Actuate One™

One Design
One Server
One User Experience

Using Information Console

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Contents

About *Using Information Console*

Using Information Console provides information about using Actuate Information Console to access, create, and run files in an Encyclopedia volume.

This document is a guide for general users of a default Information Console installation. Technical concepts and explanations about how to accomplish common activities are included in the following chapters. For more detailed information about any of the subjects discussed, see the complete set of Actuate documentation included with Actuate software or contact your Actuate BIRT iServer administrator.

The following chapters are included:

- *About Using Information Console.* This chapter provides an overview of this guide.
- *Chapter 1. Introducing Actuate Information Console.* This chapter explains online reporting and how Information Console works.
- *Chapter 2. Managing folders and files.* This chapter explains how to access an Encyclopedia volume and manage the files and folders within a volume.
- *Chapter 3. Using BIRT Dashboards.* This chapter provides information about using shared dashboards in Information Console.
- *Chapter 4. Running file jobs.* This chapter provides information about generating documents using Information Console.
- *Chapter 5. Personalizing Information Console.* This chapter provides information about changing user preferences and advanced options.
- *Chapter 6. Using BIRT Mobile.* This chapter provides information about using BIRT Mobile with Information Console.

Chapter

1

Introducing Actuate Information Console

This chapter contains the following topics:

- Document delivery and collaboration with Information Console
- About Information Console
- About file types
- About security roles, privileges, and options
- About optional browser-based tools
- About Actuate documentation

Document delivery and collaboration with Information Console

In a diverse and global business enterprise, corporations need a way to create, publish, and distribute content on a scheduled basis to a variety of users. These users require online and offline access to information from network environments, such as the internet, intranets, and extranets. Information Console provides an efficient, scalable, searchable, and easily customizable solution for document delivery and collaboration as well as data analysis and monitoring.

Information Console supports the following user activities:

- Analyzing data with browser-based tools
- Distributing a report using channels and mobile devices
- Filtering data according to user and security requirements
- Monitoring multiple documents and mashups with dashboards
- Scheduling customized report documents
- Searching for a file
- Uploading and storing multiple file types

Information Console supports customization to meet any organization's needs. This document explains the features and visual layout of a default installation of Information Console, as visited by a user with all functionality enabled. Contact your Actuate BIRT iServer administrator if features discussed in this document are not available to you. Figure 1-1 shows an example of Information Console.

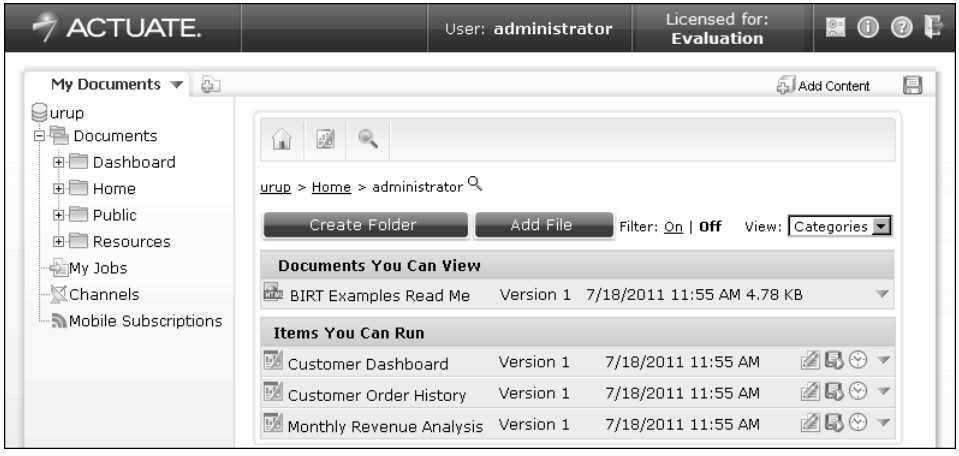


Figure 1-1 Displaying the My Documents page of Information Console

About Information Console

Actuate Information Console is a browser-based application for users to edit, print, run, schedule, share, and view business documents. Information Console supports accessing and viewing items stored in a managed repository called an Encyclopedia volume. One or more Encyclopedia volumes are managed by the Actuate BIRT iServer System.

There are two general presentation modes in Information Console:

- A file explorer mode for interacting with document files, jobs, and channels
- A dashboard mode for interacting with dashboards and gadgets

Depending on licensed options, users access additional browser-based tools such as Interactive Viewer for reorganizing document presentation or BIRT Studio, a design tool for creating and editing report documents. BIRT Dashboard and gadget tools are available with the BIRT 360 license option.

Accessing Information Console

Information Console is a browser-based application and requires a web browser. The following web browsers are supported for use with Information Console:

- Google Chrome 11.x
- Internet Explorer 7.x, 8.x, and 9.x
- Mozilla Firefox 4.x and 5.x
- Safari 4

After entering the web address of Information Console, a user logs in to access files and dashboards stored on the Encyclopedia volume. Figure 1-2 shows a high-level view of a user's web browser interacting with Information Console and an Encyclopedia volume managed by the Actuate BIRT iServer System.

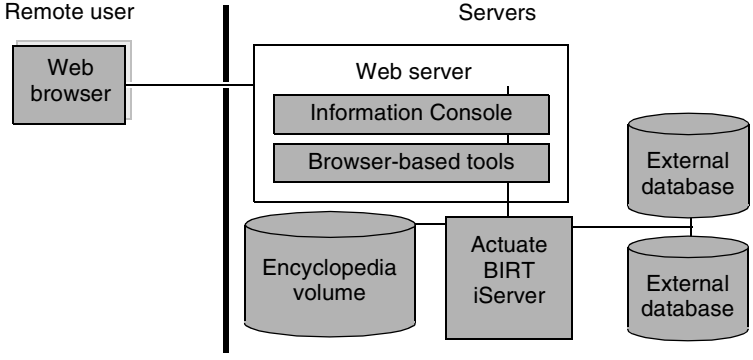


Figure 1-2 Actuate browser-based application architecture

Licensed options on BIRT iServer activate additional functionality such as browser-based tools and deployment of different file types in the Encyclopedia volume.

Understanding the file life cycle

All files are placed in the Encyclopedia volume through one of the following methods:

- Run or schedule a document job
- Save a document from a browser-based tool
- Publish a document from an Actuate desktop designer software
- Upload a file by an Actuate Encyclopedia volume administrator

Information Console users either view an existing document for printing and editing, or run a job to create a document with updated or filtered data.

Users with appropriate privileges can open design and template files in browser-based tools to change the design or data sources. Files opened in browser-based tools for design can be republished to the Encyclopedia volume.

Figure 1-3 shows the typical file life cycle that Information Console supports.

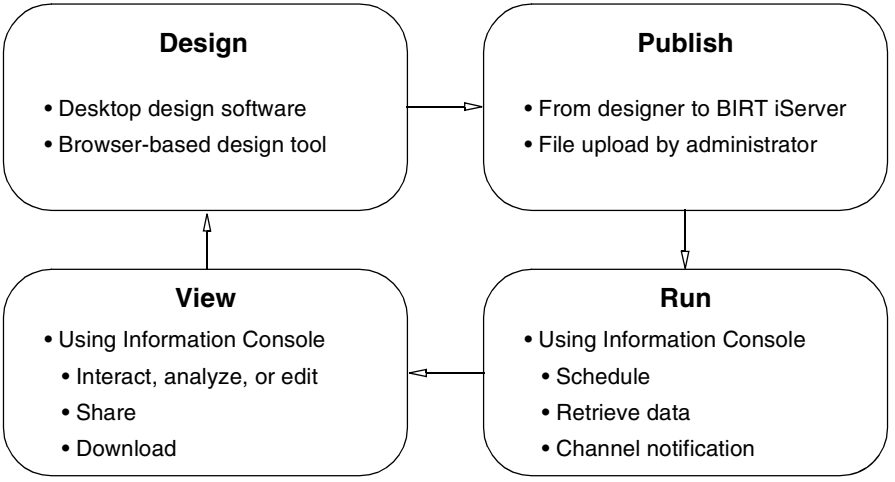


Figure 1-3 Document life cycle

About file types

Information Console manages and stores several types of files, organized in folders or dashboards. The administrator can add additional file types. Contact

your Encyclopedia volume administrator for more information about file types not described in this document.

The following groups of files summarize how specific file types are used.

- BIRT design and document files

  A developer creates a BIRT design file using Actuate BIRT Designer Professional or Actuate BIRT Studio, and publishes the file. Running a design job updates data and generates a final document format, for example, an Adobe PDF, Microsoft Excel, Microsoft Word, or BIRT document file.

  Users interact with the data and format of BIRT document files using browser-based tools such as Actuate Interactive Viewer. Users schedule these files for conversion to a final document. BIRT documents embed their data into the file to avoid additional database queries.

- BIRT data object files

  Data object files contain one or more data sets and data cubes. There are two types of data object files, a data object design file or a data object store file. Data object design files do not contain data but make queries on demand to their data sources.

  Administrators can cache this data as data object store files to avoid on-demand queries of external databases and to ensure that multiple dashboards use the same data. Data object store files support multiple versions. A data architect creates data object files using BIRT Designer Professional, and publishes the file to the Encyclopedia volume.

- BIRT cube view files

  Users launch the browser-based BIRT Data Analyzer tool to create and view reports of multidimensional data for analyzing relationships and trends in business data.

  Users can aggregate, categorize, create charts, and summarize this data. Cubes of data are contained within BIRT data object files built with the Actuate BIRT Designer Professional software or in BIRT data object store files created from an existing BIRT data object.

- BIRT dashboard files

  Dashboard files contain one or more dashboards built with various gadgets. Dashboards present data from BIRT documents, BIRT data objects, and external web-based sources for user analysis and interaction. Dashboards appear as a file or as a subscribed web page in Information Console.

  Users can interact with dashboard data using charts, Adobe Flash objects, cross-tab gadgets and tables. Data selection gadgets enable users to filter multiple data displays at the same time.

- BIRT spreadsheet files

A developer creates spreadsheet designs using Actuate BIRT Spreadsheet Designer, and publishes the designs as BIRT spreadsheet document or executable files.

Spreadsheet executable files retrieve data directly from a data source, ensuring that every generation of a report contains the most current data. BIRT spreadsheet documents embed their data into the file to avoid additional database queries.

- BIRT information object files

  A BIRT information object is a pre-defined SQL query that retrieves and optionally caches data from external databases. A data architect creates an information object using BIRT Information Designer, and publishes the object. A developer uses an information object as a data source for document designs.

  BIRT design files that use an information object as a data source to request new or cached data from the information object. The developer makes this choice when building the document design. An information object file and query output file can create an ad hoc report using the browser-based Actuate Query Wizard tool.

- Analytics cube report files

  These reports contain multidimensional data for analyzing relationships and trends in business data. It is possible to aggregate, categorize, create charts, and summarize this data. Cubes of data are built using the Actuate Cube Designer software or with cube profiles.

- Actuate e.Report files

  A developer creates Actuate Basic report designs and reusable components using Actuate e.Report Designer Professional. The developer publishes the designs as report document or executable files.

  Report executable files retrieve data directly from a data source, ensuring that every generation of a report contains the most current data. Report documents embed their data into the file to avoid additional database queries.

Additional information about each file type is available in the complete set of Actuate documentation, included with Actuate software.

Understanding file operations

Each file type supports various file operations such as viewing, sharing, running, scheduling, editing, and designing files. BIRT iServer options enable the use of browser-based tools like BIRT Data Analyzer and BIRT Studio as well as enabling the use of selected file types like BIRT document files. The BIRT iServer administrator gives users access permissions to run, share, and delete certain files, as well as assigning permission to use any installed BIRT iServer options.

Available file operations are visible when viewing a file's properties. Optionally, when using the Details, Icons, or List view, users can select file operations from the hover menu that appears when the mouse is over the file icon.

Figure 1-4 summarizes file operations for users of Information Console. Users receive access to the following file operations when they have appropriate privileges and the selected file supports the operation.

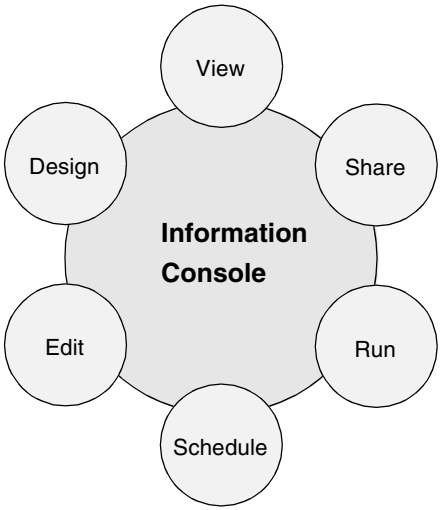


Figure 1-4 Reviewing Information Console file operations

These file operations are detailed later in this document.

Understanding file categories

Each file appears in one of the following categories when using View Categories:

- Folders
- Information Objects You Can Query
- Queries
- Documents You Can View
- Items You Can Run
- Cubes You can View
- Profiles You Can Run

The following sections describe each of these categories with examples of included file types and the file operations possible for each file type. All file types support viewing the file details.

Additional views include Details, Icons, and Lists views. For more information about views, see “Selecting a view” in Chapter 2, “Managing folders and files”.

Figure 1-5 shows the Categories view of Information Console supports.

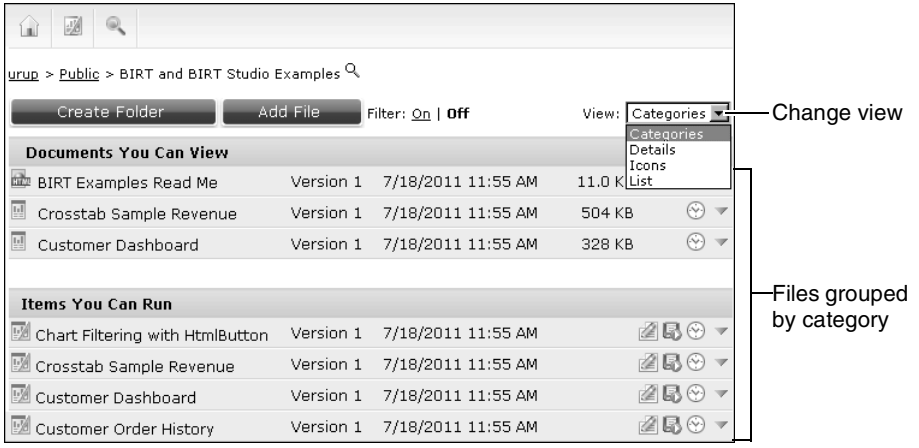


Figure 1-5 Viewing files organized by categories

Using Folders

Folders are containers where files are organized and are stored in an Encyclopedia volume. Each folder can have access privileges that are the same or different from files within the folder. Users create additional folders as needed. The following folders are available in a new Encyclopedia volume:

- Dashboard, where shared dashboard files are stored.
- Home, where each user can store their personal files.
- Public, where all users can store shared files.
- Resources, where resource files are stored that are shared among multiple documents and designs. Examples of these files include, BIRT Data Objects, graphic files such as a company logo, and report library and theme files.

Using Information Objects You Can Query

The Information Objects category contains files types that specify how to connect to or how to cache data from external databases. Table 1-1 summarizes the types of Information Object files that Information Console supports.

Table 1-1 Information Object files supported by Information Console

Icon	File type	Actuate file description	Available operations
	dox	Actuate Basic information object	New Query, Delete, Share
	iob	Information object	New Query, Create Report Design, Delete, Share
	sma	Data source map	New Query, Create Report Design, Delete, Share

The available file operations are:

- New Query
  Opens Actuate Query Wizard to create a new query from the selected information object. This operation creates and saves a Query Definition file. Optionally creates a temporary file for viewing in the DHTML Viewer, in e.Analysis, as an Excel or as a PDF file. The operation in the Query Wizard to create a temporary file is Create Query.
- Delete
  Removes the selected file.
- Share
  Assigns file access privileges on the selected item.
- Create Report Design
  Opens the browser-based BIRT Studio tool to create a new BIRT Design file using the selected information object.

Using Queries

The Queries category contains pre-defined queries of information objects. Table 1-2 describes the type of query file Information Console supports.

Table 1-2 Actuate query type supported by Information Console

Icon	File type	Actuate file description	Available Operations
	dov	Query definition	Schedule, Edit Query, Delete, Share

The available file operations are:

- Execute Query
  Runs the selected Query file and creates a temporary document that can be opened in the DHTML Viewer, as an Excel or PDF file, or in the e.Analysis tool. Optionally, saves the document as a Query Output file.

- Schedule
  Runs the selected file as a job at a particular time, saves its output as a Query output file, and optionally, sets the job to recur over a fixed period.
- Edit Query
  Opens Actuate Query Wizard to edit the query.
- Delete
  Removes the selected file.
- Share
  Assigns file access privileges on the selected file.

Using Documents You Can View

The Documents You Can View category includes file types such as HTML, PDF, Excel, Word, and PowerPoint files. Text files containing text information or data output are in this category, for example TXT files and CSV data files. Files in this category are typically the output of report designs or executable files. Table 1-3 summarizes the types of document files Information Console supports.

Table 1-3 Document types supported by Information Console

Icon	File type	Actuate file description	Available operations
	afp	IBM Advanced Function Printing Document	Delete, Open, Share
	bas	Actuate Basic source file	Delete, Open, Share
	csv	Comma separated values file	Delete, Open, Share
	cubeview	BIRT cube view file	Delete, Open, Share
	dashboard	BIRT dashboard file	Edit, Delete, Open, Share
	data	BIRT data object store	Delete, Open, Share
	doc	Microsoft Word document	Delete, Open, Share
	docx	Microsoft Word 2007 and 2010 document	Delete, Open, Share
	doi	Query output	View in PDF, View in Excel, View in e.Analysis, Delete, Open, Share
	epr	External procedure object	Delete, Open, Share
	gadget	Dashboard gadget file	Delete, Open, Share
	htm or html	HTML document	Delete, Open, Share

Table 1-3 Document types supported by Information Console

Icon	File type	Actuate file description	Available operations
	pdf	Adobe PDF file	Delete, Open, Share
	ps	PostScript document	Delete, Open, Share
	psv	Pipe separated values file	Delete, Open, Share
	ppt	Microsoft PowerPoint file	Delete, Open, Share
	pptx	Microsoft PowerPoint 2007 and 2010 file	Delete, Open, Share
	roi	Actuate report document	Delete, Open, Share
	rol	Actuate design library	Delete, Open, Share
	rop	Actuate parameter template	Delete, Open, Share
	ros	Actuate search definition	Delete, Open, Share
	rptdocument	BIRT report document	Delete, Schedule, Open, Share
	rptlibrary	BIRT report design library	Delete, Open, Share
	rpttemplate	BIRT report design template	Delete, Open, Share
	rtf	Rich text format	Delete, Open, Share
	soi	BIRT Spreadsheet document	Delete, Schedule, Open, Share, Run, and View
	tsv	Tab separated values file	Delete, Open, Share
	txt	Text file	Delete, Open, Share
	xls	Microsoft Excel spreadsheet	Delete, Open, Share
	xlsx	Microsoft Excel 2007 and 2010 spreadsheet	Delete, Open, Share

The available file operations are:

- Delete
  Removes the selected file.
- Edit
  Edits the selected dashboard file.

- Open
  Opens the selected file in the default viewer for that file. For example, a report document opens in BIRT Viewer, a BIRT cube view file and a BIRT data object store file open in BIRT Data Analyzer, a Query output file opens in DHTML Viewer, and a PDF document opens in Adobe Acrobat Reader.

  Dashboard and gadget files open in a temporary web page of the user's web browser unless the user subscribes to the dashboard file or adds the gadget file to an existing dashboard. If no default viewer is available for the selected file format, the option to download the file appears.

- Run and View
  Runs the selected BIRT Spreadsheet document as a file job and creates a temporary report document in the Excel or PDF file format. The created file format is not saved. If no default viewer is available for the selected file format, the option to download the file appears.

- Share
  Assigns file access privileges on the selected file.

- Schedule
  Schedules a time to run the selected file as a job, saves its output, and optionally, sets the job to recur over a fixed period.

- View in Excel
  Views the Query output file as a Microsoft Excel file.

- View in PDF
  Views the Query output file as a PDF file.

- View in e.Analysis
  Views the Query output file in the Actuate e.Analysis browser-based tool.

Using Items You Can Run

The Items category includes document designs and executable files. When an Information Console user runs a file job, the output appears as a document in Documents You Can View.

Table 1-4 summarizes the file types that run in Information Consoles.

Table 1-4 Actuate design and executable files supported by Information Console

Icon	File type	Actuate file descriptions	Available operations
	datadesign	BIRT data object design file	Schedule, Delete, Share

Table 1-4 Actuate design and executable files supported by Information Console

Icon	File type	Actuate file descriptions	Available operations
	rov	Report parameter values	Run, Run and Save, Schedule, Delete, Share
	rox	Report executable	Run, Run and Save, Schedule, Delete, Share
	rptdesign	BIRT report design	Run, Run and Save, Schedule, Edit, Delete, Share
	sox	BIRT Spreadsheet executable	Run, Run and Save, Schedule, Delete, Share
	vtf	BIRT Spreadsheet template package	Run, Run and Save, Schedule, Delete, Share
	vtx	BIRT Spreadsheet template	Run, Run and Save, Schedule, Delete, Share

The available file operations are:

- Delete
  Removes the selected file.
- Edit
  Edits the selected BIRT Report design file in BIRT Studio if that if that option is installed.
- Run
  Immediately runs the selected file as a job, saves its output as a temporary document, and opens it in the default file viewer.
- Run and Save
  Immediately runs the selected file as a job, saves its output.
- Schedule
  Schedules a time to run the selected file as a job, saves its output, and optionally sets the job to recur over a fixed period.
- Share
  Assigns file access privileges on the selected file.

Using Cubes You Can View

The Cubes category includes Actuate Analytics data cube files and cube report files.

Table 1-5 summarizes the types of cube files Information Console supports.

Table 1-5 Actuate cube types supported by Information Console

Icon	File type	Actuate file description	Available operations
	cb4	Analytics cube	Run, Run and Save, Schedule, Delete, Open, Share
	cvw	Analytics cube report	Delete, Open, Share
	odp	Analytics parameters for analysis services	Delete, Open, Share

The available file operations are:

- Delete
  Removes the selected file.
- Open
  Opens the selected file in the default viewer for that file. For example, Analytic cube file types open in the browser-based Analytics Cube Viewer tool.
- Run
  Immediately runs the selected Analytics cube file as a job, saves its output as a temporary document, and opens it in the default file viewer.
- Run and Save
  Immediately runs the selected Analytics cube file as a job and saves its output.
- Schedule
  Schedules a time to run the selected file as a job, saves its output, and optionally sets the job to recur over a fixed period.
- Share
  Assigns file access privileges on the selected file.

Using Profiles You Can Run

The Profile category contains design specifications for building an Actuate Analytics cube file. Table 1-6 describes the operations for profile files that Information Console supports.

Table 1-6 Actuate document type supported by Information Console

Icon	File type	Actuate file description	Available operations
	dp4	Analytics cube profile	Run, Run and Save, Schedule, Delete, Share

The available file operations are:

- Delete
  Removes the selected file.
- Run
  Immediately runs the selected cube profile as a job to generate an Analytics cube, saves the new cube as a temporary file, and opens it in the browser-based Analytics Cube Viewer tool.
- Run and Save
  Immediately runs the selected cube profile as a job to generate Analytic cube file, saves the new cube file.
- Schedule
  Schedules a time to run the selected cube profile as a job, saves the new Analytic cube file, and optionally sets the job to recur over a fixed period.
- Share
  Assigns file access privileges on the selected file.

About security roles, privileges, and options

Information Console secures user access to Actuate files stored on an Encyclopedia volume and manages access privileges of shared Actuate files. BIRT iServer options enable additional functionality for all users or specific users, depending on the option license.

Understanding user security roles

When a user logs in to Information Console, the user receives a set of functionality based on the user's security role on the connected BIRT iServer System. This functionality includes access to Information Console functions such as searching or sharing files. All users can access the following resources:

- Files and folders
- Jobs status list
- Notification channels

All users can delete files when they have the appropriate privileges and can use interactive viewing if the Interactive Viewer option for iServer is installed. When a BIRT 360 option for iServer is installed, all users can view existing dashboards.

The BIRT iServer administrator can assign additional functions to a user’s security role.

Default user functionality levels correspond with user security roles on the BIRT iServer and offer the following user functions, as shown in Table 1-7.

Table 1-7 Default security roles and the corresponding functionality

Functionality	Basic	Intermediate	Advanced	Administrator
Accessing Documents, My Jobs, and Channels	✓	✓	✓	✓
Adding and changing dashboard gadgets: data selection and data visualization			✓	✓
Adding and changing dashboard gadgets: report and extras		✓	✓	✓
Adding, deleting and downloading files		✓	✓	✓
Building and modifying dashboard files		✓	✓	✓
Cloning and creating Information Console skins				✓
Creating and deleting folders			✓	✓
Creating job notifications with email and attachments		✓	✓	✓
Using mobile subscriptions	✓	✓	✓	✓
Searching document files or folders		✓	✓	✓
Setting job priority			✓	✓
Sharing BIRT Gadget files			✓	✓
Sharing and edit dashboard files		✓	✓	✓
Sharing files and folders			✓	✓
Subscribing to channels		✓	✓	✓
Using browser-based BIRT Interactive Viewer	✓	✓	✓	✓
Viewing BIRT Dashboard files	✓	✓	✓	✓

Customized versions of Information Console can have different user levels which offer different functionality. The Encyclopedia volume administrator can change existing security roles and functionality levels.

Reviewing file access privileges

Individual files and folders have access privileges assigned to them by the user that created them or by the Information Console administrator. You can select users and BIRT iServer security roles to be given file access privileges. For more

information about sharing files, see “Sharing a folder or file” in Chapter 2, “Managing folders and files”.

Reviewing BIRT iServer options

BIRT iServer options enable Encyclopedia volumes to deploy specific file types, run jobs, query data sources, and use browser-based tools such as BIRT Interactive Viewer, BIRT Studio, and BIRT Data Analyzer. The BIRT iServer administrator manages these options and can assign them to selected users.

How to verify available BIRT iServer options

1. On Information Console, choose About.
2. Select License. Figure 1-6 shows an example of licensed options on a BIRT iServer.

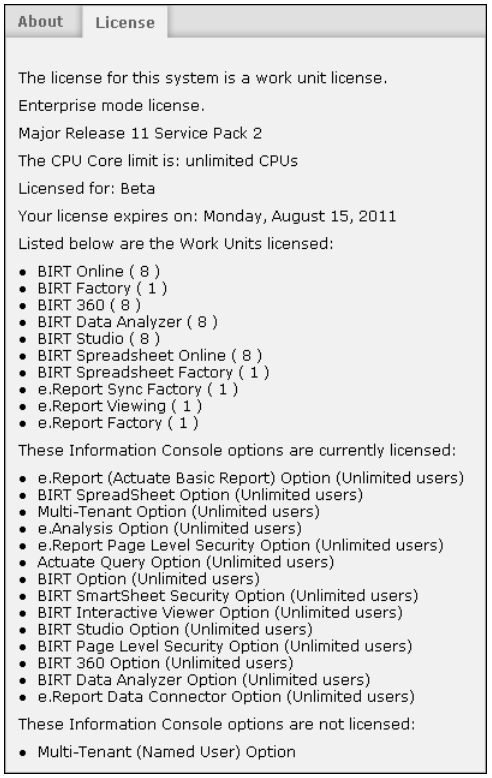


Figure 1-6 Verifying available BIRT iServer licenses

About optional browser-based tools

Information Console provides access to additional Actuate browser-based tools. These tools open in the web browser when editing or viewing specific Actuate file types in Information Console. Each browser-based tool includes online help for additional information about the active tool. Manuals are also available in PDF or printed format from Actuate Corporation. For more information about customizing skins, see "About Actuate documentation" later in this chapter.

Browser-based tools require specific Actuate BIRT iServer option licenses. The BIRT iServer administrator chooses if all users or selected users can access these tools. Contact your BIRT iServer administrator for information about what tools are available through your Information Console.

The following browser-based Actuate tools can launch from Information Console:

- BIRT Data Analyzer

  Supports the multidimensional analysis of data cubes and viewing data as tables and charts. BIRT Data Analyzer launches in the following instances; when a user edits a cross-tab component inside a BIRT document, when a user analyzes a BIRT data object store file, and when a user maximizes a cross-tab gadget on a dashboard. Users can save their data analysis as cube view files.

  See this tool's online help for additional information. Figure 1-7 shows BIRT Data Analyzer launched from a data object store file.

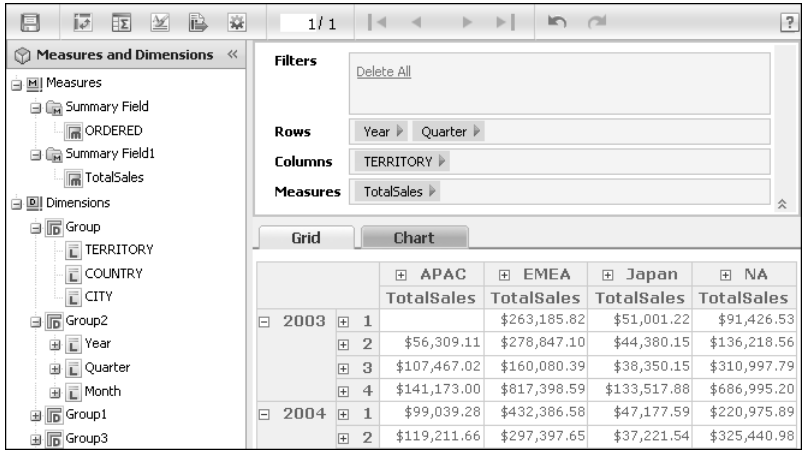


Figure 1-7 BIRT Data Analyzer interface

- BIRT Interactive Viewer

  Supports filtering, formatting, and viewing BIRT document files. For example, the user can change the order in which values display and show or hide detail rows. Figure 1-8 shows BIRT Interactive Viewer.

Figure 1-8 BIRT Interactive Viewer interface

This browser-based tool launches by selecting Enable Interactivity from the BIRT Viewer menu or by maximizing a report gadget on a BIRT Dashboard. See this tool's online help for additional information.

- BIRT Studio

  Supports business users editing existing Actuate BIRT design files or creating new document designs. Figure 1-9 shows BIRT Studio.

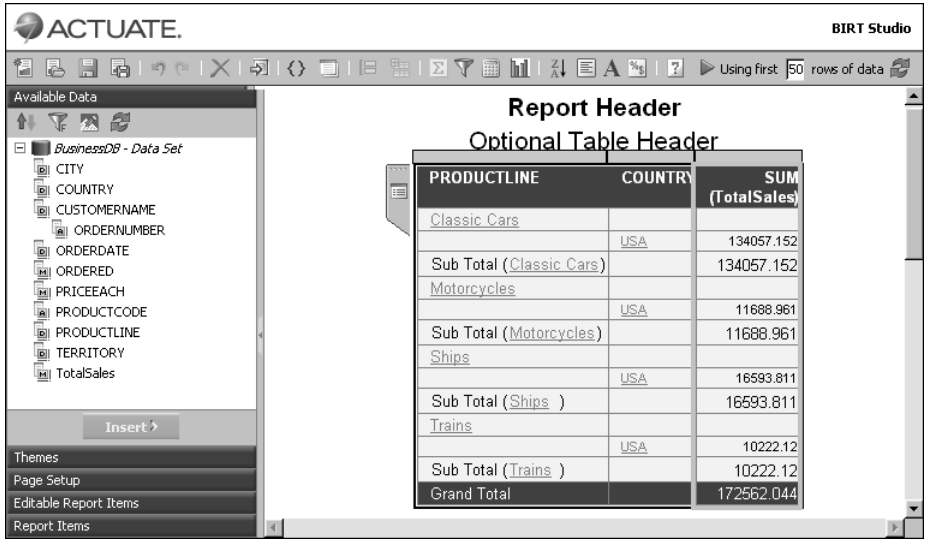


Figure 1-9 BIRT Studio interface

BIRT Studio launches when a user edits an existing BIRT design file or when a user wants to create a new BIRT design file. Choosing BIRT Studio from the inner banner menu launches BIRT Studio.

