One Design
One Server
One User Experience

Using Information Console

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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 how Information Console supports delivering BIRT content using a web browser.
- *Chapter 2. Working with items in a volume.* This chapter explains how Information Console supports specific file and folder operations on an iServer system.
- *Chapter 3. Using BIRT dashboards.* This chapter describes how an Information Console user works with shared dashboards.
- *Chapter 4. Running file jobs.* This chapter explains how to schedule and run file jobs using Information Console.
- *Chapter 5. 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:

- Delivering BIRT content
- About Information Console
- Getting started
- Accessing Information Console features
- Reviewing iServer license options
- Setting options
- About optional browser-based tools
- About Actuate documentation

Delivering BIRT content

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 manual explains features and visual layout available to a user with all functionality enabled, as in a default Information Console installation. Contact your Actuate BIRT iServer administrator if features described in this document do not appear in your installation.

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.

Browsing content in a volume

Information Console requires a web browser. The following web browsers are supported for use with Information Console:

- Google Chrome 7.x, 12.x, 14 - 22.x
- Internet Explorer 7.x, 8.x, and 9.x
- Mozilla Firefox 4 - 15.x
- Safari 4, 5

After entering the web address of Information Console, a user logs in to access files and dashboards stored on the Encyclopedia volume. Figure 1-1 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.

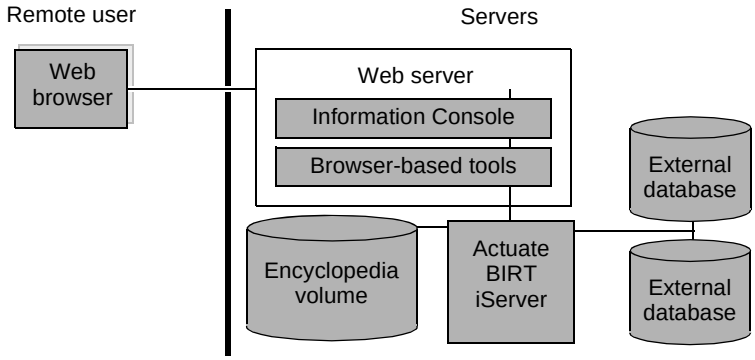


Figure 1-1 Actuate browser-based application architecture

Understanding content life cycle

All content is stored in an Encyclopedia volume through one of the following methods:

- Run or schedule a file 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 1-2 shows the typical content life cycle that Information Console supports.

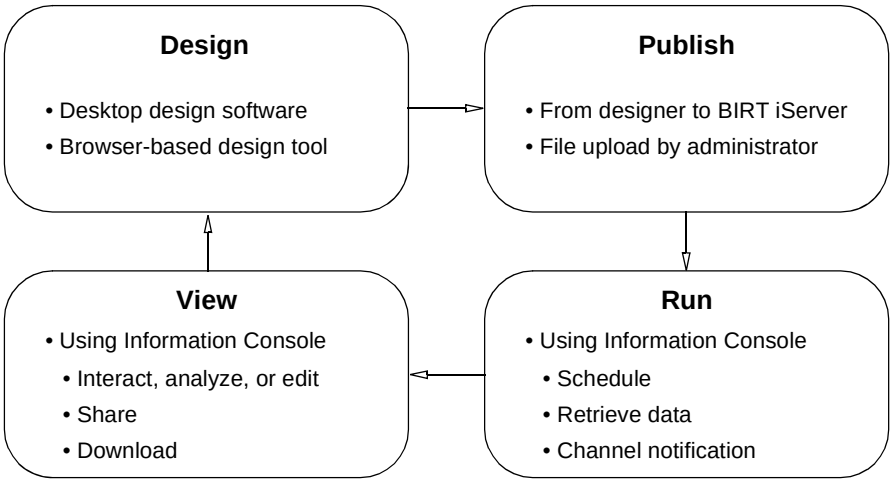


Figure 1-2 Content life cycle

Getting started

A user opens Information Console to connect to a volume on a BIRT iServer. Each user must have a user name and password to log in to Information Console. A URL address to the log in web page is also required.

When logging in to Information Console, a user selects an Encyclopedia volume. A volume contains items such as cube files, dashboards, design templates, documents, gadgets, information objects, and spreadsheets.

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 control. Dashboard use is described later in this book.

Information Console supports customization. If you cannot see a feature, file, folder or function described in this book, contact an administrator to establish the access, user role, and file or folder privileges that may be required for the feature. For example, an administrator can limit access to My Documents and make some dashboards available to only some users.

This manual describes functionality available to different Information Console user roles. Most examples show a user who can access all features available in an administrator security role. This user has privileges to access a home folder created by an administrator. For comparison, some examples show limited functionality available to a non-administrator user.

How to log in to a volume using Information Console

1 To open the Information Console login page, complete one of the following tasks:

- If you installed Information Console with BIRT iServer, choose Start➤All Programs➤Acutate11➤BIRT iServer. In the iServer welcome page, choose Log In Now.
- Alternatively, 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 an available locale. A 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.

The example in Figure 1-3 shows user choices for logging in to a volume named urup, using a western United States locale.

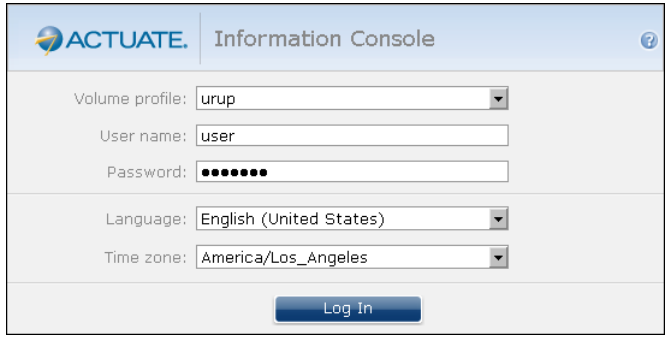


Figure 1-3 Logging in to Information Console

3 Choose Log In. The Information Console home page associated with your login credentials appears.

How to log out of a volume using Information Console

Choose Log out to quit a user session of Information Console, as shown in Figure 1-4.

Figure 1-4 Logging out using Information Console

Navigating

After logging in to a volume using Information Console, you begin to navigate from one of the following pages:

- Documents, if you have no Home folder assigned
- A folder in Home assigned to you by an administrator as your home folder
- A default dashboard defined by the BIRT iServer administrator
- A dashboard you last visited before quitting your previous session, if dashboards are enabled

The example in Figure 1-5 shows the home folder assigned to a typical user.

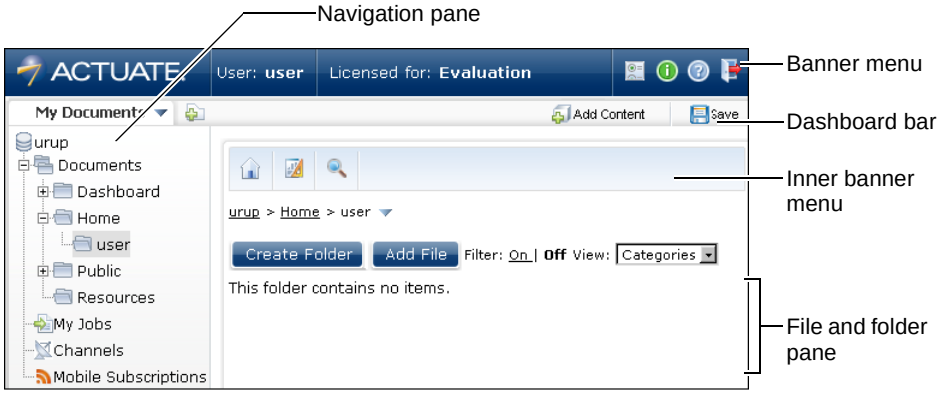


Figure 1-5 Viewing a home folder using Information Console

Table 1-1 describes each part of the Information Console web page.

Table 1-1 Parts of the Information Console web page

Part name	Description
Banner menu	Displays links to user options, the about and license page, online help, and session log out.

Table 1-1 Parts of the Information Console web page

Part name	Description
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.
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

To change way in which Information Console arranges items in the file and folder pane, in View, choose one of the following options:

- Categories
  In Categories view, files and folders appear grouped in categories, as shown in Figure 1-6. Common operations available for each file appear as icon images. All additional file operations are available by selecting an option from the File menu.

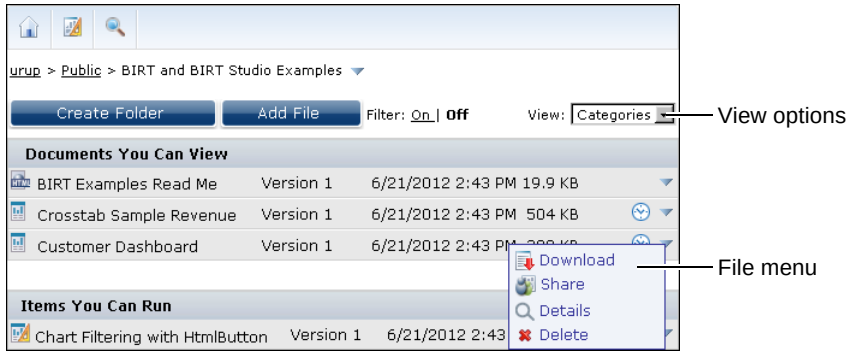


Figure 1-6 Viewing files in Categories view

- Details
  In Details view, files and folders appear organized alphabetically in a table, as shown in Figure 1-7. File type and page count are visible. Common file operations available for each file appear as options on the File menu.

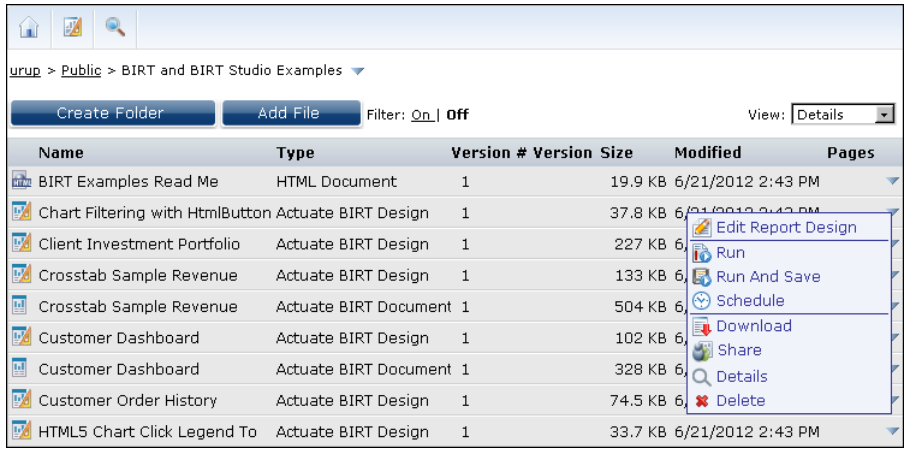


Figure 1-7 Viewing files in Details view

- Icons

  In Icons view, files and folder names appear below a large icon that represents the file's type. File names are organized alphabetically in multiple rows, as shown in Figure 1-8. Common operations available for each file appear in the File menu when the cursor hovers over the file icon.

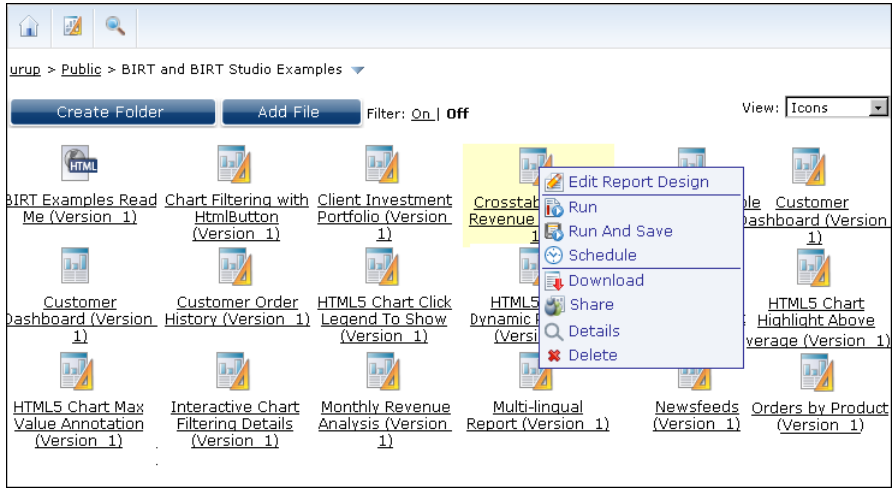


Figure 1-8 Viewing files in Icons view

- List

  In List view, files and folder names appear below a small icon that represents the file's type. File names are organized alphabetically in multiple rows, as shown in Figure 1-9. Common operations available for each file appear in the File menu when the cursor hovers over the file icon.

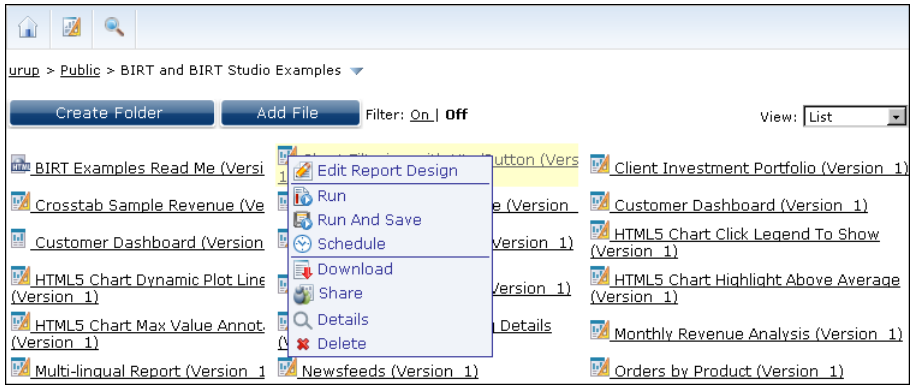


Figure 1-9 Viewing files in List view

Most examples in this manual show and describe Information Console using the Categories view.

Applying a skin

Information Console provides graphic layout options called skins. A user can select alternate skins using Options. Most examples in this manual show and describe Information Console using the default tree view skin.

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

- Classic

  Classic skin displays Documents, My Jobs, and Channels as icons in the sidebar, as shown in Figure 1-10.

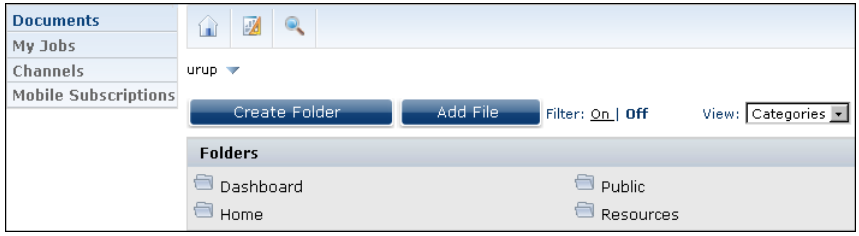


Figure 1-10 Viewing documents in Classic skin

- Tabbed

  Tabbed skin displays Documents, My Jobs, and Channels as tabs at the top of the page, as shown in Figure 1-11.

Figure 1-11 Viewing documents in Tabbed skin

- Treeview

  Treeview skin displays Documents, My Jobs, and Channels as a hierarchy in the navigation pane. The hierarchy starts at the root folder, as in Figure 1-12.

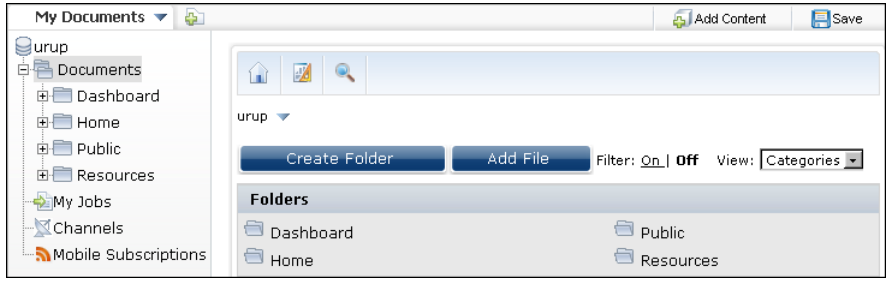


Figure 1-12 Viewing documents in Treeview skin

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.

Accessing Information Console features

Information Console provides user access to content stored in a volume on a BIRT iServer system. Using Information Console, you access the features and options included in the system license and available in your user role. Actuate supplies Information Console with all features available to all users by default.

An administrator may customize the features available in Information Console. For more information about customizing Information Console, see *Information Console Developer Guide*.

Information Console provides unique functionality levels that complement the default security roles on the BIRT iServer. For more information about how an administrator manages security roles, see *Managing an Encyclopedia Volume*.

Understanding available features

When you log in to a volume using Information Console, the features available to you depend on the security role and functionality level set for you by an administrator. As supplied, Information Console provides the following features:

- Channels
  Provides access to one personal or multiple subscribed Channels
- Customization
  Provides access to Customization options for an Information Console skin
- Documents
  Provides access to Documents and navigate files and folders in a volume to which you have View privilege
- Jobs
  Provides access to submit and access notifications in My Jobs
- Mobile
  Provides access to BIRT Mobile viewing
- Search
  Provides access to search for items in a volume on an iServer system

An Information Console sub-feature permits a user with required privileges to use Information Console features in the following ways:

- Add File
  Permits you to add a file to a volume. You must have required privileges for each file and folder you add.
- Advanced Data
  Permits you to modify and synchronize data sets using BIRT Studio.
- Create Folder
  Permits you to create a folder in which you have required privileges.
- Dashboard Developer
  Permits you to build and administer dashboard files.
- Delete File
  Permits you to delete a file for which you have required privileges, using Delete option on the File menu.
- Delete Folder
  Permits you to delete a folder for which you have required privileges, using Delete option on the Folder menu.

- Download File
  Permits you to download a file from folder in a volume You must have required privileges to the file and folder.
- Interactive Viewing
  Permits you to open the browser-based BIRT Interactive Viewer.
- Job Priority
  Permits setting a job priority value up to your maximum allowed number.
- Self Notification With Attachment
  Permits you to generate electronic notification of a file job with an attachment containing details.
- Share Dashboard
  Permits you to share a BIRT dashboard for which you have required privileges.
- Share File
  Permits you to share a file for which you have required privileges using Share option on the File menu.
- Subscribe Channel
  Permits you to subscribe to multiple channels for which you have required privileges.

All users can delete files or folders to which they have Delete privilege. All users 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.

Reviewing iServer license options

iServer license options enable multiple Information Console users to access 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 user access to the options licensed for an iServer system.

How to review BIRT iServer license options

1. In the Information Console banner, choose About.
2. Select License. The example in Figure 1-13 shows the licensed options on a BIRT iServer.

Figure 1-13 Verifying available BIRT iServer licensed options

Setting options

Options control how Information Console appears to each user. Options persist between Information Console user sessions. When logged in to a volume, you access Options from the Information Console banner.

