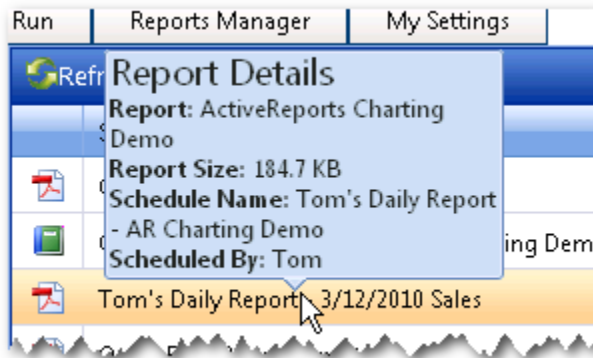
Your new name will, however, be shown in the sample report viewers.
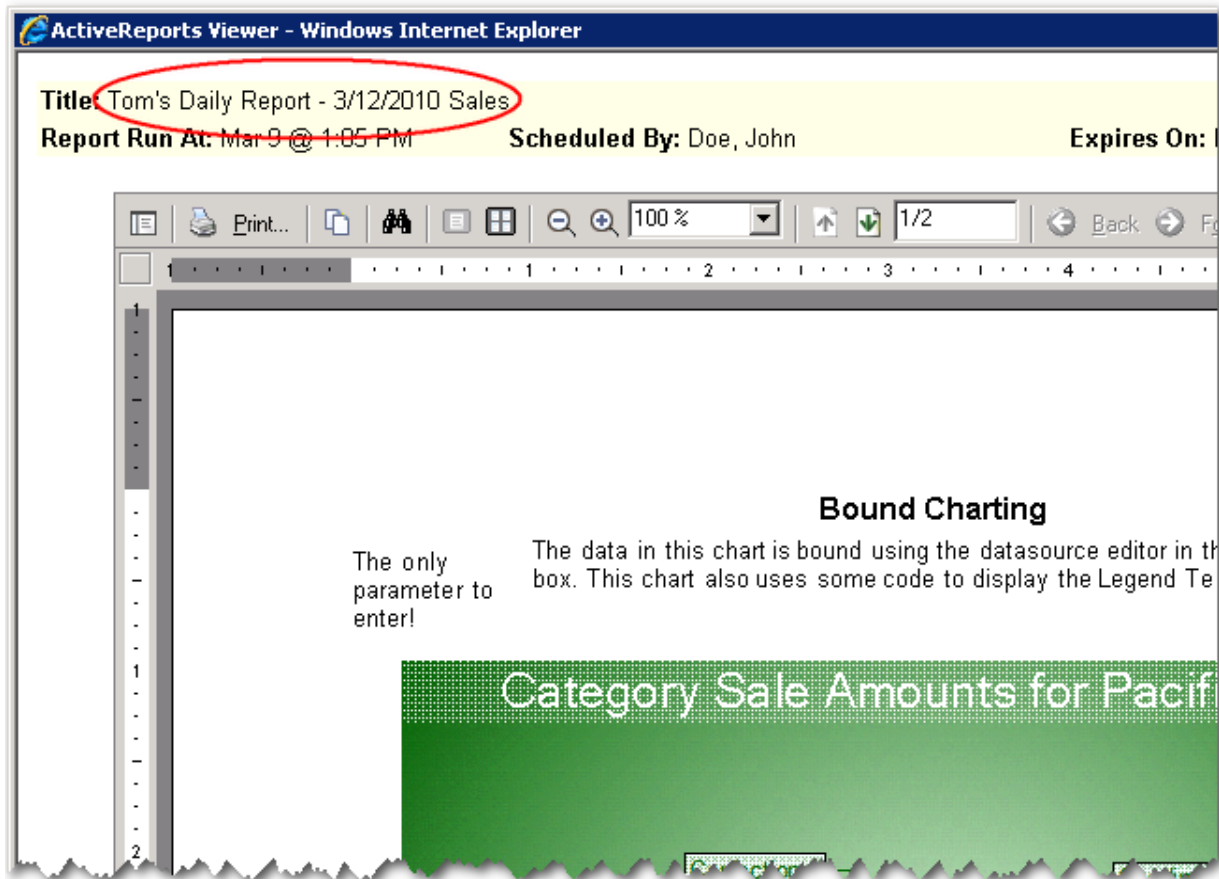
5.3.4 Distribute to Others