This option appears only if the BIRT iServer has the BIRT Studio option. For more information about using BIRT Studio, refer to the BIRT Studio online help.

Figure 1-10 shows how to launch BIRT Studio.

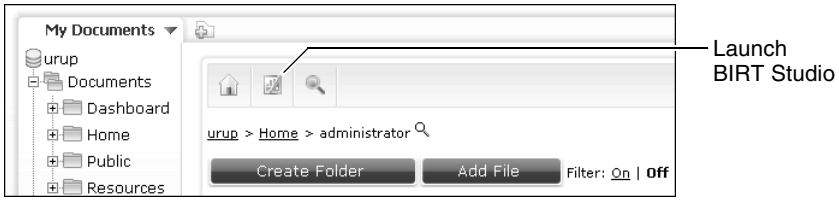


Figure 1-10 Opening BIRT Studio

- BIRT Viewer

  Supports basic viewing tasks, such as navigating BIRT document files, using a table of contents, viewing parameter information, and exporting data. This browser-based tool is the default viewer for BIRT document files. See this tool's online help for additional information.

  Figure 1-11 shows BIRT Viewer.

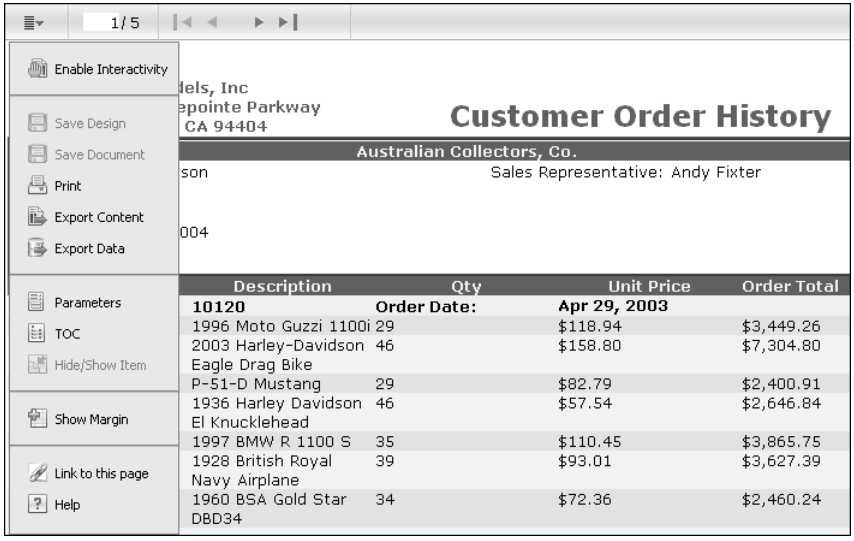


Figure 1-11 BIRT Viewer interface

- DHTML Viewer

Supports viewing the output of an information object or an e.Report in Dynamic Hyper Text Markup Language (DHTML) format.

See this tool's online help for additional information. Figure 1-12 shows DHTML Viewer.

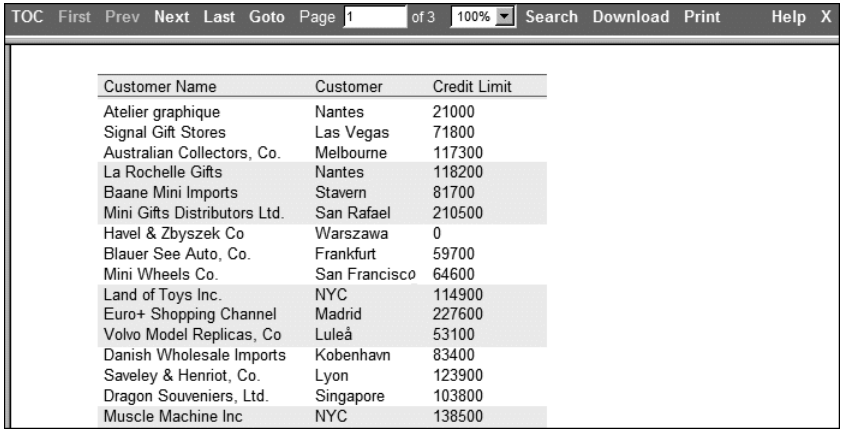


Figure 1-12 DHTML Viewer interface

- Actuate Query Wizard

  Creates a query of an information object. For more information about using the Query Wizard, see *Working with Actuate Query*.

  Figure 1-13 shows Actuate Query Wizard.

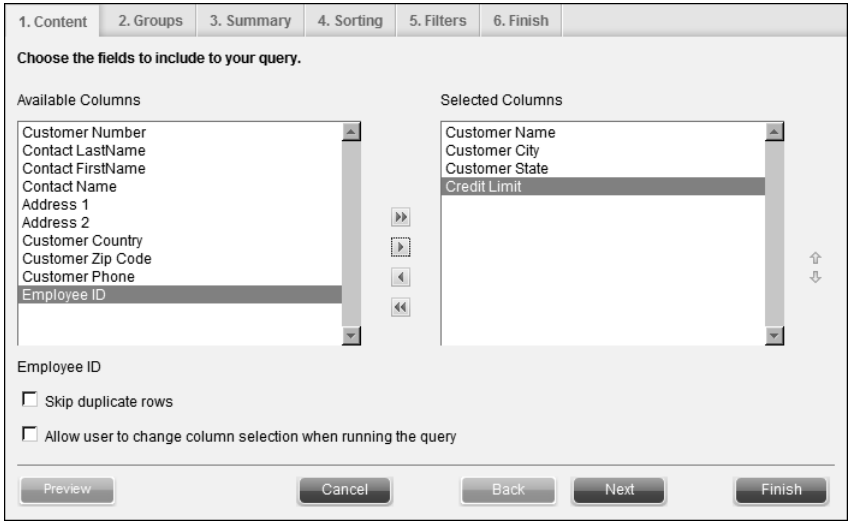


Figure 1-13 Actuate Query Wizard interface

Additional browser-based tools for data analysis include the following:

- Actuate e.Analysis
  Supports analysis of search results from an Actuate Basic report designed in e.Reports Designer Professional and from Actuate Query files. See this tool's online help for additional information. For more information about e.Analysis, see *Using e.Analysis*.

  Figure 1-14 shows Actuate e.Analysis.

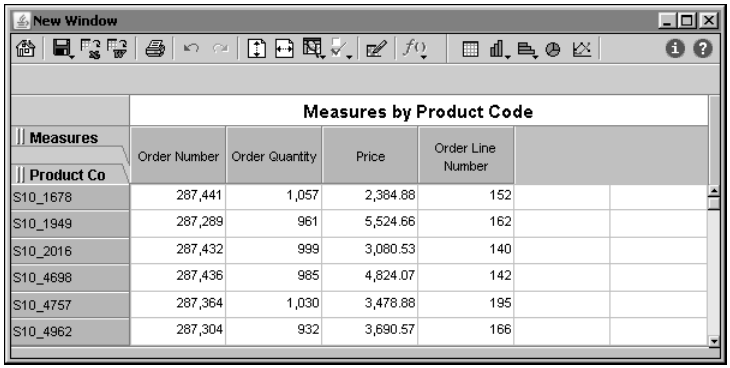


Figure 1-14 Actuate e.Analysis interface

- Analytics Cube Viewer
  Supports analysis of search results from Actuate Analytics Cubes and Reports designed in Actuate Analytics Cube Designer. See this tool's online help for additional information.

  Figure 1-15 shows the Analytics Cube Viewer tool.

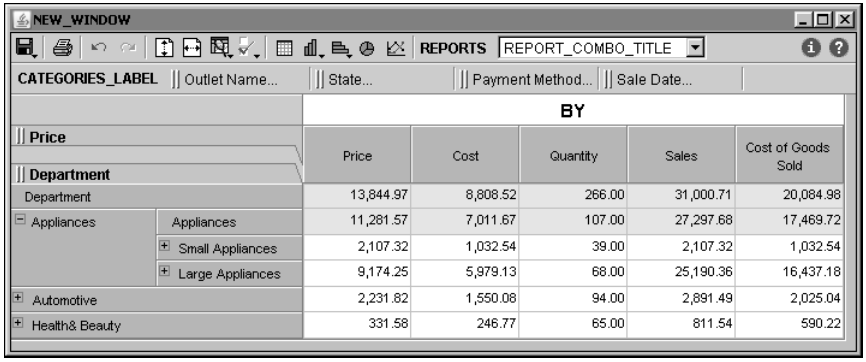
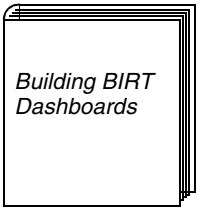
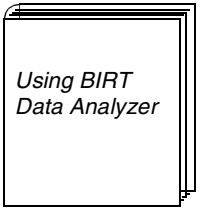
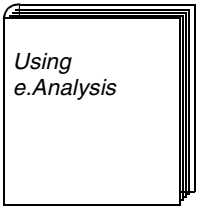
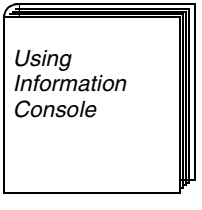


Figure 1-15 Analytics Cube Viewer interface

About Actuate documentation

The printed and online documentation includes the materials described in Table 1-8.

Table 1-8 Actuate documentation

For information about this topic	See the following resource
Building BIRT Dashboards ■ Creating and sharing dashboards ■ Creating Actuate and custom gadgets ■ Managing dashboard resources ■ Linking gadgets	
Using BIRT Data Analyzer ■ Organizing and formatting a cross tab ■ Filtering cross tab data ■ Working with data cubes ■ Working with charts	
Using BIRT Studio - iServer Edition ■ Using BIRT Studio ■ Editing and formatting report content ■ Organizing and filtering data ■ Presenting data	
Using e.Analysis ■ Analyzing data from an Actuate Basic report or an Actuate query ■ Viewing and filtering data ■ Customizing data ■ Exporting data	
Using Information Console ■ Managing folders and files ■ Running file jobs ■ Using BIRT Dashboards ■ Personalizing Information Console	

(continues)

Table 1-8 Actuate documentation (continued)

For information about this topic	See the following resource
Working with Actuate Query ■ Creating a query for an Actuate Information Object ■ Modifying a query ■ Run and schedule a query	*Working with Actuate Query*
Working with Actuate BIRT Viewers ■ Using Actuate BIRT Viewers ■ Editing and formatting a report ■ Organizing and filtering data ■ Modifying charts and cross tabs	*Working with Actuate BIRT Viewers*
Working with Actuate e.Reports ■ Using reports written in Actuate Basic ■ Viewing e.Reports in DHTML Viewer ■ Printing e.Reports ■ Searching and analyzing e.Reports	*Working with Actuate e.Reports*
Actuate Glossary Definitions of Actuate product terminology	*Actuate Glossary*
Adobe Acrobat Catalog A utility that can search all the documents in the Actuate manuals directory	*Adobe Acrobat Catalog*

You can obtain HTML and PDF files from the BIRT Exchange or Actuate Customer Support site. Additional documentation is also available from these sites. This document is the online help for Information Console. Each browser-based tool contains its own online help files.

Obtaining documentation

Actuate provides technical documentation in PDF, HTML, and print formats. You can download PDF or view HTML versions of the documentation from Birt-exchange.com. If you purchase the product, you can also download documentation using the File Transfer Protocol (FTP), as instructed in the e-mail from Actuate Distribution.

If you request a physical package, install the files using the Online Documentation and Localization Resource Files DVD, which ships as part of your Actuate software package. If you select the typical setup when you install from the DVD, the installation creates the Actuate11\Manuals directory.

Using PDF documentation

In each PDF version of a book, the table of contents and the index page numbers contain links to the corresponding topics in the text. In the table of contents, you access the link by positioning the pointer over the topic. In the index, you access the link by positioning the pointer over the page number.

The Actuate11\Manuals directory contains a file, master-index.pdx, which is an Adobe Acrobat Catalog utility that can search all the documents in the Actuate Manuals directory. This tool provides a convenient way to find information about a particular topic in Actuate documentation.

Obtaining documentation updates

The release notes contain late-breaking news about Actuate products and features. The release notes are available on the Actuate Support site at the following URL:

`http://support.actuate.com/documentation/releasenotes`

Updates to documentation in PDF form are available at the following URL:

`http://support.actuate.com/documentation`

If you are a new user, you must first register on the support site and log in to view the release notes.

These following URLs also provide updated product information:

`http://www.birt-exchange.com`
`http://www.actuate.com`

Chapter

2

Managing folders and files

This chapter contains the following topics:

- Getting started with Information Console
- Working with a file
- Viewing a file
- Working with a folder
- Finding a file
- Sharing a folder or file
- Downloading a file

Getting started with Information Console

When a user logs in to Information Console, they initiate a connection to a selected Encyclopedia volume. The volume contains report documents and design templates, spreadsheets, information objects, cube files, dashboards, and gadgets.

Each user must have a username and password to log in to Information Console. A URL address to the log in web page is also required.

Information Console appears to the user as a file explorer, as one or more dashboards, or the combination of both of these modes. Views and skins affect the presentation of the My Documents page. When dashboards are used, page layout is defined separately for each dashboard or gadget controls. Dashboard use is described later in this document.

Organizations can easily customize Information Console. If a task or screen described in this chapter is not available, contact your Encyclopedia volume administrator for information about which features are available. For example, your administrator can disable the My Documents page and only show dashboards.

How to log in to Information Console

1. To open the Information Console login page, complete one of the following tasks:
   - Start a web browser. Provide the URL for the Actuate Information Console and choose Log In Now. A default URL looks like the following web address. Your URL can be different if your organization has customized Information Console:

     ```
     http://actuate1:8900/iportal/
     ```

     where
     - actuate1 is the web server that provides the interface to BIRT iServer and 8900 is the port number of Information Console.
     - iportal is the home directory in which Information Console resides.
2. To log in, provide the following login credentials:
   - In Volume profile, select an Encyclopedia volume, if necessary.
   - In User name, type the user name.
   - In Password, type the password associated with the user name.
   - In Language, select a locale. The locale determines the date, time, currency, and number formats displayed in Information Console. The user interface appears in US English if the selected language is not available.

- In Time Zone, select a time zone. This selection specifies the time zone for jobs scheduling and time stamp for files.

Figure 2-1 shows an example of logging with the administrator user name.

Figure 2-1 Logging in to Information Console

3 Choose Log In. The My Documents page appears, as shown in Figure 2-2. The home directory of a user appears when the user is assigned a home directory.

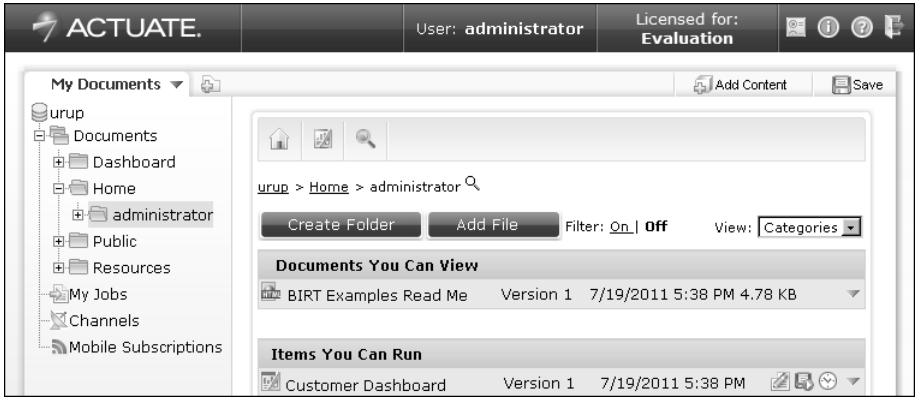


Figure 2-2 Arriving at the My Documents page.

A dashboard appears if a dashboard was open when a user logged out of Information Console or when the user's account is set to open a specific dashboard after log in.

How to log out of Information Console

Choose Log out to quit a user session of Information Console, as shown in Figure 2-3.

Figure 2-3 Logging out of Information Console

Navigating Information Console

After a user has logged in to Information Console they arrive at one of the following pages:

- A dashboard selected by the BIRT iServer administrator
- The user's last visited dashboard if dashboards are enabled
- The user's personal Home directory if one exists
- The Documents folder if the user does not have a Home directory

Figure 2-4 shows the default Documents folder for users without a home folder.

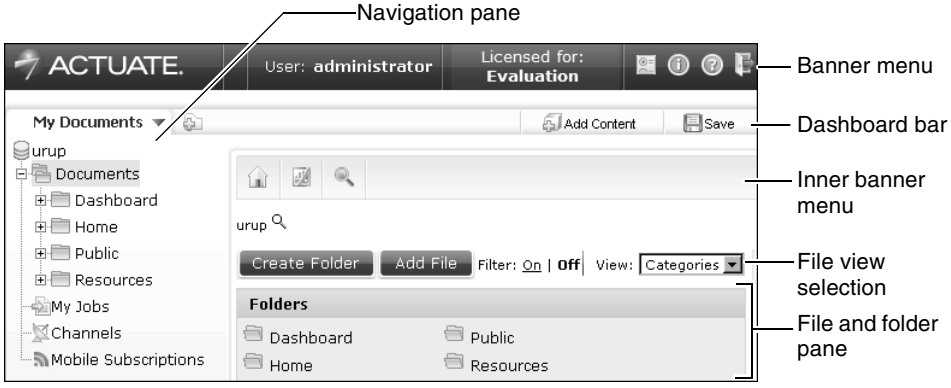


Figure 2-4 Viewing Information Console with Tree View skin

The purpose of each part of the Information Console web page is described in Table 2-1.

Table 2-1 Parts of the Information Console web page

Part name	Purpose
Banner menu	Displays links to user options, the about and license page, online help, and session log out.
Dashboard bar	Displays links to dashboards, to add new dashboards, to add content to a dashboard, and to save a dashboard file that is being edited.
File and folder pane	Displays links to the contents of the current folder. The selected file view manages the display of this pane.

Table 2-1 Parts of the Information Console web page

Part name	Purpose
Inner banner menu	Provides links to the user's home directory or the document folder if a home directory does not exist, BIRT Studio, Add file, the file search pane, and mobile browsing information.
Navigation pane	Displays links to document folders, job status, channels, and mobile subscriptions in the current encyclopedia volume. The selected skin manages the display of this pane.

Selecting a view

Users select a file view to change the layout of files and folders in Information Console. Views options are available in the My Documents page or in the user options described later in this document.

The following views are available with Information Console:

- Categories
  Files and folders are grouped into categories, as shown in Figure 2-5. Common file operations appear as icon images. All additional file operations are available by selecting an option from the File menu.

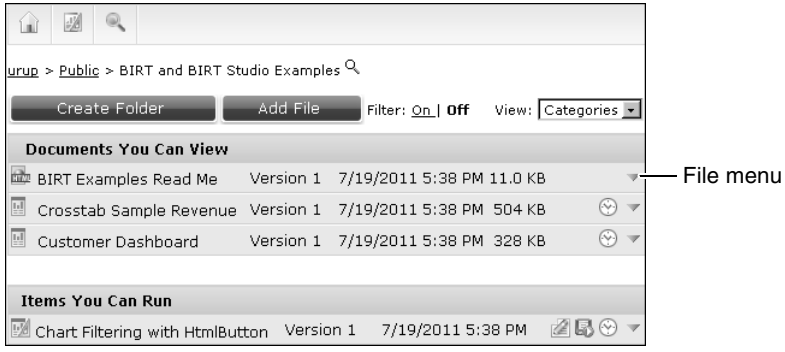


Figure 2-5 Viewing files in Categories View

- Details
  Files and folders are organized alphabetically in a table, as shown in Figure 2-6. File type and page count are visible. Common file operations appear as a menu when the mouse hovers over the file icon.

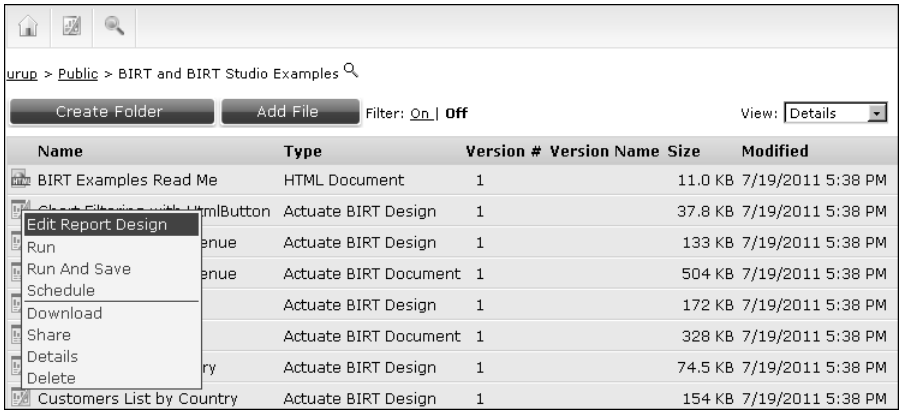


Figure 2-6 Viewing files in Details View

- Icons

  Files and folders are organized alphabetically and presented as large file icons in multiple columns, as shown in Figure 2-7. Common file operations appear as a menu when the mouse hovers over the file icon.

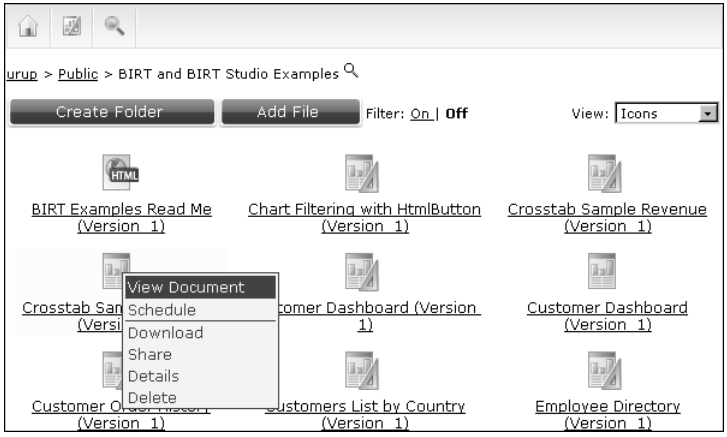


Figure 2-7 Viewing files in Icons View

- List

  Files and folders are organized alphabetically and presented as small file icons in multiple columns, as shown in Figure 2-8. Common file operations appear as a menu when the mouse hovers over the file icon.

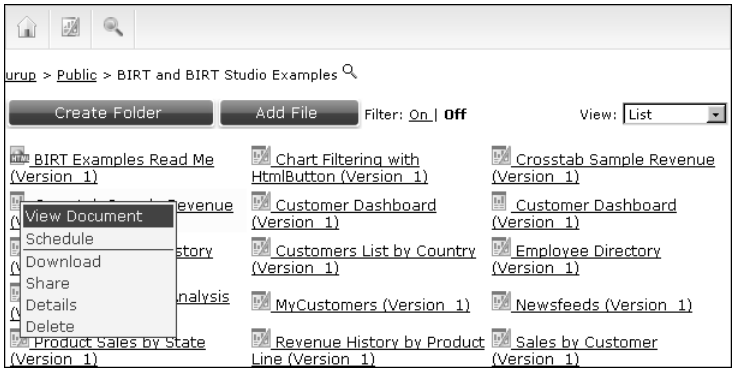


Figure 2-8 Viewing files in List View

Each view arranges items differently. Most examples in this manual show and describe Information Console using the Categories view.

Using skins

Information Console provides graphic layout options called skins. A skin affects the appearance of the My Documents page navigation pane. A user can select a skin in the user options, described later in this document.

Most examples in this manual show and describe Information Console using the default Tree View Skin. Other skins are described later in this document. Information Console administrators can create new skins and edit existing ones.

Working with a file

After logging in, Information Console displays a view of folders and files available in the Encyclopedia volume's file repository. The navigation pane displays available folders. The file and folder pane displays files and folders that the user can access. The example in Figure 2-9 shows folders in Categories view.

Each file type has specific actions associated with it, for example, viewing documents, running a document design job, editing a design file, and querying an information object.

Users manage files by viewing details about the files, deleting files, viewing file content, searching for files, or sharing files. A user's security role and a file's access privileges determine which tasks a user can perform on a selected file. Options for Encyclopedia volume licenses determine which file types users can open and which document jobs users can run. For example, running an Actuate BIRT document requires:

- The Actuate BIRT Report option installed on the BIRT iServer.

- The user's security role must allow running jobs.
- The file permissions must allow the user to read and execute the specific file.

Viewing properties for a file

Viewing file detail displays the possible file operations available to the current user, general file info like the file creator, type, location, version, author, access rights, and archiving policy of the selected file. The access rights show the file privileges for the current user. Access rights for other users are visible using the file's share operation.

How to see detailed file information

1 To see more information, do one of the following:

- Choose File menu, as shown in Figure 2-9, using the Categories view.

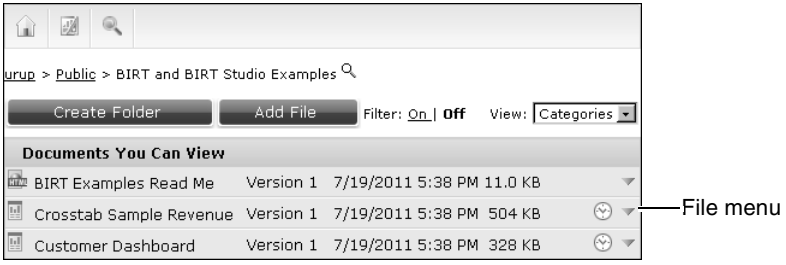


Figure 2-9 Opening the file menu in Category view

- Choose Details from the hover menu of a file's icon, when using the Details, Icons, or List views. Figure 2-10 shows the hover menu.

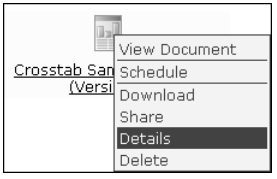


Figure 2-10 Viewing file details in Icons view

File details appears, as shown in Figure 2-11.

Figure 2-11 Viewing detailed file information

Deleting a file

Only an administrator or a user with the appropriate security role and delete privilege for a file can delete that file. Deleting a file removes it from the Encyclopedia volume.

Deleting a file does not remove temporary versions or external links to the file. Temporary versions exist until they expire or time out and links to the deleted file fail. The following scenarios show external links to a file:

- Other documents contain links to the deleted document
- The deleted document is embedded with JavaScript in an external web page
- Dashboard gadgets that use the documents or present them
- Job and channel notifications for the file job that created the deleted file
- Links to temporary or transient documents that exist in the Information Console's cache memory that have not expired

How to delete a file

1 To delete a file, navigate to the file to delete. Choose File menu for that file, as shown in Figure 2-12. Detail opens.

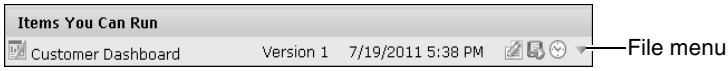


Figure 2-12 Accessing file details

In Detail, verify that you have Delete access rights, as shown in Figure Figure 2-13. In Select an Operation, select Delete. Choose OK.

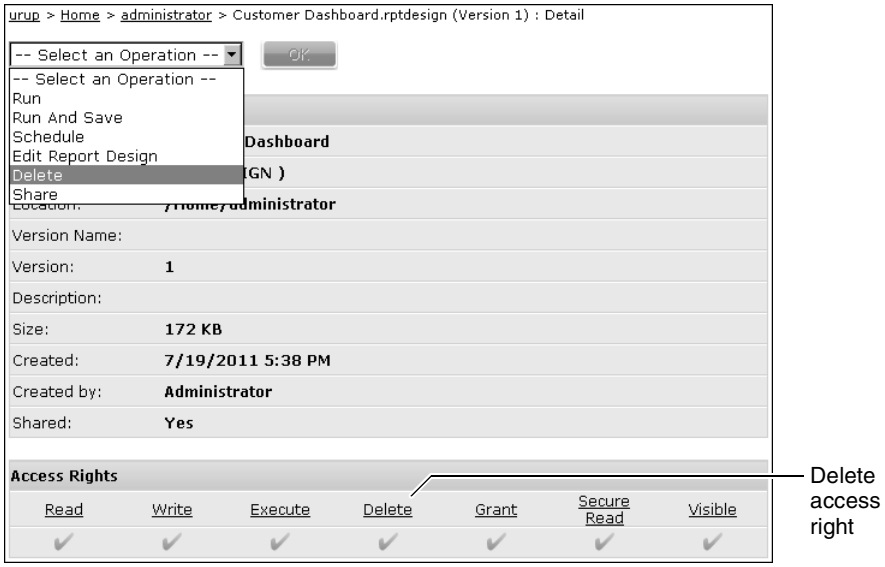


Figure 2-13 Deleting a file

2 Choose OK to confirm the deletion.

Optionally, choose Delete from the hover menu of a file's icon, when using the Details, Icons, or List views.

Figure 2-14 shows the hover menu.

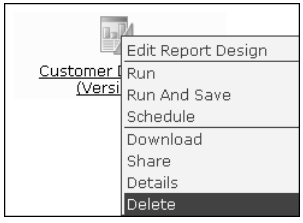


Figure 2-14 Deleting a file in Icons view

Archiving a file

An archive policy is necessary to automatically delete or archive a single file, files within a folder or all files of a selected type. The Encyclopedia volume

administrator assigns archive policies. A file can have one of the following archive policies:

- Delete file when they reach a certain age.
- Delete file on a fixed date or time.
- Do not delete file with an archive policy.
- Archive file before deletion.

Adding a file

Information Console supports a user with appropriate rights adding a file to a selected folder in a volume. To add a file to a folder, navigate to that folder, then choose Add File, as shown in Figure 2-15, to select options for the added file.

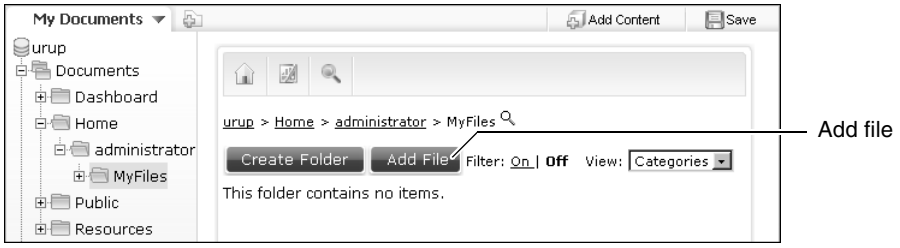


Figure 2-15 Adding a file to a selected folder

If a file with the selected name exists in the destination folder, a new version of the named file having duplicated archive rules, description and permissions appears in the destination folder.

After adding a file, edit the file permissions using the share operation. For information about files and folders to which you have access, contact your iServer administrator.

How to add a file

1. In your iServer Encyclopedia volume, navigate to a folder to which you want to add a file.
2. To select options for the added file, choose Add File, as shown in Figure 2-16.

Figure 2-16 Opening Add File

3. In Add File, browse for a file name

4 In Choose a File to Upload, select a file. Figure 2-17 shows a document file on the local computer selected.

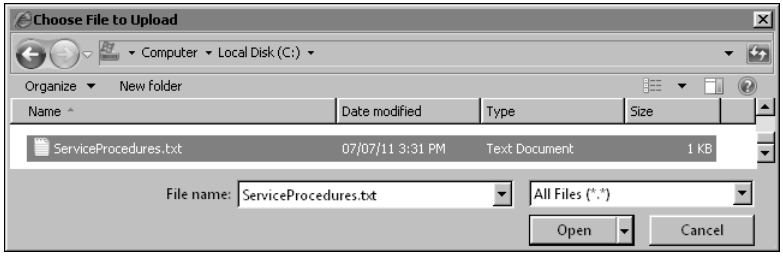


Figure 2-17 Selecting a file to add

Choose Open. In Add File, the path to the selected file appears in File.

5 Use the default selection, Create a new version, as shown in Figure 2-18. If a file having the same name already exists in the destination folder, select alternate options.

6 Optionally, when a file already exists in the folder, select copy file property options to copy properties from the latest version of the file.

7 Optionally, copy file permissions for the new file from the current folder, the user's privilege template, or the latest version of the file that already exists in the folder.