How to view an option

1 Log in to Information Console.

2 Choose Options from the banner menu, as shown in Figure 1-14.

Figure 1-14 Choosing options in the banner menu

Choosing general options

In Options—General, you can set the following options:

- Your e-mail address
- Preferred graphic skin
- Preferred file navigation view
- Analytics experience level

- Visibility of file-name filters
- Document viewing preference
- Password update

Setting an e-mail address

A user can update or add an e-mail address that Information Console associates with the user. This e-mail 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 e-mail message. If e-mail notifications do not arrive, contact your BIRT iServer administrator to see if the e-mail service is available.

Selecting an Analytics experience level

If the Analytics option is activated for viewing Analytics 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 filter options

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 1-15 shows dashboard options for an Information Console user.

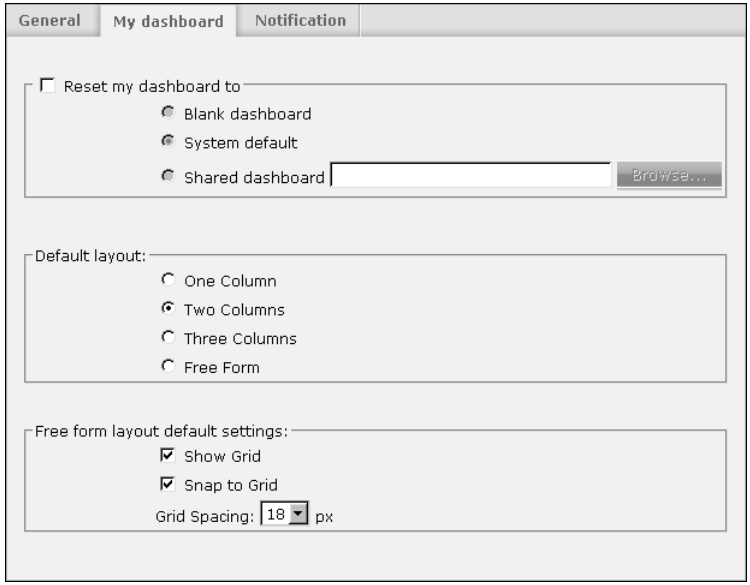


Figure 1-15 Dashboard options for an Information Console user

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

Dashboard designers who use the freeform 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 freeform 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 1-16. 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 In Options—Notification, select your preferred options. Figure 1-16 shows typical notification options.

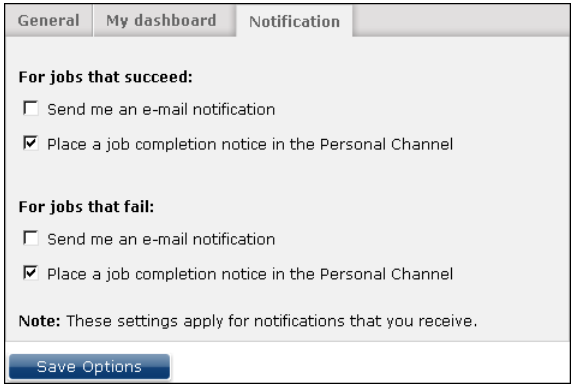


Figure 1-16 Notification options for an Information Console user

2 Choose Save Options. New settings take effect immediately.

Creating a default folder for document viewing

To any user having a home folder defined, the My Documents file explorer shows the home folder for that user. To create custom shortcuts to folders in Information Console, copy the My Documents page. Rename a copied My Documents page and set it to load any folder that a user has privileges to view.

For example, copy the My Documents page and set the copied dashboard to always display the Sales folder in the Encyclopedia volume. Then, rename the copied My Documents page to Sales. Users with appropriate rights view contents of the folders loaded on the Sales page.

How to display default folders

1 Log in to Information Console.

2 Choose Copy from the My Documents menu, as shown in Figure 1-17.

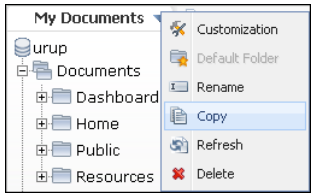


Figure 1-17 Copying the My Documents dashboard

3 Choose Default Folder in the copied page menu, as shown in Figure 1-18.

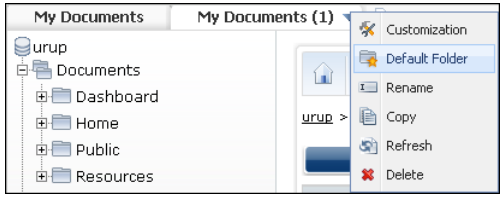


Figure 1-18 Choosing Default Folder

Default Folder appears, as shown in Figure 1-19.

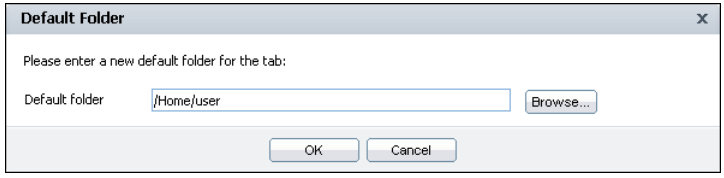


Figure 1-19 Selecting the default folder to display

4 Choose Browse. Select Folder appears, as shown in Figure 1-20.

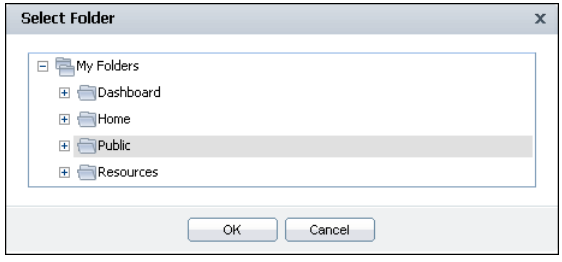


Figure 1-20 Browsing to find a new folder to display

5 Select a folder and choose OK. The selected folder appears in Default Folder.

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

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:

- Logging 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 privileges 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 privileges. For more information about accessing Information Console with custom URIs, see *Information Console Developer Guide*.

E-mail notifications also include direct links to new documents.

Customizing skins

Information Console users can change the visual appearance of Information Console by creating a new skin or customizing an existing one. To customize a skin, select the tab menu in My Documents. Then, choose Customization, as shown in Figure 1-21.

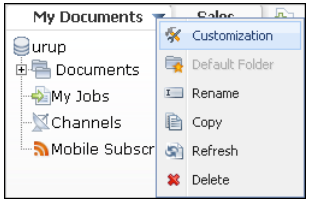


Figure 1-21 Opening the skin manager in Information Console

For more information about creating and customizing a skin for Information Console, see *Information Console Developer Guide*.

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.

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 1-22 shows BIRT Data Analyzer launched from a data object store file.

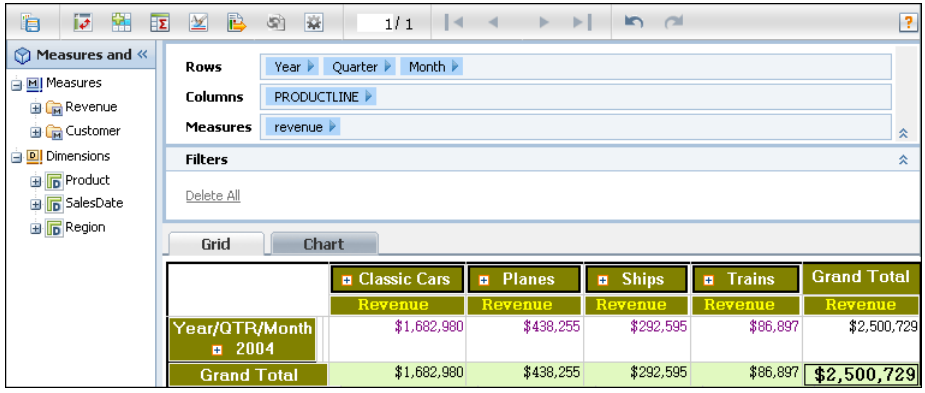


Figure 1-22 BIRT Data Analyzer interface

- 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 1-23 shows BIRT Interactive Viewer.

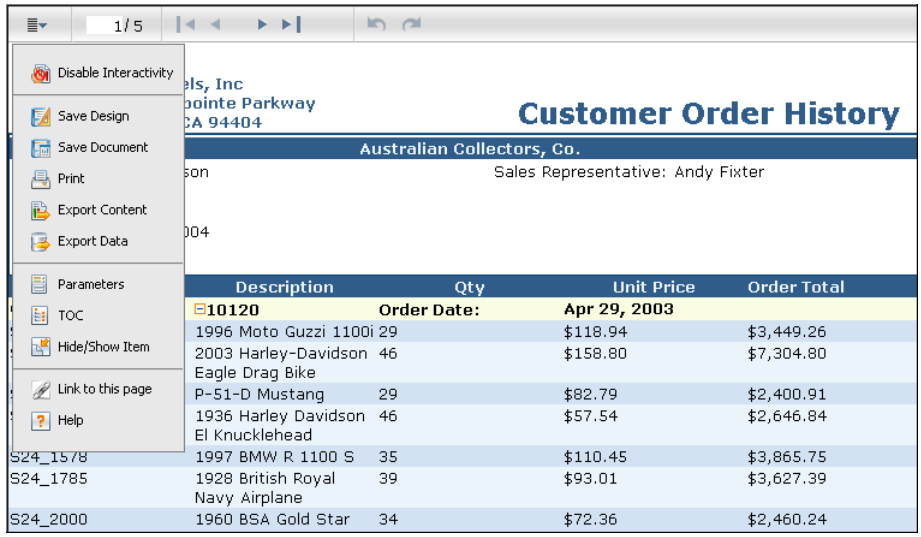


Figure 1-23 BIRT Interactive Viewer interface

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 1-24 shows BIRT Studio.

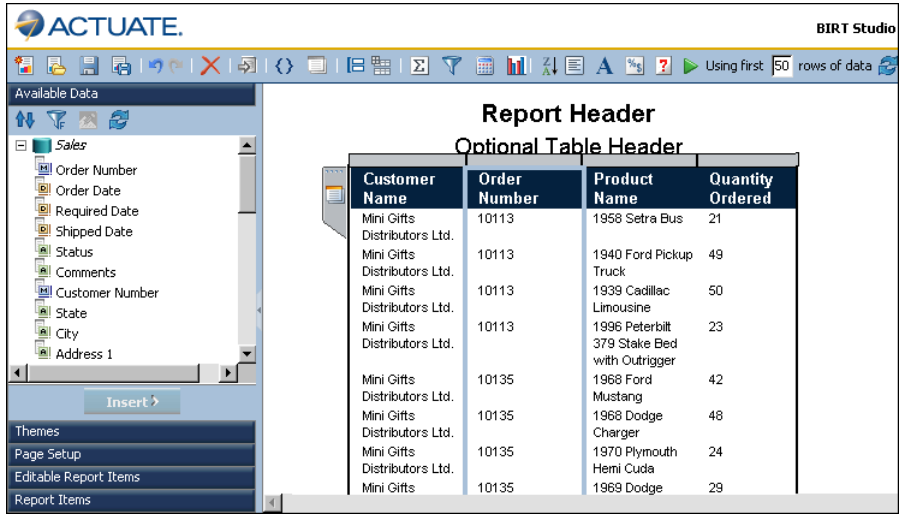


Figure 1-24 BIRT Studio interface

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 1-25 shows how to launch BIRT Studio.

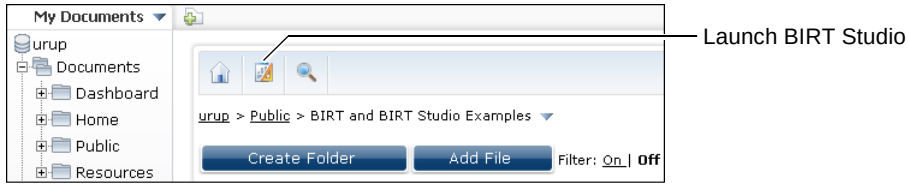


Figure 1-25 Opening BIRT Studio

- 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 1-26 shows BIRT Viewer.

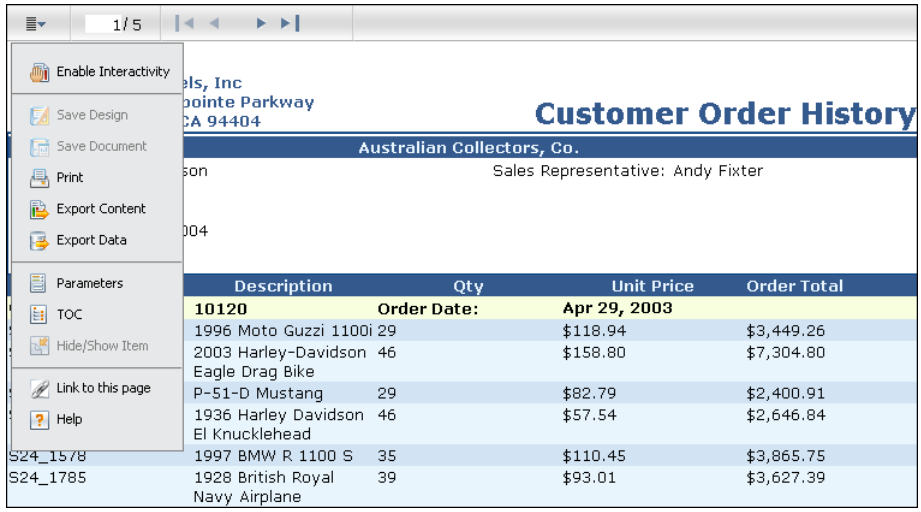
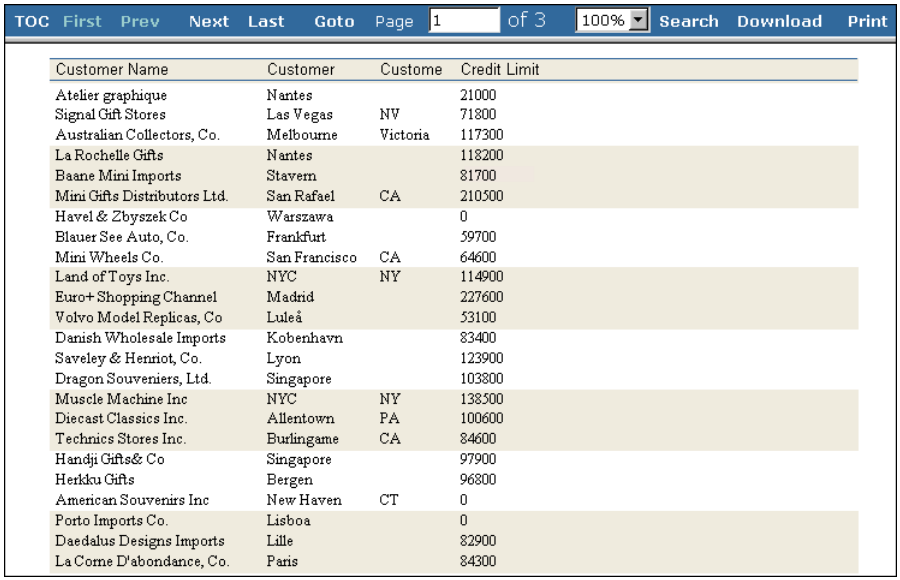


Figure 1-26 BIRT Viewer interface

- DHTML Viewer

  Supports viewing the output of an information object or an e.Report in Dynamic HyperText Markup Language (DHTML) format. See this tool's online help for additional information. Figure 1-27 shows DHTML Viewer.



Customer Name	Customer	Custome	Credit Limit
Atelier graphique	Nantes		21000
Signal Gift Stores	Las Vegas	NV	71800
Australian Collectors, Co.	Melbourne	Victoria	117300
La Rochelle Gifts	Nantes		118200
Baane Mini Imports	Stavern		81700
Mini Gifts Distributors Ltd.	San Rafael	CA	210500
Havel & Zbyszek Co	Warszawa		0
Blauer See Auto, Co.	Frankfurt		59700
Mini Wheels Co.	San Francisco	CA	64600
Land of Toys Inc.	NYC	NY	114900
Euro+ Shopping Channel	Madrid		227600
Volvo Model Replicas, Co	Luleå		53100
Danish Wholesale Imports	Kobenhavn		83400
Saveley & Henriot, Co.	Lyon		123900
Dragon Souveniers, Ltd.	Singapore		103800
Muscle Machine Inc	NYC	NY	138500
Diecast Classics Inc.	Allentown	PA	100600
Technics Stores Inc.	Burlingame	CA	84600
Handji Gifts& Co	Singapore		97900
Herkku Gifts	Bergen		96800
American Souvenirs Inc	New Haven	CT	0
Porto Imports Co.	Lisboa		0
Daedalus Designs Imports	Lille		82900
La Corne D'abondance, Co.	Paris		84300

Figure 1-27 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 1-28 shows Actuate Query Wizard.

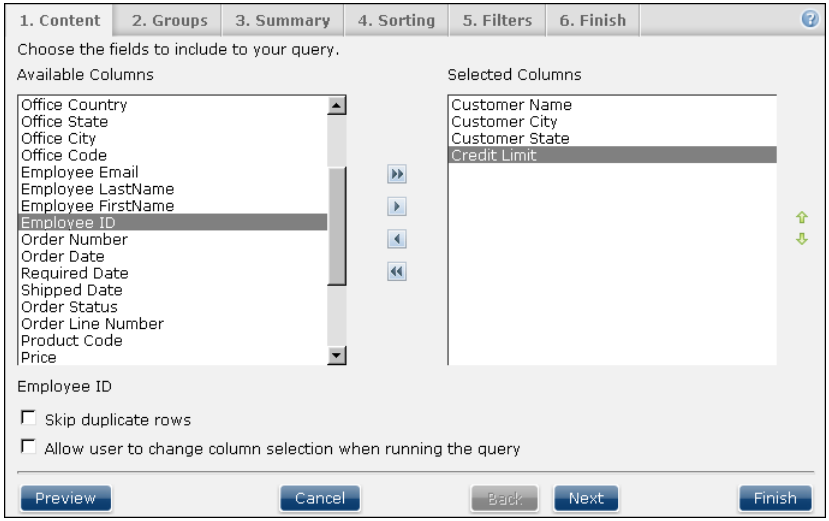


Figure 1-28 Actuate Query Wizard interface

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 1-29 shows Actuate e.Analysis.

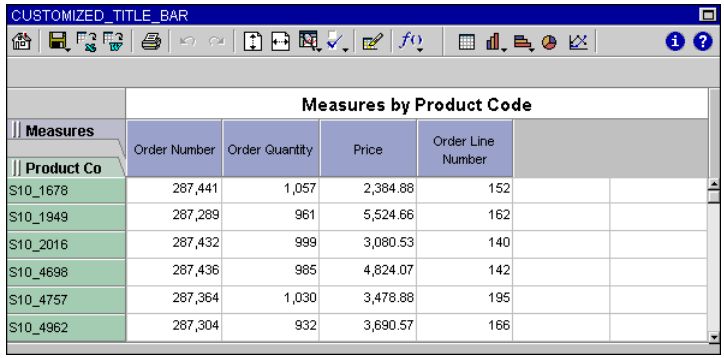


Figure 1-29 Actuate e.Analysis interface

- 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 1-30 shows the Analytics Cube Viewer tool.