Use this feature to route any report in your Reports Archive to another site user, to a distribution list, to an e-mail account, or to an FTP site:

- Internal users will receive the report in their Reports Archive list according to the date the report was run, not the date it was sent. Once the report is there, the internal recipient may treat it as any other report, except the Re-run/Refresh Now and Quick Run actions are not available.

Internal recipients will have "Sent By" information in the Report Details pop-up tool tip for the report.

- External users will be sent an e-mail with the report attached. External users can only receive reports that are not "native" (Preview-Only Format) reports.

- FTP servers will receive the reports in the folder specified by you in the FTP Site information box. Like external users, FTP sites can only receive reports that are not "native" (Preview-Only Format) reports.

If you are the scheduler of this report, there will be an option in the **Distribute Report to Additional Recipients** dialog box to permanently add the specified recipients to the report schedule's recipients list.

To use this feature, click the report and then click the **Distribute To Others** option.
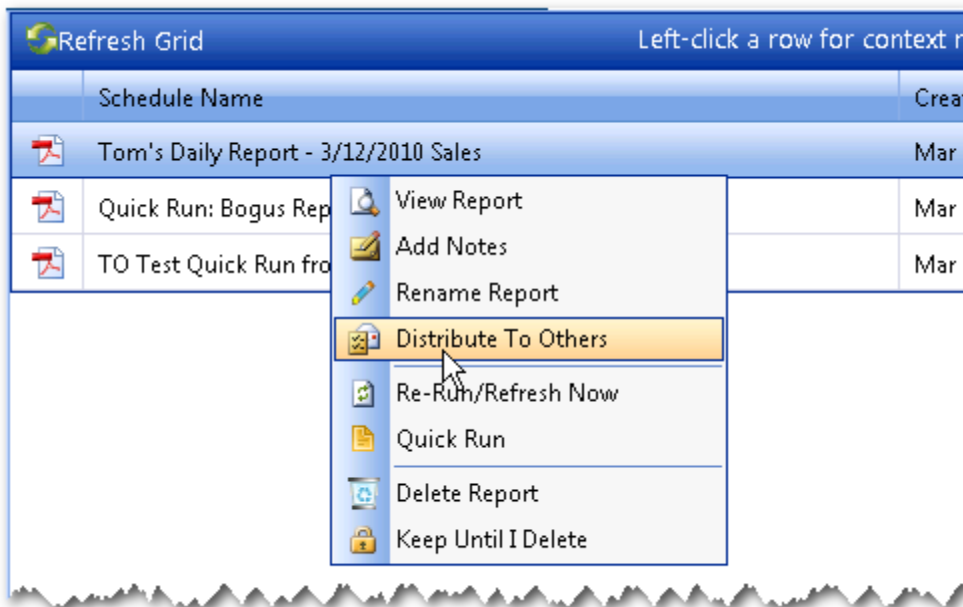
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The **Distribute Report to Additional Recipients** dialog box displays.

Reports may be distributed to site users (internal users), e-mail addresses (external users), users on a distribution list, and to a folder on an FTP server.

Note: If the format of a report is native to the report designer (that is, a Preview-Only format), the **E-mail Addresses** and **FTP Site** tabs and entry boxes will not be available.

Brief instructions for each of the Recipient Categories are given below. Refer to Section 4.3.4 Step 4 – Distribute on page 79 for detailed information and instructions.

- For Site Users, enter each login ID on a separate line, and then click **Add Users**.
- For E-mail Addresses, enter each valid e-mail address on a separate line, and then click **Add Addresses**.
- For a Distribution List, click the down arrow and then select the list from those that are available to you. Then click **Add List**.