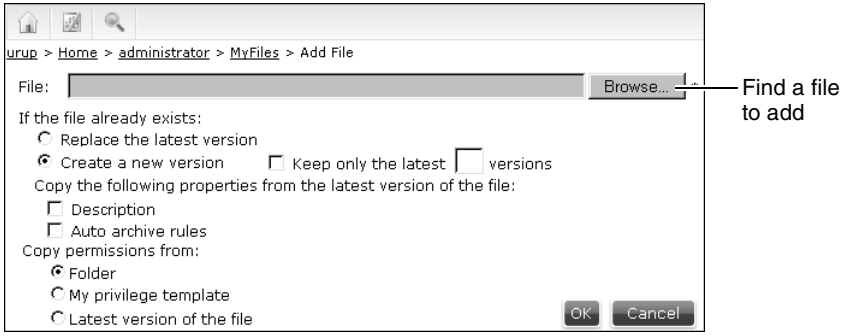


Figure 2-18 Selecting file upload options

8 Choose OK. The file appears in the destination folder, as shown in Figure 2-19.

Figure 2-19 Viewing a file added to a folder

Viewing a file

Users can view each file type in different ways. Some documents are ready to be viewed immediately and do not need to update the data they contain. These files are in the Documents you can view category.

Actuate document files are a category of documents that present formatted and structured content from a data source, such as a database, spreadsheet, or text file. These files contain data a user can view and manipulate in the browser-based Interactive Viewer tool. Users can save these files to final, third party document formats like Adobe PDF, IBM Advanced Function Printing (AFP) and Microsoft Office formats such as Word, Excel, and PowerPoint.

Other file types, such as BIRT design files, must run as a job so a user can view the data they display. Users can edit and view the design file without data using the Actuate browser-based tool like BIRT Studio. These files are in the Items you can run category.

Users view files with different tools or software depending on the file type they have selected:

- Final document files such as IBM AFP, Adobe PDF or Microsoft Word, Excel, and PowerPoint display in the user's default viewer, for example, a user would typically view Adobe PDF documents in the Adobe Acrobat Reader.
- BIRT document files display in the browser-based BIRT Viewer or Interactive Viewer tools.
- BIRT Cube View and BIRT Data Object Store files display in the browser-based BIRT Data Analyzer tool.
- BIRT Spreadsheet documents display in Microsoft Excel.
- Dashboard and gadget files display in the browser. Users can edit dashboard files viewed from the Information Console.
- e.Report documents display in the browser-based DHTML Viewer tool.
- Query output files can display as Adobe Acrobat files, as Microsoft Excel files or in the browser-based e.Analysis tool.
- Analytic cube files display in the browser-based Analytic Cube Viewer tool.

After a user edits a file in an Actuate browser-based tool such as BIRT Studio, the user saves it back to the Encyclopedia volume as a new version of the original file, saved as a new file or converts it into other document formats like Adobe PDF. Users download final document formats like Microsoft Excel or Adobe PDF for viewing and editing outside of the BIRT iServer System.

An Encyclopedia volume administrator can store custom file types to an Encyclopedia volume. These custom file types use the default viewing software

installed on the user's computer. If multiple viewers are available or no viewer is available for the selected file, the user can choose which software opens the file or choose to download the file.

Viewing a final document file

Final document files include Adobe PDF, IBM AFP, and Microsoft Office files such as Word, Excel, and PowerPoint. These documents appear in Documents You Can View category. Choose any of the following links to view a document:

- Document name, to view the newest version.
- Version number, to view a specific version.
- Choose File menu. Then, choose Details. In Detail, in Select an Operation, shown in Figure 2-20, select Open and choose OK.

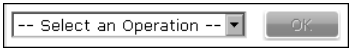


Figure 2-20 Selecting operations for the file

- View Document, from the file icon's hover menu.

  The hover menu appears when Information Console uses the Details, Icons, or List view and the mouse is over a file icon.

Figure 2-21 shows view choices for a final document file.

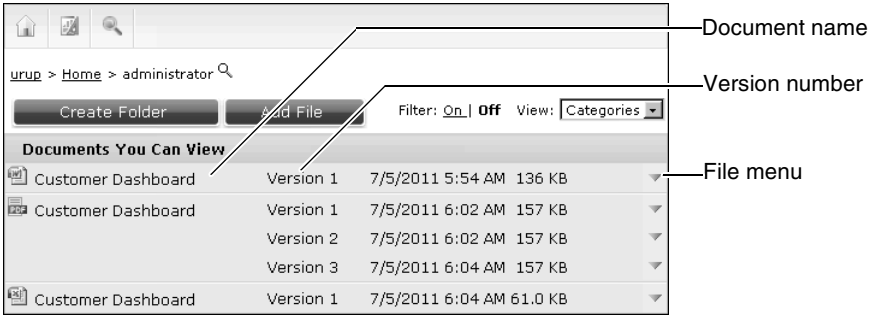


Figure 2-21 Viewing a final document file

The default viewer installed on the user's computer opens the file. If multiple viewers are available or no viewer is available for the selected file, the user can choose which software opens the file or choose to download the file.

Viewing a BIRT document

BIRT document files display in the browser-based BIRT Viewer or Interactive Viewer tools. These files are available in Documents You Can View category. Running a BIRT design file job creates BIRT documents.

To open a BIRT document, choose any of the following links:

- Document name, to view the newest version.
- Version number, to view a specific version.
- Choose File menu. Then, choose Details. In Detail, in Select an Operation, shown in Figure 2-22, select Open and choose OK.

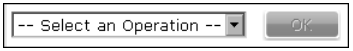


Figure 2-22 Selecting operations for the file

- View Document, from the file icon's hover menu.
  The hover menu appears when Information Console uses the Details, Icons, or List view and the mouse is over a file icon.

Figure 2-23 shows view choices for a BIRT document file.

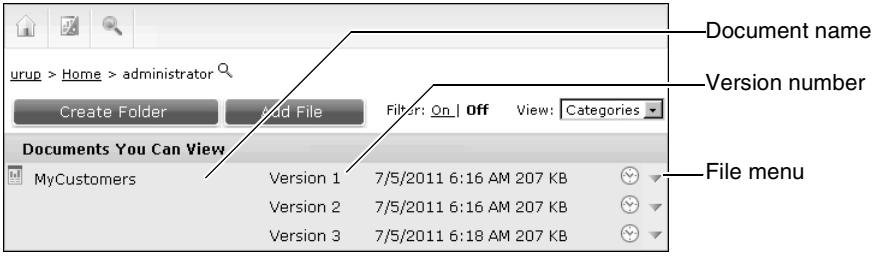


Figure 2-23 Viewing a BIRT document file

BIRT document files can be scheduled to run as a file job to create different document formats.

Viewing a BIRT Cube View file

BIRT Cube View files display in the BIRT Data Analyzer. BIRT Cube View files are available in Documents You Can View category. The browser-based BIRT Data Analyzer tool creates these files.

To open a BIRT Cube View file, choose any of the following links:

- Document name, to view the newest version.
- Version number, to view a specific version.
- Choose File menu. Then, choose Details. In Detail, in Select an Operation, shown in Figure 2-24, select Open and choose OK.

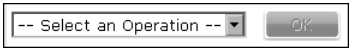


Figure 2-24 Selecting operations for the file

- View Document, from the file icon's hover menu.

The hover menu appears when Information Console uses the Details, Icons, or List view and the mouse is over a file icon.

Figure 2-25 shows view choices for a BIRT Cube View file.

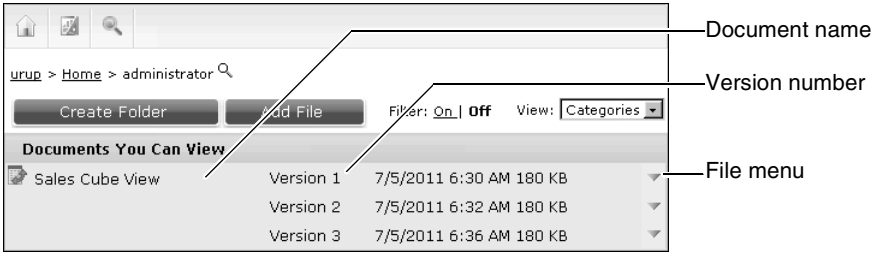


Figure 2-25 Viewing a BIRT Cube View file

Viewing a BIRT dashboard or gadget file

BIRT dashboard and gadget files display in your web browser. You can open these files using the My Documents file explorer, or you can subscribe to these files to add them to your personal dashboard file. BIRT dashboard and gadget files are created using Information Console. For more information about subscribing to dashboards, see "Working with a subscribed dashboard" later in this document.

To open a BIRT dashboard or gadget file, choose any of the following links:

- Document name, to view the newest version.
- Version number, to view a specific version.
- Choose File menu. Then, choose Details. In Detail, in Select an Operation, shown in Figure 2-26, select Open and choose OK.

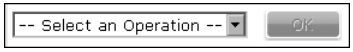


Figure 2-26 Selecting operations for the file

- Choose Open, from the file icon's hover menu.
  The hover menu appears when Information Console uses the Details, Icons, or List view and the mouse is over a file icon.

Figure 2-27 shows view choices for a BIRT dashboard and gadget file.

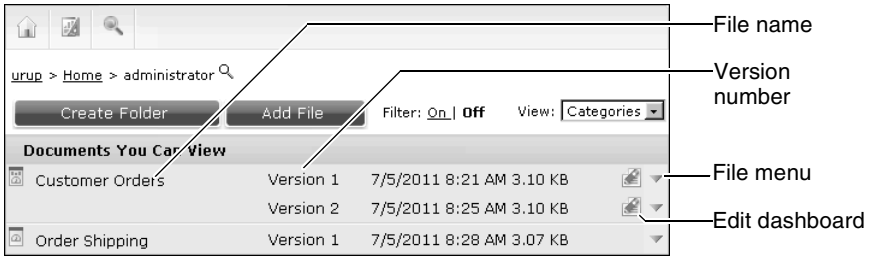


Figure 2-27 Viewing BIRT dashboard and gadget files

Users can edit BIRT dashboard files and save the updated file or save a new dashboard file. For information about building and editing BIRT dashboard files, see *Building BIRT Dashboards*.

Viewing a BIRT Spreadsheet

BIRT Spreadsheet files display in Microsoft Excel, other software capable of opening Microsoft Excel files, or as a PDF file. These files are available in Documents You Can View category. Running a BIRT Spreadsheet executable job creates BIRT Spreadsheet documents.

To open a BIRT Spreadsheet, choose any of the following links:

- Document name, to view the newest version.
- Version number, to view a specific version.
- Run and view, to convert and view in a selected document format.
- Choose File menu. Then, choose Details. In Detail, in Select an Operation, shown in Figure 2-28, select Open and choose OK.

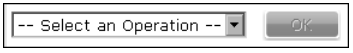


Figure 2-28 Selecting operations for the file

- View Document, from the file icon's hover menu.
  The hover menu appears when Information Console uses the Details, Icons, or List view and the mouse is over a file icon.

Figure 2-29 shows view choices for a BIRT Spreadsheet file.

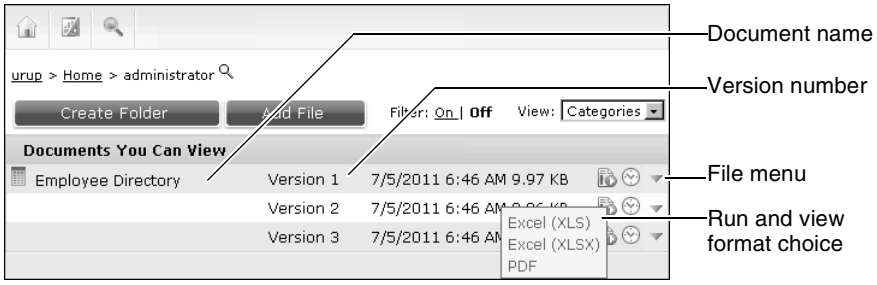


Figure 2-29 Viewing a BIRT Spreadsheet file

BIRT Spreadsheet documents are viewable in the following formats:

- Microsoft Excel 97-2003 (XLS)
- Microsoft Excel 2007-2010 (XLSX)
- Adobe Acrobat PDF

The default viewer installed on the user's computer opens the file. If multiple viewers are available or no viewer is available, the user can choose which software opens the file or choose to download the file.

Users can schedule BIRT Spreadsheet files to run as a file job to create different document formats or to update the data contained in the document.

Viewing an e.Report document

Users view e.Report document files in the browser-based DHTML Viewer tool. These files are available in Documents You Can View category and are the output of an e.Report executable file job.

Figure 2-30 shows view choices for an e.Report document file.

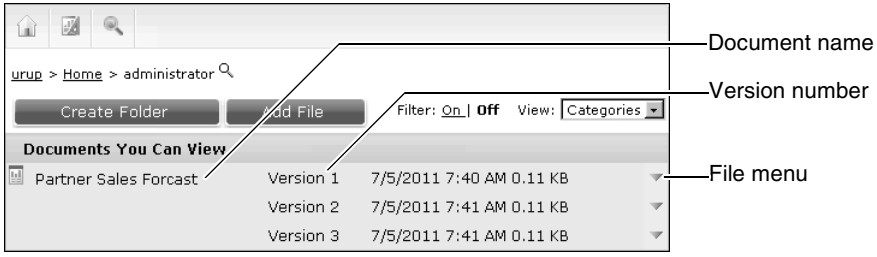


Figure 2-30 Viewing an e.Report document file

To open an e.Report document, choose any of the following links:

- Document name, to view the newest version.
- Version number, to view a specific version.

- Choose File menu. Then, choose Details. In Detail, in Select an Operation, shown in Figure 2-31, select Open and choose OK.

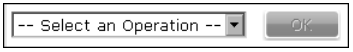


Figure 2-31 Selecting operations for the file

- View document from the file icon's hover menu.
  The hover menu appears when Information Console uses the Details, Icons, or List view and the mouse is over a file icon.

Viewing a Query output file

Query output files display in the browser-based DHTML Viewer tool. These files are available in Documents You Can View category. Running a Query definition file job creates query output files.

To open a query output file, choose any of the following links:

- Document name, to view the newest version.
- Version number, to view a specific version.
- Choose File menu. Then, choose Details. In Detail, in Select an Operation, shown in Figure 2-32, select Open and choose OK.

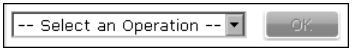


Figure 2-32 Selecting operations for the file

- View document from the file icon's hover menu.
  The hover menu appears when Information Console uses the Details, Icons, or List view and the mouse is over a file icon.

Query output files can also be viewed in the following document formats:

- Adobe Acrobat PDF

- e.Analysis file format using the browser-based e.Analysis tool

- Microsoft Excel

Figure 2-33 shows view choices for a Query output file.

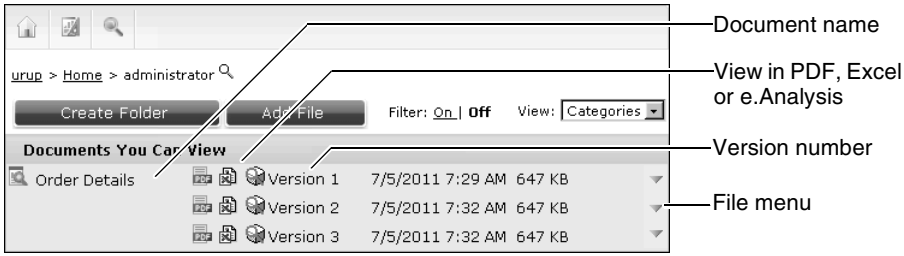


Figure 2-33 Viewing a Query output file

Viewing an Analytics cube report

Analytics cube and Analytics cube report files display in the browser-based Analytics Cube Viewer tool. These files are available in Cubes You Can View category. Running an Analytics cube profile job creates Analytic cubes and report files.

To open an Analytics cube report, choose any of the following links:

- Document name, to view the newest version.
- Version number, to view a specific version.
- Choose File menu. Then, choose Details. In Detail, in Select an Operation, shown in Figure 2-34, select Open and choose OK.

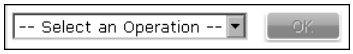


Figure 2-34 Selecting operations for the file

- View Document from the file icon's hover menu.
  The hover menu appears when Information Console uses the Details, Icons, or List view and the mouse is over a file icon.

Figure 2-35 shows view choices for an Analytic cube report file.

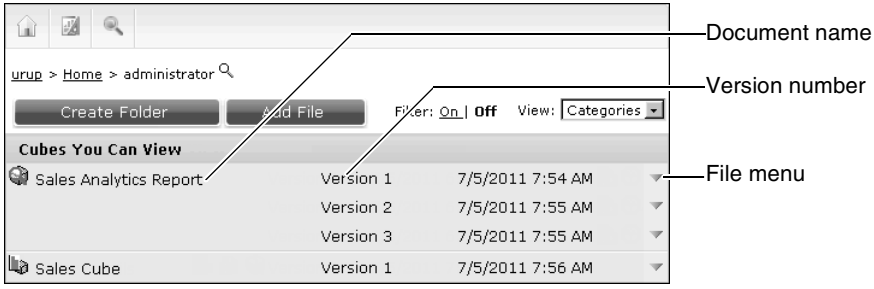


Figure 2-35 Viewing an Analytic Cube Report file

Viewing other Actuate file types

Other Actuate file types can open for editing using Actuate browser-based tools or run as a document job to create viewable document files. These additional file types and actions are described later in this document.

Working with a folder

The My Documents navigation pane displays a view of folders that the user has permission to view. The navigation pane lists folders in a tree diagram. If the tree diagram is not visible, select the Tree View skin in the user options, as described later in this document.

Users can use a folder as a destination for new documents from a file job or to upload files.

Figure 2-36 shows the Categories view of folders in a volume called urup.

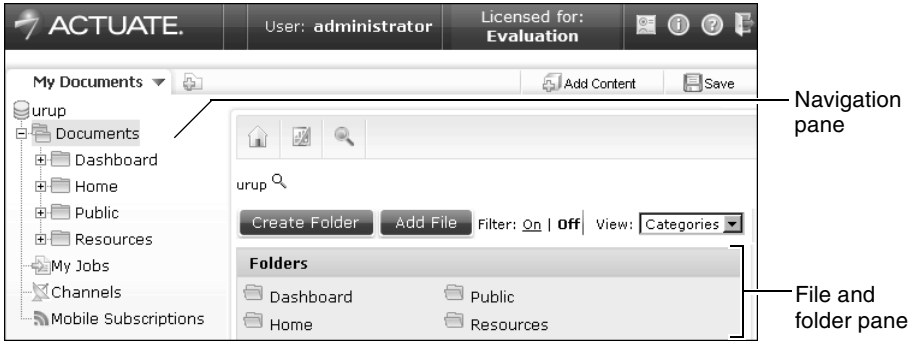


Figure 2-36 Navigating Information Console folders

Choose a folder from the navigation pane or the file and folder pane to open it. File access privileges determine which folders a user can view and open. As a user navigates to a folder, Information Console displays the path. For example, Figure 2-37 shows the path to a folder called BIRT and BIRT Studio Examples, in a volume called urup.

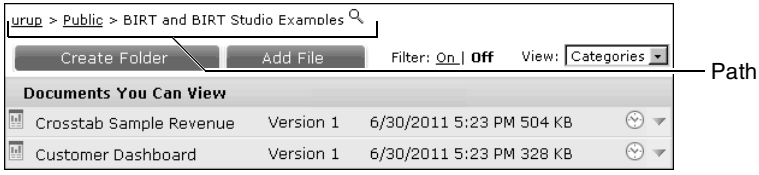


Figure 2-37 Displaying the folder details and path

Contact the Encyclopedia volume administrator to move existing files and folders.

Viewing folder properties

To view properties for a selected folder, choose View folder detail when in Categories view. Optionally, choose Detail from the folder icon's hover menu. Detail groups folder properties such as folder name, creator name, creation time, description, path location of the folder, if the folder is a shared and folder access rights into categories. For example, Figure 2-38 shows detail properties for a folder called Sales Data.

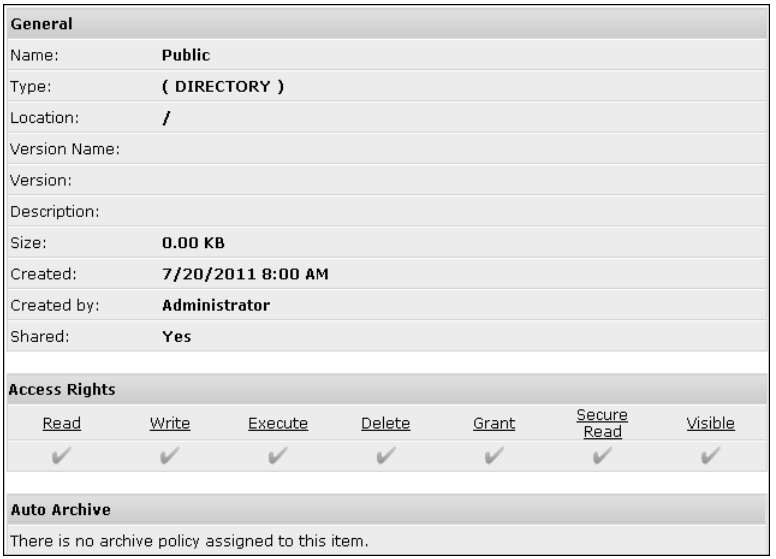


Figure 2-38 Examining folder properties in Detail

The hover menu appears in the navigation pane when the mouse is over the folder icon. The hover menu also appears in the file and folder pane when the user selects the Details, Icons, or List view.

Figure 2-39 shows how a user can view folder properties. The hover menu appears for the Public folder.

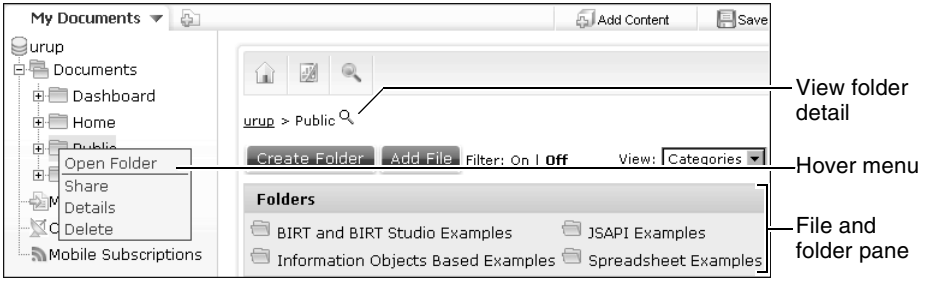


Figure 2-39 Displaying the folder details

Creating a folder

A user who has the appropriate security role and the required visible and write privileges for a folder can create a subfolder in that folder. The user that creates a folder can assign access permissions to that folder for other users or groups.

How to create a folder

1 In a volume, navigate to a folder. Choose Create Folder, as shown in Figure 2-40.

Figure 2-40 Viewing folder detail

2 In Create Folder, type a folder name in Name, then type descriptive text in Description. For example, type Sales Data in Name and Sales statistics 2011 in Description, as shown in Figure 2-41.

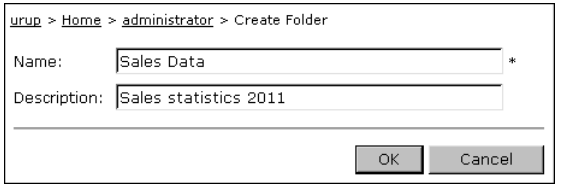


Figure 2-41 Typing a new folder name and description

Choose OK. The new folder appears in the volume, as shown in Figure 2-42.

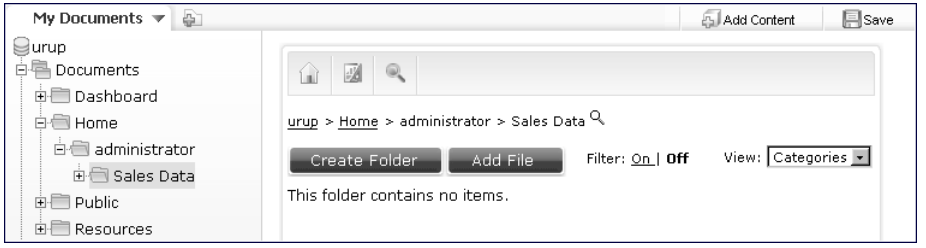


Figure 2-42 Viewing a new folder

Deleting a folder

Users with the appropriate security role and privileges for a folder can delete the folder. Deleting a folder also deletes all files and subfolders in the selected folder.

How to delete a folder

1 Navigate to the folder to delete. Choose View folder detail, as shown in Figure 2-43. Detail opens.

Figure 2-43 Viewing folder detail

2 In Select an Operation, select Delete. Choose OK. The example in Figure 2-44 shows deleting a folder.

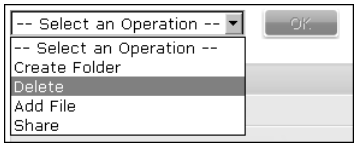


Figure 2-44 Deleting a folder

3 Choose OK to confirm deletion of the folder. When deletion completes, Information Console displays a status message in Delete file or folder(s) Status.

Figure 2-45 shows an example of a successful file deletion.

Figure 2-45 Successful deletion message for folder deletion

Finding a file

Information Console offers users various tools to find the files that they need. The following options assist users in finding and displaying files:

- Folders
- Search
- Filter
- Channel notification

Understanding folder organization

Folders can organize related files into groups. Users with the appropriate security role and the required visible and write privileges for a folder can create and name subfolders. Users can use these subfolders to save files output from jobs or

browser-based tools. To move existing files, contact the Encyclopedia volume administrator.

By default, each user has a Home folder to store their files. A Public folder exists for storing shared files, and a Resources folder is available for storing files shared by different documents like a company logo. The Dashboard folder is for storing dashboard and gadget files.

If different folders are visible either, verify the folder description by choosing View folder detail or contact your Encyclopedia volume administrator for additional information.

Searching files and folders

Searching helps a user to find an item without scanning long lists of files and folders. Search is visible in the banner only if the administrator has it enabled.

Information Console supports searching for files or folders within a folder. The scope of the search is limited to the selected folder and its subfolders. To search the entire Encyclopedia volume, the user must be at the top of the folder hierarchy.

A file and folder search displays files and folders that a user has the privilege to view.

How to use expressions in searches

Search expressions use special characters called operators to find files that match the condition in the expression. For example, Information Console supports using the special character, *, as a wildcard to indicate any variable number of characters before or after a string.

Table 2-2 lists the operators available to search for folders and files.

Table 2-2 Operators used to form search expressions

Name	Operator	Usage
Asterisk	*	Match zero or any number of characters.
Brackets	[]	Matches any character in the set between the brackets
Caret	^	Match everything not in the bracket set
Comma	,	Combine search terms and expressions.
Exclamation	!	Match everything NOT equal to the search expression
Greater than	>	Match everything greater than or alphabetically after the value that follows the operator

(continues)

Table 2-2 Operators used to form search expressions (continued)

Name	Operator	Usage
Hyphen	-	Separates upper and lower limits of the search range
Less than	<	Match everything less than or alphabetically before the value that follows the operator
Number sign	#	Match any single ASCII numeric character [0–9]
Question mark	?	Match any one character

Searches include the file-name extension. For example, to search for a file called BIRTcharts5.rptdocument, the following expressions would find the file, in addition to finding other files with similar names:

```
BIRT*
BIRTcharts*
BIRTcharts5.rptdocument
BIRTcharts#*
BIRTcharts[3-6]*
*5*
```

The following expressions, however, would not find the file:

```
BIRTcharts5
*5
```

The file-name extension is included as part of the name when matching a search expression. The search for “BIRTcharts5” fails because there is not a file or folder named “BIRTcharts5”. The search for *5 fails because the end of the document name is “t” and not “5”.

Table 2-3 lists examples of search queries.

Table 2-3 Example search expressions

Expression	Search result
[A-E]*	Returns files starting with A, B, C, D, or E.
[AE]*	Returns files starting with A or E.
[^A-E]*	Returns files that do not start with A, B, C, D, or E.
?????	Returns files that have 5 characters in its name.
Model?2010*	Returns files whose name has a single character between Model and 2010.
##	Returns files containing 2 numeric characters anywhere in the name.
BIRT*	Returns files that start with BIRT.

Table 2-3 Example search expressions

Expression	Search result
>D	Returns files that have a name starting with D or a letter higher in the alphabet than D.
70 - 90	Returns files that have a numeric name from 70 up to 90.
A - C	Returns files starting with A, B, or C.
BIRT*, customer*	Returns files that begin with BIRT or customer.
*.rptdocument	Returns files that have the file-name extension .rptdocument.
*.rptdocument, *.rptdesign	Returns files that have the file-name extension .rptdocument. or .rptdesign.
*document	Returns files whose file-name extension ends with the letters "document".

Searching for the expression "*document" finds files that finish with the word "document", such as file.rptdocument and file.cubedocument. A file named April Report Document.rptdesign does not match the because the search includes the file-name extension as the end of the file name.

How to use special characters in searches

If a user wants to find a file name that includes one or more special characters, a backslash (\) must precede each special character in the search expression.

Table 2-4 lists the special characters that require a backslash before them when used in searches.

Table 2-4 Special characters in searches that require a backslash

Character name	Symbol	Character name	Symbol
Ampersand	&	Hyphen	-
Asterisk	*	Less than sign	<
Backslash	\	Number sign	#
Close square bracket	]	Open square bracket	[
Comma	,	Pipe sign	|
Exclamation point	!	Question mark	?
Greater than sign	>	Single quotation mark	'

For example, to search for a file where the title includes the characters "user#", you must type the following search expression:

```
user\#
```

If you type user#, the search returns user names that begin with user and end with a number, such as user1, user2, and so on.

How to search for files and folders

1. Navigate to the specific folder to search.
2. In the Inner banner menu, choose Search.
3. In Search Documents, type the name of a file or folder to find.
4. Choose Search. The search results shown in Figure 2-46 include all folder and file names that begin with the following characters:

```
sales*
```

Figure 2-46 Search results

Search results include all available file names that match the search condition.

Filtering files and folders

By default, all visible files and folders in the currently selected folder appear to a user. Filtering limits the items that appear in the selected folder. For example, a user can apply filter options to display only the most recent files that include the word Marketing or start with a number.

The following parameters are available to filter files and folders:

- Display only file and folder names that match a search expression.
- Display only the most recent file versions.
- Display only folders.
- Display only document files.
- Display only executable files.

For example, to list documents and folders but not executable files, verify Documents is selected, and deselect Executables.

How to filter files

1. To enable filter options, in Filter, choose On. The available filter options appear, as shown in Figure 2-47.

Figure 2-47 Enabling filter options

2 Choose Reset to set the filter to its default setting.

3 Limit the display to document files only, verify Documents is selected, deselect Folders, and deselect Executables.

4 In the Filter text field, type a specific text character or string that appears in the beginning of a file's name.

Type the special character * as the last character. For example, the following shows files that start with the letters CU:

```
CU*
```

5 Choose Apply. A filtered list of items appears. For example, Figure 2-48 shows a filtered list of document files.

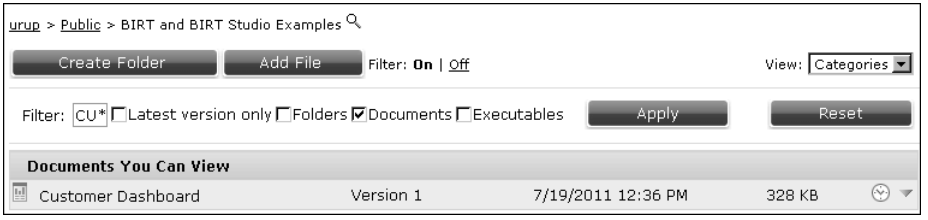


Figure 2-48 Filtering reports by viewable documents

Optionally, choose a different folder to apply the same filter inside the new folder.

6 Choose Off in Filter to disable filter options.

Using channel notifications

Channel notifications provide a list of scheduled file jobs that have completed and are available for viewing. When a document file job completes, a notice containing a URL link to the generated document appears in the Personal Channel of the user who scheduled the job. To send file job notifications to other channels or to send announcements to notification groups, contact your BIRT iServer administrator. Figure 2-49 shows a user's subscribed channels.