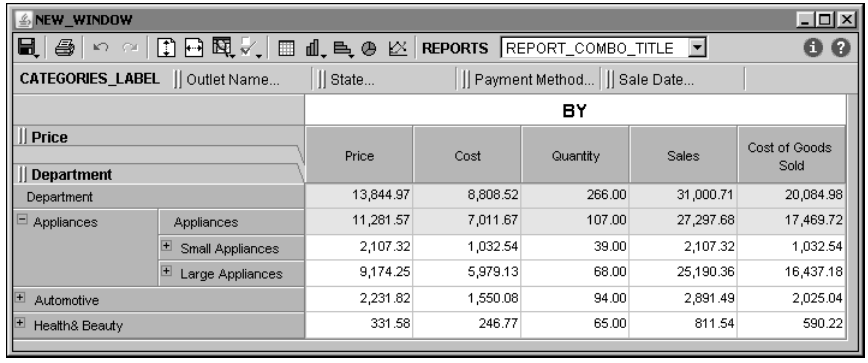


Figure 1-30 Analytics Cube Viewer interface

About Actuate documentation

The documentation includes the titles listed in Table 1-2.

Table 1-2 Actuate documentation

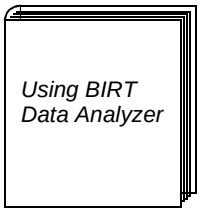
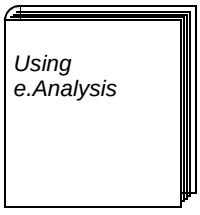
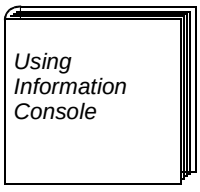
For information about this topic	See the following resource
Building BIRT Dashboards ■ Creating and sharing dashboards ■ Creating Actuate and custom gadgets ■ Managing dashboard resources ■ Linking gadgets	
Using BIRT Data Analyzer ■ Organizing and formatting a cross tab ■ Filtering cross tab data ■ 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	

Table 1-2 Actuate documentation

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 developer.actuate.com. Additional documentation is also available from this site. This document is the online help for Information Console. Each browser-based tool contains its own online help files.

Obtaining documentation

OpenText provides technical documentation in PDF and HTML formats. You can view PDF or HTML versions of the documentation from developer.actuate.com.

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 OpenText My Support at the following URL:

`https://support.opentext.com`

A new user must first register on the site and log in to view the release notes.

Updates to documentation in PDF form are available on OpenText My Support or at the following URL:

`http://www.developer.actuate.com`

Chapter

2

Working with items in a volume

This chapter contains the following topics:

- Working with a file
- Working with file types
- Sharing access to a file or folder
- Working with a folder
- Finding a file
- Using a channel

Working with a file

After logging in, Information Console displays a view of folders and files available in an iServer Encyclopedia volume. The navigation pane displays available folders. The file and folder pane displays files and folders that the user can access. The example in Figure 2-1 shows a folder in Categories view.

Each file type supports specific file operations. For example, a file type may support viewing documents, running a file job, editing a design file, or querying an information object.

An Information Console user manages a file by adding a file to folder, viewing details about a file, deleting a file, viewing content in a file, searching for a file, or sharing a file. The security role for a user and the access rights for a file determine the tasks a user can perform on a selected file. Options for Encyclopedia volume licenses determine which file types users can open and which file 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 privileges must allow the user to read and execute the specific file.

Viewing file properties

File properties include general information about the file such as file creator, type, location, version, author, access rights, and archiving policy for 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 view file properties

1 Navigate to a file.

2 To see detailed information for the file, make one of the following choices:

- In Details or Categories view select File menu, as shown in Figure 2-1. Then, choose Details.

Figure 2-1 Opening the file menu in Categories view

- In Icons or List view, open the File menu by hovering the cursor over a file icon, as shown in Figure 2-2. From the File menu, choose Details.

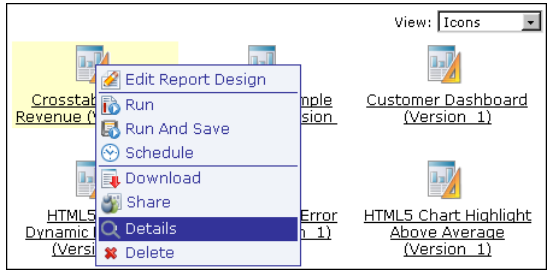


Figure 2-2 Opening Details for a file in Icons view

Detail appears, as shown in Figure 2-3.

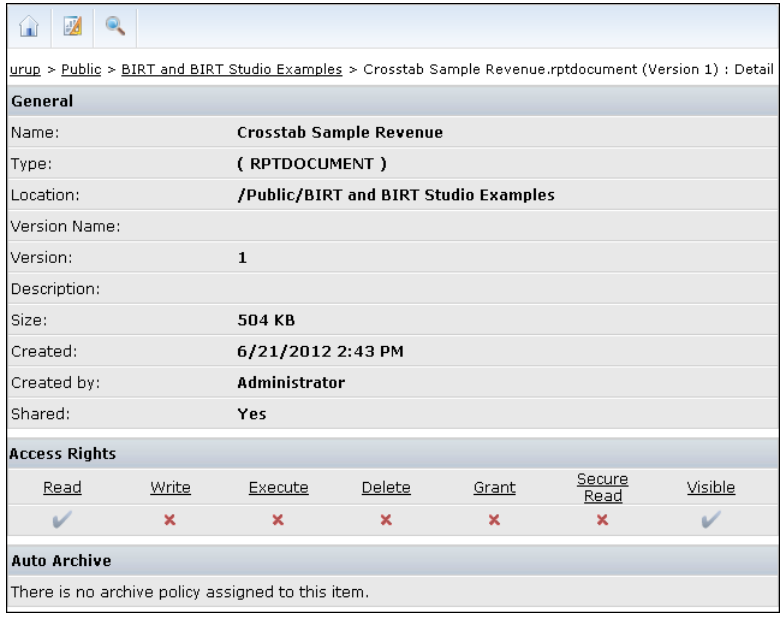


Figure 2-3 Viewing detailed file information

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. For example, temporary file links appear when:

- 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 Navigate to a file.

2 To confirm that you have the Delete privilege for a file, select the File menu for that file. Then, choose Details, as shown in Figure 2-4.

Figure 2-4 Accessing details for an Actuate BIRT design file

In Detail, verify that a check mark appears below Delete in Access Rights, as shown in Figure 2-5. Choose Back to return to the file view.

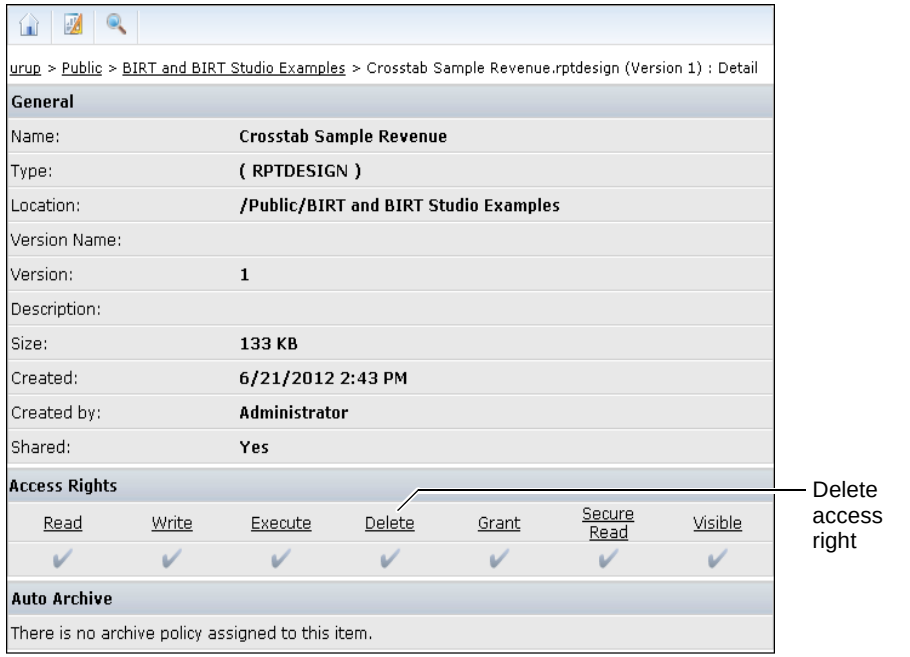


Figure 2-5 Confirming the Delete privilege for a file

3 For the file to delete, select the File menu, then choose Delete, as shown in Figure 2-6.

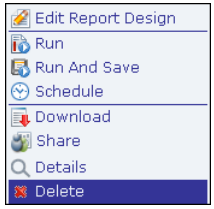


Figure 2-6 Choosing Delete for a file, using the File menu

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 adding a file to a selected folder in a volume. Add File appears to a user, as shown in Figure 2-7.

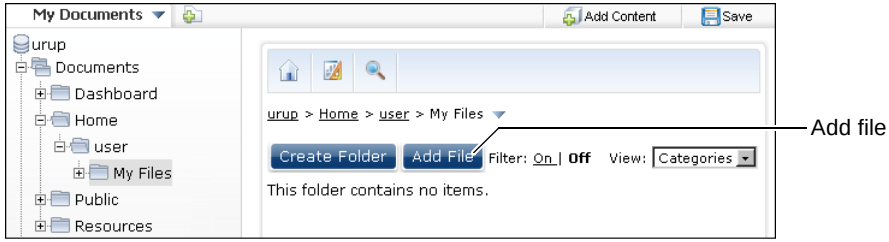


Figure 2-7 Adding a file to a selected folder

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 privileges appears in the destination folder. After adding a file, edit the file privileges 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 2-8.

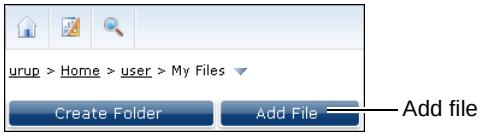


Figure 2-8 Opening Add File

3 In Add File, browse for a file name.

4 In Choose File to Upload, select a file. Figure 2-9 shows a document file on the local computer selected.

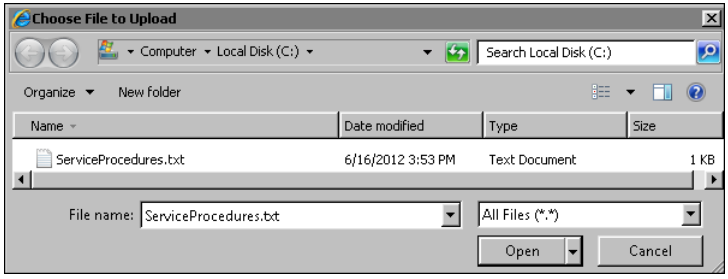


Figure 2-9 Selecting a file to add

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 2-10.

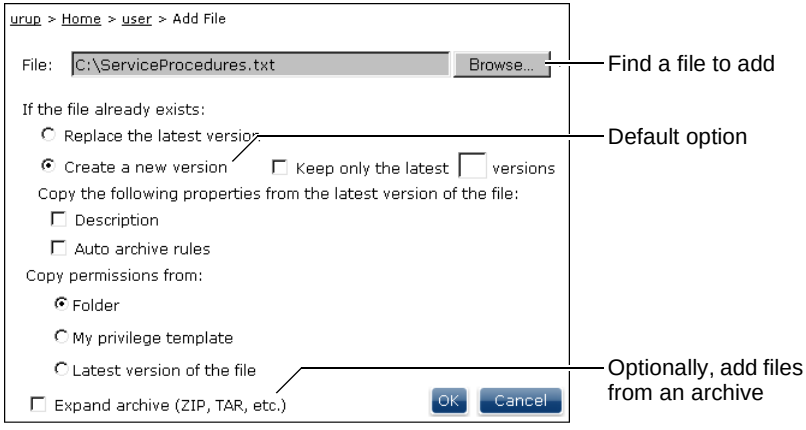


Figure 2-10 Selecting file upload options

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 options to copy properties from the latest version of the file.

7 Optionally, copy file privileges 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.

8 Optionally, to add multiple files in a folder to which you have Visible and Write privilege, select Expand archive.

9 Choose OK. The file appears in the destination folder, as shown in Figure 2-11.

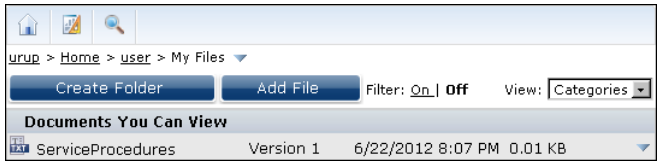


Figure 2-11 Viewing a file added to a folder

About document files

A document file presents information accurate at a single point in time. Using Information Console, you view a document file immediately. No update of the data appearing in the document occurs. In Categories view, document files appear listed in the Documents You Can View category.

An Actuate document file presents formatted and structured content from a data source, such as a database, spreadsheet, or text file. An Actuate document file contains data that a user can view and manipulate, using the browser-based Interactive Viewer tool. You can save an Actuate document file in third-party document formats such as Adobe PDF and IBM Advanced Function Printing (AFP) and Microsoft Office formats such as Word, Excel, and PowerPoint.

Download third-party files for viewing and editing outside of the BIRT iServer System. An Encyclopedia volume administrator can store custom file types in a volume. To open a custom file type, use the default viewing software. If multiple or no viewers are available locally for a selected file, choose or download a tool appropriate to open the file.

Viewing a document

Using Categories view, select a document listed in Documents You Can View. To view a document, choose one the following options, as shown in Figure 2-12.

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

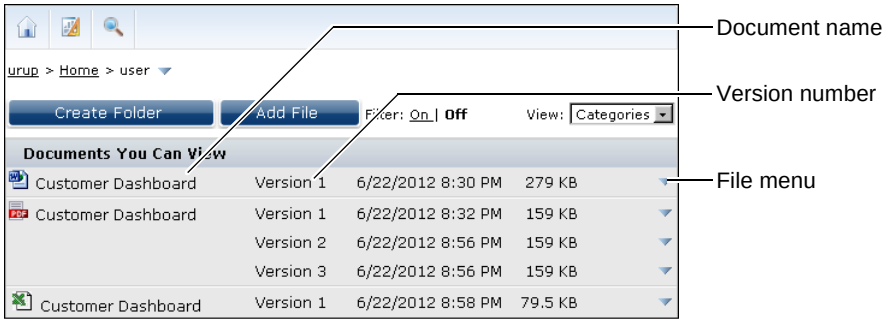


Figure 2-12 Viewing a document file

Alternatively, in View, choose Details, Icons, or List. Select File menu. Then, choose View Document. View Document appears on the file menu in the Details, Icons, or List view, as shown in Figure 2-13.

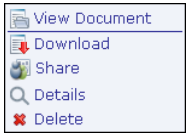


Figure 2-13 File menu options for a document file

The software tool defined as the viewer for each document file type opens the file, as described in the following list:

- Document files such as Adobe PDF, IBM AFP, or Microsoft Word, Excel, and PowerPoint open using the default viewer. For example, Adobe Acrobat Reader is the default viewer for Adobe PDF files.
- A BIRT document file opens in the browser-based BIRT Viewer or Interactive Viewer tool.
- A BIRT Cube View or a BIRT Data Object Store file opens in the browser-based BIRT Data Analyzer tool.
- A BIRT Spreadsheet document opens in Microsoft Excel, other software that support .xls files, or as a PDF file.
- A BIRT dashboard or gadget file opens in a web browser.
- An e.Report document opens in the browser-based DHTML Viewer tool.
- A query output file opens in Adobe Acrobat files, Microsoft Excel, or in the browser-based e.Analysis tool.
- An Analytics cube file opens in the browser-based Analytics Cube Viewer tool.

Opening a BIRT dashboard or gadget

Using Categories view, select a dashboard or gadget file listed in Documents You Can View. Then, using the My Documents file explorer, choose either of the following links:

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

Alternatively, in View, choose Details, Icons, or List. Select File menu. Then, choose Open. Figure 2-14 shows file options for a BIRT dashboard or gadget file, using Details view.

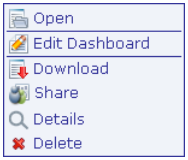


Figure 2-14 File menu options for a BIRT dashboard file

Alternatively, subscribe to a dashboard or gadget to add it to your personal dashboard file. For more information about subscribing to a dashboard, see "Using the personal dashboard." For information about building and editing BIRT dashboard files, see *Building BIRT Dashboards*.

Viewing a BIRT spreadsheet

Using Categories view, select a spreadsheet listed in Documents You Can View. 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 the file and view it in a selected document format

Alternatively, in View, choose Details, Icons, or List. Select File menu. Then, choose View Document. Figure 2-15 shows file options for a BIRT spreadsheet file, using Details view.

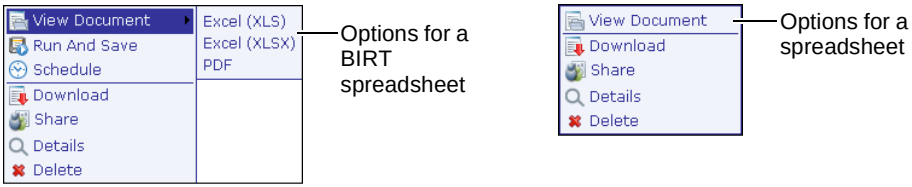


Figure 2-15 File options for a BIRT spreadsheet and for a spreadsheet file

Figure 2-16 shows choices for opening a BIRT Spreadsheet file using Categories view.

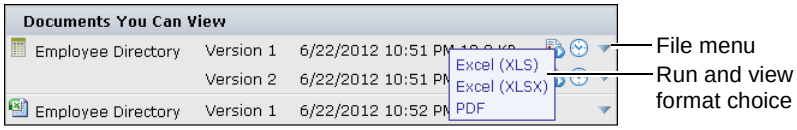


Figure 2-16 Viewing a BIRT Spreadsheet file

BIRT Spreadsheet documents are viewable in the following formats:

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

If no viewer is available, you may choose to download the file.

Downloading a file

A user with appropriate folder and file privileges can download a file using Information Console. To download a file, navigate to a file, select File menu, then choose Download, as shown in Figure 2-17.