- For an FTP Site, fill out the requested information. You can test whether the information you entered will result in a successful transfer by clicking the Test button. If the test is successful, click **Add Server**.

The **Distribute Report to Additional Recipients** dialog box shown below illustrates each of the different types of report recipients.

Note: A **(View)** hotspot follows the name of a Distribution List and FTP Site. Hover over that link to see the recipients defined for that list. Hover over this hotspot to see the recipients defined for the distribution list, or the information entered for the FTP site.

To remove a recipient from the list, click the wastebasket icon (🗑) adjacent to the name.

The **Permanently Add Recipients To Schedule For This Report** check box is available only if you are the scheduler of the report. Select this check box if you want to automatically add the listed recipients to the original schedule for the report. If not, make sure the check box is cleared.

Click **Send Copies** when you are ready to distribute this report to the designated recipients.

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While the program is processing the distribution list, it shows a progress bar.
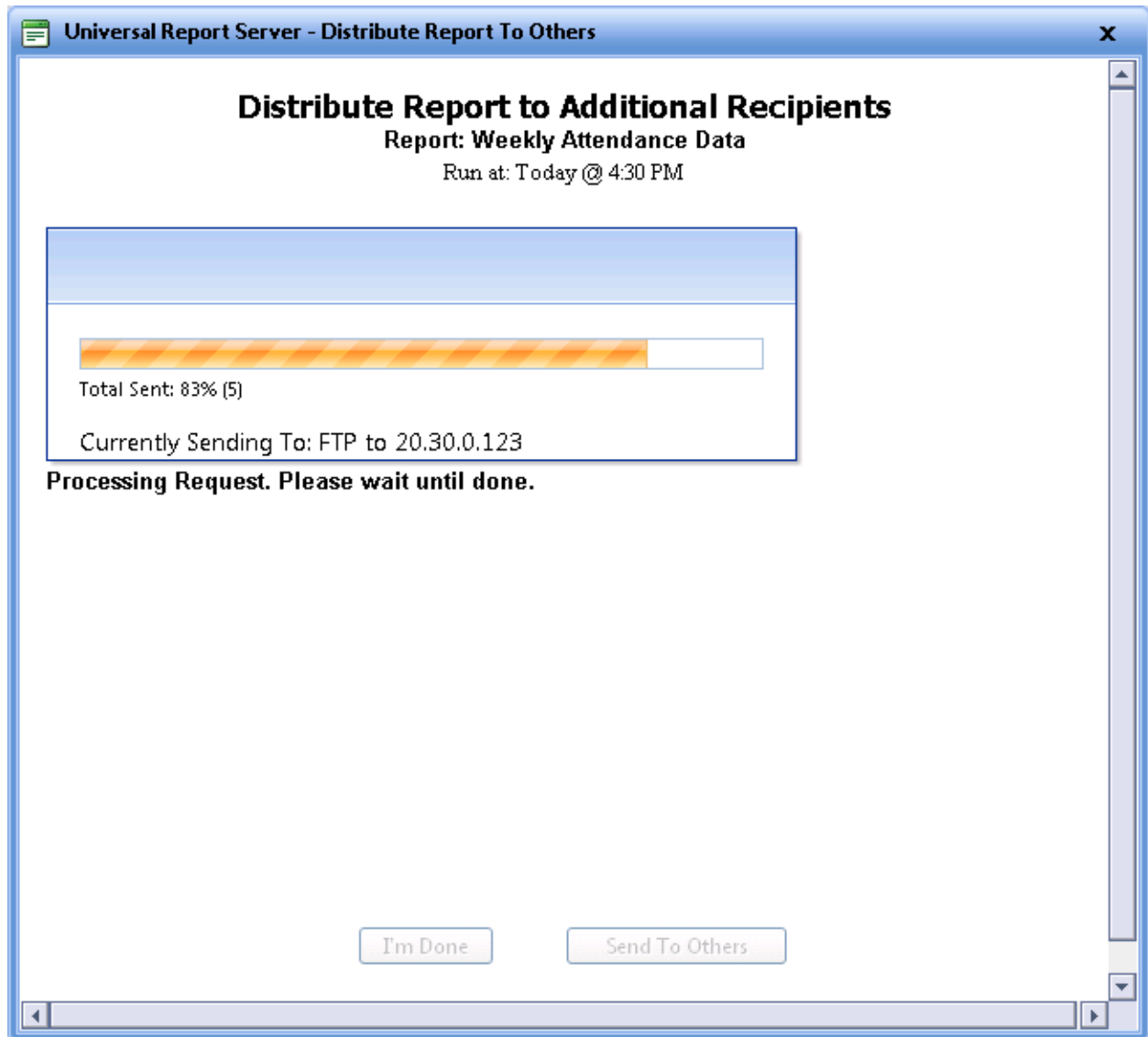
When the program is done processing, it shows the results of sending the report to the recipients.
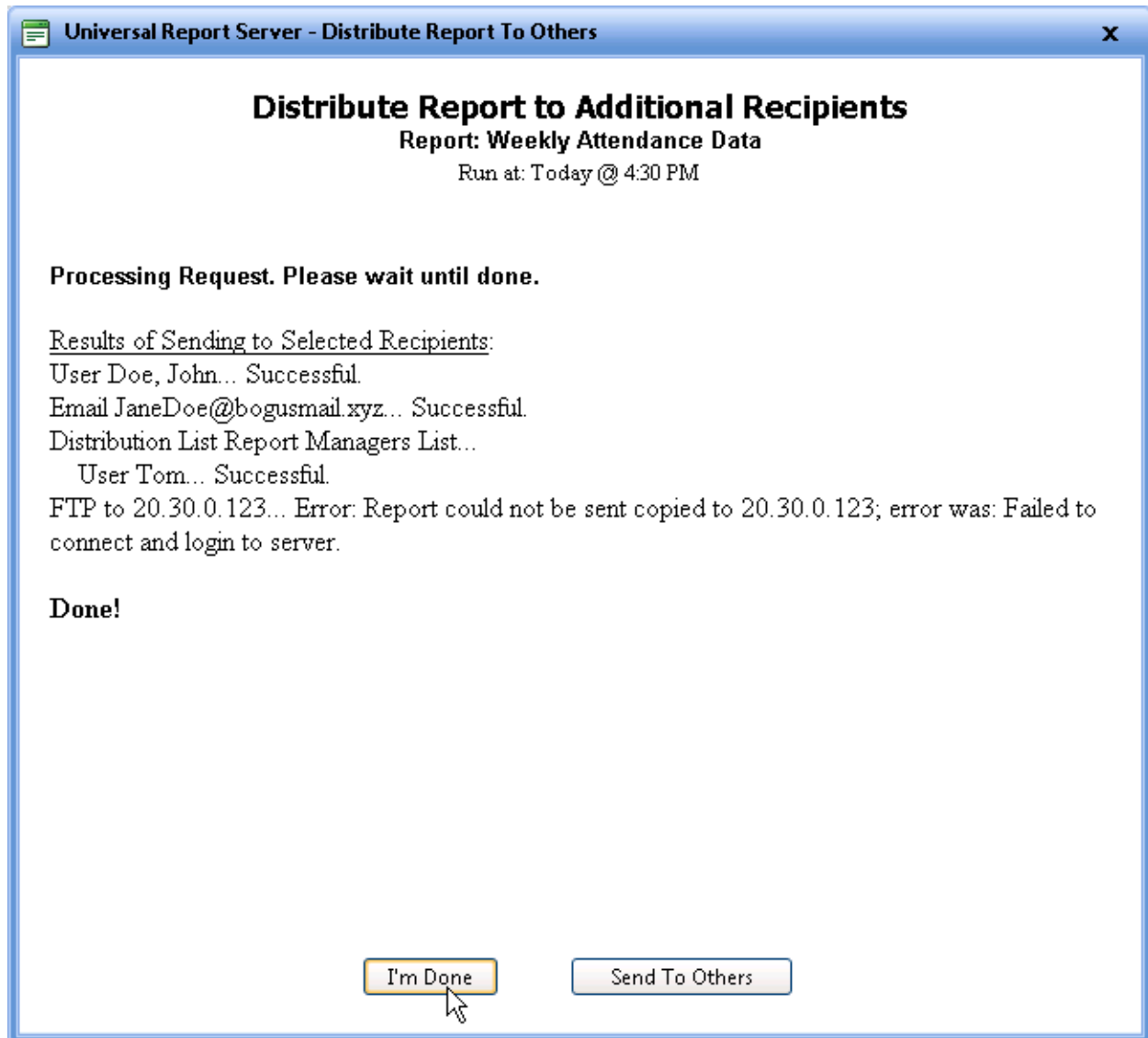
Note that if there is an unsuccessful distribution to a selected recipient, this results dialog box shows an error and gives a brief explanation of why the request did not process successfully.