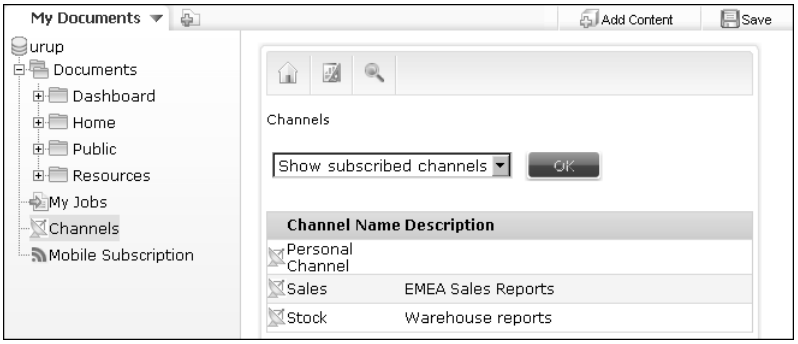


Figure 2-49 Showing subscribed channels

Channel notifications display in a summary view and can expand to a detailed view. Summary channel notifications contain the following information for the completed file job:

- File size
- Finished date and time
- Headline
- Job name
- Version name
- Version number

Figure 2-50 shows a channel notification as a summary of the file job.

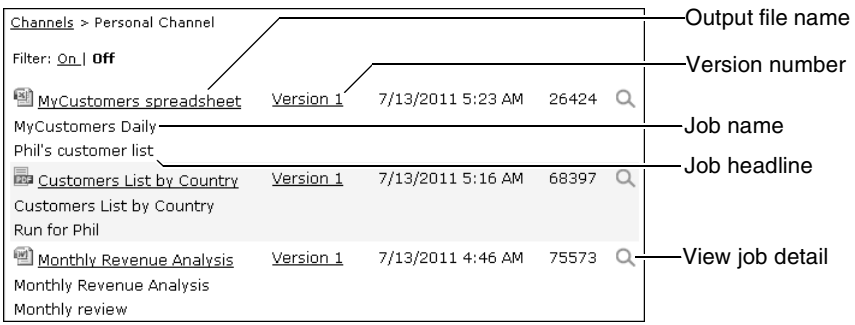


Figure 2-50 Viewing personal channel notifications

Choose View job detail for the selected channel notification to display the following information:

- Notification settings
- Output document information
- Report information

- Schedule information
- Status

The BIRT iServer administrator creates multiple channels to group report notifications together. For example, all sales managers in the US can subscribe to the US Sales channel and automatically receive all the US sales report notifications.

Information Console provides every user with a Personal Channel. This channel lists the user's most recently completed document file jobs. Choose Channels to view the currently subscribed channels or to subscribe to a new channel, as shown in Figure 2-51.

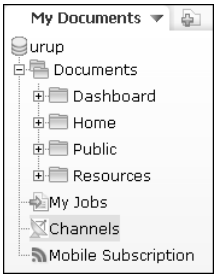


Figure 2-51 Viewing available channels

Users with the appropriate security role can subscribe to additional channels. An Encyclopedia volume administrator can also subscribe users to additional channels. These additional channels receive finished job reports for completed document jobs when configured to do so by the Encyclopedia administrator.

Similar to the way privileges permit a user to perform a specific action on files and folders, channels require a user to have specific file privileges. Table 2-5 lists the privileges necessary for performing channel tasks.

Table 2-5 Required privileges for channel tasks

Channel tasks	Required privilege settings
Reading a notice in a channel	Read or secure read on the report document associated with the notice
Sending a notice to a channel	Write privilege for the channel
Subscribing to a channel	Read
Updating the contents of a channel	Write Visible on the files that generate the report documents Execute on the files that generate the report documents

(continues)

Table 2-5 Required privileges for channel tasks (continued)

Channel tasks	Required privilege settings
Viewing a channel	Read privilege for the channel

Filtering channel notifications limits the notifications shown to a user. Use the same process as filtering files and folders to find a report within a channel. Choose Filter On and type the search string. Use the asterisk (*) special character to search for unknown characters.

Users can remove channel notifications in their Personal Channel and in channels that they have write permission. Deleting a channel notification removes the notification from the channel but it does not remove the output file or the completed job details from My Jobs.

How to remove a job notification

1 In My Documents, choose Channels.

2 In Channels, choose a channel name for which you have write privileges. Current channel notifications appear in that channel, as shown in Figure 2-52.

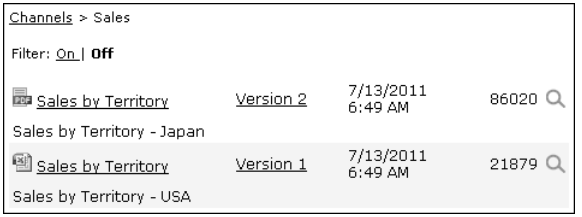


Figure 2-52 Viewing job notifications in a channel

3 Choose View job detail to display details of the file job. Details of the job notification appear, as shown in Figure 2-53.

Figure 2-53 Viewing details of a job notification

4 Choose Delete Notice. The selected channel notification is removed from the channel and delete success message appears.

Sharing a folder or file

In addition to the appropriate security role and BIRT iServer licensed options, a user must also have the required privileges to perform a specific action on a folder or file. For example, if a user has read privilege for a selected file, the user can view or print the file. The user who creates a file or folder is the owner of that item and has full privileges for that item. Only the administrator and owner have all privileges.

Privileges are set on existing files or folders by using the share file operation.

The administrator and owner can assign privileges to an individual user or to a security role. Roles simplify administering privileges by grouping privileges into sets. A user can belong to several security roles. Users that belong to the same role share the same privileges. For example, the All role includes all the users who access the Encyclopedia volume.

Folder privileges can apply to a single folder or to all the files and subfolders in that folder. To have access to a file, the user must also have access to the folder that contains the file.

Table 2-6 lists and describes all supported privileges, the symbol that represents the privilege, and the task that each privilege allows a user to perform.

Table 2-6 Privileges and allowed tasks for a folder or file

Privilege	Symbol	Allowed Task
Delete	D	Delete the folder or file.
Execute	E	Run a document design or executable file. Only an administrator can set this privilege. The execute privilege does not apply to folders or document files.
Grant	G	Change privileges for a file or folder. An administrator has grant privileges on all files and folders by default.
Read	R	View and print an entire report. Privilege to view the contents of a folder. The file or folder must be visible.
Secure read	S	View and print only restricted parts of a document.
Visible	V	See a folder or a file in a list.
Write	W	Modify a file or the contents of a folder.

A new file or folder has share access enabled but does not assign any privileges to users or security roles. Shared files or folders enable the owner or administrator to grant access privileges to the new file or folder. A user cannot perform tasks on an item until the owner or administrator grants access and the required privileges to that user. A user must have the appropriate security role and BIRT iServer options assigned to them.

To prevent users from changing, viewing or sharing the file to other users, the file or folder owner or administrator sets the share permission to Do not share.

Table 2-7 lists privileges a user requires to perform typical tasks in either a folder or file.

Table 2-7 Tasks and required privileges

Information Console task	Required privilege settings
Creating a new file or folder	Visible
	Write on the destination
Deleting a folder	Visible
	Delete
	Delete on all files in the deleted folder
Deleting a file	Visible
	Delete
Opening an Actuate search definition	Visible
	Read
	Read on the corresponding document file
	Read on the corresponding executable file
Printing a report	Secure read or Read
Reading the entire contents of a file	Visible
	Read
Reading restricted contents of a BIRT report	Visible
	Secure read
Replacing the latest report version	Visible
	Delete on the current report document version
	Execute on the report executable
Running a report executable	Visible
	Execute
	Delete on the existing report file if execution replaces the file
Setting privileges to access any item	Visible
	Grant
Viewing a cube (.cb4) file	Read
	Read on the associated cube profile (.dp4) file
Viewing a file or folder	Visible
Viewing properties	Visible

How to set privileges for a folder

1 Navigate to a selected folder. Choose View folder detail.

2 In Select an Operation, select Share, as shown in Figure 2-54.

3 Choose OK. Share options appear.

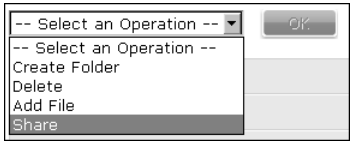


Figure 2-54 Selecting Share for a folder

4 In Share options, enable users to access the folder, select Share.

5 In Available, select Roles or Users. Choose the right arrow to move a role or user from Available to Selected. Figure 2-55 shows the share options configured for the folder.

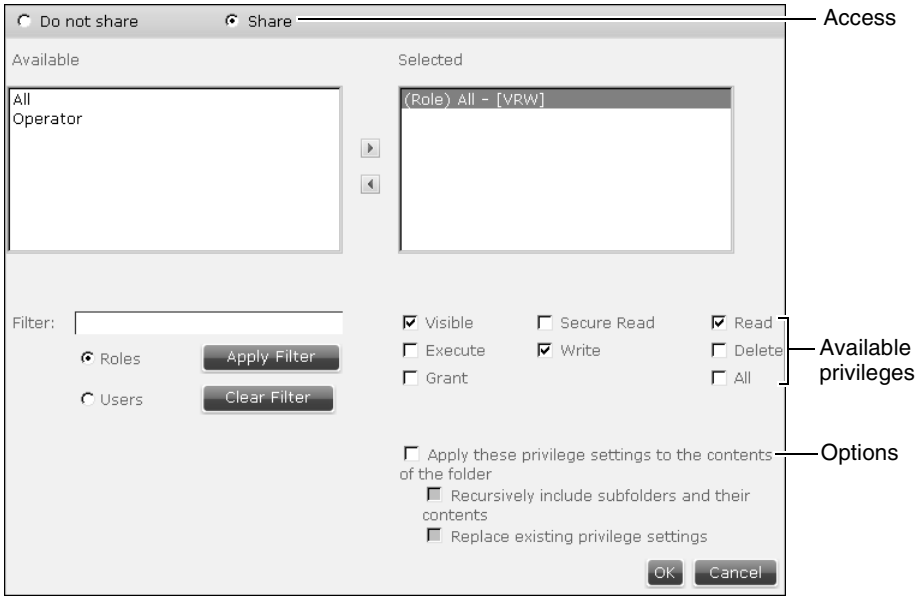


Figure 2-55 Setting access and privileges for a folder

6 From the list of available privileges, select privileges that a user requires to perform tasks in the folder, as described in Table 2-7.

For example, Figure 2-55 shows the available privileges Visible, Read, and Write set for the selected role All, in a shared folder.

- To set the same privileges for all items in a folder, select Apply these privilege settings to the contents of the folder.

- To set the same privileges for all subfolders and subfolder contents, select Recursively include subfolders and their contents.
- To replace any privileges on items in the folder with displayed selections, select Replace existing privilege settings.

7 Choose OK.

How to set privileges for a file

1 Navigate to a selected file. Choose File menu for that file. Then, choose Details.

2 In Detail, in Select an Operation, as shown in Figure 2-56, select Share. Then, choose OK. Share options appear.

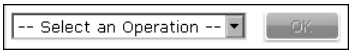


Figure 2-56 Selecting operations for the file

3 In Share options, to enable user access to a file, select Share, as shown in Figure 2-57.

To prevent access to a file, select Do not share.

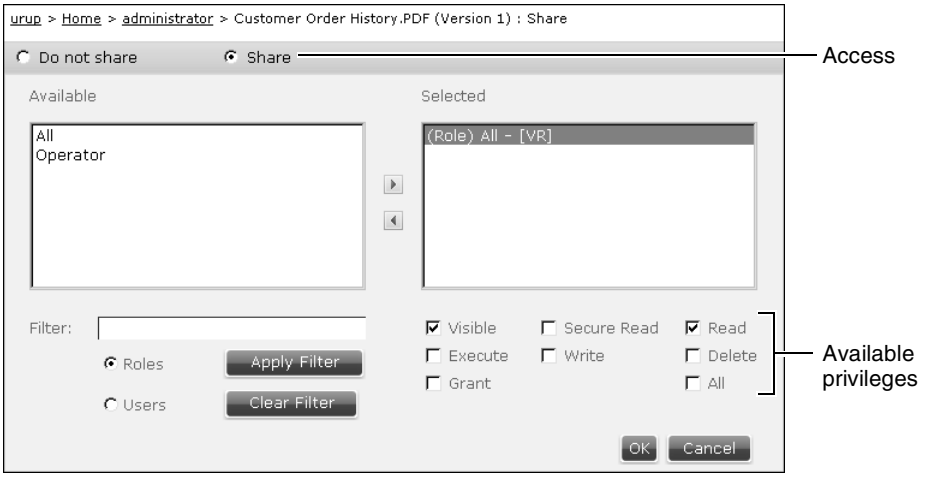


Figure 2-57 Setting access and privileges for a file

4 In Available, select Roles or Users. Choose the right arrow to move a role or user from Available to Selected.

5 From the list of available privileges, select privileges that a user requires to perform tasks on the file, as described in Table 2-7.

For example, Figure 2-57 shows the available privileges Visible and Read set for the selected role All, for a shared file.

Choose OK.

Downloading a file

Users with appropriate permissions can download files from Information Console's file browser. To download a file, navigate to a file, then choose Download file from the file menu, as shown in Figure 2-58.

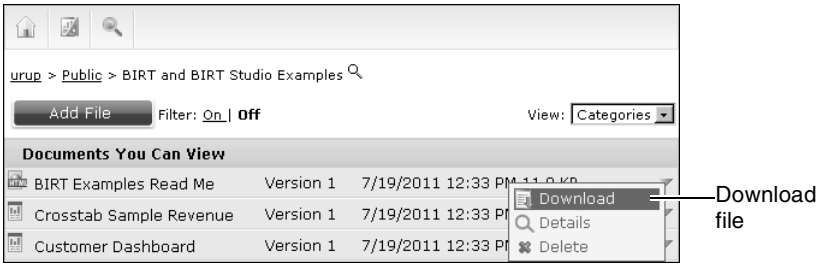


Figure 2-58 Downloading a file from an Encyclopedia volume

Chapter

3

Using BIRT Dashboards

This chapter contains the following topics:

- About dashboards and gadgets
- Working with a subscribed dashboard
- Types of gadgets
- Using a gadget

About dashboards and gadgets

An Actuate BIRT dashboard is a self-contained business application that delivers business performance data in interactive charts, cross-tab tables, formatted text, and flash visualizations. Subscribing to shared dashboards or opening dashboard and gadget files, enables users to analyze and monitor business data. Users can build and share their own dashboards using browser-based tools.

Advanced users build analytic dashboards using a variety of gadgets for data analysis and selection. Analytic dashboards either query data sources on demand or use in-memory cached data for fast analysis.

Network content with a URL address, such as images, videos, text, web pages, and Google gadget files, can be included on dashboards. Advanced users link network content and business data together for enhanced analysis and selection of related information. Figure 3-1 shows a dashboard in Information Console.

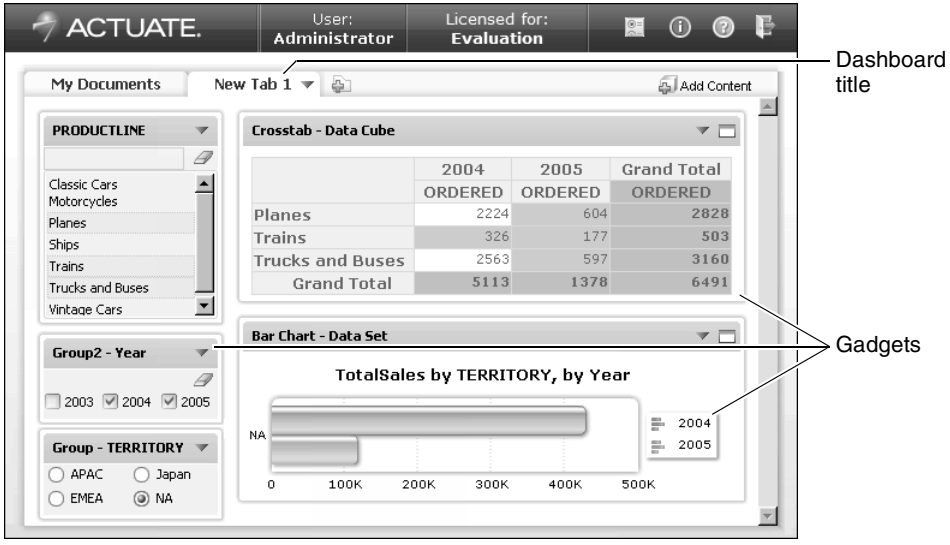


Figure 3-1 Displaying a sample dashboard layout

This chapter describes how to view and subscribe to shared dashboard files. For information about building and sharing BIRT dashboard files, see *Building BIRT Dashboards*.

About BIRT dashboard functionality

Actuate BIRT dashboards support the following user activities:

- Building web-based reports and performance indicators using charts, tables, cross tabs, and Adobe Flash objects.

- Using multiple BIRT document or design files at the same time.
- Viewing a part of a BIRT document or design file instead of an entire file.
- Displaying and linking multiple data sources.
- Interacting with gadgets by launching browser-based tools such as BIRT Data Analyzer.
- Keeping information up-to-date using dashboard and gadget refresh timers.
- Exploring data using dynamic filtering and drill-through.

Data displayed in gadgets comes from existing Actuate BIRT documents, from BIRT data objects, or from external web sources. Gadgets can link together so that a change to one updates all other linked gadgets. The BIRT 360 option for BIRT iServer is required to open and subscribe to dashboard and gadget files.

Users can maximize chart, report, and table gadgets in dashboard files to launch BIRT Interactive Viewer. Users can maximize cross-tab gadgets in these dashboards to launch BIRT Data Analyzer. For more information about maximizing gadgets, see "Maximizing gadgets" later in this chapter.

Some optional features require appropriate BIRT iServer options. For example, to use browser-based tools such as BIRT Interactive Viewer or BIRT Data Analyzer, the appropriate BIRT iServer options are required.

About web browsers

BIRT dashboards rely on the user's web browser to present information. Using supported web browsers assures consistent display of dashboards and gadgets. Although external resources can be displayed in a dashboard, the security settings, installed browser plug-ins (like Adobe Flash Player), and printer settings are managed by the user's web browser.

Working with a subscribed dashboard

A dashboard is either a subscribed dashboard or a user dashboard. Multiple users can monitor the same charts and analyze data by subscribing to the same dashboards. Users build and manage user dashboards for their own use or to share with other users.

Dashboard and gadget files use the same file access privileges as other Actuate files. In Information Console, a user either opens dashboard files from My Documents file explorer or subscribes to dashboards and gadgets using the Dashboard and Gadget Gallery. To view a dashboard file, open it from the Information Console file explorer. A user can add, change, delete, and share user dashboards if their iServer license includes the dashboard business user or dashboard developer option.

The following types of dashboard users define what a user can accomplish with a dashboard file:

- All users can refresh dashboards, interact with data selector gadgets and maximize gadgets for access to browser-based tools such as BIRT Interactive Viewer and BIRT Data Analyzer. The dashboard file or gadget is reset each time it is viewed.
- Business users are the same as basic users but also use report and extras gadget types to create, change, and share dashboards. This user can subscribe to shared dashboard files, copy shared dashboards, and use shared gadgets in user dashboards. Business users can also share their dashboards for access by other users.
- Dashboard developers are the same as business users but also create gadget scripts, use data visualization gadgets, and use data selection gadgets.

These user types are defined by the Information Console administrator.

Subscribing to a dashboard

Subscribed dashboard files contain one or more dashboards. Users can rename, reorder, copy, or delete a shared dashboard. Users can also interact with gadgets on a subscribed dashboard, for example, using data selectors to filter a report gadget, print a chart gadget, or interact with the data using BIRT Interactive Viewer. Modifications to gadgets on subscribed dashboards reset the next time the dashboard refreshes or updates.

Subscribed dashboards appear with the share icon on the dashboard title.

Users with write permissions to the dashboard file can update subscribed dashboard files. When a shared dashboard is changed, users that subscribe to the dashboard receive the changes the next time the dashboard opens or refreshes.

How to subscribe to a dashboard

1 To subscribe to a new dashboard, choose Add content, as shown in Figure 3-2.

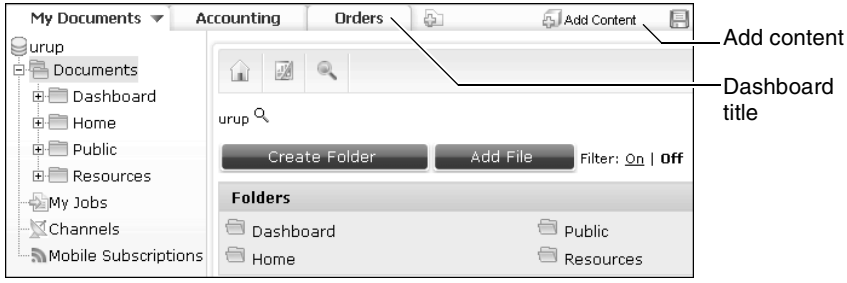


Figure 3-2 Subscribing to a shared dashboard

Dashboard Gallery appears as shown in Figure 3-3.

Figure 3-3 Exploring Dashboard Gallery

2 To subscribe to a dashboard, drag a shared dashboard and drop it after an existing dashboard title, as shown in Figure 3-4.

The placement indicator shows possible locations for the new dashboard.

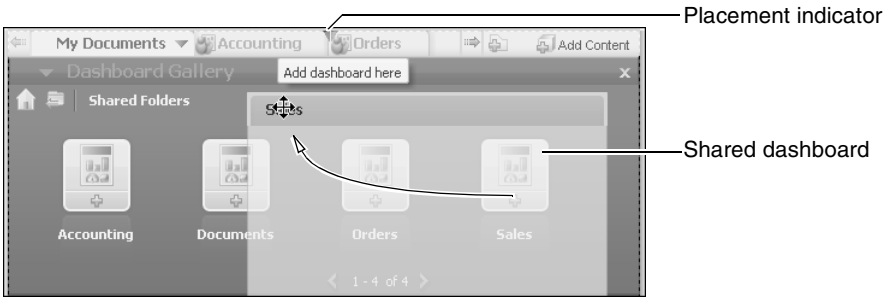


Figure 3-4 Placing a new dashboard

Navigating a dashboard

Each dashboard has a tab with a name describing the contents of the dashboard. Users can change the order and the name of each dashboard.

Dashboard settings are in the dashboard's tab menu, as shown in Figure 3-5.

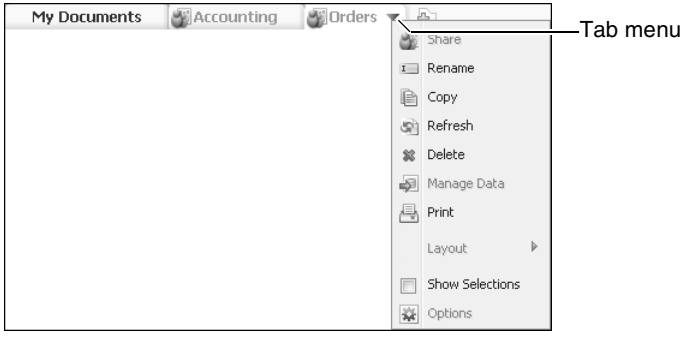


Figure 3-5 Accessing dashboard settings

Subscribed dashboards have different options than a user dashboard. Table 3-1 lists dashboard settings for subscribed and user dashboards.

Table 3-1 Settings for subscribed and user dashboards

Option	Description	Subscribed	User
Copy	Duplicate the dashboard as a new dashboard	✓	✓
Delete	Remove the dashboard	✓	✓
Layout	Select column or free form layout for gadgets on the dashboard		✓
Manage Data	Select one or more BIRT data objects or BIRT data object Stores to be data sources of the dashboard		✓
Options	Modify dashboard name, header and footer text, auto refresh rate		✓
Print	Print the contents of the active dashboard	✓	✓
Refresh	Query and update data object design, BIRT design and external files in use	✓	✓
Rename	Change the name of the dashboard	✓	✓
Share	General sharing options and permissions on the dashboard		✓
Show Selections	Display and optionally reset any data selectors used on the dashboard	✓	✓

Managing dashboards

Users can personalize the following dashboard options:

- Change the order of dashboards in Information Console
- Copy a subscribed dashboard to a user dashboard to enable editing
- Delete dashboards
- Display all selections on a dashboard
- Rename dashboards

How to change the dashboard order

1 To change the dashboard order, drag a dashboard title and drop it after an existing dashboard title, as shown in Figure 3-6. The placement indicator shows possible locations for the new dashboard.

Figure 3-6 Changing the dashboard order

How to delete a dashboard

1 On the dashboard menu choose Delete, as shown in Figure 3-7.

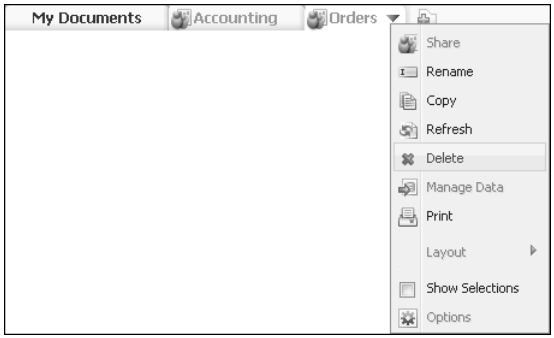


Figure 3-7 Choosing Delete from a dashboard menu

2 On Delete tab, choose OK, as shown in Figure 3-8.

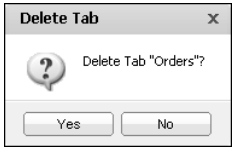


Figure 3-8 Deleting a dashboard

How to rename a dashboard

1 On the dashboard menu, choose Rename, as shown in Figure 3-9.

Figure 3-9 Viewing a dashboard menu

2 In Rename Tab, type a dashboard name, as shown in Figure 3-10. Choose OK.

Figure 3-10 Renaming a dashboard

Copying a subscribed dashboard

A user can copy a subscribed dashboard. A copied dashboard becomes a user dashboard that a user can edit or share under a new name. A copied dashboard does not link to the original shared dashboard. Updating the original shared dashboard file does not change a copied dashboard.

User dashboards support additional dashboard and gadget features:

- Adding or deleting gadgets on the dashboard.
- Changing gadget location, using a columns or free form layout.
- Setting the auto refresh time for gadgets on a dashboard.
- Managing data sources for gadgets on a dashboard.
- Changing chart and flash object types of a dashboard.
- Showing or hiding selected gadget headers, borders, and browser-based tools.

For more information about building and editing a dashboard, see *Building BIRT Dashboards*.

How to copy a dashboard

To copy a subscribed or user dashboard, select Copy from the dashboard menu as shown in, as shown in Figure 3-11. Copied dashboard appears at the end of the available dashboards. All copied dashboards become user dashboards.

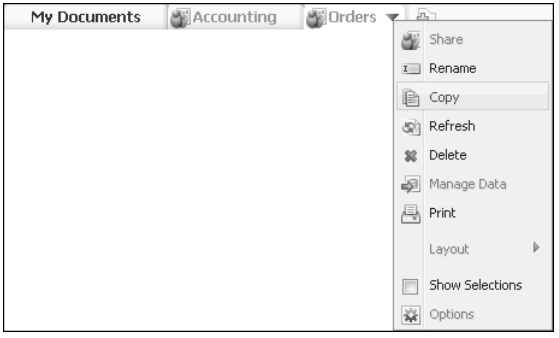


Figure 3-11 Copying a dashboard page

Showing selections on a dashboard

Dashboards that use data selectors enable users to select data displayed in the dashboard gadgets. Show selections lists all the data selections on a dashboard and can clear those selections.

How to reset selections on a dashboard

1 On the dashboard menu choose Show Selections, as shown in Figure 3-12.

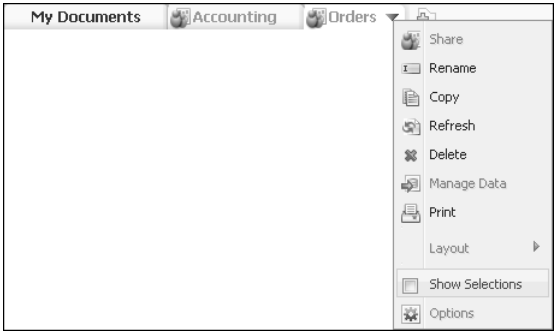


Figure 3-12 Showing selections in a dashboard menu

The Show Selections gadget appears on the dashboard.

2 In the Show Selections gadget, select Clear All, as shown in Figure 3-13, to remove all selections from the dashboard.

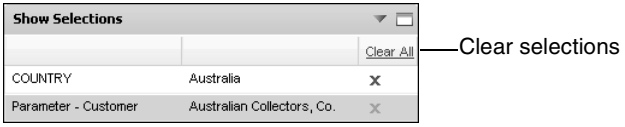


Figure 3-13 Clearing all selections on a dashboard

Exporting dashboard data

Dashboards can contain many different data sources. Users can export data from individual report and data visualization gadgets using the gadget toolbar. For more information about exporting gadget data, see "Exporting gadget data" later in this chapter.

Printing a dashboard

Users print a dashboard using Print from the dashboard menu. A print preview is generated displaying the gadgets on the dashboard.

Many gadget types can export a PDF as an alternative to printing the gadget contents. For more information about exporting gadget contents, see "Exporting gadget content" later in this chapter.

Users can also print using their web browser's printing capability. See your web browser online help for printing options that it supports.

How to print a dashboard

1 Choose Print from the dashboard menu, as shown in Figure 3-14. Print Preview appears.

Figure 3-14 Printing a dashboard page

2 In Print Preview, after reviewing the preview, choose Print, as shown in Figure 3-15.

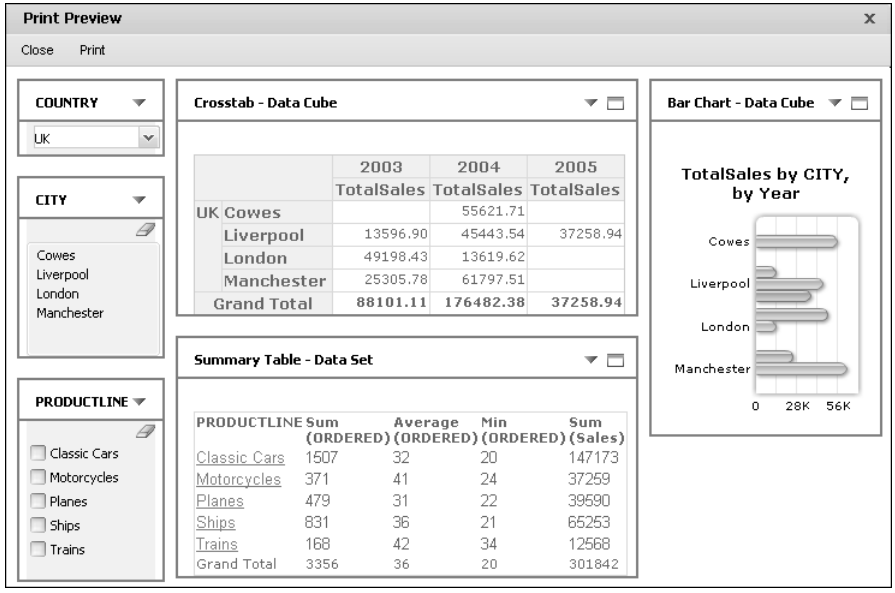


Figure 3-15 Previewing the dashboard for printing

3 In the web browser print window, select an available printer. Then, choose Print.

Types of gadgets

A dashboard displays data from BIRT data objects in various gadgets, such as lists, tables, cross tabs, charts, and Adobe Flash objects. Gadgets also embed BIRT document and design files, and external HTML-based content.

Figure 3-16 shows the layout of a BIRT Gadget.