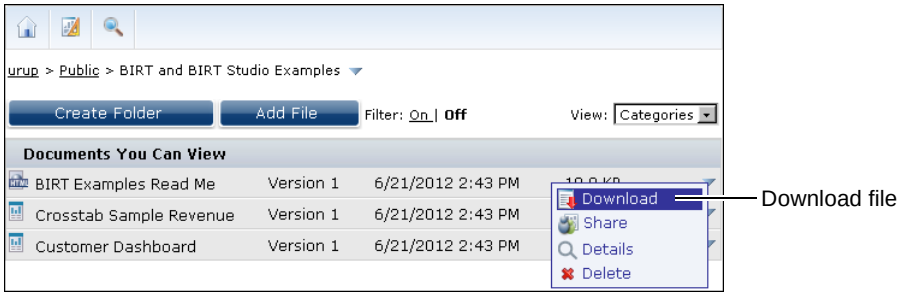


Figure 2-17 Downloading a file from an Encyclopedia volume

Working with file types

Information Console provides access to several different types of files stored in folders in a volume. An Information Console user having Write privilege can add a file to a folder. Contact your Encyclopedia volume administrator for information about any file type not described in this document.

A typical Information Console user works with the following types of files:

- 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 documents 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.

For more information about each file type and other tools that support it, consult the complete set of Actuate documentation, included with Actuate software.

Understanding file categories

Using the default Categories view, you see the files in a volume to which you have View privilege. Categories view arranges items in the following categories:

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

The example in Figure 2-18 shows items available to view in the home folder assigned to a typical Information Console user.

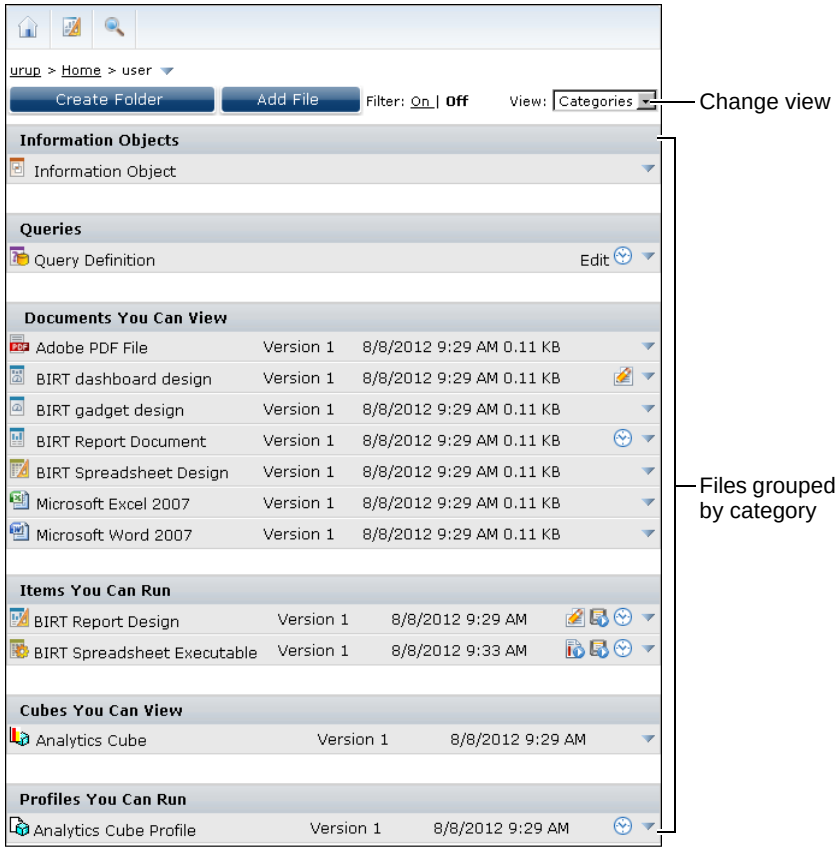


Figure 2-18 Viewing files organized by categories

The following sections describe each file category and provide a list that shows and describes the file types that appear in each category. The list also contains file operations available for each file type. All file types support viewing file details.

Using Information Objects

The Information Objects category contains files types that specify how to connect to or how to cache data from external databases. Table 2-1 summarizes types of information object files that Information Console supports.

Table 2-1 Supported information object file types

Icon	File type	Actuate file description	Available operations
	dox	Actuate Basic information object	New Query, Delete, Share

(continues)

Table 2-1 Supported information object file types (continued)

Icon	File type	Actuate file description	Available operations
	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 2-2 describes the type of query file Information Console supports.

Table 2-2 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 2-3 summarizes the types of document files Information Console supports.

Table 2-3 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

(continues)

Table 2-3 Document types supported by Information Console (continued)

Icon	File type	Actuate file description	Available operations
	htm or html	HTML document	Delete, Open, Share
	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 You Can Run 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 2-4 summarizes the file types that run in Information Console.

Table 2-4 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
	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 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, 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 Cubes You Can View

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

Table 2-5 summarizes the types of cube files Information Console supports.

Table 2-5 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

The available file operations are:

- Delete
  Removes the selected file.
- Open
  Opens the selected file in the default viewer for that file. For example, Analytics 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 Profiles You Can Run category contains design specifications for building an Actuate Analytics cube file. Table 2-6 describes the operations for profile files that Information Console supports.

Table 2-6 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 Analytics cube file, saves the new cube file
- Schedule
  Schedules a time to run the selected cube profile as a job, saves the new Analytics cube file, and optionally sets the job to recur over a fixed period
- Share
  Assigns file access privileges on the selected file

Sharing access to a file or folder

An Information Console user with an appropriate security role and BIRT iServer licensed options must also have the access and privileges required to perform a task on a file or folder. An Information Console user must share a file or folder to set privileges on it or allow other users to access it. Only an administrator and the owner of a file or folder and can access a file or folder that is not shared. To prevent other users from accessing a file or folder, select Do not share for the item.

Setting privileges for a file or folder

An administrator or a file or folder owner can set privileges on a file or folder. A folder owner or an administrator can choose to apply privileges to only the folder or to all the files and subfolders in that folder. Table 2-7 lists and describes all supported privileges and the task that each privilege allows a user to perform.

Table 2-7 Privileges and allowed tasks for a folder or file

Privilege	Symbol	Allowed task
Delete	D	Delete the folder or file.
Execute	E	Run a design, dashboard, 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.

For information about how an iServer administrator manages user privileges for files and folders on a volume, see *Managing an Encyclopedia Volume.*

Table 2-8 lists privileges required to perform typical tasks in a folder or file.

Table 2-8 Tasks and required privileges

Information Console task	Required privilege settings
Creating a new file or folder	Visible on the destination folder Write on the destination folder
Deleting a folder	Visible on the folder Delete on the folder Delete on all files in the folder
Deleting a file	Visible on the file Delete on the file
Downloading contents of a document	Read
Expanding an archive file	Read, Write, and Visible privilege in a folder
Opening an Actuate search definition (.ros) file created by another user	Visible on the search definition file Read on the document file Read and execute on the executable file
Printing a report	Secure read or read

(continues)

Table 2-8 Tasks and required privileges (continued)

Information Console task	Required privilege settings
Reading the entire contents of a document	Visible Read
Reading restricted contents of a document	Visible Secure read
Replacing the latest report version	Visible Delete on the current document version Execute on the executable file
Running or scheduling a design to run	Read, secure read, or visible (for a .rox file) on the design Execute on the design (for a .rox file) 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 on the cube Read on the associated cube profile (.dp4) file
Viewing a file or folder	Visible, read or secure read Visible is required for a .rox file
Viewing item properties	Visible, read or secure read Visible is required for a .rox file

An administrator assigns privileges to channels, users, folders, and files that allow each user to perform tasks using channels. If you cannot access a channel to which you want to subscribe or send a notice, contact the volume administrator.

Table 2-9 lists the privileges required to perform tasks using a channel.

Table 2-9 Privileges required to perform tasks in a channel

Task	Required privilege settings
Reading a notification in a channel	Read or secure read for the report document associated with the notification
Sending a notification to a channel	Write for the channel
Subscribing to a channel	Read for the channel

Table 2-9 Privileges required to perform tasks in a channel

Task	Required privilege settings
Updating the contents of a channel	Write for the channel Visible for a file that generates a report document Execute for a file that generates a report document
Viewing a channel	Read for the channel

How to set privileges for a folder

1 Navigate to a folder. Choose View folder detail.

2 In View folder detail, choose Share, as shown in Figure 2-19.

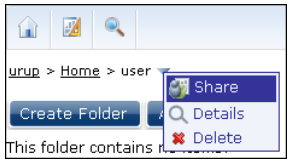


Figure 2-19 Selecting Share for a folder

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

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 in the folder, as described in Table 2-8. For example, Figure 2-20 shows the available privileges Visible, Read, and Write set for the selected role user, in a shared folder.

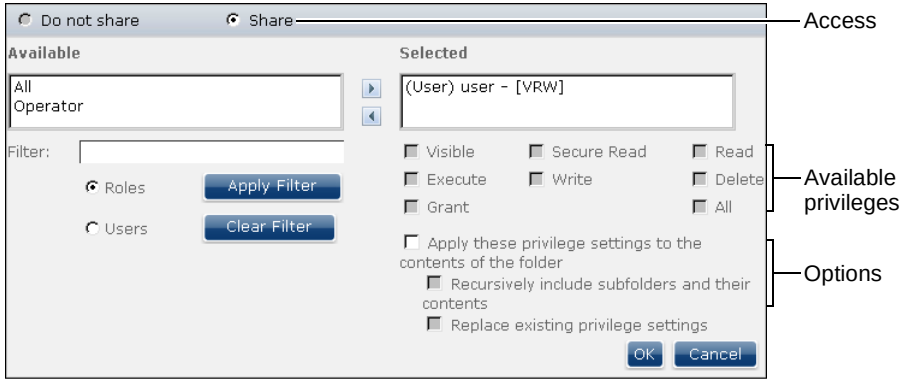


Figure 2-20 Setting access and privileges for a folder

- 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.

6 Choose OK.

How to set privileges for a file

1 Navigate to a file. Choose File menu for that file. Then, choose Share, as shown in Figure 2-21.

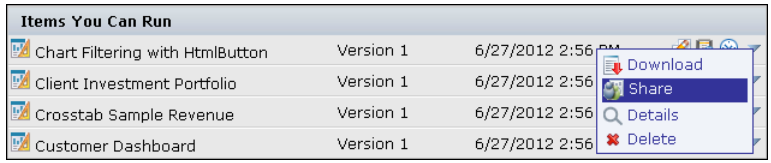


Figure 2-21 Selecting Share for a file

2 In Share options, to enable user access to a file, select Share, as shown in Figure 2-22.

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

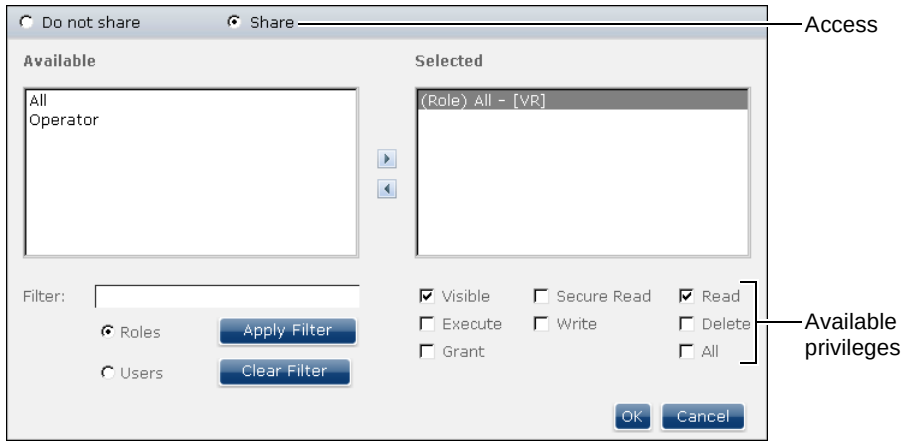


Figure 2-22 Setting access and privileges for a file

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

4 From the list of available privileges, select privileges that a user requires to perform tasks on the file, as described in Table 2-8.

For example, Figure 2-22 shows the available privileges Visible and Read set for the selected role All, for a shared file.

5 Choose OK.

Working with a folder

The My Documents navigation pane displays a view of folders for which a user has the Visible privilege. The navigation pane lists folders in a tree diagram. If the tree diagram is not visible, select the Tree View skin in Options—General. Users can select a folder as a destination for documents from a file job.

Using Folders

Folders are containers in which files stored in an Encyclopedia volume are organized. 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.

Figure 2-23 shows the Categories view of folders in a volume called urup.

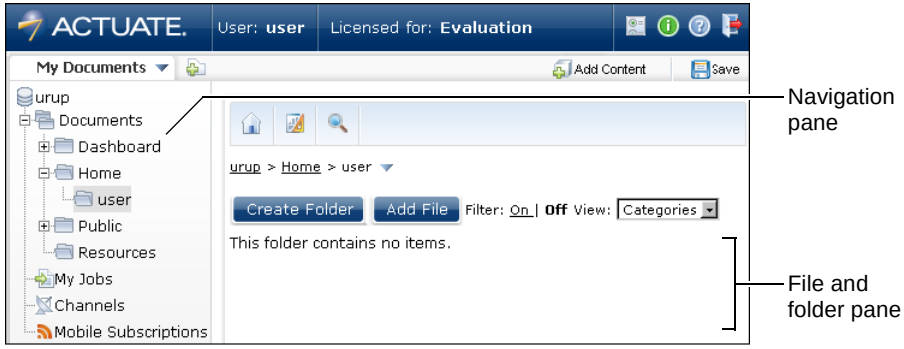


Figure 2-23 Navigating Information Console folders

Choose a folder from the navigation pane or the file and folder pane to open it. File and folder privileges determine the files and folders a user can view and open. As a user navigates to a folder, Information Console displays the path. For example, Figure 2-24 shows the path to a folder called BIRT and BIRT Studio Examples, in a volume called urup.

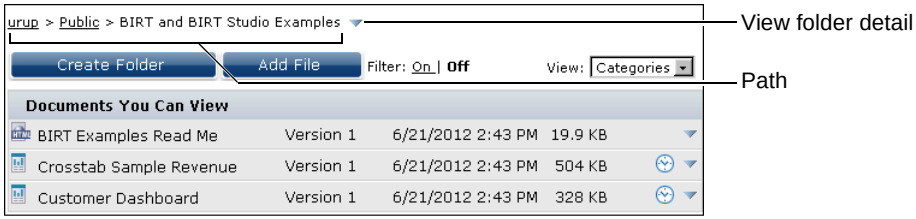


Figure 2-24 Displaying the folder details and path

Contact the volume administrator to move existing files and folders.

Viewing folder properties

To view properties for a selected folder, select View folder detail. Then, choose Details from the context menu. 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 appear in Details. For example, Figure 2-25 shows Details for an advanced user viewing properties for a folder called Public. Public was created by the administrator.

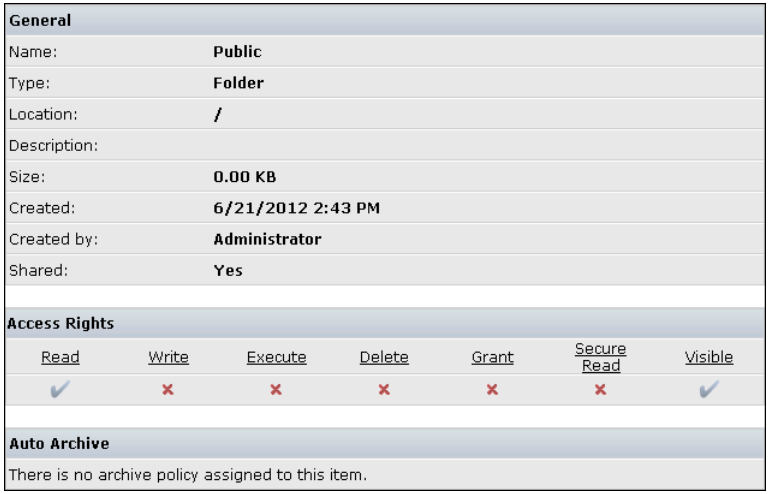


Figure 2-25 Examining folder properties in Detail

The Folder menu appears in Navigation pane when the cursor hovers over a folder icon. The Folder menu also appears in the file and folder pane when using the Icons, or List view. Figure 2-26 shows how a user can view folder properties. In this example, the Folder menu appears open for the Public folder.

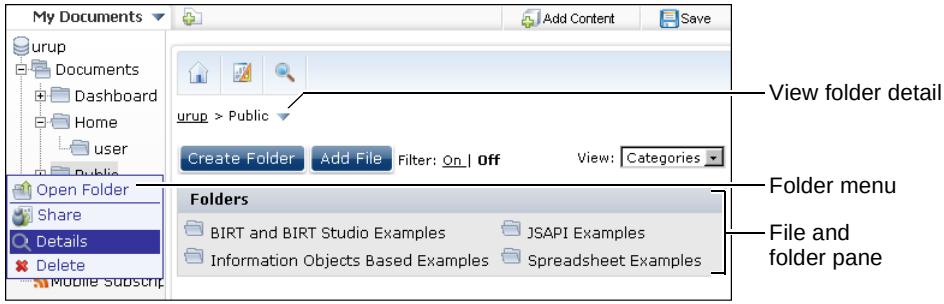


Figure 2-26 Displaying the folder details

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 privileges to that folder for other users or groups.

How to create a folder

1 Navigate to a folder. Choose Create Folder, as shown in Figure 2-27.

Figure 2-27 Creating a new folder in a user home folder

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 for last year in Description, as shown in Figure 2-28.

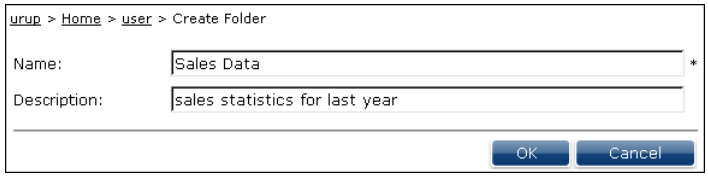


Figure 2-28 Typing a new folder name and description

Choose OK.

The new folder appears in the volume, as shown in Figure 2-29.

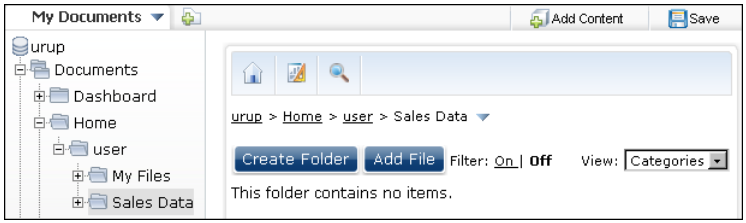


Figure 2-29 Viewing a new folder

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 2-30.

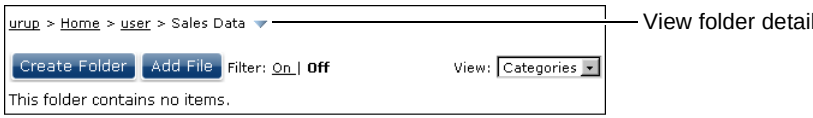


Figure 2-30 Viewing folder detail

2 In View folder detail, choose Delete.

3 In the confirmation message, choose OK.

When deletion completes, Information Console displays a status message in Delete file/folder(s) Status. Figure 2-31 shows an example of a successful file deletion.