If you are finished, click **I'm Done**. If you still want to distribute this report to others, click **Send To Others**.

5.3.5 Re-run/Refresh Now

Note: This feature is only available to those users who have scheduling permission for the selected report.

Use this feature when you want to quickly re-run a report. Essentially this is a "report refresh" that executes a one-time run of a copy of an existing schedule. Before running the report, you are permitted to make changes to the name of the schedule, to the report parameters (if any), to the recipients, and to the default retention for internal recipients.

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You may not make changes to the schedule. If the relative time has changed and the schedule uses a parameter that is relative to the current time (for example, the current hour), the report will still use the time relative to NOW instead of to when the report originally ran.

To use this feature, click the report and then click the **Re-run/Refresh Now** option.

The first step of the basic Schedule a Report wizard displays,

Note that the **Schedule** tab is not visible and therefore not available for editing. Information on the other tabs can be changed if desired. To review this scheduling wizard and the fields on these tabs, please refer to Section 4.3 Scheduling Reports – the Schedule a Report Wizard on page 71.

When you are ready to run the report, click **Finish**. The report is run immediately and distributed to the listed recipients.

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5.3.6 Quick Run

Note: This feature is only available to those users who have scheduling permission for the selected report.

This feature is similar to the **Re-run/Refresh Now** option as it immediately runs the report for the selected schedule, but you may only change the name of the schedule, the report parameters (if any), and the format of the report.

You may not make changes to the schedule, to the distribution list, or to the retention policy. You will be the only recipient and retention is preset to Save Until Deleted.