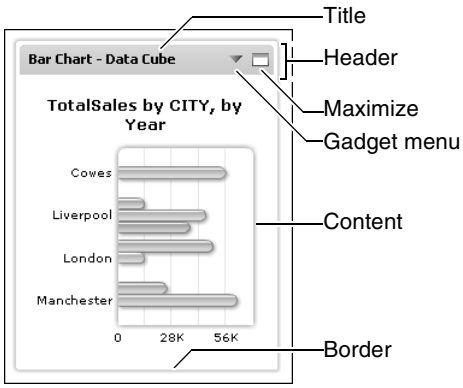


Figure 3-16 Gadget structure

Each gadget has different ways to interact with the information it displays. BIRT Dashboard gadgets are divided into the following categories:

- Report gadgets
  Embeds a complete or partial BIRT document or design file.
- Extras gadgets
  - Displays HTML formatted text.
  - Displays an external web page, image, video, or embedded HTML and JavaScript code.
  - Displays an external Actuate Gadget file or Google Gadget file.
- Data visualization gadgets
  Displays BIRT Data Objects in charts, tables, cross tabs, Adobe Flash objects, and Adobe Flex table.
- Data selection gadgets
  Displays user selection choices, for example: lists, check boxes, sliders, calendars and data version. User choices filter data in linked gadgets.

The maximize and menu icons are not visible when the gadget header is not shown. Users can also double-click the gadget title to maximize the gadget or right-click the title to see the gadget menu.

About report gadgets

A report gadget embeds an entire BIRT document file, BIRT design file or an element found in either file that has a reference bookmark, such as a single cross tab, table, or chart, into a gadget. The embedded document retains the file access permissions of the original BIRT document.

Other gadgets can affect the data displayed in a report gadget. For example, parameters for a BIRT document can appear as a user selectable list. When a user selects a different item in the list, the report gadget updates to show data relevant to the user choice.

Figure 3-17 shows a report gadget with a parameter as part of the report gadget and as a separate selector gadget.

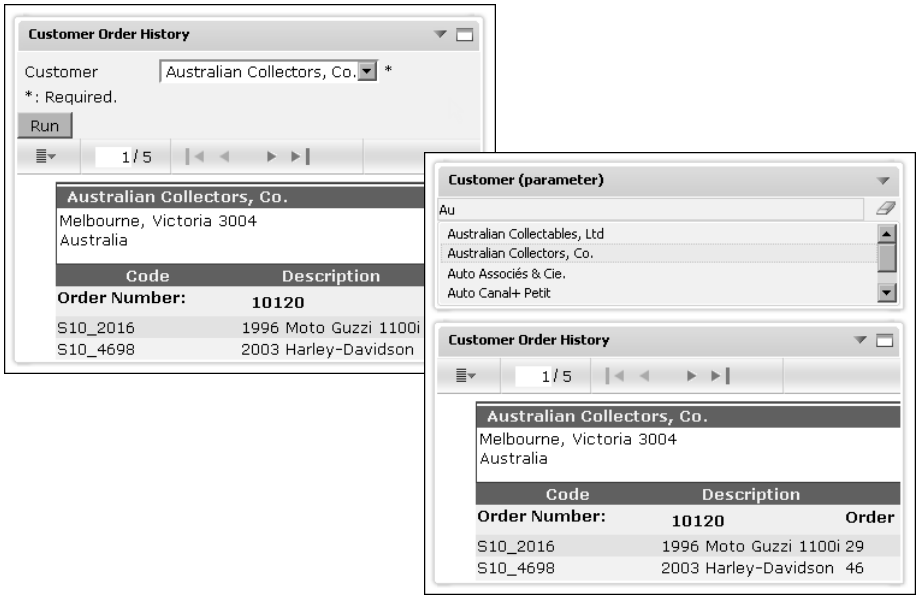


Figure 3-17 Parameter as part of a report gadget and in a data selection gadget

Report gadgets can request parameters when the designer of the BIRT design file has required them. These parameters are displayed by the report gadget as part of the gadget or in a parameter gadget on the same dashboard.

A user selects operators and values in parameter gadgets that are sent to the report design file for use when by report design file. These values can filter data displayed in the BIRT report or be used in the BIRT report by scripts.

For example, an Internal Use only choice that prints additional information to a report file based on the user selected parameter value. Figure 3-18 shows a sample parameter gadget.

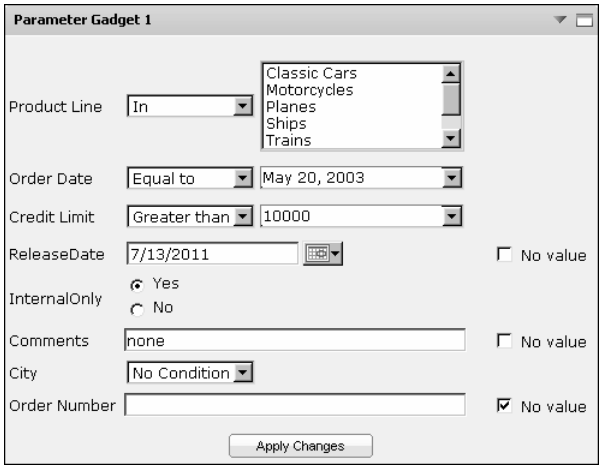


Figure 3-18 Supplying values to a parameter gadget

After selecting parameter values and choosing Apply Changes, the report gadget updates the report and displays the new data. For more information about report parameters, see "Using parameters" in Chapter 4, "Running file jobs."

Report gadgets support interactive changing of the appearance and layout of BIRT document data, when the user maximizes the gadget. Report and reportlet gadgets support multiple drill-through of charts when the BIRT developer enables this functionality, as shown in Figure 3-19.

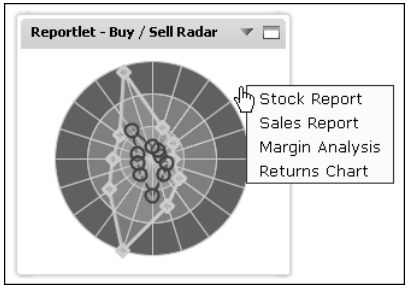


Figure 3-19 Selecting a multiple drill-through link from a BIRT chart

Modifications to report gadgets on subscribed dashboards reset the next time the dashboard refreshes. Modifications to a user dashboard are stored in the user's personal dashboard file. Refreshing a report gadget or refreshing a dashboard with a report gadget will rerun the report displayed in the gadget.

About extras gadgets

A gadget from the Extras category embeds external content into a dashboard. External content can be on a server inside the local network or a public server on

the internet. Hyperlinks in the external content open in new browser pages or within the extras gadget, depending on the external web site design.

The following gadgets are available in the Extras category:

- HTML gadget
  HTML gadgets contain external web site URL addresses or embedded HTML and JavaScript code. This gadget displays the embedded content or external web site.
- Image gadget
  Image gadgets contain external image URL addresses. The image displays on the dashboard through an Adobe Flash based image viewer.

  This gadget supports the JPG, PNG, and GIF image formats.
- Import gadget
  Import gadgets display Google gadgets from the internet or a local network. These gadgets can link to data selection gadgets on the dashboard.
- Text gadget
  Text gadgets contain HTML formatted text. When editing text in the gadget, an HTML text editor appears for visual editing or HTML source editing.
- Video gadget
  Video gadgets contain external video URL addresses or embedded HTML or JavaScript code. This external content or web site displays within the gadget.

  For example, some media services offer HTML code for embedding custom video players or play lists into other web sites. The Video gadget uses this embedded code to display the external media.

Verify what external content is available and acceptable on your network by contacting your network administrator. For example, your company might use a network firewall or implement other security that controls network access.

Extras gadgets display their content on-demand. If external content is not available or changes occur to the external content between dashboard views, the information displayed in the gadget also changes.

About data visualization gadgets

Data visualization gadgets visualize data from BIRT data objects. Data visualization gadgets can link to data selection gadgets on the same dashboard to filter data based on user selection.

When a data version gadget is on a dashboard, users can select which version of a BIRT data store file is displayed in gadgets on the dashboard. For example, a data version gadget that displays Q1 2010, Q2, 2010, Q3 2010, Q4 2010 enables the user to view data from any quarter of 2010 in the current dashboard.

The following gadgets are available in the data visualization category:

- Chart gadgets

  Chart gadgets display data in an Adobe Flash based chart. Users can filter, group, change chart types and aggregate data. Available chart types are Bar, Column, Doughnut, Line, and Pie. Chart gadgets support drill-down when displaying cube-based data. When a chart displays a legend, users can filter data by selecting a legend value.

  Figure 3-20 shows an example column chart.

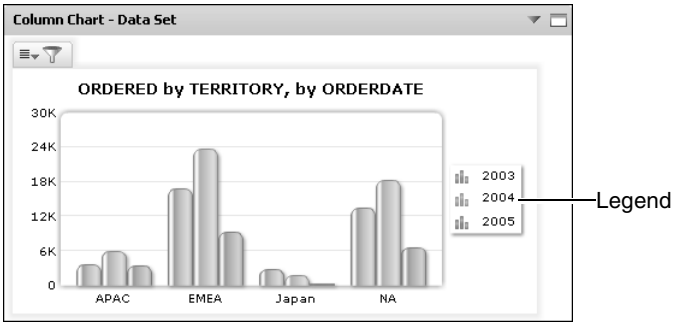


Figure 3-20 Reviewing a data set in a column chart

- Cross-tab gadget

  Cross-tab gadgets display aggregated data in rows and columns. Users can analyze, manipulate, and download this data by opening the cross tab in the browser-based BIRT Data Analyzer tool. Figure 3-21 shows a cross tab.

Crosstab - Data Cube

1 / 1

		2003	2004	2005	Grand Total
		ORDERED	ORDERED	ORDERED	ORDERED
APAC	Australia	2514	2232	1500	**6246**
	New Zealand	1015	2537	1844	**5396**
	Singapore		1169	67	**1236**
	APAC Total	**3529**	**5938**	**3411**	**12878**
EMEA	Austria	872	491	611	**1974**
	Belgium	47	799	228	**1074**
	Denmark	903	1120	174	**2197**

Figure 3-21 Reviewing a data cube in a cross tab

- Flash gadgets

  Flash gadgets display data in an Adobe Flash based viewer. Users can filter, group, and aggregate data. Available Flash gadget types are Bullet, Cylinder, Linear Gauge, Meter, Spark Line, and Thermometer.

  Figure 3-22 shows an example linear gauge gadget.

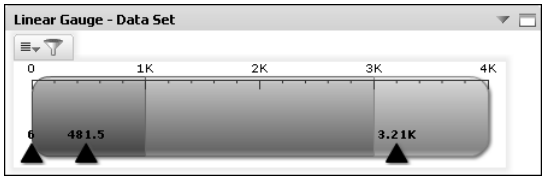


Figure 3-22 Reviewing a data set in a linear gauge

- Flex table gadget

  Flex table gadgets display a data set in a row and column layout. Optionally, users can summarize this data with various aggregation options, filtering, and sorting. Gadget designers can change a Flex table from summary to detail without rebuilding the gadget. Figure 3-23 shows an example Flex table.

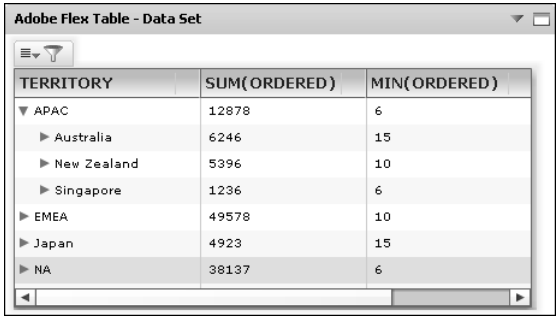


Figure 3-23 Reviewing a data set in a Flex Table

- Table gadget

  Table gadgets display a data set in a row and column layout. Optionally, use aggregation options, filtering, and sorting to summarize this data. When creating a table gadget, the designer must choose whether the gadget displays summary or detailed data. Figure 3-24 shows an example summary table.

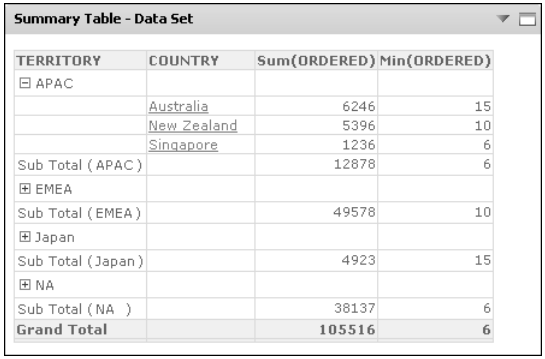


Figure 3-24 Reviewing a data set in a summarized table

About data selection gadgets

Data selection gadgets present users with selectable data. Other gadgets can link to data selection gadgets to filter their displayed data.For example, a selection gadget can be a list of customers. When a user selects a customer from the list, a linked report gadget can show data about to the selected customer.

Data selection gadgets can be linked to other data selection gadgets to present users with related data choices. For example, a list gadget displaying customer order numbers is linked to a list gadget displaying customer names. When the user selects a customer name, the order numbers for the selected customer appear in the list gadget of order numbers.

The following gadgets are available in the data selection category of gadgets:

- Calendar gadget
  Users can select day, month, or year from a BIRT data object using calendar gadgets. Fast access to a month or year is available by selecting the month and year, as shown in Figure 3-25.

Figure 3-25 Report parameters in a calendar gadget

- Check Box gadget
  Check box gadgets display data with a check box next to each value, as shown in Figure 3-26. This gadget supports multiple-value selections. Users can also clear the selected value.

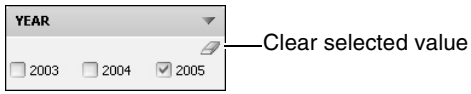


Figure 3-26 Report parameters in a check box gadget

- Combo Box gadget
  Combo box gadgets display data in a drop-down list, as shown in Figure 3-27. This gadget supports typing of values, using auto-suggest functionality, and selecting from a list of values.

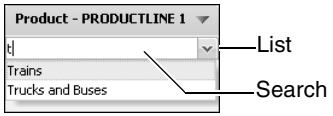


Figure 3-27 Report parameters in a combo box gadget with auto suggest

- Data version gadget

  Users select the data object store version to display on the dashboard. Other gadgets on the dashboard that use the same data object store display the version selected by the user. Users can select the most current data object store by choosing Latest from the list of available versions. Figure 3-28 displays different versions of the data object store that a user can select.

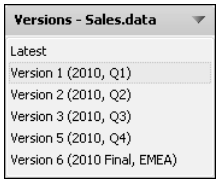


Figure 3-28 Versions of a data store displayed for user selection

- Radio button gadget

  Radio button gadgets display data with a radio button next to each value, as shown in Figure 3-29. This gadget supports single-value selections.

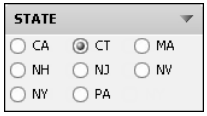


Figure 3-29 Report parameters in a radio gadget

- List gadget

  List gadgets display data in rows, as shown in Figure 3-30. This gadget supports multiple-value selections and searching list items. Press the shift key while selecting separate values; press Ctrl while selecting a range of values. Users can also clear the selected value.

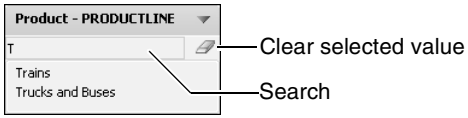


Figure 3-30 Report parameters in a list gadget

- Slider gadget

  Slider gadgets display data as a sliding bar with tick marks next to known values. Users slide one or two thumbs along the slider to select values. When two thumbs are displayed, the value between the two thumbs is used to select

data. When one thumb is displayed the value can be used to select data using one of the following operators:

- Equal to
- Less than
- Less than or equal to
- Greater than
- Greater than or equal to

The operator is selected by the dashboard designer. Figure 3-31 shows a slider gadget.

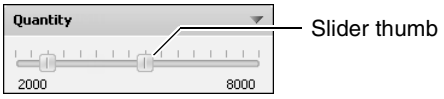


Figure 3-31 Report parameters in a slider gadget

Using a gadget

A subscribed dashboard contains one or more gadget files that display data. Each gadget on a dashboard has general options, common to all gadgets, and special options based on the gadget type.

Some gadgets offer additional interactivity, depending on the gadget contents, for example report gadgets can include toolbars, launch browser-based tools or contain hyperlinks to other Information Console documents or web sites.

Users interact with gadget content depending on the type of gadget:

- Charts can be drilled through or contain links to other reports.
- Cross tabs can be maximized to edit in BIRT Data Analyzer.
- Data selectors filter data displayed in other gadgets.
- All gadget content can be filtered or refreshed
- Reports and tables can be modified and formatted using Interactive Viewer.

These tools and links enable dashboard users to quickly access and analyze the desired information. For example, using a list gadget, a user selects a month from a list. The user selection updates a linked chart gadget to display data for the selected month.

Gadgets on a dashboard offer users a menu to interact with the gadget and its contents, as shown in Figure 3-32. Users can refresh data, interact with gadget content, or maximize gadgets to launch browser-based tools, from subscribed dashboards. Users can move, resize, share, and edit gadgets on user dashboards.

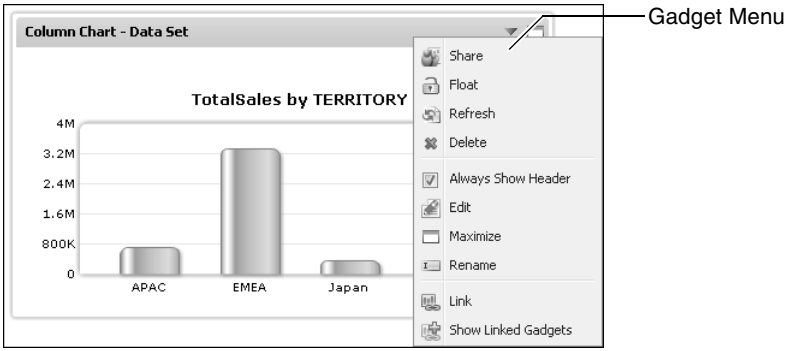


Figure 3-32 Gadget menu

Table 3-2 lists the menu choices available on gadgets.

Table 3-2 Gadget settings

Option	Description	Subscribed	Personal
Always Show Header	Choose to display the gadget header, which includes the gadget icons.		✓
Analyze	Maximizes selected gadget and launches appropriate browser-based tool.	✓	✓
Bring To Front	Move a floating gadget in front of other gadgets.		✓
Delete	Remove the selected dashboard gadget.		✓
Dock	Change a gadget floating freely to a gadget that is docked to a dashboard column.		✓
Edit	Display general gadget options and any special options available to the selected gadget.		✓
Float	Change a docked gadget to a floating gadget that can be moved freely.		✓
Link	Choose one or more data selection gadgets on the current dashboard that can filter data in the current gadget.		✓
Maximize	Maximizes selected gadget and launches appropriate browser-based tool.		✓
Refresh	Reload the content of the selected gadget.	✓	✓
Rename	Change the name of the selected gadget.		✓

Table 3-2 Gadget settings

Option	Description	Subscribed	Personal
Send To Back	Move a floating gadget behind other gadgets.		✓
Share	General sharing options and permissions.		✓
Show Linked Gadgets	Display an outline around gadgets that are linked together on the dashboard.	✓	✓

Drilling into a chart gadget

Users can change the data displayed in a chart gadget when Drill into appears in the content menu. Users choose from available categories to view chart data in greater detail. For example, a user viewing a chart of sales data by state can drill down and see sales data by city, office, or employee.

How to drill down in a chart gadget

1 Select the chart content, the context menu appears.

In context menu, choose Drill into <value> where <value> is a data category or data series displayed in the chart, as shown in Figure 3-33.

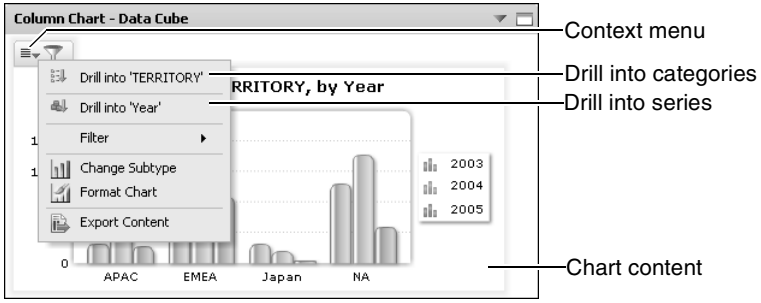


Figure 3-33 Choosing a drill-down into a chart gadget

The chart displays the new data category or series selected. Users can continue to drill-down and receive more detail or drill-up to the previous chart view.

Filtering gadget content

Users can filter data displayed in gadgets to limit a display of data to only data matching one or more filter conditions. For example, a user filters a pie chart of top customers from a selected city whose total purchases are above $30,000 USD. Users can change the data displayed in the following gadgets using filters:

- Chart gadgets

- Flash gadgets
- Flex table gadget
- Table gadget

Report and reportlet gadgets can also be filtered in interactive mode by first maximizing the gadget.

How to filter a chart gadget

1 Select the gadget content. Filter appears, as shown in Figure 3-34.

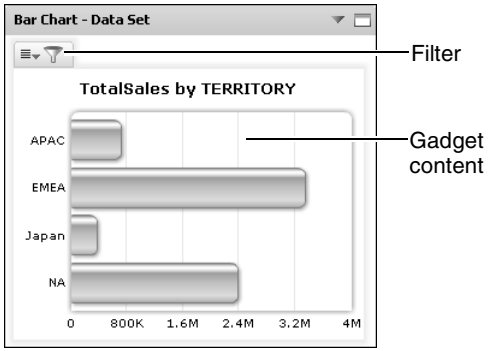


Figure 3-34 Filtering a gadget's data

2 Choose filter. Filter appears, as shown in Figure 3-35.

Figure 3-35 Creating a filter

3 Select the following:

- Select the data column to filter. This example uses TotalSales.
- Select the filter condition. This example uses greater than or equal to.
- Type a value. This example uses 10000.

4 Choose OK to apply the filter condition.

Optionally, choose Select Values to see a list of possible values. Choose Advanced Filter to create additional filter conditions. Clear Filter erases the current values.

Filtering top and bottom values

Data in gadgets can be filtered to display only the highest or lowest of values in the data column, such as the top 15% of sales or the lowest 25 product orders. The following gadgets support filtering the top or bottom values:

- Chart gadgets
- Flash gadgets
- Flex table gadget
- Table gadget

Report and reportlet gadgets can also use top and bottom filtering in interactive mode by first maximizing the gadget. For more information about maximizing gadgets, see "Maximizing gadgets" later in this chapter.

How to filter the top values in a chart gadget

1 Select the chart content, the context menu appears.

2 In the context menu, select Filter➛Top/Bottom N, as shown in Figure 3-36. Top/Bottom N appears.

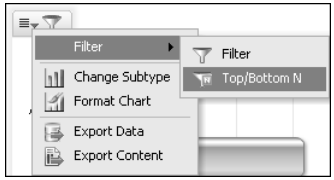


Figure 3-36 Filtering the top or bottom values of a gadget's data

3 In Top/Bottom N—Filter, select Top Percent and enter a value of 15, as shown in Figure 3-37.

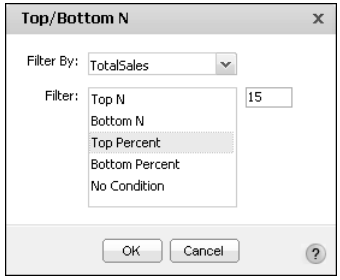


Figure 3-37 Adding a top filter

4 Choose OK, the chart gadget appears and displays the top 15% of the selected data column.

Exporting gadget content

Reports and data visualization gadgets can export visual content in the following formats: AFP, Excel, PDF, PostScript, PowerPoint, Word, and XHTML. Gadgets using Adobe Flash for information display can print using the Flash Player print menu. Table 3-3 lists gadgets that support exporting their content in different formats.

Table 3-3 Availability of export content and printing for gadgets

Gadget type	Normal	Maximized	Flash printing
Charts	✓ (PDF)	✓	✓
Cross tab	✓ (in toolbar)		
Flash objects	✓	✓	✓
Flex table			
Image			✓
Report	✓	✓	
Reportlet	✓	✓	
Table	✓ (in toolbar)	✓ (in toolbar)	
Video			✓

How to export a PDF from a report gadget

1 Open the toolbar menu and select Export Content, as shown in Figure 3-38.

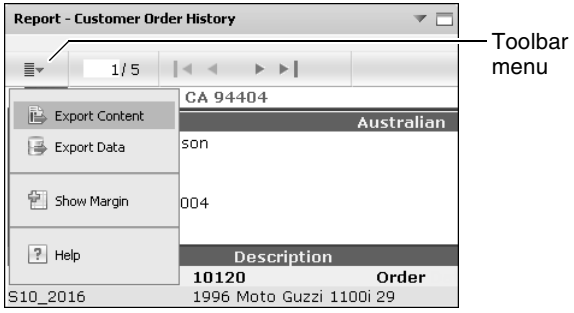


Figure 3-38 Exporting report gadget content

Export Content appears.

2 In Export Content, select the PDF export format and choose OK, as shown in Figure 3-39.

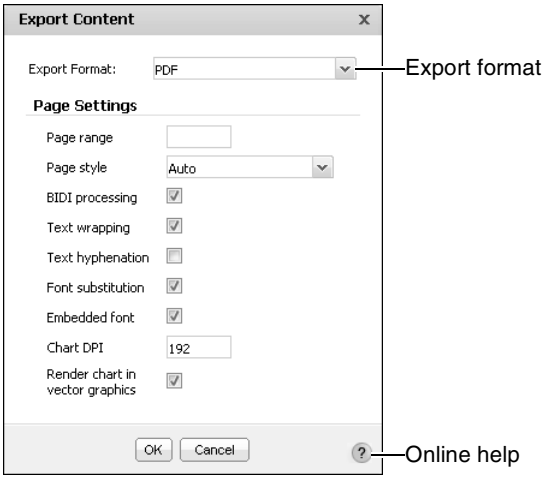


Figure 3-39 Selecting the PDF export format

3 When prompted, save the PDF file to your computer desktop and open the file for printing using Adobe Acrobat Reader.

See the online help in Export Content for more information about exporting formatted content in different file formats.

How to export a PDF from a data visualization gadget

1 Select the gadget content. The context menu appears, as shown in Figure 3-40.

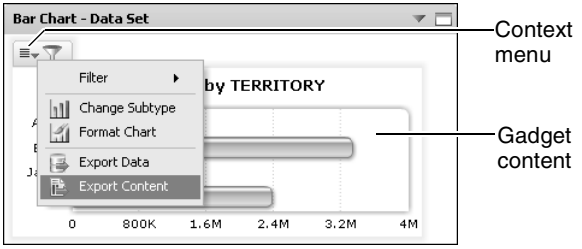


Figure 3-40 Opening a gadget's context menu

2 In context menu, select Export Content as shown in Figure 3-40. Export Content appears.

3 In Export content, select the PDF export format and choose OK, as shown in Figure 3-41.

4 When prompted, save the PDF file to your computer desktop and open the file for printing using Adobe Acrobat Reader.

See the online help in Export Content for more information about exporting formatted content in different file formats.

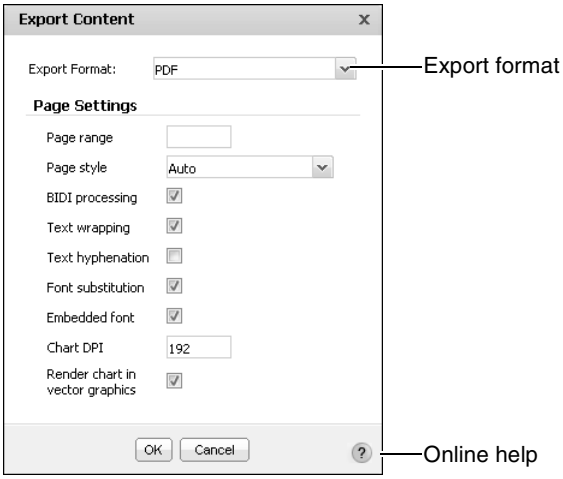


Figure 3-41 Selecting the PDF export format

How to print an Adobe Flash based gadget

Gadgets using Adobe Flash to display gadget content can use Adobe Flash Player to print the gadget. Right-click the gadget content and choose the Print option, as shown in Figure 3-42.

Figure 3-42 Flash print menu

Exporting gadget data

Data displaying in a gadget is a result set from the gadget's data source. Report and data visualization gadgets can export these result sets in the following formats: Comma (CSV), Pipe (PSV), Tab (TSV), and Semicolon (SSV). This data downloads as a file.

Table 3-4 lists gadgets that support exporting their data in different formats.

Table 3-4 Availability of export data for dashboard gadgets

Gadget type	Normal gadget size	Maximized gadget size
Chart	✓	✓
Cross tab	✓	
Flash objects		✓
Flex Table	✓	✓

Table 3-4 Availability of export data for dashboard gadgets

Gadget type	Normal gadget size	Maximized gadget size
Report	✓	✓
Reportlet	✓	✓
Table	✓ (in toolbar)	✓ (in toolbar)

Exported data can open in the user's default viewing software for the selected data format. For example, after viewing a report of orders by a specific customer, the user wants to export a list of the order numbers to include in an email.

How to export data from a gadget

1 Choose Maximize when the toolbar is not already visible, as shown in Figure 3-43.

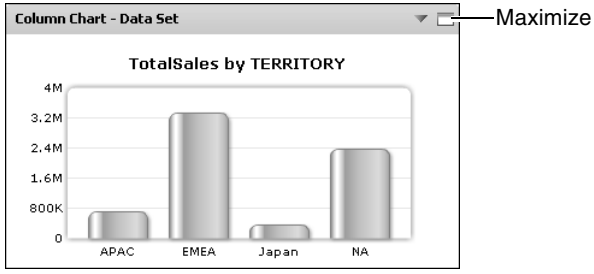


Figure 3-43 Opening a gadget's toolbar

2 In toolbar menu, select Export Data, as shown in Figure 3-44. Export Data appears.

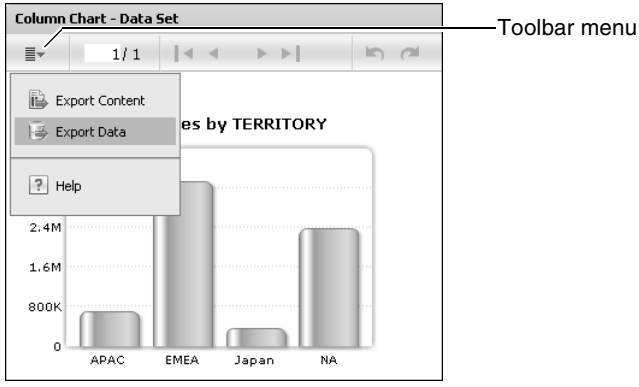


Figure 3-44 Exporting gadget data

3 In Export Data, as shown in Figure 3-45:

- Select the result set to export that matches the gadget name.

- Select the desired columns from Available Columns. This example uses the Territory and TotalSales.
- Select an encoding style. This example uses UTF-8.
- Select additional data export options that match the requirements of the software that will process the exported data. This example sets the Values Separator to Comma (CSV).

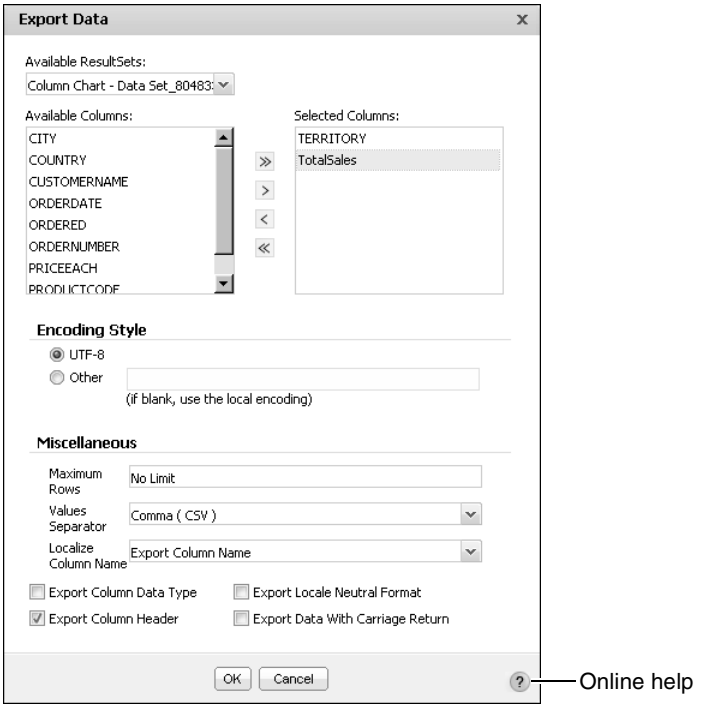


Figure 3-45 Exporting data from a gadget

4 Choose OK. Data download begins.

Exported files use the default viewing software installed on the user's computer. If multiple viewers are available or there is no viewer for the selected file, the user can choose which software opens the file or choose to download the exported data file. See the online help in Export Data for more information.