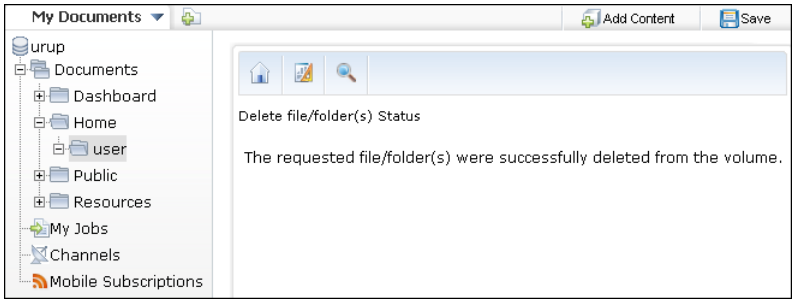


Figure 2-31 Viewing the result of a successful folder deletion

Finding a file

Information Console offers users multiple 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.

For information about folders other than the default folders, select View folder detail, then choose Details. Contact your Encyclopedia volume administrator for additional information, if necessary.

Searching files and folders

Searching helps a user to find an item without scanning long lists of files and folders. Search appears in the banner for Information Console users with intermediate-, advanced-, and administrator-level functionality.

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, start 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 2-10 lists the operators available to search for folders and files.

Table 2-10 Operators used to form search expressions

Name	Operator	Usage
Asterisk	*	Match zero or any number of characters.
Brackets	[]	Match 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.
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, the following expressions would find the file BIRTcharts5.rptdocument, and other files with similar names:

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

The following expressions, however, would not find BIRTcharts5.rptdocument:

```
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 “ts” and not “5”.

Table 2-11 lists examples of search queries.

Table 2-11 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
>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 2-12 lists the special characters that require a backslash before them when used in searches.

Table 2-12 Special characters in searches that require a backslash

Character name	Symbol	Character name	Symbol
Ampersand	&	Hyphen	-

(continues)

Table 2-12 Special characters in searches that require a backslash (continued)

Character name	Symbol	Character name	Symbol
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 2-32 include all folder and file names that begin with the following characters:

```
sales*
```

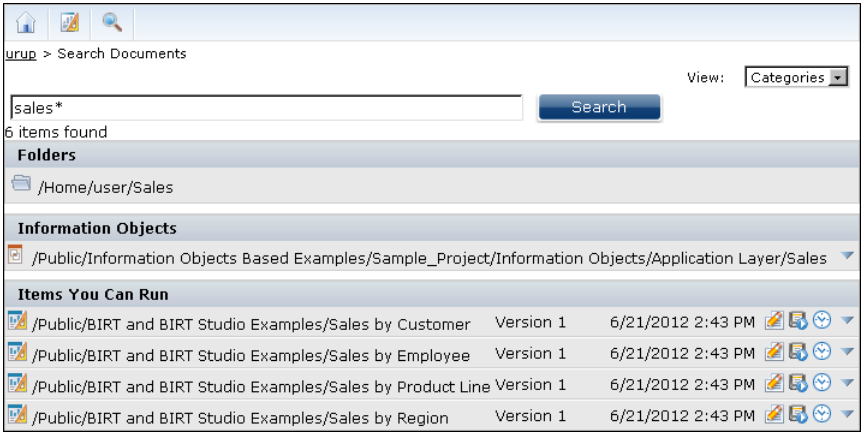


Figure 2-32 Search results

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

Filtering items in a folder

Filtering limits the items that appear in a selected folder. By default, filter options are off. With filters off, all items in a folder for which a user has access and the Visible privilege appear to that user. To limit the items that appear, select filter options. For example, a user can select a filter option to display only items that are Documents. Information Console supports filter options that limit display of items in a folder to those that match the following criteria:

- File and folder names that match a search expression
- The most recent version of each file
- Only sub-folders
- Only document files
- Only executable files

How to filter files

1 To enable filter options, in Filter, choose On. The available filter options appear, as shown in Figure 2-33.

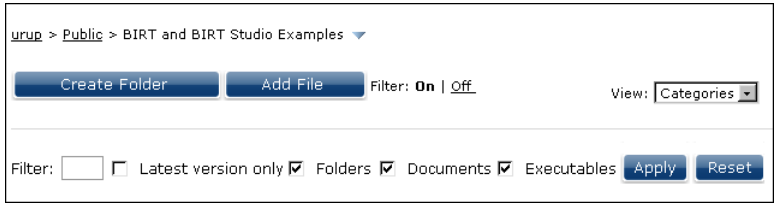


Figure 2-33 Enabling filter options

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 2-34 shows a filtered list of document files. Optionally, choose a different folder to apply the same filter inside the new folder.

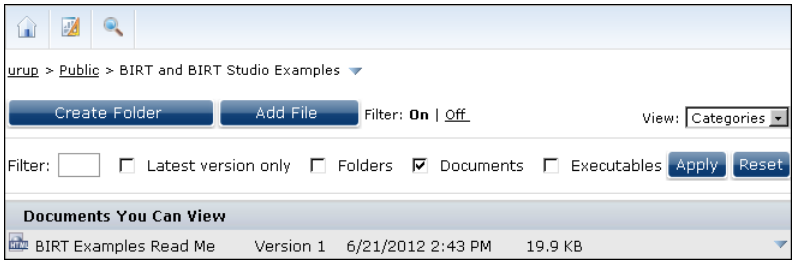


Figure 2-34 Filtering reports by viewable documents

6 Choose Off in Filter to disable filter options.

Using a channel

A channel is a service to which users and security roles subscribe. Channels use publish-subscribe technology to deliver job completion notices and documents from a central server across the internet to users. Using Channels, an Information Console user can open a document or read information about the job that generated it in a channel to which he subscribes.

Every Information Console user is subscribed to a personal channel. A user cannot unsubscribe from a personal channel. An administrator sets options that control whether iServer sends job completion notices to a user's personal channel by default, and if so, under what conditions iServer deletes notices. A user can also set these options, using Options—Notification.

A user scheduling a job can choose whether iServer sends a job completion notice for that job. If the user decides to send a notice, it appears in the user's personal channel and any other channels the user specifies when setting up the job.

A user with access and privileges can subscribe to multiple channels. Choose Channels to view all currently subscribed channels as shown in Figure 2-35, or to subscribe to a new channel.

Figure 2-35 Viewing subscribed channels

Filtering a channel limits the notices that a user sees in a channel. To limit the notices that you see in a channel, use the same procedure that you use to filter file names in a folder. For example, in your personal channel, choose Filter On. Then, type characters in Filter. Use the asterisk (*) special character to search for a partial string.

A volume administrator may create multiple channels to group job notifications together. For example, in a typical channel created for sales managers, all sales managers in the US can subscribe to the US Sales channel in which links to US sales reports appear.

Subscribing to a channel

Every Information Console user is subscribed to their personal channel. A user can be subscribed to multiple channels. If a channel is not visible, contact an administrator to establish the required access and privileges.

How to subscribe to a channel

1 Log in to Information Console.

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

3 Select Subscribe to channels and choose OK, as shown in Figure 2-36. Available channels appear in a list.

Figure 2-36 Displaying available channels

4 Select subscribe for each desired channel, as shown in Figure 2-37.

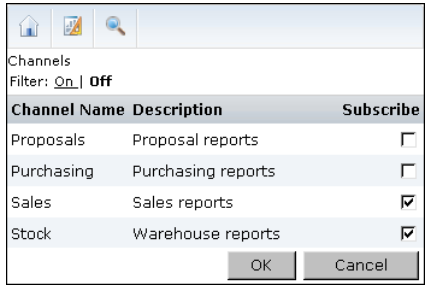


Figure 2-37 Selecting from available channels

5 Choose OK.

Viewing a job completion notice

A channel lists notices that indicate completed status for scheduled file jobs. Each job completion notice provides a link to view more details about the file job. The job completion notice for a successful job includes a URL link to the document generated by the job.

A job completion notice provides the following summary information:

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

Figure 2-38 shows several job completion notices that summarize file jobs.

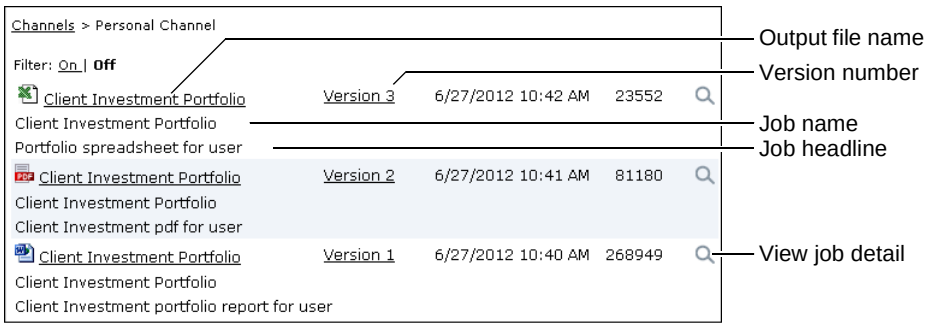


Figure 2-38 Viewing job completion notices in a personal channel

Choose View job detail for a job completion notice to see the following information:

- Notification settings
- Output document information
- Report information
- Schedule information
- Status

Viewing a document from a channel

In Channels, choose the channel in which you expect to find a job completion notice. In a notice for a successful job, select the link that shows the document

name or the link that shows the document version number. The document appears in the viewer set for that document type on the user's machine.

Deleting a job completion notice

A user can delete a job completion notice from their personal channel and from any channel for which that user has Write privilege. Deleting a job completion notice removes that notice from the channel but does not remove the output file or the completed job details that appear in My Jobs.

How to delete a job completion notice from a channel

1 In My Documents, choose Channels.

2 In Channels, choose a channel name for which you have Write privilege.

3 Choose View job detail to display details for each file job. Details for the file job appear, as shown in Figure 2-39.

Figure 2-39 Viewing details of a file job

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

Chapter

3

Using BIRT dashboards

This chapter contains the following topics:

- About dashboards and gadgets
- Using the personal dashboard
- Types of dashboard gadgets
- Using a gadget

About dashboards and gadgets

An Actuate BIRT dashboard is a self-contained web application that delivers business performance data in interactive charts, cross-tab tables, formatted text, and Adobe Flash visualizations. You can download, explore, and monitor data displayed on your personal dashboard. Use the browser-based dashboard tools to organize dashboards, subscribe to shared dashboards, or build new ones.

Dashboards display a variety of gadgets that enable users to find and analyze data. Data that appears in a dashboard is either queried on demand or cached as BIRT data objects for fast analysis.

Network content with a URL address, such as images, videos, text, web pages, and Google gadget files, can display on dashboards. The network content and business data link together for enhanced analysis and data presentation. Figure 3-1 shows a dashboard in Information Console.

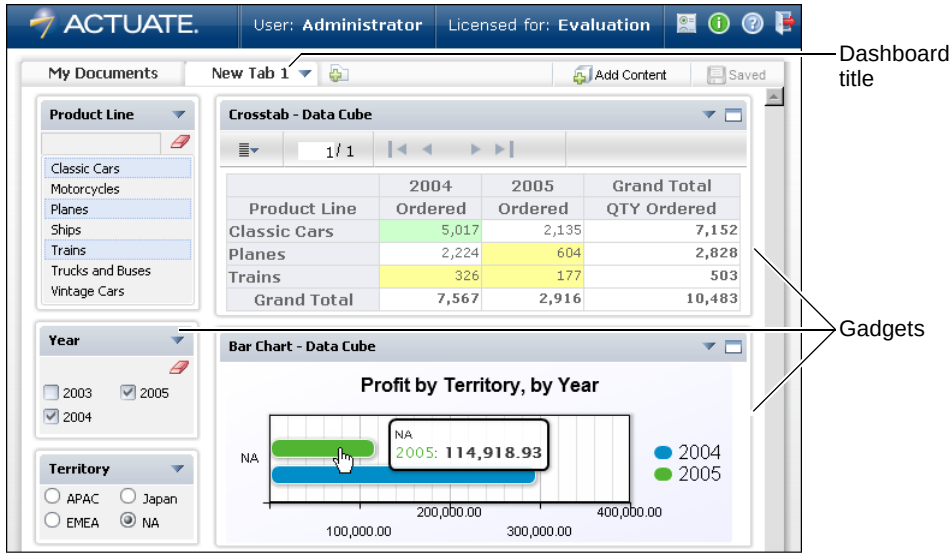


Figure 3-1 Displaying a sample dashboard layout

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

Users interact with dashboard data using the gadgets on the dashboard. Each gadget is a self-contained data viewer. For example, gadgets can display interactive BIRT reports, tables, cross tabs, and charts. Other gadgets enable users

to display selected data such as a list of customers or a calendar. External resources can display on the dashboard, such as HTML pages, images and web services.

Actuate BIRT dashboards support the following user activities:

- Building web-based reports and performance indicators using charts, tables, cross tabs, and Adobe Flash objects
- Reviewing multiple BIRT files at the same time
- Viewing part of a BIRT file instead of the entire file
- Displaying and linking multiple data sources
- Interacting with data by launching browser-based tools such as BIRT Data Analyzer
- Keeping information up-to-date using refresh timers
- Exploring and exporting data using filtering, drill-down analysis, and drill-through hyperlinks
- Mixing external web services with existing business data

Users can analyze cross-tab gadgets using BIRT Data Analyzer. For more information about maximizing gadgets, see "Maximizing gadgets," later in this chapter.

The BIRT 360 Option for BIRT iServer is required to open dashboard and gadget files. 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. Dashboard and gadget files use the same file access privileges as other Actuate files.

About web browsers

BIRT dashboards rely on the your 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 your web browser.

Using the personal dashboard

In Information Console, a user can open a dashboard file from the My Documents file explorer or add a dashboard file to their personal dashboard. Each user receives a personal dashboard to display multiple dashboard files. Changes on a user's personal dashboard persist across sessions in the user's Information

Console account. In Information Console, users add dashboard files to their personal dashboard by subscribing to a dashboard file.

The personal dashboard displays either shared or user dashboard files. Shared dashboard files enable groups of users to monitor the same charts and analyze the same data by subscribing to the same dashboard file. User dashboard files are private and enable individuals to build and manage their own dashboard files for personal use.

User types define what a user can accomplish with a dashboard file. The Information Console administrator manages the following user types:

- 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 and share dashboards. This user can subscribe to shared dashboard files, copy shared dashboards, and use shared gadgets in their own dashboards. Business users can also share their dashboards.
- Dashboard developers are the same as business users but also create gadget scripts, use data visualization gadgets, and use data selection gadgets.

Subscribing to a dashboard file

Shared dashboard files contain one or more dashboard tabs. You can subscribe to, rename, reorder, copy, or delete a shared dashboard. You can also interact with gadgets on a shared 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 shared dashboards reset the next time the dashboard refreshes or updates.

Shared dashboards appear with the share icon on the dashboard title. Users with write privileges to the dashboard file update shared dashboard files by overwriting the saved version of the dashboard. 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 file

1 Choose Add Content, as shown in Figure 3-2.

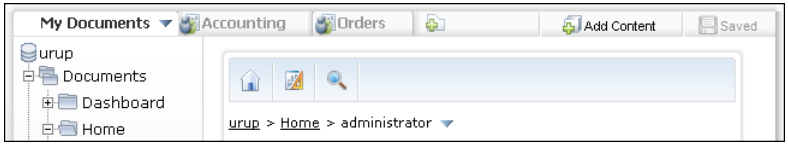


Figure 3-2 Subscribing to a shared dashboard

2 Choose Dashboard Gallery, as shown in Figure 3-3.

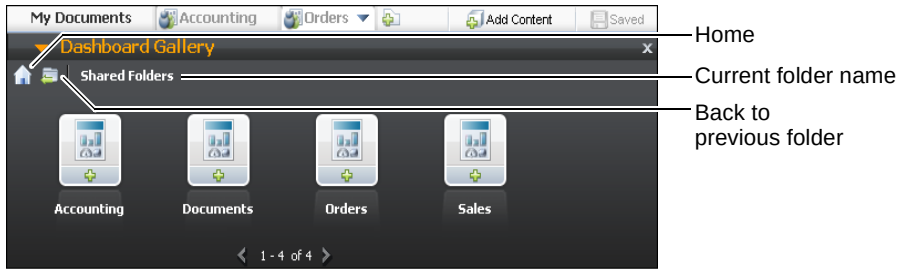


Figure 3-3 Exploring Dashboard Gallery

If Shared Folders is not visible, choose Home first and then choose Shared Folders.

3 Double-click the Documents dashboard to add a new Documents dashboard to your personal dashboard, as shown in Figure 3-4.

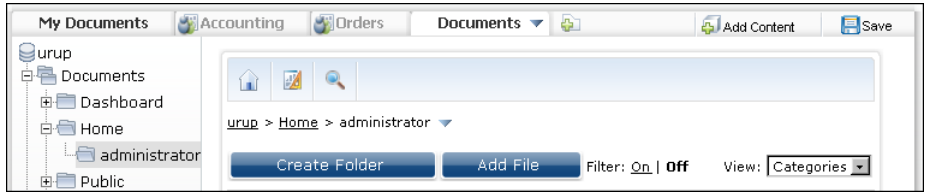


Figure 3-4 Adding a new dashboard

About dashboard options

Each dashboard has a tab with a name describing the contents of the dashboard. Users can organize and manage their dashboards with these options, for example change the name of a dashboard or copy a dashboard.

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

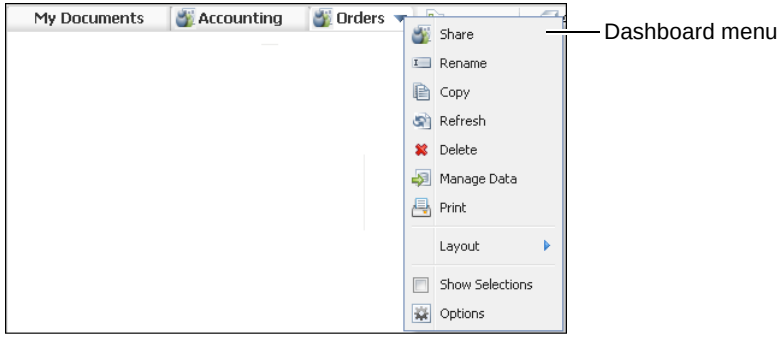


Figure 3-5 Accessing dashboard options

Shared dashboards have different options than a user dashboard. Table 3-1 lists dashboard options for shared and user dashboards.

Table 3-1 Options for shared and user dashboards

Option	Description	Shared	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 privileges on the dashboard.		✓
Show Selections	Display and optionally reset any data selectors used on the dashboard.	✓	✓

Organizing the personal dashboard

Users can personalize the following dashboard options:

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

How to change the dashboard order

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

Delete a dashboard from your personal dashboard when you no longer need it. When you delete a user dashboard from the personal dashboard it is permanently removed unless you previously saved the dashboard. You can subscribe again to shared dashboards that you remove from your personal dashboard.

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

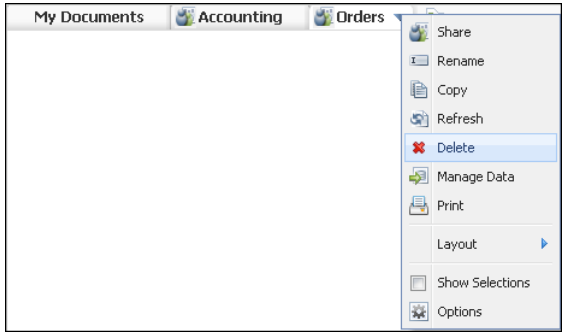


Figure 3-7 Choosing Delete from a dashboard menu

2 On Delete Tab, choose Yes, as shown in Figure 3-8. The selected dashboard is removed.

Figure 3-8 Deleting a dashboard

The personal dashboard appears without the deleted dashboard tab.

How to rename a dashboard

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

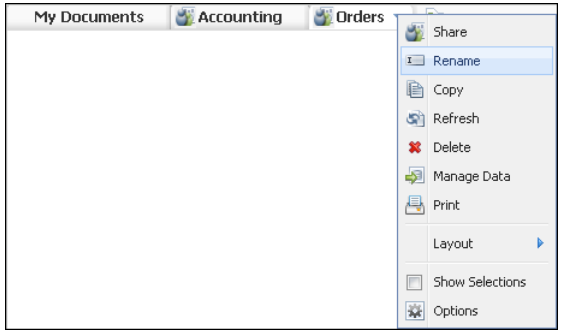


Figure 3-9 Viewing a dashboard menu

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

Figure 3-10 Renaming a dashboard

Choose OK. The personal dashboard displays the new name.

Copying a shared dashboard

A user can copy a shared dashboard. A copied dashboard becomes a user dashboard that a user can edit or share using 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 the following dashboard and gadget features:

- Adding or deleting gadgets on the dashboard