To use this feature, click the report and then click the **Quick Run** option.
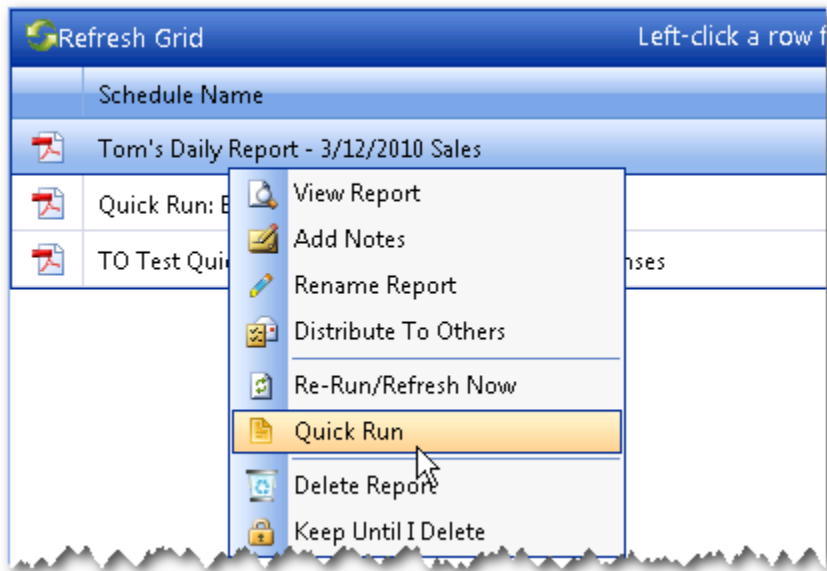
The first step of the basic Schedule a Report wizard displays,
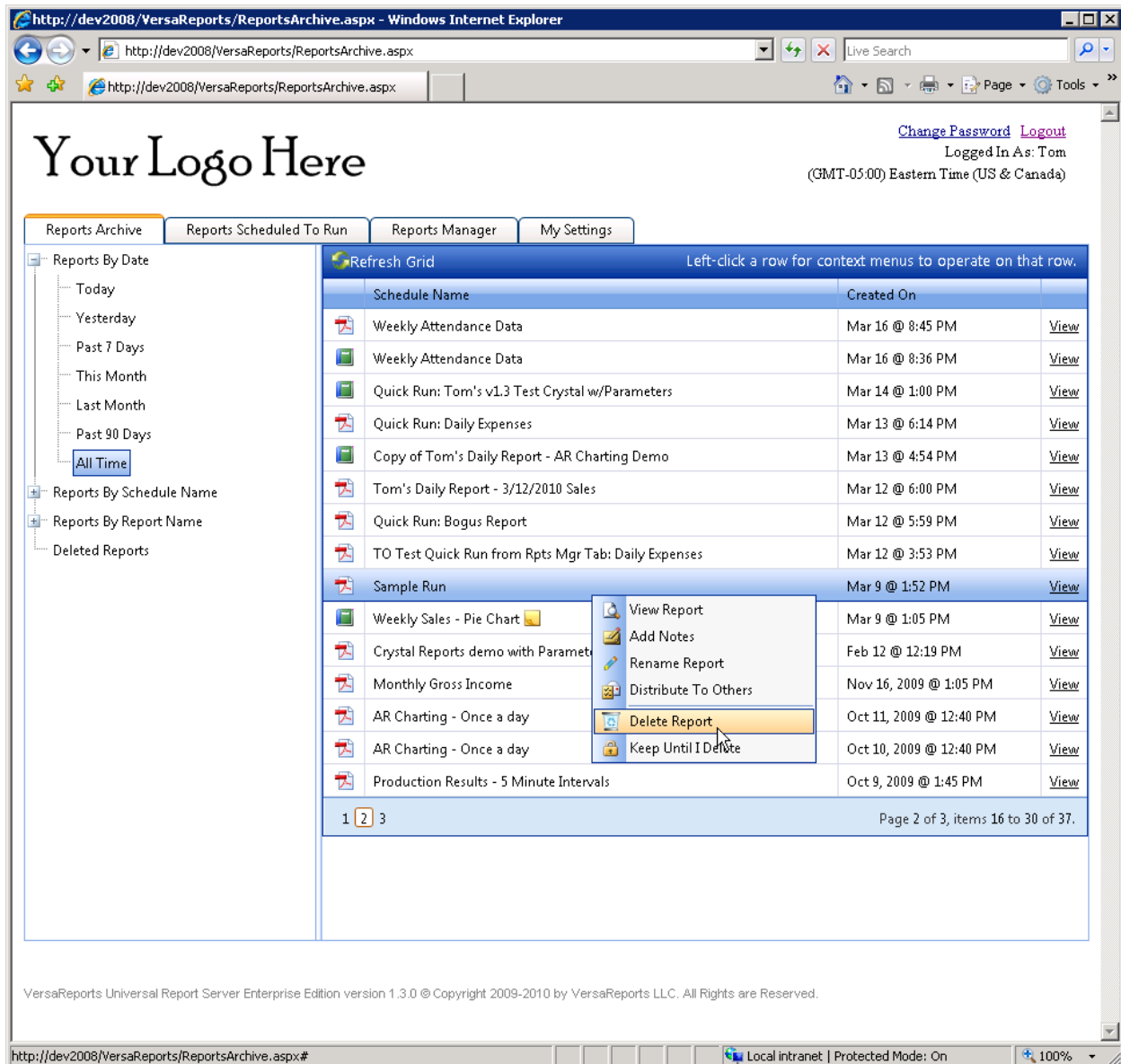
Note that the **Schedule** and **Retention** tabs are not available.