Maximizing gadgets

Although gadgets display in a column or free form layout, users can maximize a gadget to fill the browser window. Maximized gadgets enable more space for a gadget to use and launches the browser-based tool for editing the selected gadget.

The following browser-based tools are launched by maximizing gadgets on the dashboard:

- BIRT Data Analyzer launches from cross-tab gadgets.
- Interactive Viewer launches from chart, report, reportlet, and table gadgets.

A browser-based tool can save changes to a gadget when the user has write permissions to the dashboard file.

Gadgets are maximized by:

- Double-clicking the gadget title
- Selecting Analyze from the gadget menu
- Selecting Maximize from the gadget header

Interactive Viewer features, such saving a file, hiding document parts, printing, and linking or embedding the document page, requires that the BIRT document or design file be opened from Information Console and not from within a gadget.

How to launch BIRT Interactive Viewer

Maximize a chart, report, reportlet, or table gadget by selecting Maximize. Right-click part of the report to display the BIRT Interactive Viewer context menu, for example, right-click a column or a title, as shown in Figure 3-46.

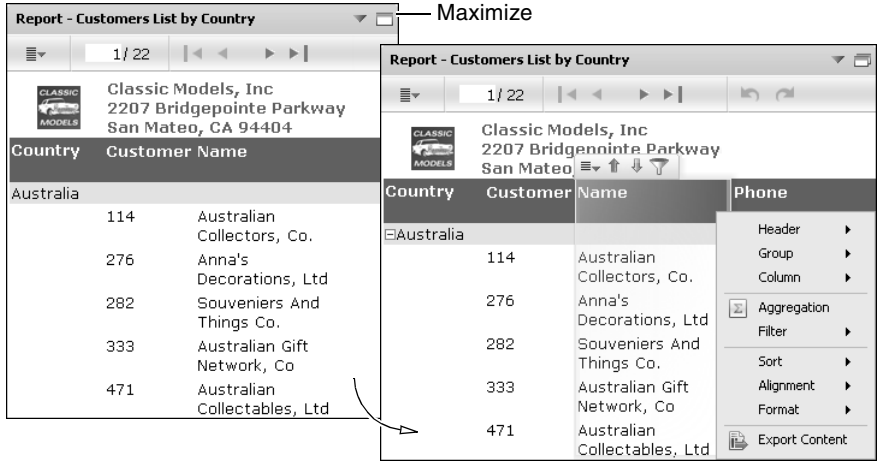


Figure 3-46 Launching BIRT Interactive Viewer from a gadget

Optionally, double-click the gadget title to launch BIRT Interactive Viewer.

How to launch BIRT Data Analyzer

Maximize a cross-tab gadget or a report gadget that contains a cross tab by selecting Maximize. Optionally, double-click the cross-tab gadget title to maximize the gadget.

- When the maximized gadget is a cross-tab gadget, BIRT Data Analyzer opens as shown in Figure 3-47.

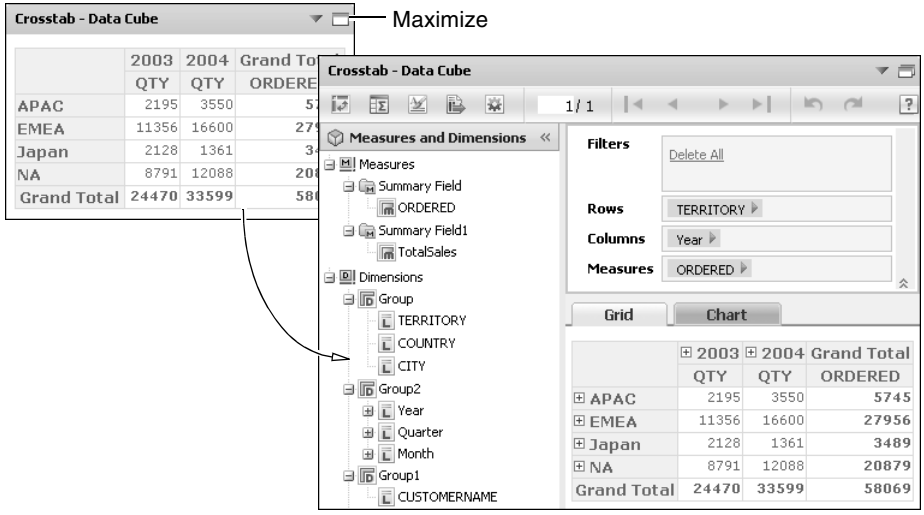


Figure 3-47 Launching BIRT Data Analyzer from a cross-tab gadget

- When the maximized gadget is a report or reportlet gadget, right-click the cross tab and choose Analyze, as shown in Figure 3-48.

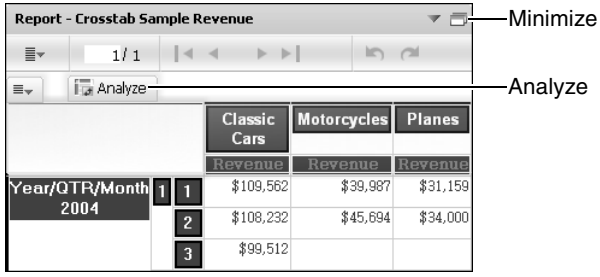


Figure 3-48 Launching BIRT Data Analyzer from a maximized report gadget

BIRT Data Analyzer opens.

Refreshing gadget content

Users can refresh a gadget to update the displayed information. Gadgets displaying external web sites or real-time data displays the latest data when the user refreshes the gadget.

Choose Refresh from the gadget menu, as shown in Figure 3-49, to refresh the content of a gadget.

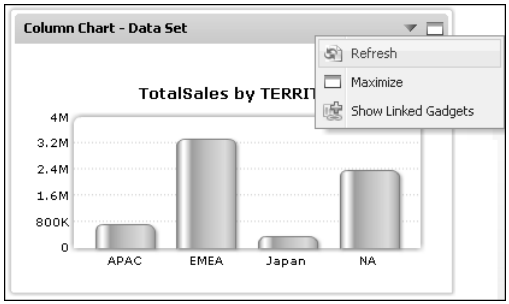


Figure 3-49 Refreshing content of a bar chart gadget

Showing linked gadgets

Users can see which gadgets are linked to a selected gadget by choosing Show Linked Gadgets from a gadget menu. For example, a user wants to see if any data selection gadgets can change the table gadget they are reviewing. By selecting Show Linked Gadgets in the table gadget's menu, the user can see which gadgets they can change the data displayed in the table.

How to show linked gadgets

1 On the dashboard menu, choose Show Linked Gadgets, as Figure 3-50 shows.

Figure 3-50 Showing gadgets linked to the cross tab

Gadgets that link to the selected gadget appear outlined, as Figure 3-51 shows.

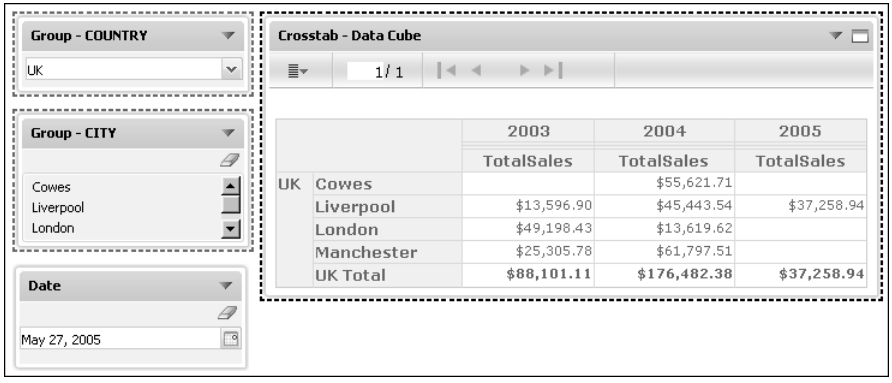


Figure 3-51 Reviewing which gadgets are linked together

2 On the dashboard menu choose Hide Linked Gadgets, as shown in Figure 3-52. The outline around linked gadgets disappears.

Figure 3-52 Hiding linked gadgets

Switching the view of a cross-tab gadget

Gadget designers can add a chart view to a cross tab to represent the data displayed in the gadget. When the chart view has been added, users can switch between the cross tab view and chart view.

BIRT designers can also add chart views to tables and cross tabs in BIRT design files. This content displays in report and reportlet gadgets on the dashboard, but this gadget must be maximized for Switch View to appear in the context menu. Users of cross-tab gadgets can choose Switch view in the content menu when the gadget is minimized.

How to switch views in a cross-tab gadget

1 Left-click the gadget content, context menu appears, as shown in Figure 3-53.

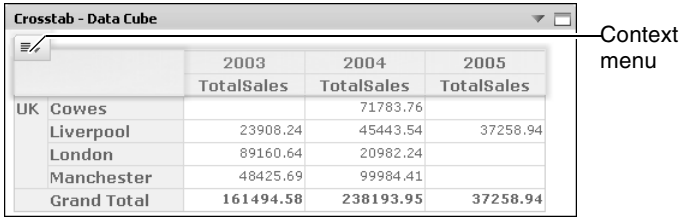


Figure 3-53 Opening a cross-tab gadget's context menu

2 In the cross-tab gadget menu, select Switch View, as shown in Figure 3-54.

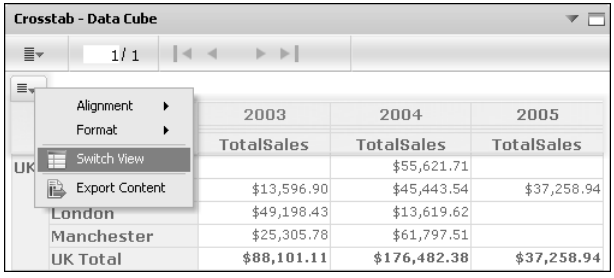


Figure 3-54 Selecting Switch View from a gadget's context menu

The chart view appears, as shown in Figure 3-55.

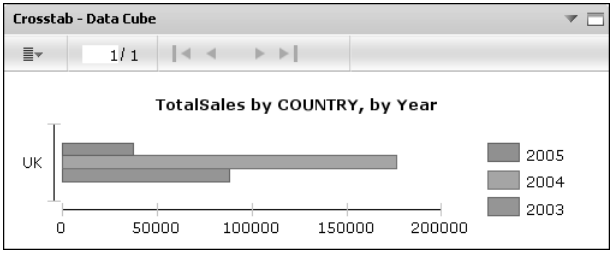


Figure 3-55 Displaying the chart view

Cancelling gadget content generation

Gadgets have time-out settings to limit how long they can attempt to generate content. Users can cancel gadget content generation in the following ways:

- Press Esc to stop generating all gadget content on the visible dashboard
- Choose Cancel, when the gadget times out, as shown in Figure 3-56.

Gadget content can be regenerated by refreshing the dashboard in the web browser or by selecting the Refresh option in the gadget menu.

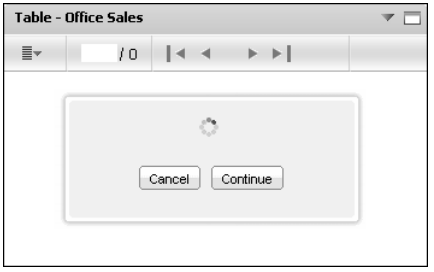


Figure 3-56 Cancelling generation of gadget content

Chapter

4

Running file jobs

This chapter contains the following topics:

- About running and scheduling file jobs
- Running a file job
- Scheduling a file job
- Using parameters
- Tracking a file job
- Using date-and-time expressions in names

About running and scheduling file jobs

Users run and schedule Actuate file types such as BIRT designs and BIRT spreadsheet executable files as file jobs to generate new document files. When a file job is run, the data used in the document is updated and parameters values, when designed into the file, are used to limit the data query to a specific set of data.

Running or scheduling a file job makes a query request to the external data sources and applies any selected parameters to the query. When a file job is finished, a new document file is either available for viewing in a temporary cache or saved to the Encyclopedia volume. The finished document files can be viewed, downloaded or, if they are Actuate file types, be converted to other document formats like Adobe PDF, IBM Advanced Function Printing (AFP), or Microsoft Office formats such as Word, Excel, and PowerPoint.

Table 4-1 shows Actuate file types that a user can run or schedule as a file job to update data from data sources and create new document files.

Table 4-1 Successful file job results

File type	Format created from file job	Save in 3rd party formats
BIRT designs	BIRT documents	yes
BIRT data object designs	BIRT data object stores	no
BIRT spreadsheet executables	BIRT spreadsheet documents	yes
Query definitions	Query output files	no
Report (e.Report) executables	Report documents	yes
Analytics cube profiles	Analytics cube files	no
Analytics cube files	Analytics cube reports	no

Users schedule jobs to run in the future or on a recurring basis. Parameters, if the file designer requires them, control data selection and formatting. For example, a document design that makes monthly sales reports, can request which month and year to use when creating the report.

Users track or cancel scheduled file jobs in My Jobs. Users can also select email and channel notifications for successful file jobs. All users who subscribe to the selected channels receive these notifications with links to the new file.

Actuate document formats cannot run as a file job but support scheduled conversions to create third party file formats like Adobe PDF, IBM Advanced Function Printing (AFP), and Microsoft Office formats such as Word, Excel, and PowerPoint.

Running a file job can be done in the following ways:

- Run or Run and View to immediately view a document
- Run and Save to save the new document
- Schedule to create the new document in the future or on a recurring basis

Running a file job

All design and executable files, such as BIRT Design files, BIRT Data Object Design files, BIRT Spreadsheet executable files, and e.Report executable files appear in the category Items You Can Run. An Information Console user with appropriate permissions can run a design or executable file job. The output of the job appears as a new document in Documents You Can View or as a temporary, in-memory document for immediate viewing or downloading.

When a job is run, the user decides which result they want:

- Create a new document by running the selected file.
- Create a new document by converting the selected document into a different document format.
- Select parameters to filter data in the new document.

Running a BIRT design or report executable job

BIRT Design files and e.Report executable files are available in Items You Can Run. They run as file jobs to create new documents. Either the browser-based BIRT Studio tool or BIRT Designer Professional can create BIRT report design files. Developers create report executable files in e.Report Designer Professional.

Users can run a design or executable file job in the following ways:

- Run: prompts for parameters if required, starts generating the document immediately and opens the resulting document in BIRT Viewer or BIRT Interactive Viewer.
- Run and Save: prompts for parameters if required and save-as details before opening the resulting document. The document from the finished file job becomes available in the Encyclopedia volume.
- Schedule: prompts for parameters if required, scheduling, and save-as details before entering the job in the job task list. The document from the finished file job becomes available in the Encyclopedia volume. Scheduling is described later in this chapter.

When the file job creates a new file, the user permissions after the file job finishes.

How to run a file job without saving

This example uses the Categories view, as shown in Figure 4-1.

Figure 4-1 Selecting the categories view

To generate an instant document without saving it in the Encyclopedia volume:

1. Navigate to the design or report executable file in Items You Can Run and choose the file name to generate the latest version.
2. When the file requires parameters, Parameters appears, as Figure 4-2 shows.

Figure 4-2 Selecting parameters

Select or type values for required parameters. Use the Query by Example syntax if the parameter is ad hoc, as explained later in this chapter.

3. Choose Finish. The generated document appears.

Optionally, the user can select the design or report executable file by choosing Run, from the file icon's hover menu. The hover menu appears when Information Console uses the Details, Icons, or List view and the mouse is over a file icon.

How to run a file job and save a document

This example uses the Categories view, as shown in Figure 4-3.

Figure 4-3 Selecting the categories view

To immediately generate a document and save it in the Encyclopedia volume:

1. Navigate to the design or report executable file in Items You Can Run and choose Run and Save.
2. When the file requires parameters, Parameters appears, as Figure 4-4 shows.

Figure 4-4 Selecting parameters

Select or type values for any required parameters.

Optionally use the Query by Example syntax when the parameter is an ad hoc parameter, as explained later in this chapter.

3 Choose Next. Save As appears, as shown in Figure 4-5.

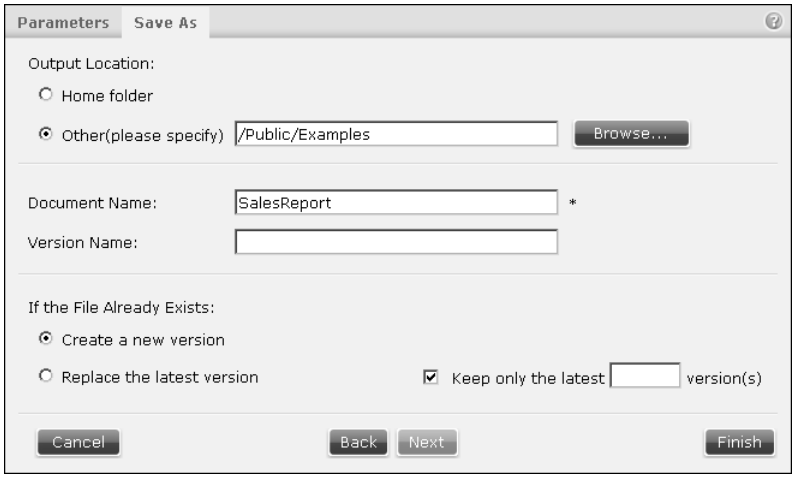


Figure 4-5 Adding information to save a file job

4 In Output location, select a location to save the document or select the Home folder location. Other locations are available by typing a new location, navigating to a new save location or by using a date-and-time expression as explained later in this chapter.

5 In Document name, accept the default or type a new name. Optionally use date-and-time expressions as explained later in this chapter.

6 In Version name, optionally type a custom version name.

7 Specify a resolution if the file name already exists in the selected location:

- To create a new version of the report and retain existing versions, accept the default, Create a new version. Optionally, choose how many previous versions to retain by selecting Keep only the latest. Type the number of versions to keep.
- To replace an existing report version, select Replace the latest version.

8 Choose Finish. Information Console displays and saves the generated document.

Optionally, the user can select the design or report executable file by choosing Run and Save, from the file icon's hover menu. The hover menu appears when Information Console uses the Details, Icons, or List view and the mouse is over a file icon.

Running a BIRT Spreadsheet executable job

BIRT Spreadsheet executable files are available in Items You Can Run. They run as file jobs to create a new BIRT Spreadsheet documents. Developers create spreadsheet executable files in the BIRT Spreadsheet Designer software.

Users can run a spreadsheet executable job in the following ways:

- Run: prompts for parameters if required, starts generating the document immediately. The resulting document is downloaded as a Microsoft Excel file.
- Run and Save: prompts for parameters if required and save-as details before opening the resulting document.
- Run and View: prompts for report format, prompts for parameters if required, and starts generating the document immediately. The resulting document downloads or opens in the selected report format.
- Schedule: prompts for parameters if required, scheduling, and save-as details before entering the job in the job task list. Scheduling is described later in this chapter.

How to run a spreadsheet executable

To generate an instant spreadsheet document without saving it in the Encyclopedia volume:

1 In view, select Categories, as shown in Figure 4-6.

Figure 4-6 Selecting the categories view

2 Navigate to the spreadsheet executable file in Items You Can Run and select the file name to generate the latest version. The generated document appears unless the file job requires parameters.

3 When the file requires parameters, Parameters appears, as shown in Figure 4-7.

Figure 4-7 Selecting parameters

Select or type values for any required parameters.

Optionally use the Query by Example syntax when the parameter is an ad hoc parameter, as explained later in this chapter.

4 Choose Finish to generate the spreadsheet.

How to run and view a spreadsheet executable

To generate an instant spreadsheet document without saving it in the Encyclopedia volume:

1 In view, select Categories, as shown in Figure 4-8.

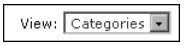


Figure 4-8 Selecting the categories view

2 Navigate to the spreadsheet executable file in Items You Can Run and select Run and View, as shown in Figure 4-9. The spreadsheet output format appears.

Figure 4-9 Choosing Run and View

3 Choose a file output type such as Excel 97-2003, Excel 2007, or PDF. The file job runs and the file output appears unless the file job requires parameters.

4 When the file requires parameters, Parameters appears, as shown in Figure 4-10.

Figure 4-10 Selecting parameters

Select or type values for any required parameters. Optionally use the Query by Example syntax when the parameter is an ad hoc parameter, as explained later in this chapter. Choose Finish.

If a default viewer is available for the file output chosen, the generated spreadsheet opens in the viewer. Otherwise, the web browser offers to download the spreadsheet file.

Optionally, the user can generate the spreadsheet executable file by choosing Run and View, from the file icon's hover menu. The hover menu appears in the Details, Icons, or List view when the mouse is over the file icon.

How to run and save a spreadsheet executable

To immediately generate a spreadsheet file and save it in the Encyclopedia volume:

1 In view, select Categories, as shown in Figure 4-11.

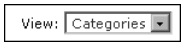


Figure 4-11 Selecting the categories view

2 Navigate to the spreadsheet executable file in Items You Can Run and select Run and Save, as shown in Figure 4-12.

Figure 4-12 Choosing Run and Save

3 When the file requires parameters, Parameters appears, as Figure 4-13 shows.

Figure 4-13 Selecting parameters

Select or type values for any required parameters. Optionally use the Query by Example syntax when the parameter is an ad hoc parameter, as explained later in this chapter.

Choose Next. Save As appears, as shown in Figure 4-14.

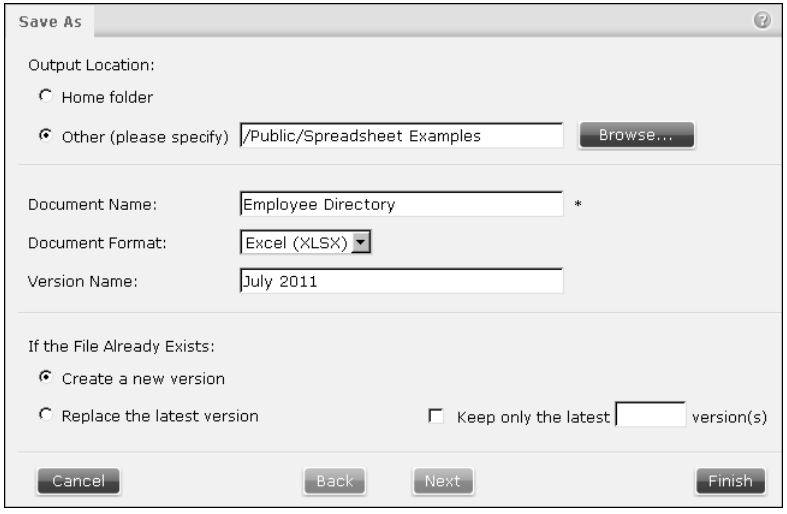


Figure 4-14 Adding information to save a spreadsheet file job

4 In Output location, select a location to save the document or select the Home folder location. Other locations are selected by typing a new location,

navigating to a new save location or by using a date-and-time expression, as explained later in this chapter.

5 In Document name, accept the default or type a new name. Optionally use date-and-time expressions, as explained later in this chapter.

6 In Document format, accept the default or select a format for the new spreadsheet document. Choose SOI for the BIRT Spreadsheet document file type, Excel (XLS), Excel (XLSX), or PDF. Optionally use date-and-time expressions, as explained later in this chapter.

7 In Version name, optionally type a custom version name.

8 Specify a resolution if the file name already exists in the selected location. Select Create a new version to create a new version of the report and retain existing versions. Optionally choose how many previous versions to retain by selecting Keep only the latest. Type the number of versions to keep.

9 Choose Finish. Information Console saves the generated document and opens it for viewing.

Optionally, the user can select the spreadsheet executable file by choosing Run and Save, from the file icon's hover menu. The hover menu appears in the Details, Icons, or List view when the mouse is over the file icon.

Scheduling a file job

Information Console can run an executable, document or design file at a scheduled time to enable the user to:

- Continue with other tasks without waiting for report results.
- Run a bursting report. Report bursting generates other report jobs.
- Save the output report document in a specific format or convert an existing BIRT Report document or BIRT Spreadsheet document file into another format like Adobe PDF or Microsoft Office formats such as Word, Excel, and PowerPoint.
- Schedule the design or executable file to run at a later date and time. For example, outside of peak use time.
- Schedule the design or executable file to run on a recurring basis.
- Send a notification with an optional headline to one or more channels that a new document is available.

Scheduled file jobs support set priority levels between 1 and 1000. The higher the priority value the higher the priority on the BIRT iServer.

Table 4-2 lists supported file types and conversion options for report output.

Table 4-2 Supported file types and conversion options

File type	File-Name Extension	Conversion options
Acrobat portable document format file	pdf	Page range, page style, BIDI processing, text wrapping, text hyphenation, font substitution, embedded font, chart DPI, render chart in vector graphic
Comma-separated values file	csv	Table name, column list, export columns data type, locale neutral format, encoding, maximum rows
IBM Advanced Function Printing	afp	Page range, chart DPI, page DPI, Plex mode, support the following images: black and white, grayscale, single color, full color RGB, color CMYK
Microsoft Excel format	xls	Page range, text wrapping, enable pivot table, auto adjustment for pivot table, chart DPI, export charts as images, hide grid lines, output to multiple sheets
Microsoft Excel format	xlsx	Same as xls with the following additional option: enable live formulas
Microsoft Word format	doc, docx	Page range, chart DPI
Microsoft PowerPoint format	ppt, pptx	Page range, page style, BIDI processing, text wrapping, font substitution, chart DPI
Pipe-separated values file	psv	Table name, column list, export columns data type, locale neutral format, encoding, maximum rows
PostScript document format	ps	Page range, page style, BIDI processing, text wrapping, font substitution, chart DPI
BIRT document	rptdocument	None
BIRT spreadsheet file	soi	None
Tab-separated values file	tsv	Table name, column list, export columns data type, locale neutral format, encoding, maximum rows

How to schedule a document job

1 In view, select Categories, as shown in Figure 4-15.

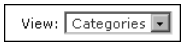


Figure 4-15 Selecting the categories view

2 Navigate to the document file in Items You Can Run and choose Schedule.

3 On Schedule, provide scheduling information, as shown in Figure 4-16.

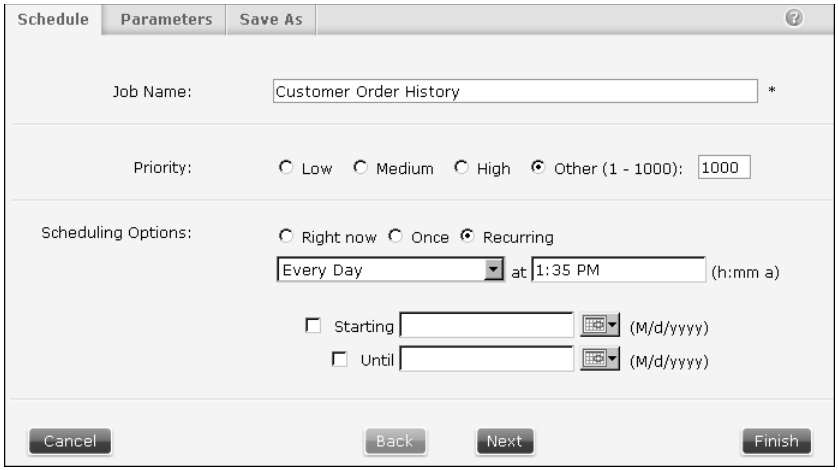


Figure 4-16 Scheduling a file job

- Accept the default job name or type a new name. To distinguish multiple run schedules for the same report, assign a unique name for each job.
- To set the job priority, select Low, Medium, or High, or select Other and type a priority value.
- Select a scheduling option:
  - To schedule the report to run immediately, select Right Now.
  - To generate the report once on a specified day and time, select Once. Type the date-and-time value, or choose Calendar to select a date.
  - To repeat generating the report, select Recurring, as Figure 4-17 shows.

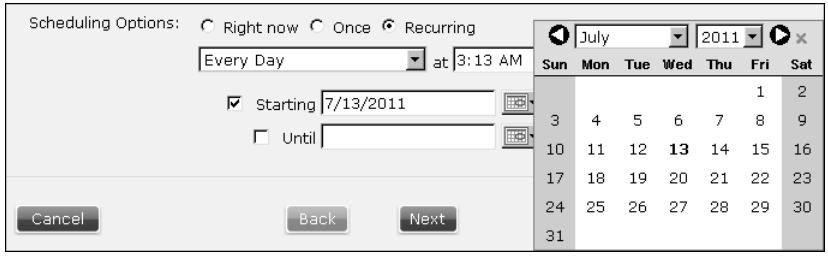


Figure 4-17 Scheduling options

Select an interval, such as the first day of every month, and a time to run the report. Optionally, select a start and end date during which the run job repeats.

4 Choose Next. When the file requires parameters, Parameters appears, as shown in Figure 4-18. Otherwise Save as appears.

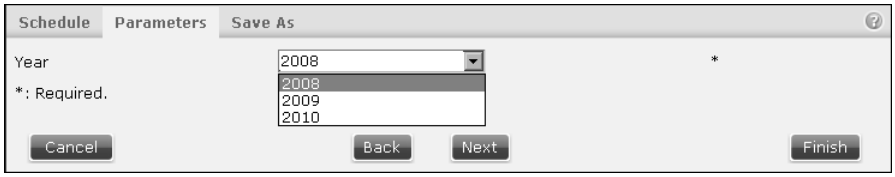


Figure 4-18 Selecting parameters

5 Select or type values for required parameters. Use the Query by Example syntax when the parameter is an ad hoc parameter, as explained later in this chapter. Choose Next to specify output settings.

6 In Save As, provide the information necessary to save the scheduled file., as shown in Figure 4-19.

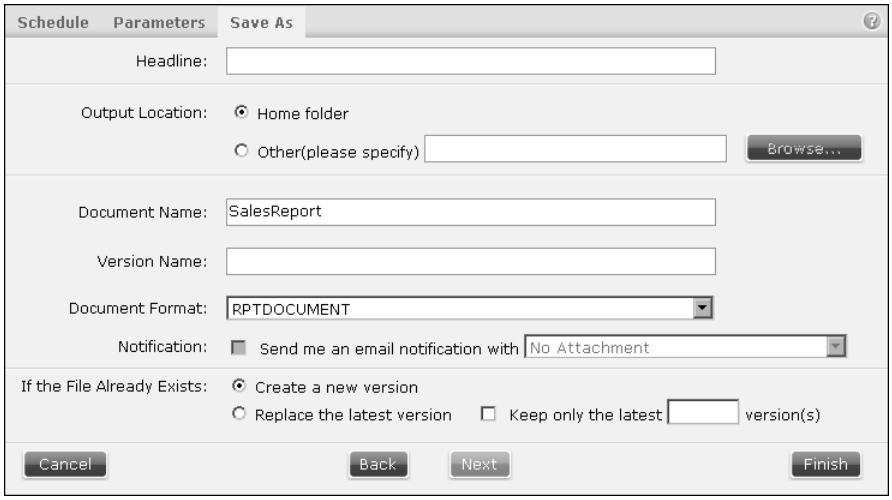


Figure 4-19 Adding information to save a file job

- In Headline, type a description of the file job. This description is included in any channel notifications and is saved with the job report.
- In Output location, select a location to save the document or select the Home folder location. Other locations are available by typing a new location, navigating to a new save location or by using a date-and-time expression as explained later in this chapter.
- In Document name, accept the default or type a new name.

- In Version name, optionally type a unique version name. When scheduling a file job to run on a recurring basis, adding a date-and-time expression creates unique document, directory, or version names, as explained later in this chapter.

7 Select the document format to generate. Each output type has various conversion options, as shown in Figure 4-20. Additional conversion options appear depending on the selected document format.