- Changing gadget location, using a columns or freeform 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 dashboard, select Copy from the dashboard menu, as shown in Figure 3-11.

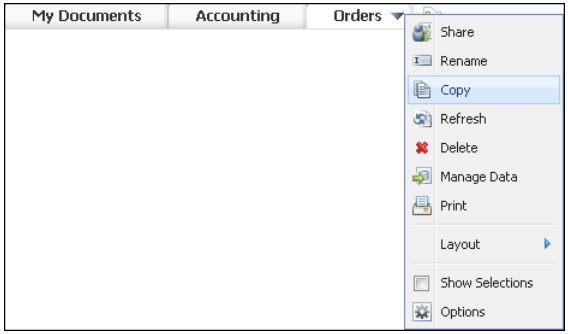


Figure 3-11 Copying a dashboard page

The copied dashboard appears at the end of the displayed dashboard names. Copied dashboards become user dashboards that you can edit.

Showing user selections on a dashboard

Data selection gadgets enable users to choose data to display on a dashboard. Choose Show Selections to display or remove all data selections on a dashboard.

How to reset selections on a dashboard

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

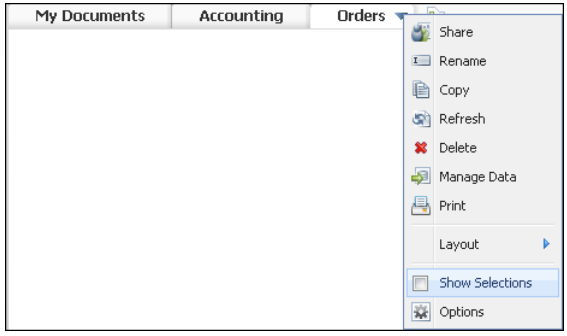


Figure 3-12 Showing selections in a dashboard menu

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.

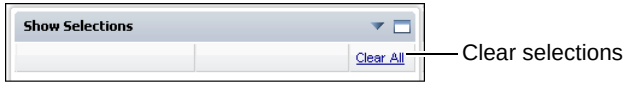


Figure 3-13 Clearing all selections on a dashboard

Gadgets on the dashboard update to show data without filtering from user selections.

Printing a dashboard

Choose Print from the dashboard menu to print the current dashboard. 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.

Printing a dashboard uses your 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.

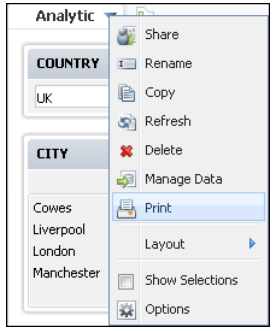


Figure 3-14 Printing a dashboard page

Print Preview appears.

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

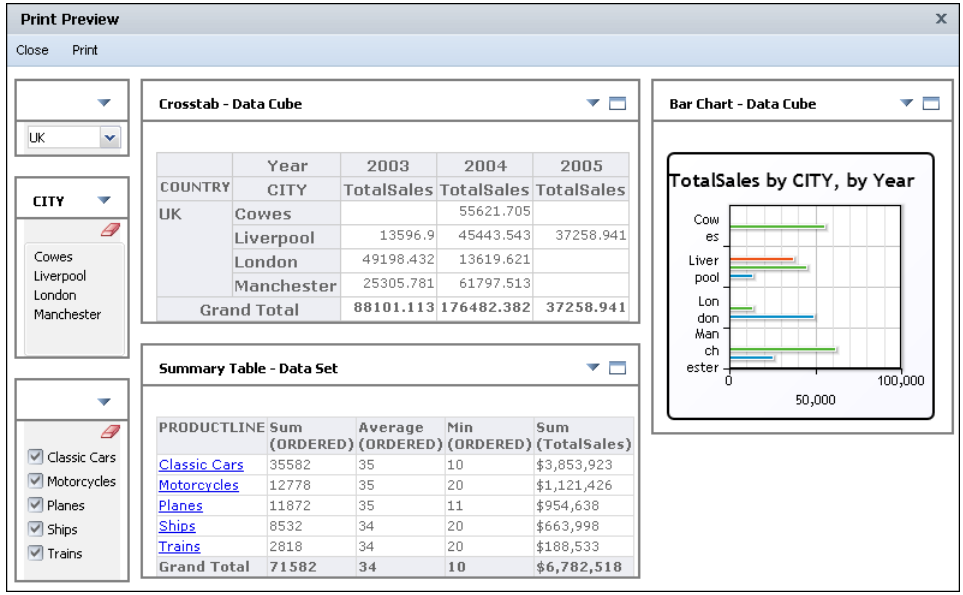


Figure 3-15 Previewing the dashboard for printing

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

Saving dashboard changes

Changes to a user dashboard or to a dashboard file that you have permission to edit are saved automatically at a time interval configured by the iServer administrator. You can use the save status to verify that the current changes will be available the next time that you log in to Information Console.

Figure 3-16 shows a dashboard save status.

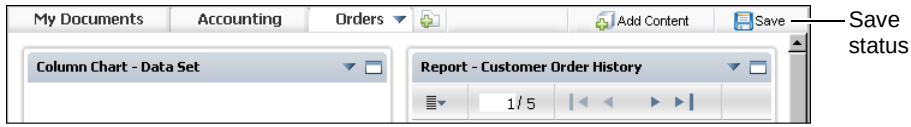


Figure 3-16 Verifying the save status of a dashboard

The save status displays the following information:

- Save: the dashboard has not yet been saved or a saved dashboard has been changed since the last time it was saved.
- Saving: your changes are being saved.
- Saved: previous changes have been saved and there are no other changes to the dashboard that you can save.

You can save changes to dashboards on your personal dashboard by clicking the save status when it displays Save. Shared dashboards continue to reset to the most recent version but user dashboards will save their most recent changes.

Dashboards opened as a file from the Information Console file explorer have the following save options if you have permission to edit the dashboard:

- Save: save the current dashboard settings to the existing dashboard file.
- Save as: save the current dashboard to a new dashboard file.

How to save a dashboard as a new dashboard file

Follow these instructions to save a new dashboard file from a dashboard opened from the Information Console file explorer.

1 In My Documents, open a dashboard file for editing. Figure 3-17 shows opening a dashboard in the Information Console file explorer.

Figure 3-17 Editing a dashboard file

2 Select Save. Choose Save As, as shown in Figure 3-18.

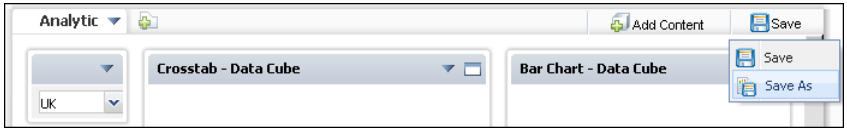


Figure 3-18 Selecting Save As

3 In Save As, select an output location and name for the new dashboard file, as shown in Figure 3-19. Use Browse to navigate to a new location if necessary.

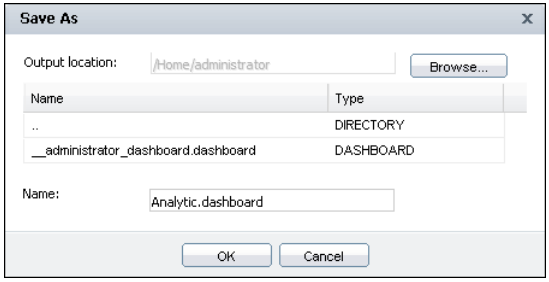


Figure 3-19 Selecting the output location and name for the dashboard

4 Choose OK to save the new dashboard file.

Restoring dashboard settings

You can reset your personal dashboard to one of the following options:

- Blank dashboard
- System default
- Shared dashboard file

Resetting your personal dashboard erases the existing personal dashboard. Save any user dashboards before resetting your dashboard. After resetting the personal dashboard, you can subscribe again to shared dashboards.

How to restore a personal dashboard

Follow these instructions to restore your personal dashboard to your system default. The BIRT iServer administrator configures the system default.

1 Choose Options from the banner menu, as shown in Figure 3-20.

Figure 3-20 Choosing options in the banner menu

2 Choose My dashboard.

3 Choose Reset my dashboard to.

4 Choose System default, as shown in Figure 3-21.

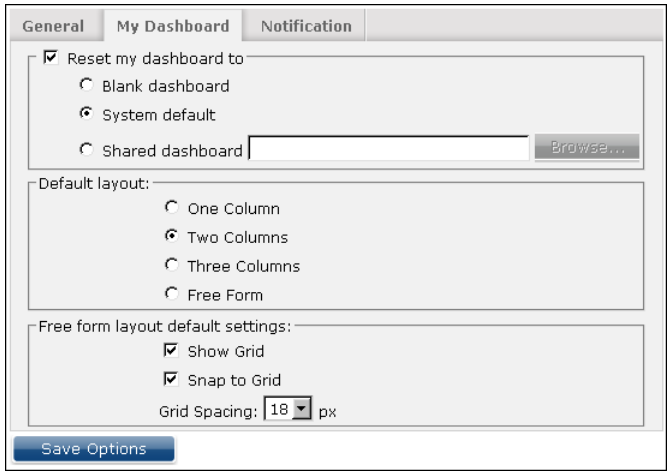


Figure 3-21 Dashboard options for an Information Console user

5 Choose Save Options.

Types of dashboard 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.

New Gadget includes several gadget types. Each gadget type supports displaying and interacting with data in a different way, as described in the following list:

- Data selection gadgets
  Displays user selection choices, for example: lists, check boxes, sliders, calendars, and data version. User choices filter data displayed in linked gadgets.
- Data visualization gadgets
  Displays BIRT data objects in charts, tables, cross tabs, Adobe Flash objects, and Adobe Flex table.
- Extras gadgets
  - Displays HTML-formatted text.
  - Displays an external web page, image, video, or embedded HTML and JavaScript code.

- Displays a Google gadget file.
- Displays a BIRT data object in Adobe Flash charts.

- Report gadgets
  Embeds a complete or partial BIRT document or design file.

Figure 3-22 shows the layout of a BIRT gadget.

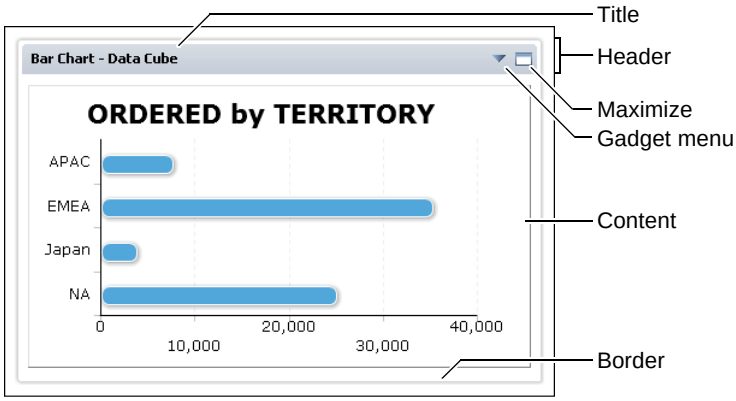


Figure 3-22 Gadget structure

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 privileges of the original BIRT document.

If the displayed BIRT file includes parameters, other gadgets can affect the data displayed in the report. Parameters enable users to input values into the BIRT document or design file for filtering, formatting or processing data. Parameters can be required to run a file job or they can be optional.

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.

You can also use parameters to request a report in a specific language or to add comments into the final report. Parameters are created by BIRT developers using BIRT Designer Professional.

Report gadgets can display parameters as part of the gadget. After selecting your parameters, choose Run to update the report.

Figure 3-23 shows a report gadget with a parameter as part of the report gadget.

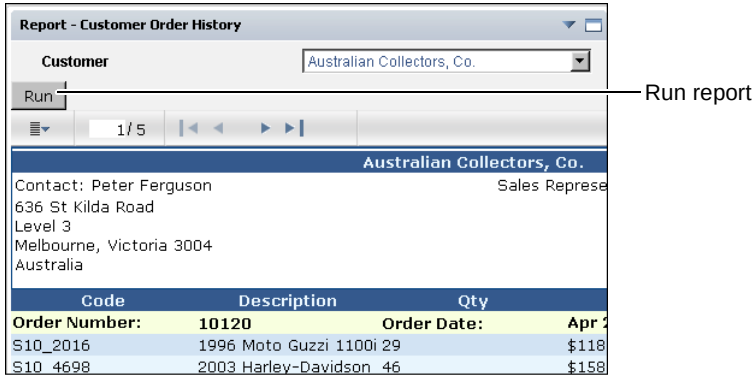


Figure 3-23 Parameter as part of a report gadget

Use data selection gadgets to search for and send selected values to multiple BIRT reports. After selecting the desired values, the linked report gadgets update to show data related to your selection. These values can filter data displayed in the BIRT report or be used in the BIRT report by scripts.

Figure 3-24 shows a report gadget with a parameter in a separate selector gadget.

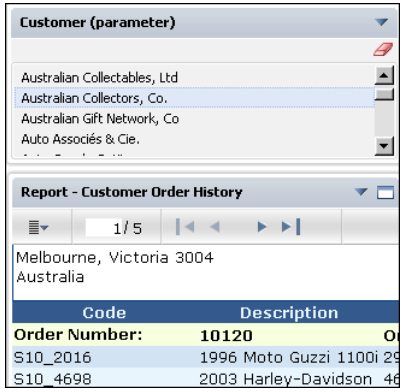


Figure 3-24 Parameter as a separate data selection gadget

Use parameter gadgets to send one or more selected operators and values to multiple BIRT reports. For example, an Internal Use choice that prints additional information to a report file based on the user selection.

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.”

Figure 3-25 shows a sample parameter gadget.

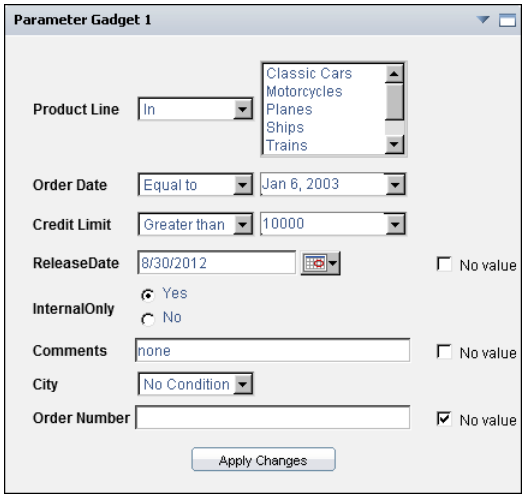


Figure 3-25 Supplying values to a parameter gadget

You can change the appearance and layout of BIRT document data, when you maximize a report gadget. Report and Reportlet gadgets support multiple drill-through of charts when the BIRT developer enables this functionality, as shown in Figure 3-26.

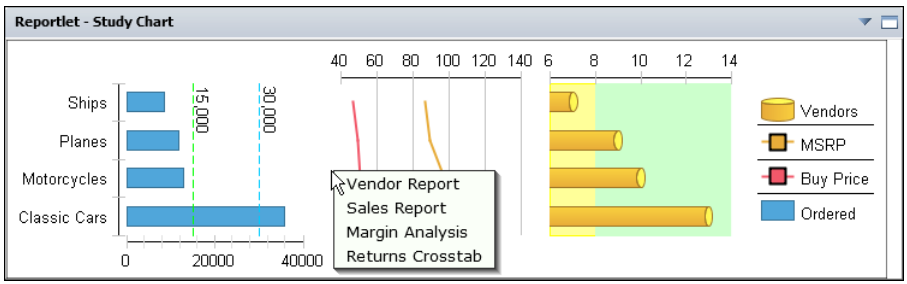


Figure 3-26 Selecting a multiple drill-through link from a BIRT chart

Modifications to report gadgets on shared 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:

- Flash charts
  Flash charts are Adobe Flash-based charts. These charts require the Adobe Flash Player, installed in your web browser, for viewing and interaction.
- HTML gadget
  An HTML gadget contains an external web site URL address or embedded HTML and JavaScript code. This gadget displays the external web site or the embedded content.
- Image gadget
  An image gadget contains an external image URL address. 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
  An import gadget displays a Google gadget from the internet or a local network. These gadgets can link to data selection gadgets on the dashboard.
- Text gadget
  A text gadget contains HTML-formatted text. When editing text in the gadget, an HTML text editor appears for visual editing or HTML source editing.
- Video gadget
  A video gadget contains an external video URL address or embedded HTML or JavaScript code. The video or embedded content plays 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.

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 display 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 gadget

  A chart gadget displays data in a JavaScript-based chart. A user can filter, group, change chart types and aggregate data. Available chart types are area, bar, column, doughnut, line, pie and scatter. A chart gadget supports drill-down when displaying cube-based data. When a chart displays a legend, you can filter data by selecting a legend value. Figure 3-27 shows a column chart.

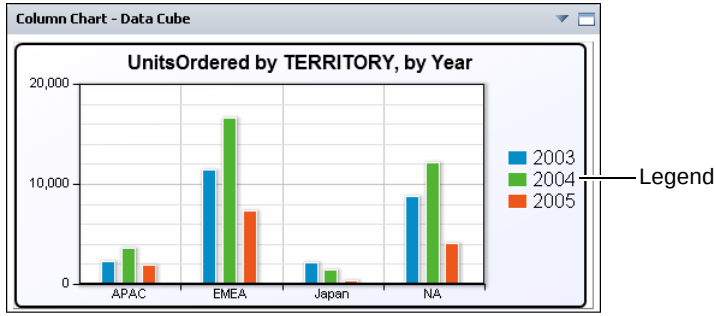
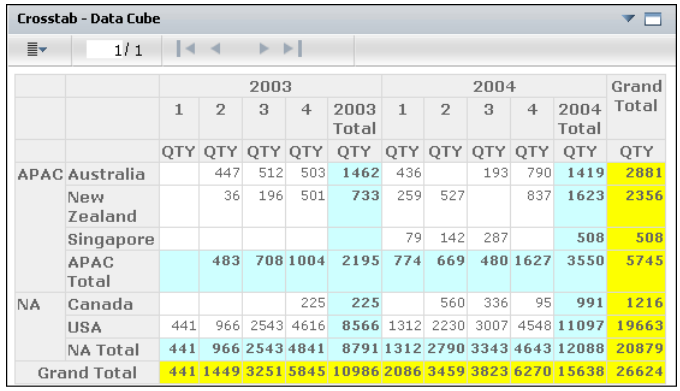


Figure 3-27 Reviewing a data set in a column chart

- Cross-tab gadget

  A cross-tab gadget displays aggregated data in rows and columns. Users can analyze, filter, and download this data by opening the cross tab in the browser-based BIRT Data Analyzer tool. Figure 3-28 shows a cross tab gadget.



		2003					2004					Grand Total
		1	2	3	4	2003 Total	1	2	3	4	2004 Total	
		QTY	QTY	QTY	QTY	QTY	QTY	QTY	QTY	QTY	QTY	QTY
APAC	Australia		447	512	503	1462	436		193	790	1419	2881
	New Zealand		36	196	501	733	259	527		837	1623	2356
	Singapore						79	142	287		508	508
	APAC Total		483	708	1004	2195	774	669	480	1627	3550	5745
NA	Canada				225	225		560	336	95	991	1216
	USA	441	966	2543	4616	8566	1312	2230	3007	4548	11097	19663
	NA Total	441	966	2543	4841	8791	1312	2790	3343	4643	12088	20879
Grand Total		441	1449	3251	5845	10986	2086	3459	3823	6270	15638	26624

Figure 3-28 Reviewing a data cube in a cross tab

- Flash gadget

  A Flash gadget displays data in an Adobe Flash-based visualization. Users can filter, group, and aggregate data. Available Flash gadget types are bullet, cylinder, linear gauge, meter, spark line, and thermometer. Figure 3-29 shows a linear gauge gadget.

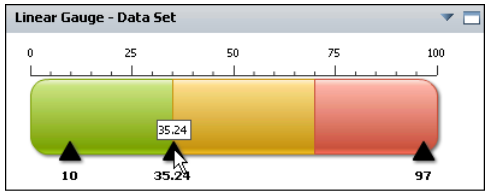


Figure 3-29 Reviewing a data set in a linear gauge

- Flex table gadget

  A Flex table gadget displays a data set in a row and column layout. Optionally, users can summarize this data with various aggregation options, filtering, and sorting. Gadget developers can change a Flex table from summary to detail without rebuilding the gadget. Figure 3-30 shows a Flex table gadget.

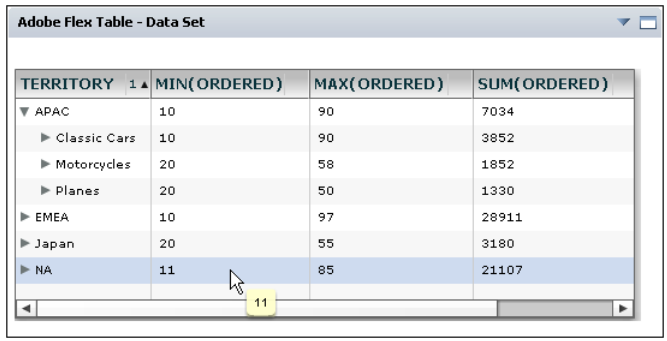


Figure 3-30 Reviewing a data set in a Flex table

- Table gadget

  A table gadget displays a data set in a row and column layout.

  Optionally, use aggregation options, filtering, and sorting to summarize this data. The dashboard developer decides if a table gadget displays summary or detailed data when the gadget is created. Figure 3-31 shows a summary table.

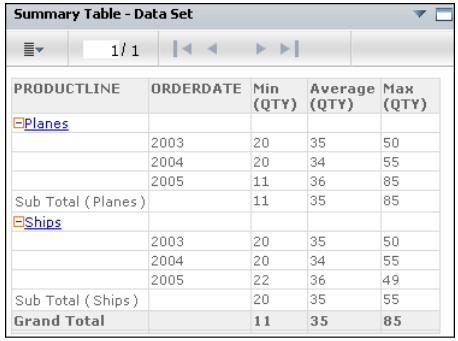


Figure 3-31 Reviewing a data set in a summarized table

About data selection gadgets

You filter data displayed in gadgets by choosing values in data selection gadgets (selectors), such as a list. Other gadgets 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 related to the selected customer.

Data selection gadgets can be linked to other data selection gadgets to present users with related 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 3-32.

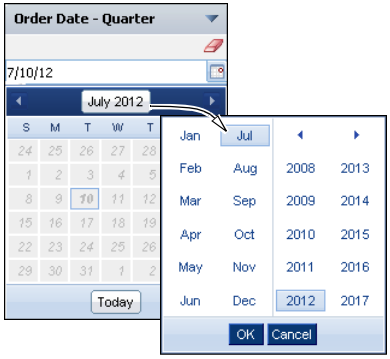


Figure 3-32 Values in a calendar gadget

- Check box gadget

  Check box gadgets display data with a check box next to each value, as shown in Figure 3-33. This gadget supports multiple-value selections. Users can also clear the selected value.

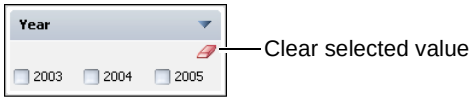


Figure 3-33 Values in a check box gadget

- Combo box gadget

  Combo box gadgets display data in a drop-down list, as shown in Figure 3-34. This gadget supports typing of values, using auto-suggest functionality, and selecting from a list of values.

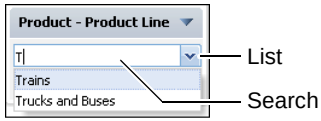


Figure 3-34 Values in a combo box gadget with auto-suggest

- Data version gadget

  This gadget enables you to 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 3-35 displays different versions of the data object store that a user can select.

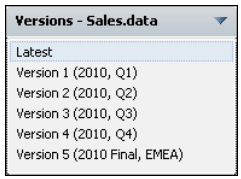


Figure 3-35 Versions of a data store displayed for user selection

- List gadget

  List gadgets display data in rows, as shown in Figure 3-36. This gadget supports multiple-value selections and searching list items. Press the Ctrl key while selecting separate values; press Shift key while selecting a range of values. You can also clear the selected value.