On the **Basic Info** tab you may change the name of the schedule if you want. On the **Parameters** tab, if there are parameters you may change their values if desired. On the **Distribute** tab, the only field showing is the format for the report. You may change this also if you wish.

When you are ready to run the report, click **Finish**. The report is run immediately and the report is placed in your Report Archives.

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5.3.7 Delete Report

You may want to delete reports from your Reports By Date, Reports By Schedule Name, or Reports By Report Name lists to allow you to better manage the number and types of reports in your Reports Archive. Deleted reports are sent to the Deleted Reports list.

To delete a report from the list shown in the grid, click the report name and then click the **Delete Report** option. A confirmation dialog box displays.
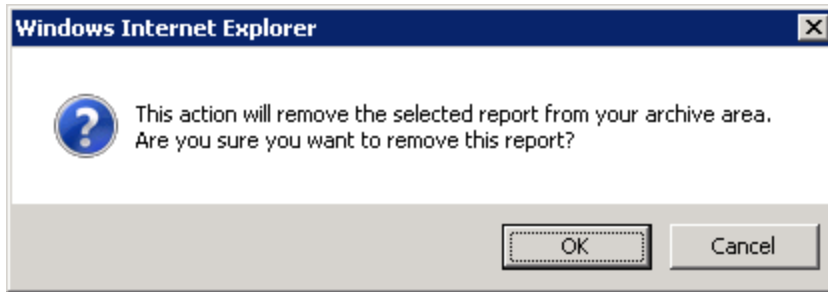
Click **OK**. The report is moved to the Deleted Reports list.

5.3.8 Keep Until I Delete

Reports are automatically removed from your lists based on the default retention rule or your Personal Retention Rule for that report. Use the **Keep Until I Delete** action to supersede this rule and keep the report in your archive until you manually delete it.

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Click the report name and then click the **Keep Until I Delete** action. A lock icon (🔒) is placed next to the report name to identify this is a "Keep Until I Delete" report.

The options for this report now do not include the **Keep Until I Delete** action. When you are ready to permanently delete this report, click **Delete Report**,

If you want to remove the lock on the report, click the lock icon. The retention rule that is in force for this report will again govern when it will be automatically removed. An informational dialog warns you that unlocking the report may immediately cause the report to be deleted. Click **OK** to continue with the unlock action.

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5.4 Restoring a Deleted Report

The **Restore Report** option is available for reports in the Deleted Reports list. It moves the report back to the list from which it was deleted.

1. From the Deleted Reports list, click the report name to restore and click the **Restore Report**. A confirmation dialog box displays.
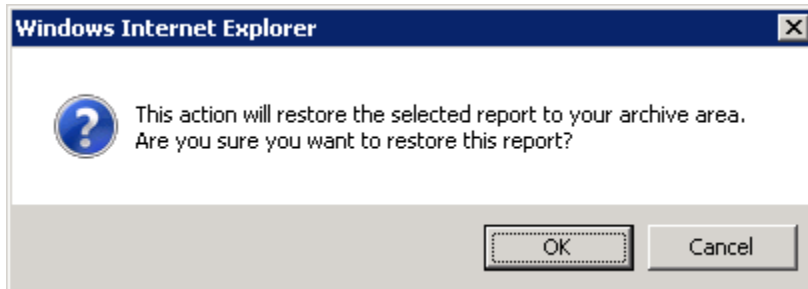
2. Click **OK** to return the report to the appropriate Reports By Date and Reports By Schedule Name lists

5.5 Adjusting Your Personal Retention Rule for a Scheduled Report

A scheduled report's retention rule has two levels: the default rule, which applies to all users, and a personal retention rule that you can use to override the default rule.

The original scheduler of a report defines the default Retention Rule for that particular schedule of the report. Those reports having that schedule will remain in your Reports Archive until they meet the criteria of the Retention Rules, at which point they are removed from the list.

Each user, however, can set a Personal Retention Policy for each scheduled report and URS will use these rules instead of the default rules.