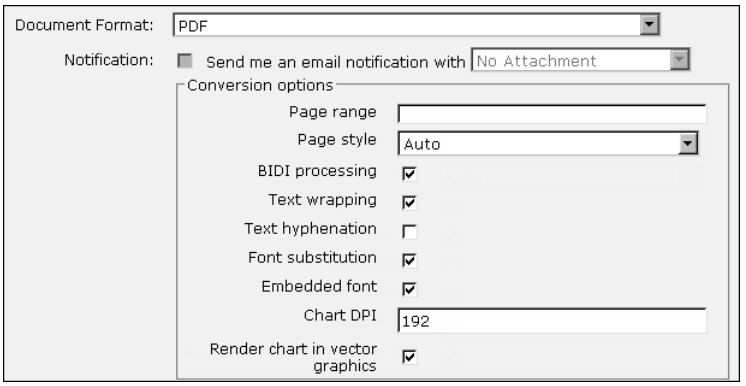


Figure 4-20 Selecting output conversion options

8 Optionally receive an e-mail notification when the file job runs, select Send me an email notification. Select the attachment format to attach a copy of the file job output to the email notification. The user's email address as configured from the Information Console's user options is used to send the email. If the email notification option is not available, contact the administrator.

9 Specify a resolution if the file name already exists in the selected location. Select Create a new version to create a new version of the report and retain existing versions. Optionally choose how many previous versions to retain by selecting Keep only the latest. Type the number of versions to keep.

Choose Finish. Confirmation of job submission appears, as Figure 4-21 shows.

Figure 4-21 Confirming submission of a scheduled job

Optionally, to schedule the job, choose Schedule from the file icon's hover menu. The hover menu appears in the Details, Icons, or List view when the mouse is over the file icon.

Using parameters

A parameter is an element in reports or dashboard gadgets that provides input to the select data used in a file job. Report developers use parameters to request report data from users for processing, formatting, and determine aspects such as:

- Which records are retrieved
- The sorting sequence of the data
- The output format

If an Actuate file has parameters, the user sets the parameter values when running the file job or uses the default parameter values set by the developer. If a report parameter file is available, the user that starts a report and loads the report parameters with predefined values.

Understanding parameter types

The parameter types available using Information Console are:

- Ad hoc

  An ad hoc parameter uses patterns to retrieve or filter data from a document's data source. This data displays in its tables, charts, maps, or other presentation formats built in to the document.

- Cascading

  Parameter choices depend on other parameters. For example, a parameter to select from a list of cities is empty until the country is selected first.

- Multiple-value

  A multiple-value parameter accepts more than one value to filter the document data. For example, a report that provides sales information of products sold can request the user to select multiple products.

- Optional

  A user can select or group the data presented in a report by typing values or conditions into the optional parameter. If a user does not specify a value for an optional parameter, the document job uses a value chosen by the document designer.

- Required

  A required parameter must have a value before the document job can run. For example, a report that accesses a database can require a user name and password or require a user to select a city before running a city report. Typically, a document designer supplies a default value for a required parameter.

- Single-value

  A single-value parameter accepts one value to filter the document data. For example, a report that provides sales information by customer requires the user to select a customer from a list of existing customers.

Figure 4-22 shows Parameters prompting input of values.

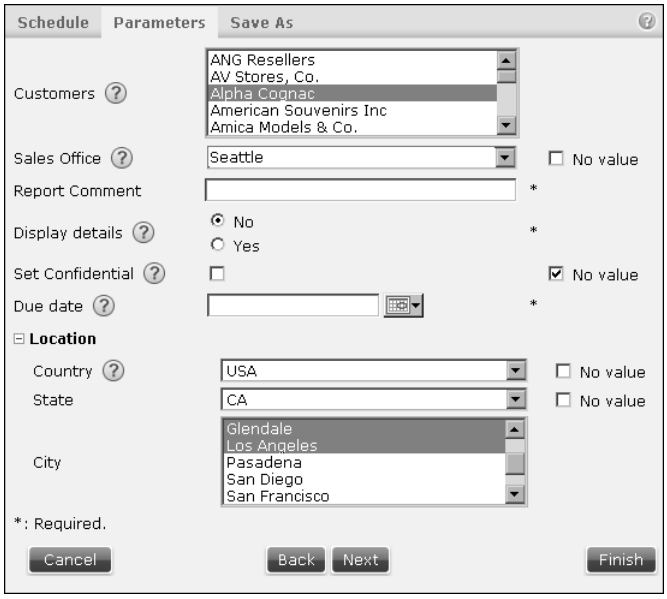


Figure 4-22 Using parameters to customize a report

Using multiple-value parameters

Multiple-value parameters are drop-down lists, radio buttons, or check lists. The values you select in a multiple-value parameter restrict the resulting document data to the elements with the selected values for that parameter. For example, selecting years from a multiple-value parameter, causes the generated report to show data from the selected years.

Making expressions for ad hoc parameters

The value of an ad hoc parameter can be a single value or an expression. Expressions use special characters called operators to select a group or range of values. For example, a greater than sign (>) specifies matching a value that is greater than the value that follows the symbol, as in >10. In this example, the greater than sign is the operator and 10 is the value.

There are 2 types of ad hoc parameters available to Information Console users; Dynamic Filters and Query by Example (QBE). Dynamic Filters requests users to

build expressions using a single operator. Query by Example (QBE) syntax requests users to select one or more operators to also build complex expressions.

Examples of using expressions in an ad hoc parameter:

- A single value, such as 10.
- A relational expression, such as >10.
- A range of values, such as 10–20.2
- A list of values, expressions, or ranges, separated by pipe signs, such as 10|20–30|>50. Some locales also accept a comma as a list separator.
- A group of values, such as (abc|xyz), that a Boolean expression can combine, such as (abc|xyz)&bbb.

Dynamic Filters are used in BIRT design and document files. QBE ad hoc parameters are used in BIRT Spreadsheet and e.Report files.

Using a dynamic filter operator

Dynamic filters appear in BIRT design and document files. When dynamic filters exist in an Actuate file, Information Console prompts the user to select from a list of operators and supply a value. The developer decides which operators are available in an Actuate file.

Dynamic filters support multiple values and complex string expressions, depending on the operator. Data matching this expression displays in the output document of the file job.

Figure 4-23 shows an example of using dynamic filter operators to make an ad hoc expression.

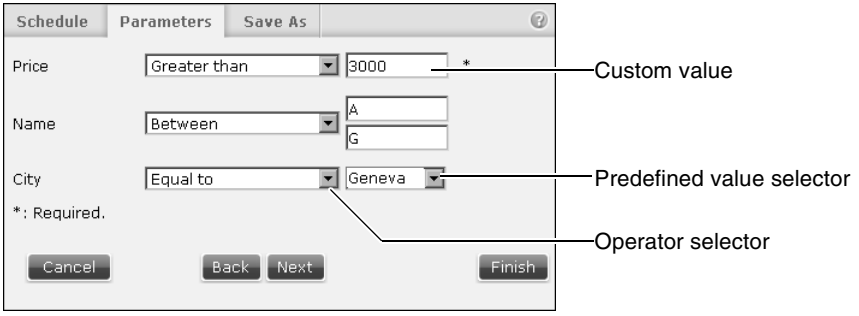


Figure 4-23 Using dynamic filters

Table 4-3 lists the operators that are available in Actuate files. Developers select which operators are available to users of the file.

Table 4-3 Dynamic filter operators

Operator	Usage
Between	Find data that is between two specific values
Equal to	Find data equal to a specific value
Greater than	Find data greater than the specific value
Greater than or equal to	Find data greater than or equal to the specific value
In	Find data that matches any of the selected values
Is false	Find data that equals zero
Is not null	Find data that does not have a null value
Is null	Find data that has a null value
Is true	Find data that does not equal zero
Less than	Find data less than the specific value
Less than or equal	Find data less than or equal to the specific value
Like	Find data matching the value's string pattern
Match	Find data matching the value's string expression
No Condition	Find all values for this parameter
Not between	Find data that is not between two specific values
Not equal to	Find data not equal to a specific value
Not in	Find data that does not match any of the selected values
Not like	Find data not matching the value's string pattern
Not match	Find data not matching the value's string expression

The Like operator supports the following special characters:

- % matches zero or more characters. For example, %ace% matches any value that contains the string ace, such as Ace Corporation, Facebook, Kennedy Space Center, and MySpace.
- _ matches exactly one character. For example, t_n matches tan, ten, tin, and ton. It does not match teen or tn.

The Match operator is case sensitive and supports special metacharacters that combine to form text patterns called regular expressions. For example, using ^H.*(Gifts|Collectables)$ to search through a list of company names matches all companies whose name starts with the letter H, has one or more letters after H and includes the word Gifts or Collectables at the end of the name.

If you need to match on a metacharacter, a backslash (\) followed by the metacharacter causes the search to interpret the metacharacter as a normal character.

For example, if $ is part of the data to be found, it must be entered as \$ because $ is a metacharacter. Table 4-4 lists the metacharacters available to form regular expressions with the Match operator.

Table 4-4 Regular expression metacharacters used with Match

Metacharacter	Usage
.	Matches any single character.
*	Matches the previous character zero or more times. For example po* matches Liverpool and Leipzig.
!	Matches everything not equal to the search expression.
( )	Matches all characters in the set between the parentheses.
|	Matches if any one of multiple conditions is true.
[]	Matches any character in the set between the brackets
[^]	Matches any character not in the set between the brackets.
+	Matches the previous character one or more times. For example, po+ matches Singapore and Liverpool but not Leipzig.
?	Matches the previous character zero or one times. For example, po? matches Singapore and Leipzig.
x{y}	Matches the previous character exactly y times. For example, o{2} matches Liverpool but not Lyon.
^	Matches the start of the string. For example ^A matches Australia but does not match Los Angeles.
$	Matches the end of the string. For example n$ matches Lyon.
\	Used with a metacharacter to make it a literal character. For example, to search for a string containing a $ sign, use \$.
\A	Matches the start of a string.
\b	Matches the edge of a word, beginning, or end.
\B	Matches any place inside a word, but not the edge of a word.
\d	Matches any decimal digit.
\D	Matches any non digit character.
\s	Matches a space.
\S	Matches a non space.

Table 4-4 Regular expression metacharacters used with Match

Metacharacter	Usage
\w	Matches a word that is made of letters, numbers, or an underscore.
\W	Matches a non word.
\Z	Matches the end of a string.

Table 4-5 provides examples of dynamic filter expressions.

Table 4-5 Example results for dynamic filter expressions

Operator	Values	Matches	Does not match
Between	'A'	'Barcelona'	'Zurich'
	'D'	'Dublin'	'Seattle'
Greater than	'Oslo'	'Oulu'	'Oslo'
		'Paris'	'NYC'
In	'Lyon'	'Lyon'	'London'
	'New York'	'New York'	'New Haven'
Is False		'0'	'11'
Like	'A%'	'Amsterdam'	'Zurich'
		'Auckland'	
Like	'B___'	'Bern'	'Berlin' or 'Boston'
Like	'Be%n'	'Berlin' or 'Bern'	'Bergamo'
Like	'%& Co%n'	'Handji Gifts& Co'	'Boards & Toys Co'
		'Models & Co.'	'Cruz & Sons Co.'
Match	'es.'	'Manchester'	'Nantes'
Match	'ity'	'City'	'Nantes'
		'Makati City'	'Paris'
Match	'ern'	'Stavern'	'Liverpool'
		'Bern'	'Bergen'
Match	'(ern)|(New)'	'Bern'	'Glendale'
		'Newark'	'Cunewalde'
		'New Bedford'	
Match	'A'	'Allentown'	'Nantes'
		'Los Angeles'	'Paris'

(continues)

Table 4-5 Example results for dynamic filter expressions (continued)

Operator	Values	Matches	Does not match
Match	'.A'	'Los Angeles'	'Allentown'
Match	'[A-C]'	'Burbank'	'Frankfurt'
		'Los Angeles'	'Singapore'
		'NYC'	
Match	L[^o]s	'Lisboa'	'Los Angeles'

Using Query by Example operators

Users build a QBE expression by combining operators and values, for example >10 is a QBE expression defining a value greater than ten. QBE expressions are available with BIRT Spreadsheet and e.Report files. Table 4-6 lists the operators available to form ad hoc parameter expressions.

Table 4-6 QBE operators used in ad hoc parameters

Name	Operator	Usage
Ampersand	&	Match if two or more conditions are true
Backslash	\	Used with an operator to make it a literal character
Brackets	[]	Matches any character in the set between the brackets
Caret	^	Matches everything not in the bracket set
Comma	,	Combines search terms and expressions
Exclamation	!	Matches everything not equal to the search expression
Greater than	>	Matches everything greater than the value that follows the operator
Greater than or equal to	>=	Matches everything greater than the value that follows the operator
Hyphen	-	Separates upper and lower limits of the search range
Less than	<	Matches everything less than the value that follows the operator
Less than or equal to	<=	Matches everything less than or equal to the value that follows the operator
Number sign	#	Matches any single ASCII numeric character [0–9]

Table 4-6 QBE operators used in ad hoc parameters

Name	Operator	Usage
Parenthesis	( )	Matches all characters in the set between the parenthesis
Percent sign	%	Matches any character, group of characters, or no character
Pipe sign	|	Matches if any one of multiple conditions is true
Single quotation mark	'	Converts an operator character in a string into a literal character
Underscore	_	Matches any single character

How to use the ad hoc parameter builder

For a field that supports typing an ad hoc value, you can type the value and use the ad hoc parameter builder operators and characters to provide a QBE expression in the field.

1 In Parameters, choose expression builder, as shown in Figure 4-24.

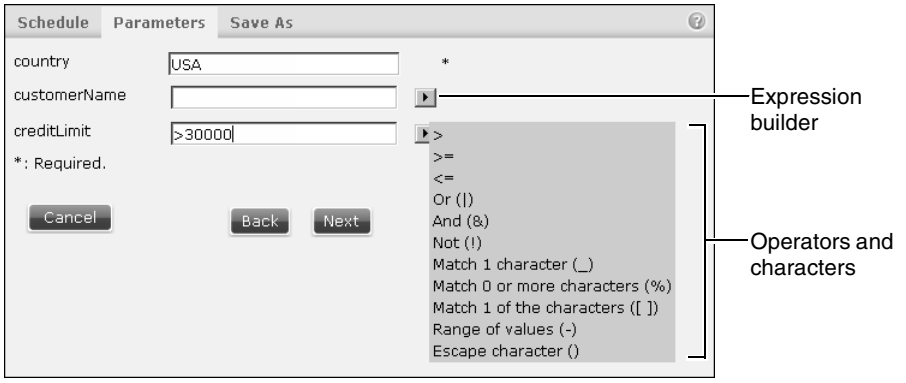


Figure 4-24 Using the ad hoc expression builder

2 Use a combination of text, operators, and characters to build a QBE expression for any of the parameter fields.

Figure 4-25 shows the result of adding two pipe signs (|) and typing several values. The resulting QBE expression specifies that the values must match 'A', 'B', or 'S'.

Figure 4-25 A QBE expression on the requester page

3 Choose Next to provide Save As information or choose Finish to save the report job.

Table 4-7 provides examples of QBE expressions.

Table 4-7 Example results for QBE expressions

QBE expression	Matches	Does not match
Sm[aeiou]th	'Smith'	'Smooth'
	'Smath'	'Smth'
ab[%]c	'ab%c'	'abac'
		'ab[%]c'
Smith%	'Smith'	'Smit'
	'Smithsonian'	
	'Smith '	
ab%c	'abac'	
	'ab%c'	
	'abc'	
Sm_th	'Smith'	'Smooth'
	'Smoth'	'Smth'

Using Query by Example with data types

A value in a QBE expression must match the data type of the data source field to which it applies. For example, you must use a numeric value in a QBE expression that filters a numeric field. Do not include characters, such as commas used as placeholders, when typing a numeric parameter value.

Using a date in a QBE expression

To supply a date in the short date format, use the locale-specific date separator and date format order.

Table 4-8 lists examples of correct date formats in different locale settings.

Table 4-8 Using a date in a QBE expression

Locale setting	Correct format
US English	01/15/2011
French (France)	15/01/2011
Russian	15.01.2011

When using a date in a QBE expression, use four-digit years rather than two-digit year abbreviations. For example, to signify January 15, 2011, type 01/15/2011 rather than 01/15/11.

Using a null value in a QBE expression

To specify that a field in the database must or must not contain a data value, use the keyword Null. To specify that the field must not contain a data value, type Null as the QBE expression. To specify that a field must contain a data value, type !Null as the QBE expression. Null is not case sensitive.

Matching an exact string value in a QBE expression

To ensure a match with only exact values from the data sources, enclose the text string in single quotation marks in the QBE expression. Returned data must match the enclosed string exactly. Returned data does not include values that have additional characters at the end of the string. A comma appears as a list separator for Smith, Jane. Use the pipe sign (|) to specify a list separator that is locale independent.

Table 4-9 lists the values that example QBE expressions return.

Table 4-9 Matching an exact string value in a QBE expression

QBE expression	Matches	Does not match
Smith	'Smith' or 'Smith ' or 'Smithson'	
'Smith'	'Smith'	'Smith '
		'Smithson'
Smith, Jane	'Smith, Jane' or 'Smith, John' or 'Janesson, Per'	
'Smith, Jane'	'Smith, Jane'	'Smith, John'
Red|Green|Blue	'Green'	
	'Red|Green|Blue'	
'Red|Green|Blue'	'Red|Green|Blue'	'Red'
		'Green'
		'Blue'

Making a literal character in a QBE expression

A specific syntax is required when a QBE expression attempts to match a value using an operator character as a literal character. Table 4-6 shows available operator characters.

Type a backslash (\) before each special character, or enclose the string in single quotation marks, which directs the application to match the string value exactly. For example, typing a backslash before the comma directs the application to interpret the comma literally in the following QBE expression:

```
16M x 1 Dynamic Ram\, 3.3 volts
```

Without the backslash, depending on your locale setting, Information Console interprets the comma as an OR.

Use the pipe sign (|) to specify a list separator that is locale independent.

The following QBE expression matches the percent sign (%) literally in a string:

```
'ab\%c'
```

Matching character sets and spaces with the percent sign

The percent sign (%) matches any set of characters or blank characters. Information Console adds a percent sign to a string supplied as a QBE expression when all the following conditions are true:

- The database column is of type string.
- The input parameter value is not enclosed in single quotation marks and is not a range.
- The string does not contain a percent sign, such as Sm%th.

Information Console adds a percent sign to ensure blank characters at the end of strings in the database do not interfere with the matching process. To stop Information Console from adding the percent sign (%) to the end of a string, enclose the string in single quotation marks in the QBE expression.

Table 4-10 illustrates the results of the application adding a percent sign to QBE expressions.

Table 4-10 Adding a percent sign to QBE expressions

QBE expression	SQL condition	Matches	Does not match
'Smith'	custName LIKE 'Smith'	'Smith'	'Smith '
Smith	custName LIKE 'Smith%'	'Smith'	
		'Smith '	
		'Smithe'	
		'Smithsonian'	

To match values ending in a space character when the QBE expression contains a percent character, append a percent character to the QBE expression. For example:

```
Sm%th%
```

The above syntax is valid for a QBE expression with only a single value. Information Console does not add a percent sign to an expression for a range of values. For example, if the database column custName is a string and the report user types D as the value of the ad hoc parameter, the query retrieves the data row that contains Design Boards.

If the user types a range of values, such as A-D, for the ad hoc parameter value, Information Console does not match customer records where custName is Design Boards. This is because the value is a range and not a single value. For example, QBE expression values that retrieve values starting with A through D appear in Table 4-11, including one to which Information Console adds a percent sign.

Table 4-11 Examples of QBE expressions to retrieve a range of values

QBE expression	SQL condition
A-E	custName BETWEEN 'A' AND 'E'
>A&<E	custName > 'A' AND custName < 'E'
A|B|C|D	custName LIKE 'A%' OR custName LIKE 'B%' OR custName LIKE 'C%' OR custName LIKE 'D%'

Matching character sets with brackets

Brackets ([and]) specify a set of matching characters. Information Console manages any special characters enclosed by brackets as literal characters. For example, the following QBE expression encloses the percent sign (%) and uses it literally:

```
ab[%]c
```

Tracking a file job

Information Console tracks a report job in the My Jobs area. Depending on its status, a report job appears in Schedules, Waiting for Event, Pending, Running, or Completed, as shown in Figure 4-26.

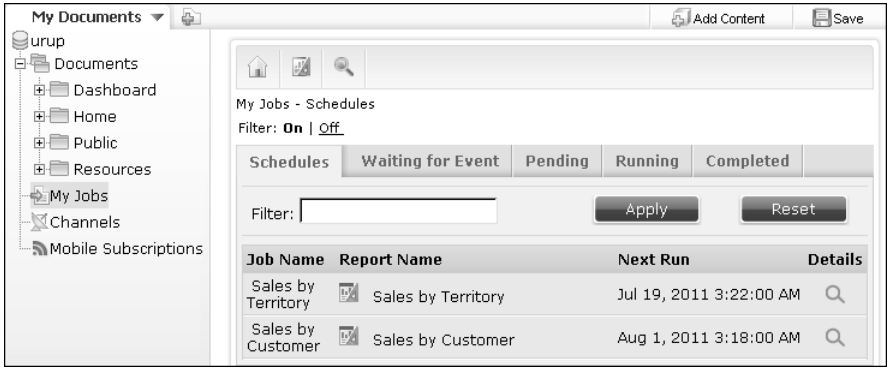


Figure 4-26 Tracking reports in My Jobs

A submitted report job appears first in Schedules or Waiting for Event. When a job enters the queue, it moves to Pending. When a job executes, it moves to Running. When the document is finished, the file job status moves to Completed. You can delete a job that is in Schedules or Waiting for Event. A job remains in Completed until you delete it. Deleting a completed job removes the job from the Channels displaying it.

Only scheduled reports appear in My Jobs, and only file jobs that succeed appear in Completed.

To see more information about a file job, including options to open the output document from the file job and delete the file job information, choose view job detail. The displayed details include:

- Information about the scheduled file job, as shown in Figure 4-27.

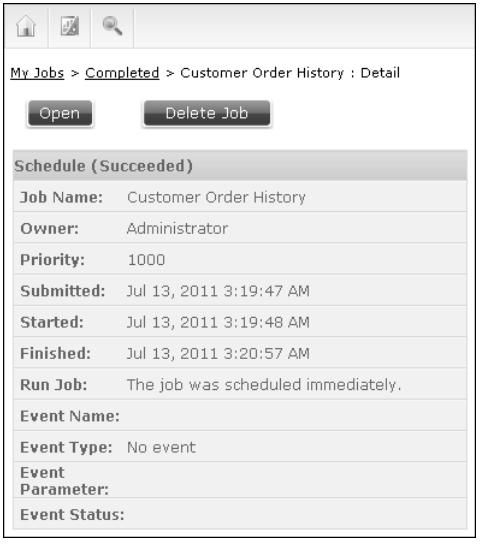


Figure 4-27 Displaying details about a file job

- Information about the original file used in the file job, as shown in Figure 4-28.

Figure 4-28 Displaying details about the original file used in the file job

- Information about the output document from the job, as Figure 4-29 shows.

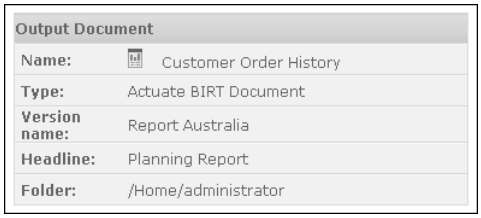


Figure 4-29 Displaying details about the output document from a file job

- Status of the file job, as shown in Figure 4-30.

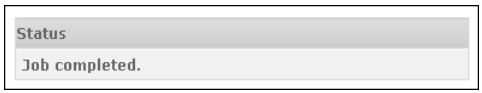


Figure 4-30 Displaying details about the status of a scheduled file job

- Notification settings for the file job, as shown in Figure 4-31.

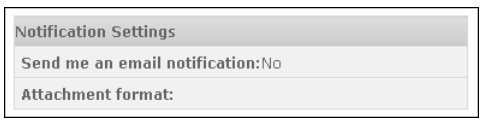


Figure 4-31 Displaying details about notification settings of a file job

Users can quickly find a specific document by using the filter option to search for files. The My Jobs filter supports using string expressions, as described earlier in this document.

How to filter reports in My Jobs

1. In My Jobs, choose Completed. Completed file jobs appear.
2. Choose Filter On. The available filter options appear.
3. Type a string in the text field. Use the asterisk (*) character to narrow a search. For example, to display all jobs whose names start with M, type: M*
4. Choose Apply. The resulting filtered jobs appear. For example, in Figure 4-32, only jobs that start with M appear.

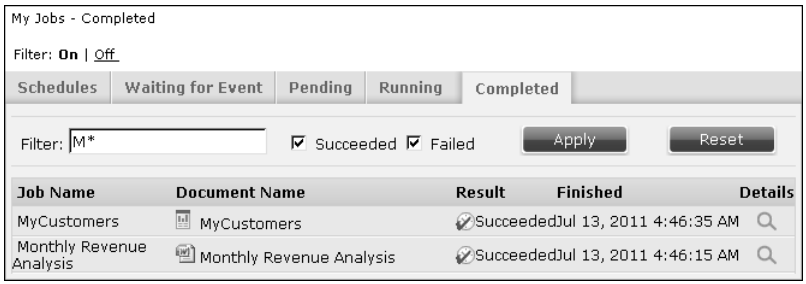


Figure 4-32 Filtering jobs

How to cancel a scheduled job

1 In My Jobs, choose Schedules. Scheduled file jobs appear.

2 In Schedules, choose view job detail for the job to delete. The job details appear, as shown in Figure 4-33.

Figure 4-33 Deleting a scheduled report

3 Choose Delete Schedule. A confirmation page appears to confirm the deletion.

How to delete a job notice from the completed jobs page

1 In My Jobs, choose Completed. Completed file jobs appear.

2 Choose view job detail of the file job to delete. The completed file job details appears, as shown in Figure 4-34.

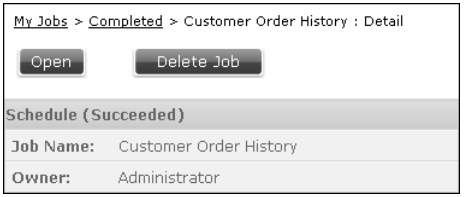


Figure 4-34 Viewing details of a completed file job

3 Choose Delete Job. After you delete the job, a confirmation page appears. The job notice is deleted from My Jobs and from notification channels. The output file that was created from the file job must be deleted manually.

Using date-and-time expressions in names

Information Console supports date-and-time expressions to automatically add the document generation date and time value to the:

- File name
- Version of the file
- Directory name where the file will be saved

For example, a user can use Sales Report followed by the report generation date as a document name, use the following expression:

```
Sales Report {mm-dd-yy}
```

On August 28, 2011, the name appears as:

```
Sales Report 08-28-11
```

When scheduling a report to run on a recurring basis, adding a date-and-time expression creates unique document, directory, or version names. A user can create date-and-time expressions in either of the following ways:

- Use the date-and-time formats in Table 4-12.
- Create custom date-and-time formats based on the symbols in Table 4-13 and Table 4-14.

Table 4-12 lists the date-and-time format keywords to use and the expression to which each keyword evaluates in a report. This table uses the locale English (USA). Actuate recommends not using General Date, Long Date, Long Time, Medium Time, and Short Time types.

Table 4-12 Date-and-time expressions

Keyword	Description	Example	Result
General Date	Returns a date and time in the Short Date Long Time format as defined in the Information Console locale map file	{General Date}	01/23/2011 8:53:03PM
Long Date	Returns a Long Date as defined in the Information Console locale map file	{Long Date}	Tuesday, January 23, 2011
Long Time	Returns a Long Time as defined in the Information Console locale map file	{Long Time}	8:45:00 PM
Medium Date	Returns a date with the month name abbreviated to 3 letters: dd-mmm-yy	{Medium Date}.soi	23-Jan-11.soi
Medium Time	Returns hours and minutes in 12-hour format, including AM/PM designation (hh:nn AM/PM)	{Medium Time}	8:45 PM
Short Date	Returns a Short Date as defined in the Information Console locale map file	{Short Date}.soi	01-23-2011.soi
Short Time	Returns hours and minutes in 24-hour format (hh:nn)	{Short Time}	20:45

Table 4-13 lists the date format symbols to use and the expression to which each symbol evaluates in a report.

Table 4-13 Date format symbols

Symbol	Description	Example	Result
c	Returns the Short Date Long Time format as defined in the Information Console locale map file	{c}	01/23/2011 8:53:03PM
d	Returns the day of the month without a leading zero (1-31)	Day{d}.soi	Day3.soi
dd	Returns the day of the month with a leading zero (01-31)	Day{dd}.soi	Day03.soi
ddd	Returns the three-letter abbreviation for the week day	{ddd}.soi	Tue.soi
dddd	Returns the full name of the day of the week	{dddd}	Tuesday
ddddd	Returns the Short Date string as defined in the Information Console locale map file	{ddddd}	01/23/2011
dddddd	Returns the Long Date string as defined in the Information Console locale map file	{dddddd}.soi	Tuesday, January 23, 2011.soi
m	Returns the number of the month without a leading zero	Month{m}.soi	Month1.soi
mm	Returns the number of the month with a leading zero	Month{mm}.soi	Month01.soi
mmm	Returns the three-letter abbreviation for the name of the month	{mmm}.soi	Jan.soi
mmmm	Returns the full name of the month	{mmmm}.soi	January.soi
w	Returns the day of the week as a number, where Sunday = 1, and Saturday = 7	Weekday{w}.soi	Weekday3.soi
ww	Returns the week of the year as a number (1-53)	Week{ww}.soi	Week4.soi
q	Returns the number of the quarter (1-4)	Quarter{q}.soi	Quarter1.soi
y	Returns the number of the day of the year (1-365)	Day{y}.soi	Day23.soi

Table 4-13 Date format symbols

Symbol	Description	Example	Result
yy	Returns the last two digits of the year (00-99)	Year{yy}.soi	Year11.soi
yyyy	Returns all four digits of the year (1000-9999)	Year{yyyy}.soi	Year2011.soi

Examples and results with a .soi file-name extension are document names. Examples and results without a .soi file-name extension are version names.

Table 4-14 lists the time format symbols that you use and the expression that each symbol evaluates in a report. The examples and results use a .soi file-name extension for names of document file types. The examples and results without a .soi file-name extension are version names.

Table 4-14 Time format symbols

Symbol	Description	Example	Result
AMPM	Uses the format that is defined in the Actuate Information Console locale map file. The default format is AM/PM.	{h:n:s AMPM}	8:45:3 PM
AM/PM	Returns AM/am for any hour before noon and PM/pm for any hour after. This symbol is case-sensitive.	{hh:nn:ss am /pm}	08:45:03 pm
		{hh:nn:ss AM /PM}	08:45:03 PM
A/P or a/p	Returns A/a for any hour before noon and P/p for any hour after noon. This symbol is case-sensitive.	{h:n:s a/p}	8:45:3 p
		{h:n:s A/P}	8:45:3 P
h	Returns the hour of the day without the leading zero (0-23)	Hour {h}. soi	Hour 9. soi
hh	Returns the hour of the day with a leading zero (00-23)	Hour {hh}. soi	Hour 09. soi
n	Returns the minute without a leading zero (0-59)	Minute {n}. soi	Minute 5. soi
nn	Returns the minute with a leading zero(00-59)	Minute {nn}. soi	Minute 05. soi
s	Returns the number of seconds without a leading zero (0-59)	Second {s}. soi	Second 1. soi

(continues)

Table 4-14 Time format symbols (continued)

Symbol	Description	Example	Result
ss	Returns the number of seconds with a leading zero (00-59)	Second {ss}. soi	Second 01. soi
tttt	Uses the format that is defined in the Actuate Information Console locale map file.	{tttt}	8:45:00 PM

Times return in 24-hour format unless you use an AM/PM symbol. The symbol for minute is n. The symbol for month is m.

Chapter

5

Personalizing Information Console

This chapter contains the following topics:

- Setting user options
- Creating default folders for document viewing
- Selecting language and time zone settings
- Subscribing to channels
- Using browser bookmarks
- Customizing skins

Setting user options

Options control how Information Console appears to each user. These options are persistent between user sessions. Users that have logged in to Information Console access options as shown in Figure 5-1.

Information Console options are presented in 3 categories:

- General
- My dashboard
- Notification

How to view an option

In the banner, choose Options, as shown in Figure 5-1. Options—General appears.