Start on any of the sub-tabs under the **Reports Scheduled To Run** tab.

To adjust the personal retention rule, click a report scheduled for you or that you scheduled and then click **Adjust Your Retention Rule**. The **Personal Retention Policy Editor** dialog box displays.

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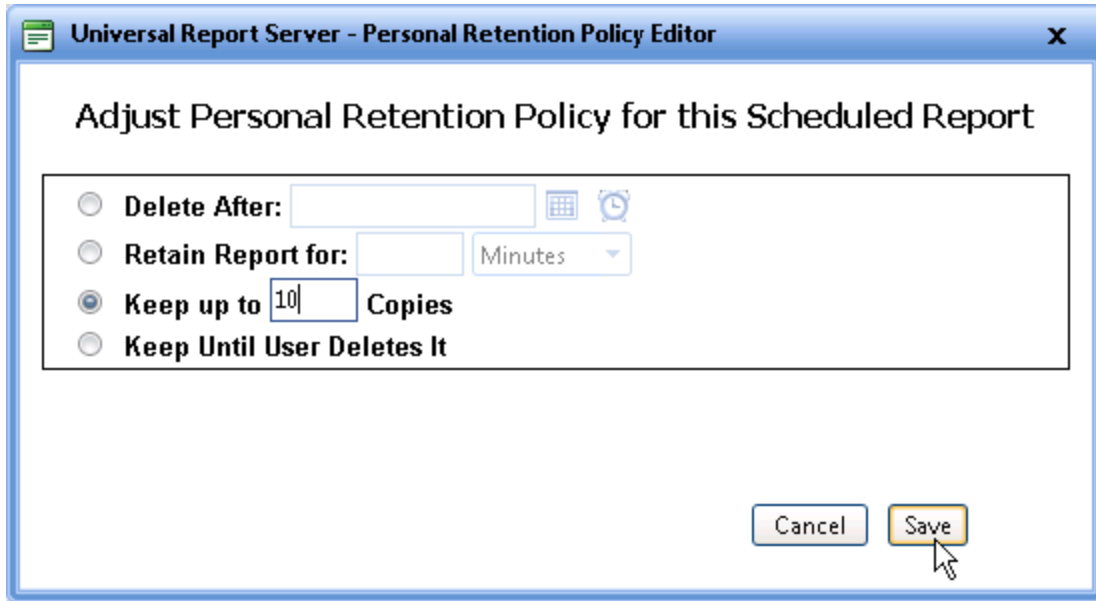
The personal retention rule for the scheduled report specifies how long you will see this report in the **Reports Archive** page. The four Retention Policy options available are described in the following table.

Retention Policy Option	Description
Delete After:	Use this option when you want to delete the reports on a certain date and time. All reports having this schedule will be deleted (even if they were recently created just prior to this date and time). Click the calendar icon to select the date; click the clock icon to select the time. This field is editable as long as the date and time you enter pass the validity tests. For example, you can type in "December 1, 2010 1:45 PM" and it will reformat to "12/1/2010 1:45 PM".
Retain Report for:	Use this option when you want to delete a report after an elapsed time period. Type a number in the first box, then select Minutes, Hours, Days, Months, or Years from the list. As each report in the schedule reaches the time period specified here, it will be deleted. For example, if a report is scheduled to run daily and this retention rule is set to retain reports for five days, then you will only have the last five reports kept in your archive. As the oldest report reaches the fifth day, it will be dropped off the list.
Keep up to ___ Copies	Use this option when you want to keep only a specific number of copies of a report. Any reports that are outside of the number you specify here will be deleted. For example, if you specify you want to keep 10 copies, then when a new report is generated, the oldest one will be dropped from the list. The maximum number you may enter here is 999.
Keep Until User Deletes It	Use this option when you don't want this report to be automatically deleted according to one of the Retention Rules above, but rather you want all reports of this schedule to be kept in your Reports Archive until you specifically delete them using the Delete Report option.

Select one of these options and click **Save**. Your personal retention rule is now saved for that scheduled report.