If Options does not appear on the Information Console banner, contact your Encyclopedia volume administrator.

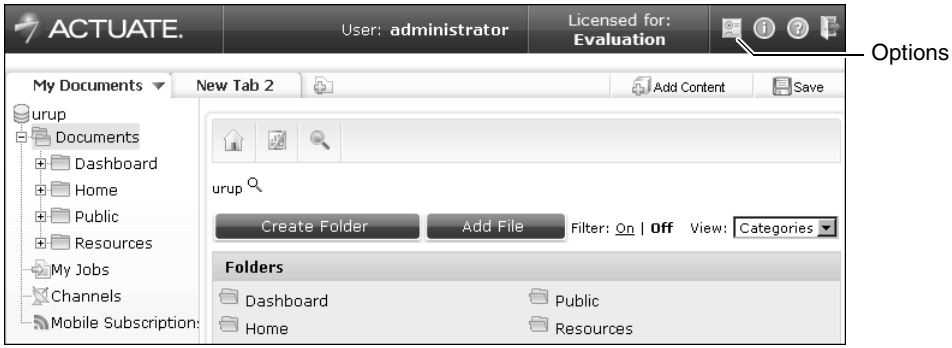


Figure 5-1 Accessing general preference options

Choosing general options

Options—General, as shown in Figure 5-2, include the following options:

- The user's e-mail address
- Preferred graphic skin
- Preferred file navigation view
- Analytics experience level
- Visibility of file name filters
- Document viewing preference
- Password update

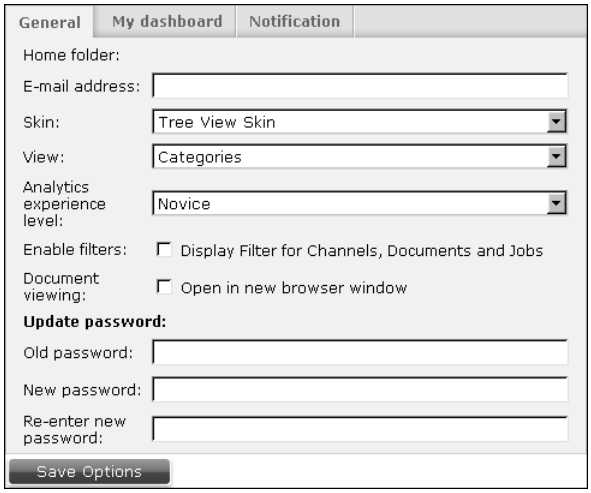


Figure 5-2 General user options for Information Console

Setting e-mail address

A user can update or add an e-mail address that Information Console associates with the user. This email address is used to notify a user of document job completion or failure.

The notification can include the generated document as an attachment to the email message. If email notifications do not arrive, contact your BIRT iServer administrator to see if the email service is available.

Selecting a skin graphic layout

A skin controls the layout of elements that appear in the Information Console navigation pane. Information Console provides the following skin options:

- Classic Skin displays Documents, My Jobs, and Channels as icons in the sidebar, as shown in Figure 5-3.

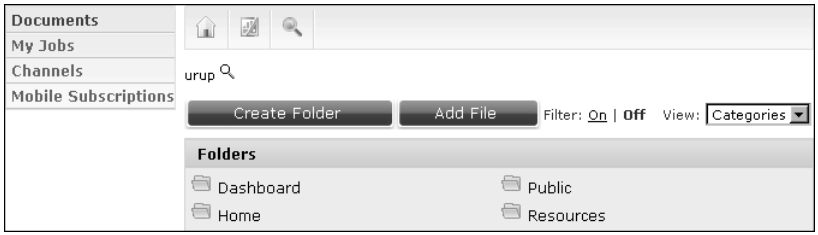


Figure 5-3 Viewing documents in Classic Skin

- Tabbed Skin displays Documents, My Jobs, and Channels as tabs at the top of the page, as shown in Figure 5-4.

Figure 5-4 Viewing documents in Tabbed Skin

- Tree View Skin displays Documents, My Jobs, and Channels as a hierarchy in the navigation pane. The folder hierarchy begins at the root folder, as shown in Figure 5-5.

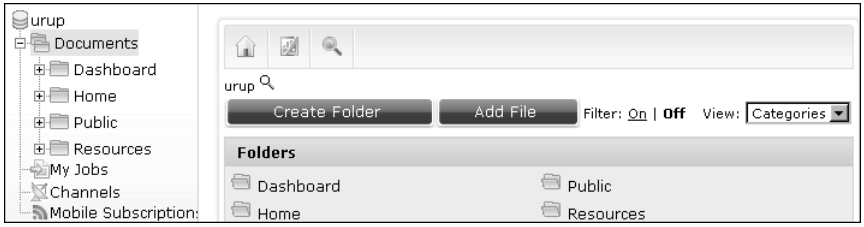


Figure 5-5 Viewing documents in Tree View Skin

The examples in the preceding three figures show how the standard Categories view looks in each of the three different skins. All Information Console skins show volume, system, and user information in the banner.

Selecting a file view

To change the way Information Console arranges files, in View, select Categories, Details, Icons, or List. These views provide the following changes to viewing files:

- Categories view displays files in different categories, as shown in Figure 5-6.

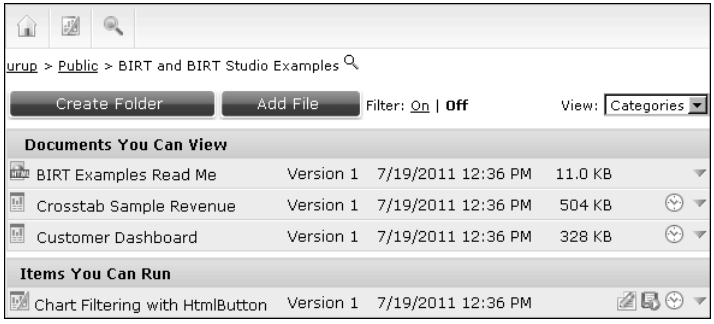


Figure 5-6 Viewing files in Categories View

- Details view displays specific details about each file and enable hover menus, as shown in Figure 5-7.

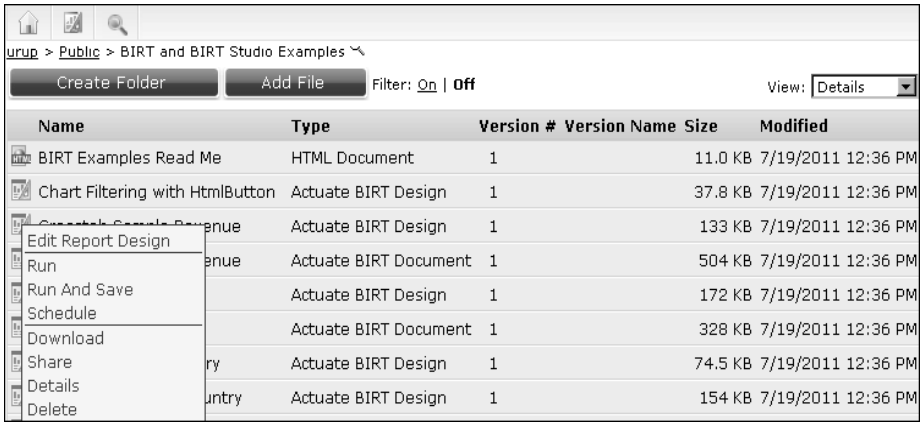


Figure 5-7 Viewing a file's hover menu in Details View

- Icons view displays a large icon for each file and enables hover menus. Icons view supports finding items by recognizing the icon as a visual cue, as shown in Figure 5-8.

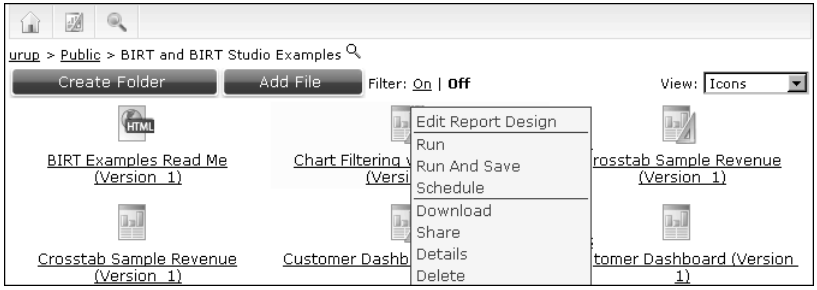


Figure 5-8 Viewing a file's hover menu in Icons View

- List view displays a small icon for each file in an Encyclopedia volume. List view supports viewing many items, as shown in Figure 5-9.

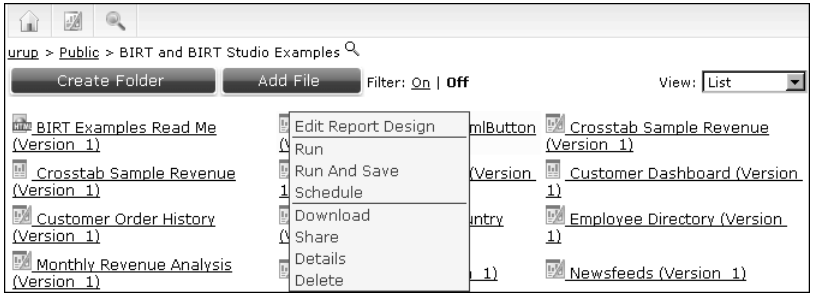


Figure 5-9 Viewing a file's hover menu in List View

Selecting an analytics experience level

If the analytics option is activated for viewing Analytic Cube files, users can enable different feature sets of the browser-based Analytics Cube Viewer tool by selecting one of the following standard levels:

- Novice
- Standard
- Advanced

For more information about Analytics experience levels, see *Information Console Developer Guide.* These levels can be customized by an Encyclopedia volume administrator.

Enabling filters

To display filter options on Information Console pages, select Display Filter for Channels, Documents, and Jobs. The setting Enable filters does not prevent a user from turning filter options off in individual pages.

Setting the document viewing option

To open each document that a user runs in a separate browser window, select Open in a new browser. Some web browsers can override this setting and open new windows in a separate tab of the web browser.

Updating password

The Encyclopedia volume administrator sets an initial user name and password for each user. To change the password for a user name, in Old password, type the user's current password. In New password, type characters different from those in the current password. In Re-enter new password, type those characters again to confirm the new password.

Choosing dashboard options

When the BIRT 360 option is available on the BIRT iServer, the user can reset dashboard options. Users can reset their dashboard to show a blank dashboard, to use the system default, or to load a shared dashboard file. This process erases all the user's existing shared or user dashboards loaded in the user's personal dashboard file. Dashboard and gadget files saved to a folder are not removed.

A user's dashboard settings can be reset in the dashboard options pane. This option erases any existing dashboards in the user's account.

Dashboards can be reset in the following ways:

- Blank dashboard starts Information Console with a blank dashboard.

- System default starts Information Console with default settings configured by the BIRT iServer administrator.
- Shared dashboard starts Information Console with the user selected shared dashboard file.

Figure 5-10 shows a user's dashboard options.

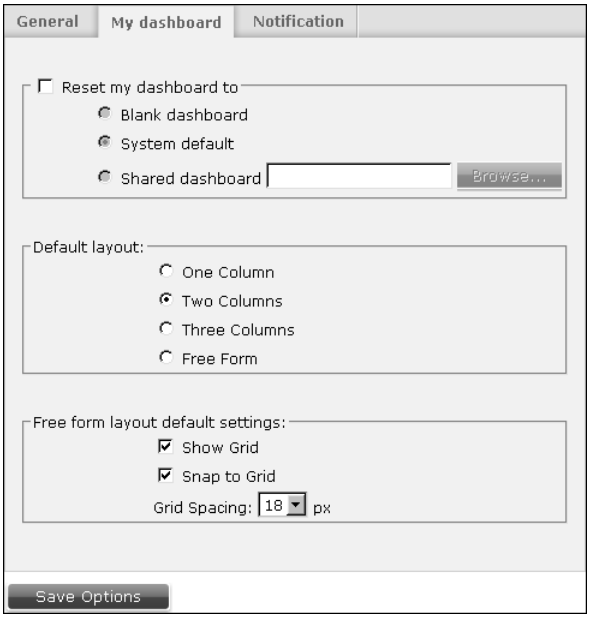


Figure 5-10 Dashboard user options for Information Console

Users can configure the default layout for their new dashboards. All new dashboards can have 1, 2, 3 column layout or a free form layout.

Dashboard designers who use the free form layout for gadgets, can activate a grid and select spacing of the grid. This helps the user to organize gadgets on the new dashboard. When Snap to grid is selected, gadgets in a free form layout will snap to the grid lines to help the user align multiple gadgets on the dashboard.

Choosing notification options

The Encyclopedia volume administrator sets initial report notification options, as shown in Figure 5-12. A user can change these options at any time.

The notification options determine if and how the user can receive notifications about successful and failed jobs. The notification options also apply to jobs that the Encyclopedia volume administrator or other users submit and to which you have access. You can choose to receive notices through e-mail, in your personal

channel, or both. By default, notices for failed and successful jobs appear only in your Personal Channel.

How to set notification options

1 Log in to Information Console.

2 Choose Options from the banner menu, as shown in Figure 5-11.

Figure 5-11 Choosing options in the banner menu

3 Choose Notification.

4 In Options—Notification, select your preferred options. Figure 5-12 shows typical notification options.

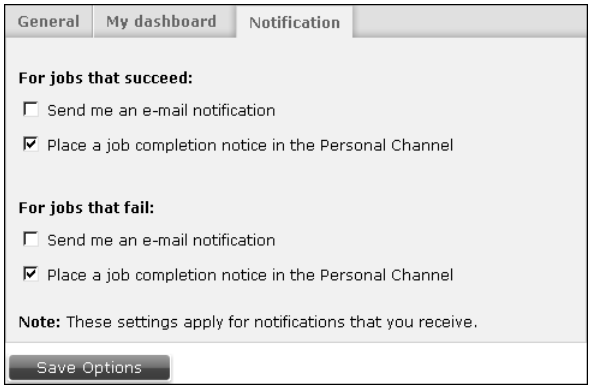


Figure 5-12 Notification user options for Information Console

5 Choose Save Options. New settings take effect immediately.

Creating default folders for document viewing

The My Documents file explorer shows a users home directory. You can create custom shortcuts to folders in Information Console by copying the My Documents page. You can rename copied My Documents pages and set them to load any folder that the you have permissions to view.

For example, a user copies the My Documents page and sets the copied dashboard to always display the Sales folder of the Encyclopedia volume. The user then renames the copied My Documents page to Sales.

How to display default folders

1 Log in to Information Console.

2 Choose Copy from the My Documents menu, as shown in Figure 5-13.

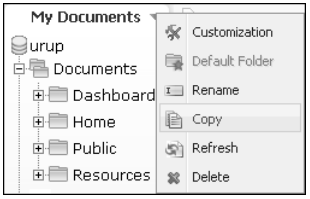


Figure 5-13 Copying the My Documents dashboard

3 Choose Default Folder in the copied page menu, as shown in Figure 5-14.

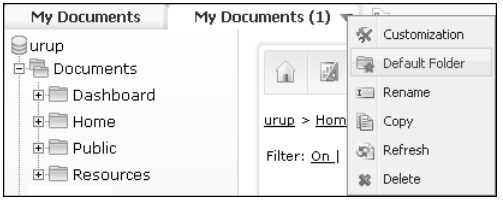


Figure 5-14 Choosing default folder

Default Folder appears, as shown in Figure 5-15.

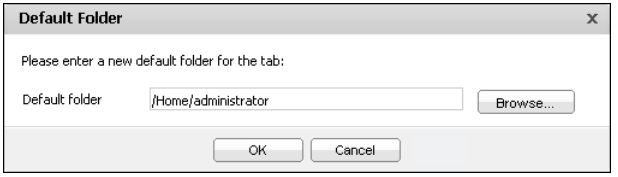


Figure 5-15 Selecting the default folder to display

4 Choose browse to select a folder. Select Folder appears, as shown in Figure 5-16.

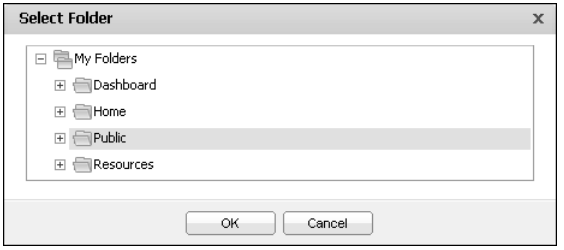


Figure 5-16 Browsing to find a new folder to display

5 Select a folder and choose OK. Default Folder appears displaying the selected folder.

6 In Default Folder, choose OK. The new page now shows the selected folder.

Selecting language and time zone settings

An Encyclopedia volume administrator sets up available language and time zone selections. The language setting determines the language of the user interface and the format in which dates, times, numbers, and currency display in the Information Console user interface.

For example, using the English (United States) locale, Information Console displays a date and time as May 14, 2010 5:08:30 PM. Using the French (France) locale for the same time, Information Console displays the date and time as 14 mai 10 17:08:30. Information Console users must select language and time zone settings independently and appropriately for any locale.

In some cases, Actuate Information Console and the BIRT iServer that manages the Encyclopedia volume run in different time zones. For example, a user chooses GMT (Greenwich Standard Time) for the time zone, but Actuate iServer runs on IMT (India Standard Time). When scheduling a report, the user specifies the time in Greenwich Standard Time. The BIRT iServer schedules the job for the corresponding time in its time zone.

How to select language and time zone settings

1. Log out of Information Console.
2. In Log In, select a volume profile name. Type a user name and password. Make the following selections:
   - In Language, select the appropriate language for the user.
   - In Time Zone, select an appropriate time zone.

   Choose Log In, as shown in Figure 5-17.

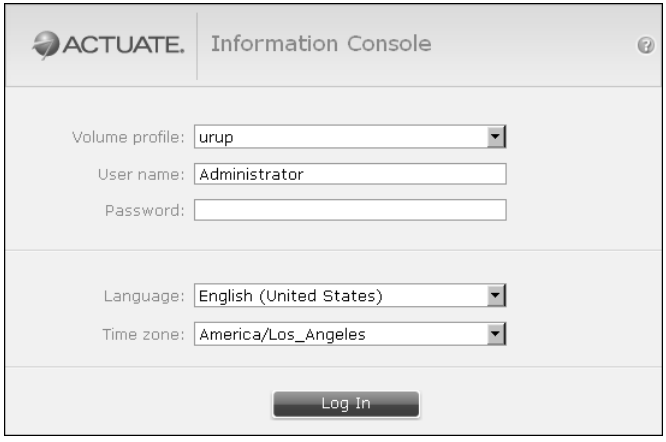


Figure 5-17 Logging in to Information Console

Subscribing to channels

Channels provide a list of the most recently completed file jobs. When a user's file job completes, a notification containing the URL to the generated document appears in a user's personal channel. This notification also appears in channels the user subscribes to if the user has write permission to the channel. Other channel subscribers receive the notification.

By default, every user subscribes to their Personal Channel. A user can be subscribed to additional channels by choosing from available channels. If a channel is not visible, contact the BIRT iServer administrator.

How to subscribe to a channel

1 Log in to Information Console.

2 Choose Channels from the My Documents navigation pane. The Channel page appears.

3 Select Subscribe to channels and choose OK, as shown in Figure 5-18. Available channels appear in a list.

Figure 5-18 Displaying available channels

4 Select subscribe for each desired channel, as shown in Figure 5-19.

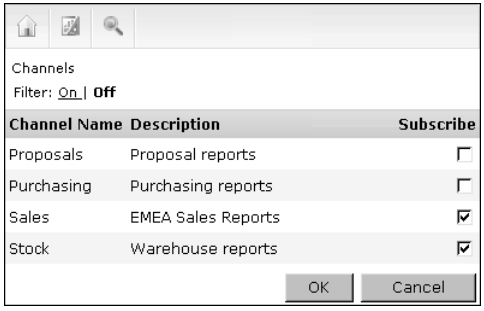


Figure 5-19 Selecting from available channels

5 Choose OK.

Using browser bookmarks

Information Console is a browser-based application and uses URL addresses to interact with an Encyclopedia volume. Many of these URL addresses can become browser bookmarks or favorites for fast user access to selected web pages of Information Console. The following activities can be saved as browser bookmarks or favorites:

- Log in to Information Console
- Running or scheduling a job
- Viewing a document file

Bookmarks for running a job or viewing a document require users to log in to Information Console.

Many Actuate documents exist for temporarily viewing. When the BIRT iServer time out period for these documents is exceeded, the web URL becomes unavailable. Additionally, document permissions can limit which users can see or run a report.

Some browser-based tools, for example BIRT Viewer and BIRT Interactive Viewer, include a link option that can create a URI to rerun a document on demand by any user with the appropriate permissions. For more information about accessing Information console with custom URIs, see *Information Console Developer Guide*.

Email notifications also include direct links to new documents.

Customizing skins

Information Console administrators can create new or personalize existing skins using the skin manager. Customization is available to administrators from the My Documents menu, as shown in Figure 5-20.

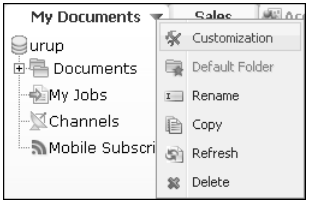


Figure 5-20 Launching Information Console skin customization

For more information about using the Information Console skin manager, see *Information Console Developer Guide*.

Chapter

6

Using BIRT Mobile

This chapter contains the following topics:

- About BIRT Mobile software
- Using Mobile Subscriptions
- Configuring BIRT Mobile profiles
- Restarting BIRT Mobile

About BIRT Mobile software

BIRT documents can be viewed on Apple® and Android™ mobile devices using BIRT Mobile software. Applications connect to an enterprise BIRT iServer over a virtual private network or wireless network to display BIRT report files on a cell phone or tablet. Figure 6-1 shows BIRT content displayed on mobile devices.

Figure 6-1 BIRT content viewed using BIRT Mobile

BIRT Mobile software supports the following user activities:

- Viewing BIRT reports
- Sharing BIRT reports by email
- Printing to network printers supported by the mobile device
- Running BIRT report design files with custom parameters

- GPS awareness when supported by the mobile device
- Selecting hyperlinks to view report details, access web sites and send email
- Making phone calls to phone numbers in a report

The following steps enable you to view BIRT reports on your mobile device:

1. Subscribe to selected BIRT reports from Information Console, using Mobile Subscriptions.
2. Install the BIRT Mobile software on your mobile device.
3. Configure a connection profile to access your Information Console account.
4. Start the BIRT Mobile software on a network connected to the BIRT iServer. If your BIRT iServer is behind a network firewall you may need to open a virtual private network (VPN) connection first. Check with your network administrator.

Using Mobile Subscriptions

Mobile users manage which BIRT content to display on their mobile device using Information Console's Mobile Subscriptions page. Figure 6-2 shows the Mobile Subscriptions page.

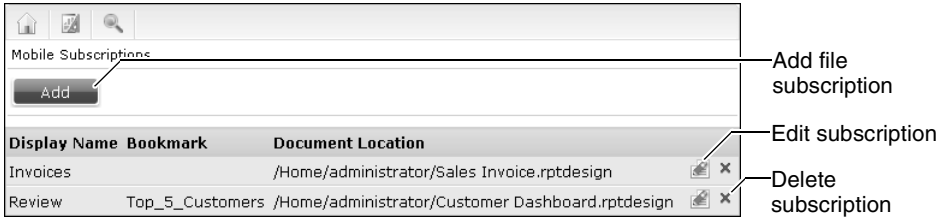


Figure 6-2 Managing files using Mobile Subscriptions

Using Mobile Subscriptions, users can select the latest version of BIRT design and document files. Subscribed files contain the following options:

- A custom display name
- Orientation for the file in landscape or portrait mode
- Display the entire file or only a bookmarked part of it
- Select parameters values for reports that are run on demand.

Contact your BIRT iServer administrator for more information about using BIRT mobile viewing software.

How to add a file to mobile subscriptions

1 Log in to Information Console.

2 Choose Mobile Subscriptions from the My Documents navigation pane. The Mobile Subscriptions page appears, as shown in Figure 6-3.

Figure 6-3 Adding files to Mobile Subscriptions

3 Choose Add. Mobile subscription appears, enabling you to select a file for mobile viewing, as shown in Figure 6-4.

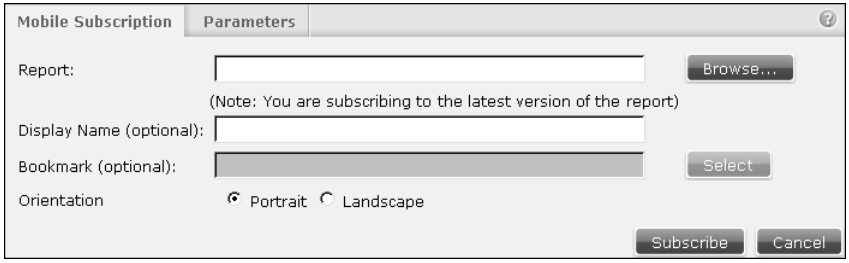


Figure 6-4 Selecting BIRT content to display on a mobile device

4 Choose Browse. A folder browser appears for you to select a file, as shown in Figure 6-5. A filter is available to find a file in a folder with many files.

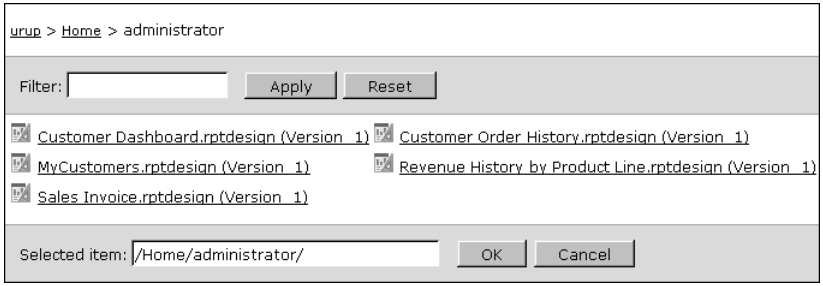


Figure 6-5 Selecting a file for mobile viewing

5 Select the file that you want to view on a mobile device. If necessary, navigate to a different folder where your file is located. This example selects the SalesInvoice.rptdesign file, as shown in Figure 6-6.

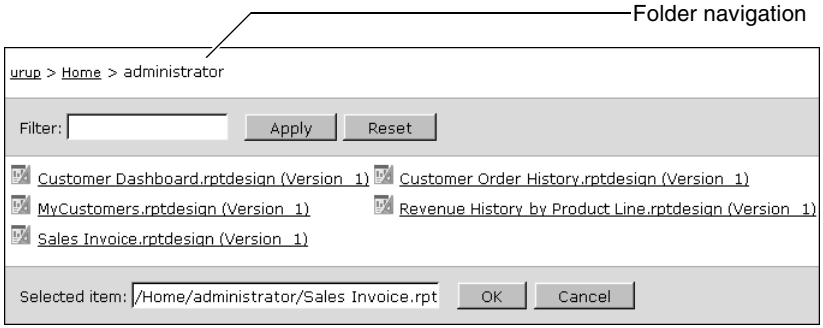


Figure 6-6 Selecting a file for mobile viewing

Choose OK to subscribe to the selected file. Mobile subscription appears and displays the name of the selected file.

6 Add the following optional values to the selected file:

- Add a display name that will be displayed in the Mobile Device in place of the filename. This example adds the display name Invoices, as shown in Figure 6-7.

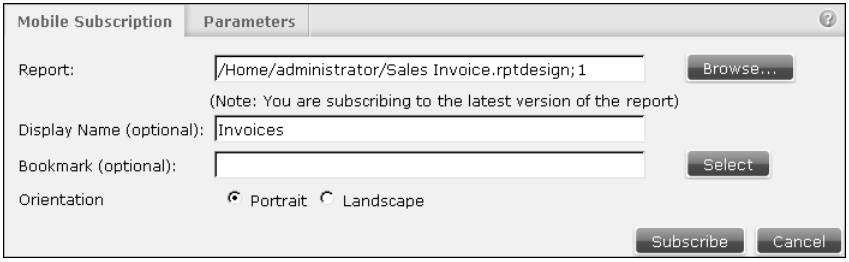


Figure 6-7 Adding a mobile display name to the selected BIRT file

- Add a bookmark to display instead of displaying the entire file in the BIRT mobile viewer software. Choose Select to select a bookmark in the file.
- Select a default orientation to display the file when viewed in the BIRT Mobile viewer software.

Choose Subscribe unless the BIRT file requires parameters.

7 When the BIRT file requires parameters, choose parameters to select a parameter value, as shown in Figure 6-8. Required parameters are highlighted.

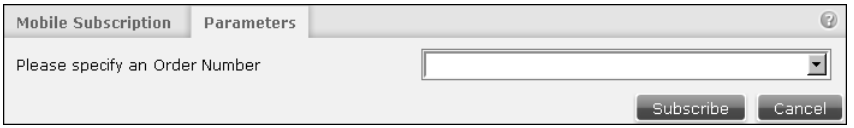


Figure 6-8 Adding a parameter value to use when viewing the file

Choose Subscribe when finished selecting or adding parameter values.

8 The Mobile subscription page appears and displays the new mobile subscription, as shown in Figure 6-9.

Figure 6-9 Reviewing a new mobile subscription

Configuring BIRT Mobile profiles

BIRT Mobile viewing software supports multiple connection profiles. Each profile contains the information needed to log in to a BIRT iServer. Figure 6-10 shows a typical connection profile.

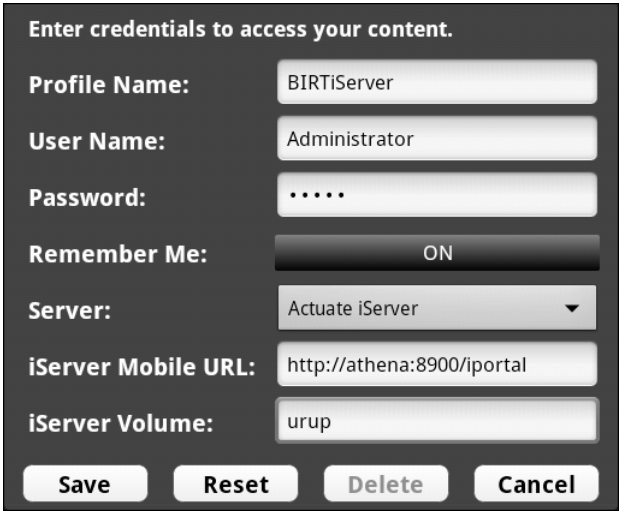


Figure 6-10 Configuring a connection profile

The following information is required to connect BIRT Mobile to a BIRT iServer:

- Profile Name, a name to identify the connection profile
- User Name, the name of your Information Console account
- Password, your password to access Information Console
- iServer Mobile URL, the URL to access Information Console
- iServer Volume, the name of your Encyclopedia volume which Information Console uses to store files

This information is available from your BIRT iServer administrator. Disabling Remember Me requires you to type your password each time that you use the connection profile to access the BIRT iServer.

Restarting BIRT Mobile

BIRT Mobile for Apple devices can be reset from the Settings panel. This resets the BIRT Mobile software to use its default connection profile. The BIRT Mobile application must not be running as a multitasking background task. Apple devices running iOS 4.3 and later support multitasking.

How to reset BIRT Mobile

The following steps will reset the BIRT Mobile application:

1. Verify if BIRT Mobile is not running in the background by double-clicking the Home button. A list of running applications appears.
    1. If you see BIRT Mobile in this list, press and hold the BIRT Mobile image until a minus sign appears on the BIRT Mobile image. Figure 6-11 shows the BIRT Mobile application running.

Figure 6-11 Closing BIRT Mobile

    2. Choose the minus sign on the BIRT Mobile image to close BIRT Mobile. This does not delete it from the device.
2. Select Settings from the Apple mobile device and choose BIRT Mobile. The BIRT Mobile settings appear, as shown in Figure 6-12.

3 Enable Reset settings on App restart.

4 Press the home button to return to the Home screen.

Figure 6-12 Resetting the configuration of BIRT Mobile

5 Choose BIRT Mobile to restart the BIRT Mobile application with the default settings.

Index

Symbols

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y