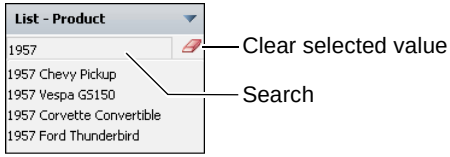


Figure 3-36 Values in a list gadget

- Radio button gadget

  Radio button gadgets display data with a radio button next to each value, as shown in Figure 3-37. This gadget supports single-value selections.

Figure 3-37 Values in a radio gadget

- Selector group gadget

  Selector group gadgets display values in a cascade. Users pick from a lists of related values. When the user chooses apply, linked gadgets on the dashboard

update to display data related to the all user selections in the data selector gadget. Figure 3-38 shows a slider gadget.

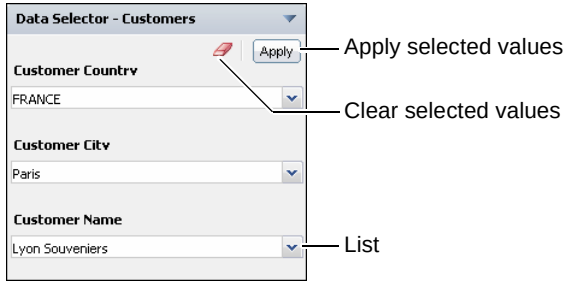


Figure 3-38 Values in a selector group gadget

- Slider gadget
  Slider gadgets display data as a sliding bar with tick marks next to known values. You can 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. Figure 3-39 shows a slider gadget.

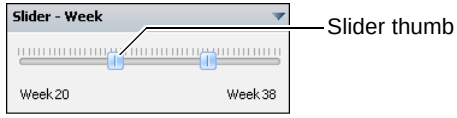


Figure 3-39 Report parameters in a slider gadget

Using a gadget

A dashboard contains one or more gadget files that display data. Each gadget has actions common to all gadgets, such as printing, refreshing, and maximizing. Other actions are specific to the gadget type such as drill-through and zoom. Some gadgets offer additional interactivity, depending on the gadget content. For example report gadgets can include toolbars, launch browser-based tools or contain hyperlinks to other Information Console documents or web sites.

You can interact with gadget content depending on the type of gadget:

- Analyze, edit, and add a chart view to cross tabs using BIRT Data Analyzer.
- Drill into charts displaying data cubes to see summary or detail data.
- Drill-through charts that contain hyperlinks to other reports.
- Filter displayed data using data selectors.
- Modify and format reports and tables using BIRT Interactive Viewer.
- Zoom in to a chart's *x*-axis, *y*-axis, or both to view increased detail.

Gadgets on a dashboard include a menu to interact with the gadget and its contents, as shown in Figure 3-40.

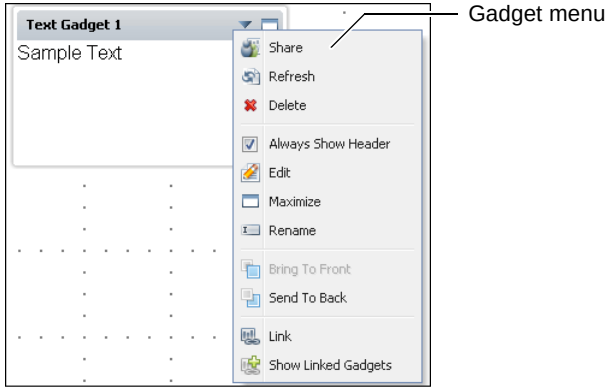


Figure 3-40 Gadget menu

You can refresh data, interact with gadget content, or maximize gadgets to launch browser-based tools, from shared dashboards. Users can move, resize, share, and edit gadgets on user dashboards. Table 3-2 lists the options available on gadgets.

Table 3-2 Gadget settings for shared and user gadgets

Option	Description	Shared	User
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 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.		✓

(continues)

Table 3-2 Gadget settings for shared and user gadgets (continued)

Option	Description	Shared	User
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.		✓
Send To Back	Move a floating gadget behind other gadgets.		✓
Share	General sharing options and privileges.		✓
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 context 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.

2 In the context menu, choose Drill into <value> where <value> is a data category or data series displayed in the chart, as shown in Figure 3-41.

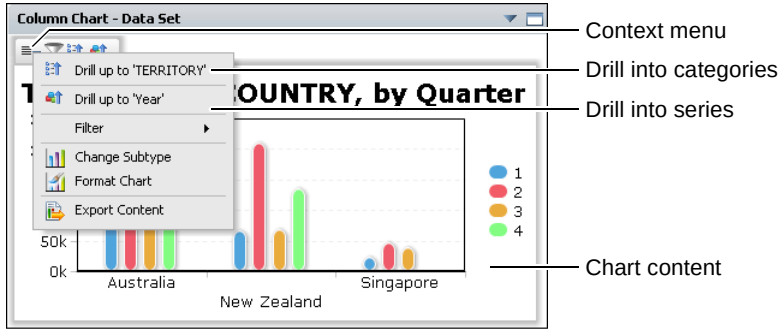


Figure 3-41 Choosing a drill-down into a chart gadget

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

To filter report and Reportlet gadgets in interactive mode, maximize the gadget.

How to filter a chart gadget

1 Select the gadget content. Filter appears, as shown in Figure 3-42.

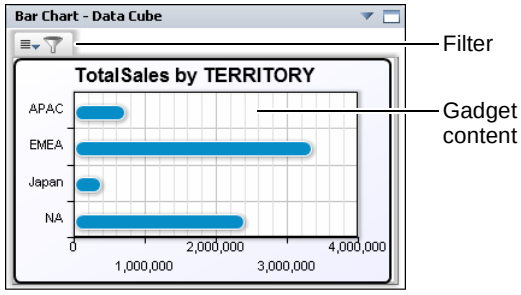


Figure 3-42 Filtering a gadget's data

2 Choose Filter. Filter appears, as shown in Figure 3-43.

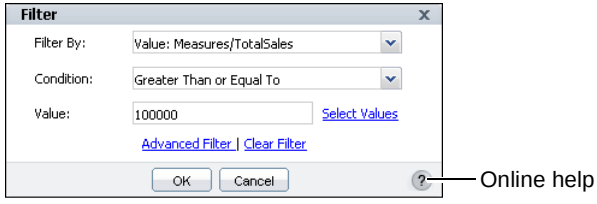


Figure 3-43 Creating a filter

3 Select the following options:

- Select the data column to filter. This example uses Measures/TotalSales.
- Select the filter condition. This example uses Greater Than or Equal To.
- Type a value. This example uses 100000.

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

You can filter top and bottom values displayed in a gadget to the highest or lowest values in a data set. For example, you can display the top 15% of sales or the lowest 25 customer orders. The following gadgets support filtering top and bottom values:

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

To use top and bottom filtering for report and Reportlet gadgets in interactive mode, maximize the gadget.

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 3-44.

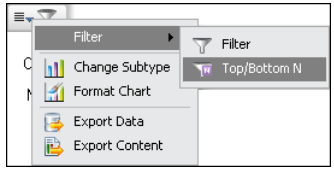


Figure 3-44 Filtering the top or bottom values of a gadget's data

3 In Top/Bottom N—Filter, select Top Percent and enter a value of 15, as shown in Figure 3-45.

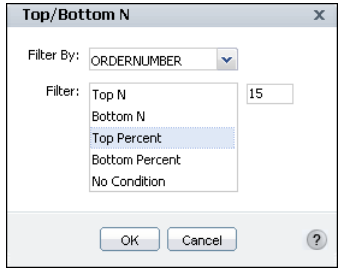


Figure 3-45 Adding a top filter

4 Choose OK. The chart gadget displays the top 15% of the selected data.

Exporting gadget content

Report and data visualization gadgets can export visual content in the following formats: AFP, Excel, PDF, PostScript, PowerPoint, Word. 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
Chart	✓	✓	
Cross tab	✓		
Flash chart	✓ (PDF)	✓	✓
Flash object	✓ (PDF)	✓	✓
Flex table			
Image			
Report	✓	✓	
Reportlet	✓	✓	
Table	✓ (in toolbar)	✓ (in toolbar)	
Video			

For more information about exporting formatted content in different file formats, select Online help in Export Content, as shown in Figure 3-47.

How to export a PDF from a report gadget

1 Open the toolbar menu and select Export Content, as shown in Figure 3-46. Export Content appears.

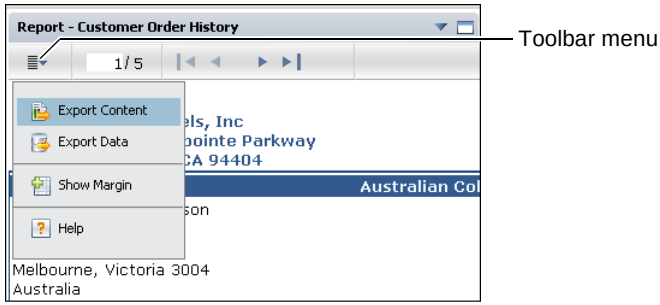


Figure 3-46 Exporting report gadget content

2 In Export Content, select the PDF export format and choose OK, as shown in Figure 3-47.

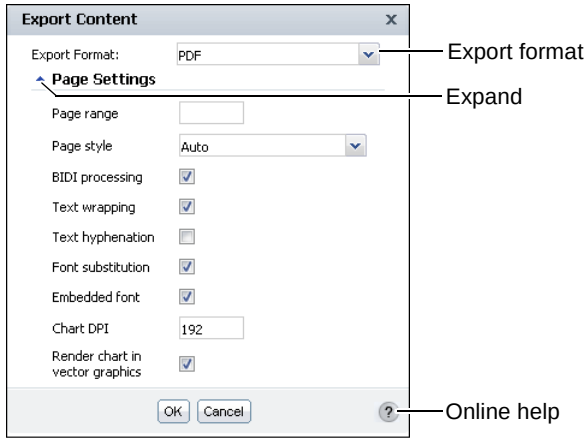


Figure 3-47 Selecting the PDF export format

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

How to print an Adobe Flash-based gadget

Use Print Chart from the Adobe Flash Player for gadgets using Adobe Flash. Right-click the gadget content to display Print Chart, as shown in Figure 3-48.

Figure 3-48 Flash print menu

How to export a PDF from a data visualization gadget

1 Select the gadget content. The context menu appears, as shown in Figure 3-49.

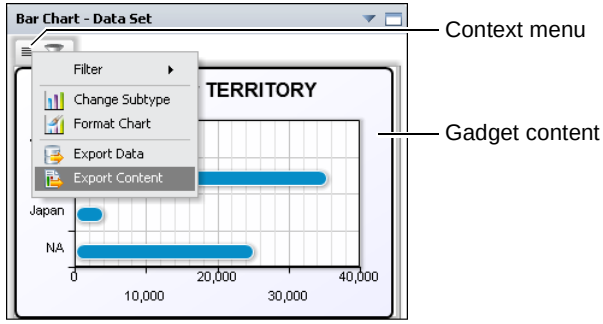


Figure 3-49 Opening a gadget's context menu

2 In the context menu, select Export Content as shown in Figure 3-49. Export Content appears.

3 In Export Content, select the PDF export format and choose OK, as shown in Figure 3-50.

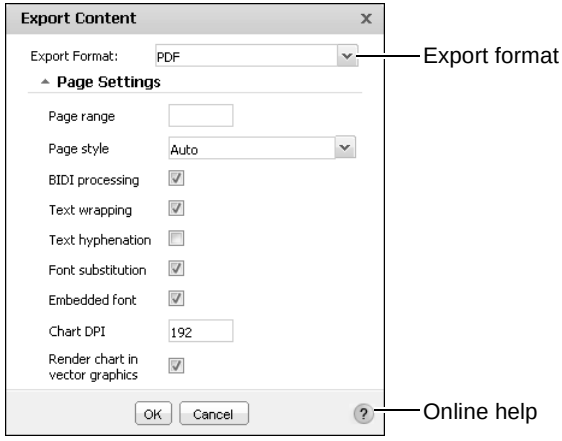


Figure 3-50 Selecting the PDF export format

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

For more information about exporting formatted content in different file formats, search for the term export content in the online help.

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.

If you export column headers with the data, you can select to export the column name or the display name. For example, if you export aggregated data from a flex table gadget and the column name is SUM(sold), exporting the column name gives the header name sold and exporting the display name gives the header name SUM(sold). Seeing the display name is useful when there are multiple aggregations of the same column data, such as SUM(sold), AVERAGE(sold) and MAX(sold).

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 e-mail. 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	✓ (in toolbar)	
Flash chart	✓	✓
Flash objects	✓	✓
Flex table	✓	✓
Report	✓	✓
Reportlet	✓	✓
Table	✓ (in toolbar)	✓ (in toolbar)

For more information about exporting data from a gadget, select Online help in Export Data, as shown in Figure 3-52.

How to export data from a gadget

1 In the toolbar menu, select Export Data, as shown in Figure 3-51. Export Data appears.

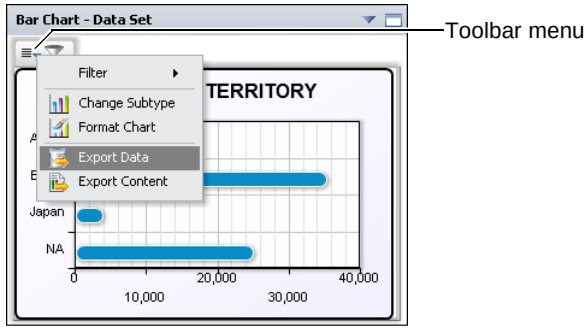


Figure 3-51 Exporting data from a chart gadget

2 In Export Data, complete the following steps:

- 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), as shown in Figure 3-52.

3 Choose OK. Data download begins.

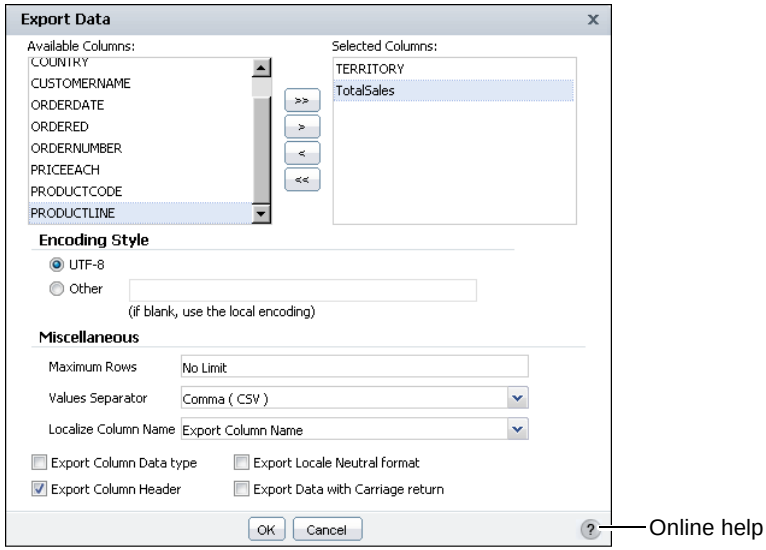


Figure 3-52 Choosing data to export from a gadget

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. For more information about exporting data, search for the term export data in the online help.

Maximizing gadgets

Although gadgets display in a column or free form layout, users can maximize a gadget to fill the browser window. Maximizing a gadget enables more space for viewing data 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 privileges 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 as 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 Data Analyzer

Launch BIRT Data Analyzer from a cross-tab gadget or a report gadget that contains a cross tab by selecting Maximize from the gadget title. 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 3-53.

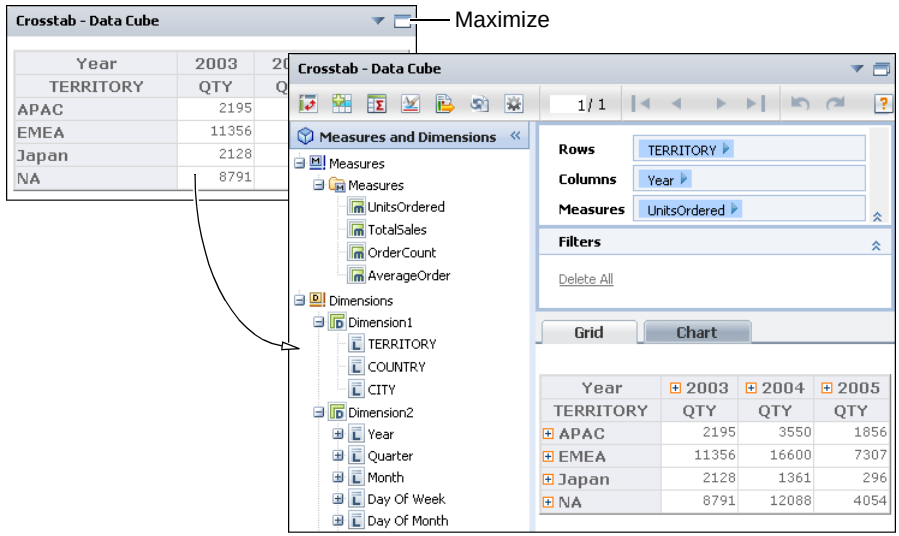


Figure 3-53 Launching BIRT Data Analyzer from a cross-tab gadget

- When the maximized gadget is a report or Reportlet gadget, right-click the cross tab and choose Analyze, as shown in Figure 3-54.

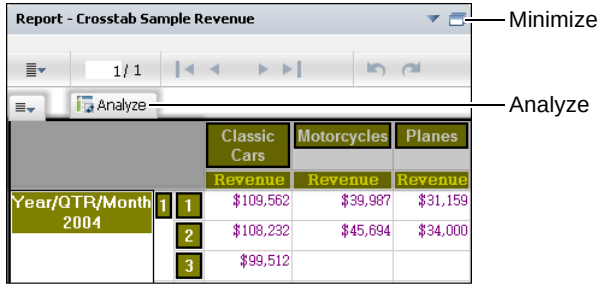


Figure 3-54 Launching BIRT Data Analyzer from a maximized report gadget

BIRT Data Analyzer opens.

How to launch BIRT Interactive Viewer

Maximize a chart, report, Reportlet, or table gadget by selecting Maximize. Optionally, double-click the gadget title to launch BIRT Interactive Viewer.

After BIRT Interactive Viewer is enabled, right-click part of the report to display the BIRT Interactive Viewer context menu, for example, right-click a title in a column to display sorting, filtering and additional interaction choices.

Figure 3-55 shows the process of maximizing a report gadget to enable interactive viewing.

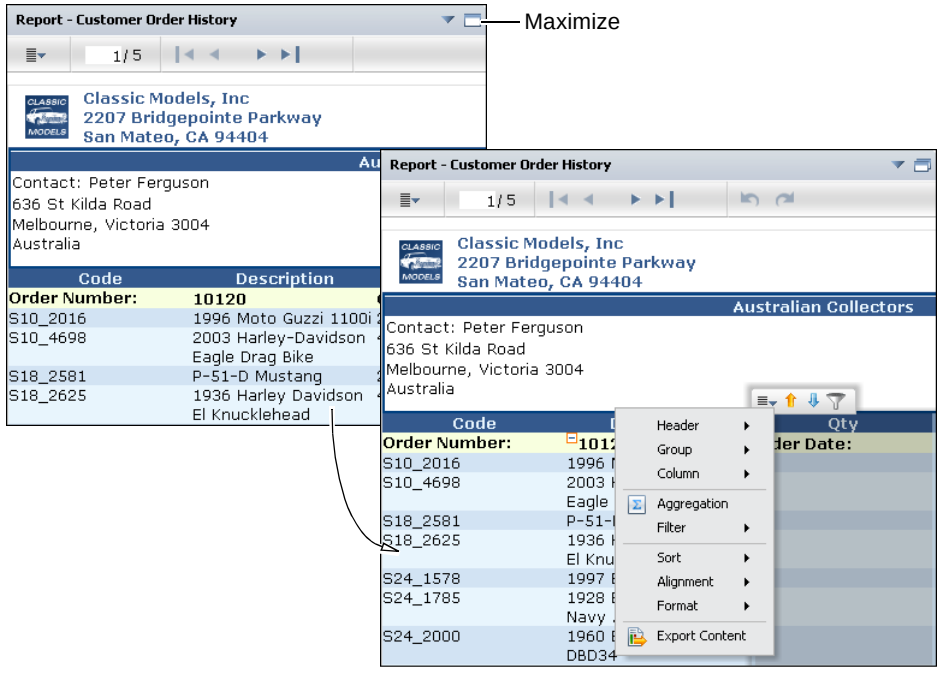


Figure 3-55 Launching BIRT Interactive Viewer from a gadget

Refreshing gadget content

Users can refresh a gadget to update the displayed information or rerun a report. Gadgets displaying external web sites or real-time data display the latest data when the user refreshes the gadget. Choose Refresh from the gadget menu, as shown in Figure 3-56, to refresh the content of a gadget.

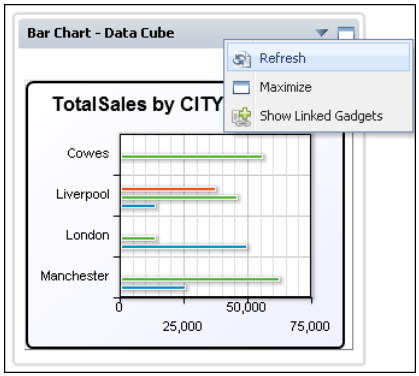


Figure 3-56 Refreshing content of a bar chart gadget

Showing linked gadgets

You 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 can change the data displayed in the table.

How to show linked gadgets

1 On the dashboard menu, choose Show Linked Gadgets, as Figure 3-57 shows.

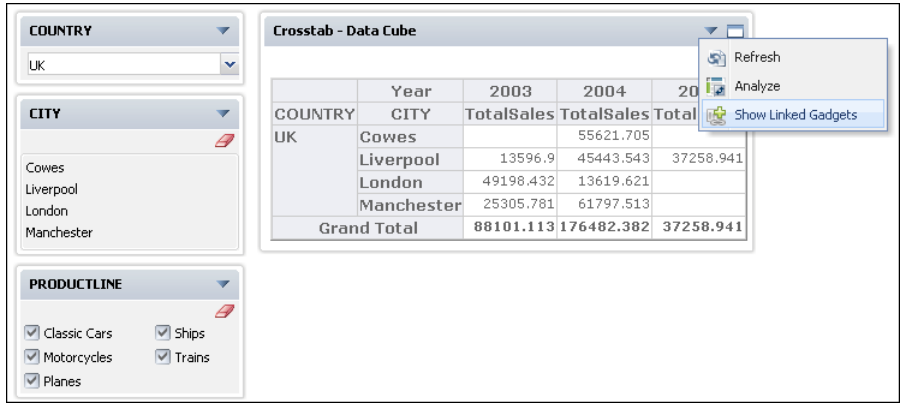


Figure 3-57 Showing gadgets linked to the cross tab

Gadgets that link to the selected gadget appear outlined, as Figure 3-58 shows.

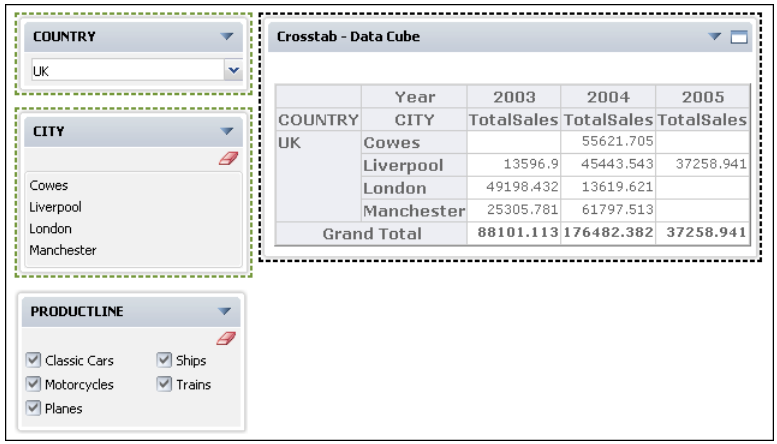


Figure 3-58 Reviewing which gadgets are linked together

2 On the dashboard menu choose Hide Linked Gadgets, as shown in Figure 3-59. The outline around linked gadgets disappears.

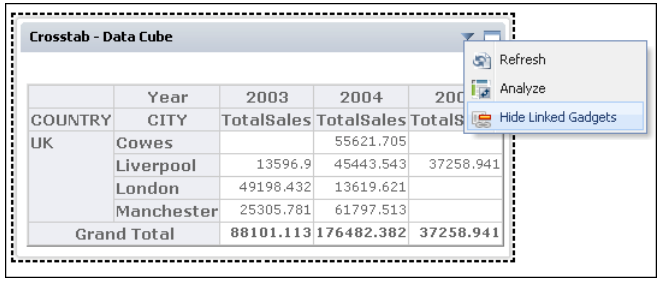


Figure 3-59 Hiding linked gadgets

Switching the view of a cross-tab gadget

Gadget developers 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 tabular view and chart view of the data displayed in the cross tab. Choose Switch View in the context menu of the cross-tab gadget

BIRT developers 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.

How to switch views in a cross-tab gadget

1 Left-click the gadget content. A context menu appears, as Figure 3-60 shows.

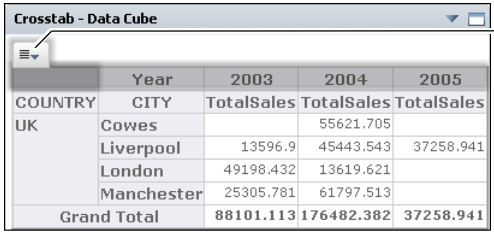


Figure 3-60 Opening a cross-tab gadget's context menu

2 In the cross-tab gadget menu, select Switch View, as shown in Figure 3-61.

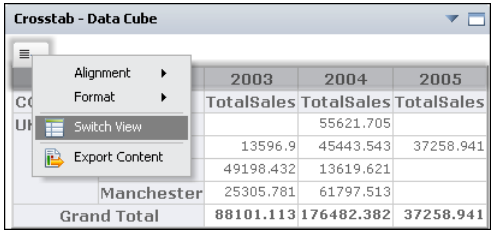


Figure 3-61 Selecting Switch View from a gadget's context menu

The chart view appears, as shown in Figure 3-62.

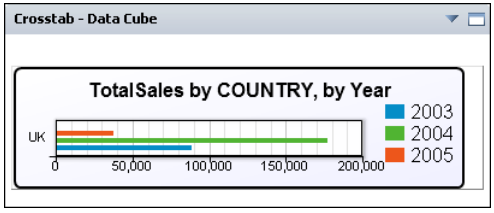


Figure 3-62 Displaying the chart view

Zooming in to a chart

You can zoom in to a chart to see details of displayed data. Chart gadgets and charts in BIRT documents support zooming on the *x*-axis, *y*-axis, or both at the same time. Zoom is enabled by the BIRT dashboard developer.

To make an *x*-axis zoom, select a start point on the *x*-axis, drag the mouse to the end point, and then release the mouse button. Figure 3-63 shows an *x*-axis zoom.

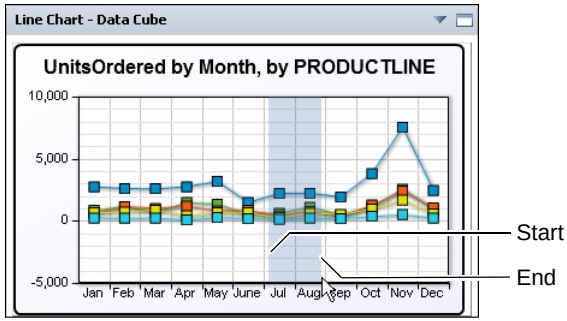


Figure 3-63 Zooming on the *x*-axis

Figure 3-64 shows the results of an *x*-axis zoom. Choose Reset zoom to return the chart to the default display or continue to zoom to view additional detail.

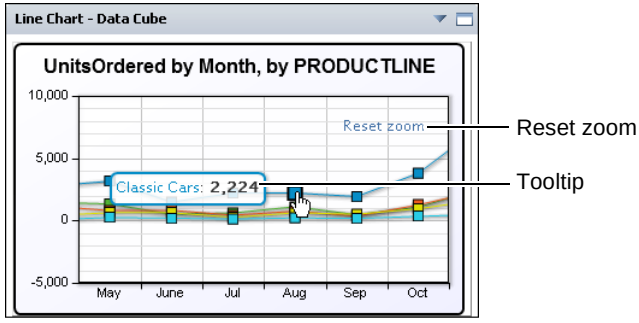


Figure 3-64 Finished zoom on the *x*-axis

To make a *y*-axis zoom, select a start point on the *y*-axis, drag the mouse to the end point, and then release the mouse button. Figure 3-65 shows a *y*-axis zoom.

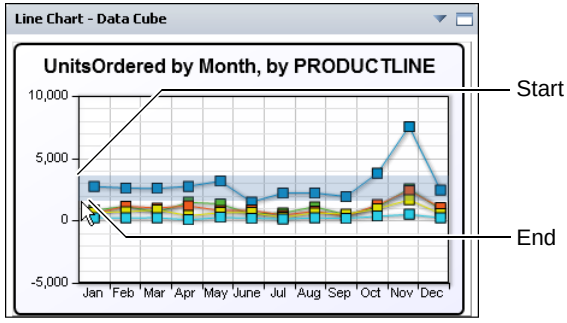


Figure 3-65 Zooming on the *y*-axis

Figure 3-66 shows the results of a *y*-axis zoom. Choose Reset zoom to return the chart to the default display or continue to zoom to view additional detail.

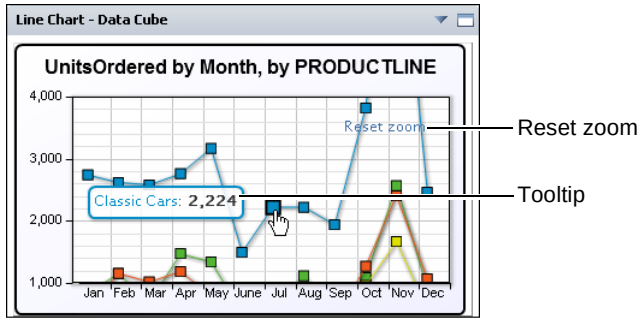


Figure 3-66 Finished zoom on the *y*-axis

To make an *x*- and *y*-axis zoom, select a beginning point on the *y*-axis, drag the mouse to the end point on the *x*-axis, and then release the mouse button. This creates a box around the points to zoom in to, as shown in Figure 3-67.

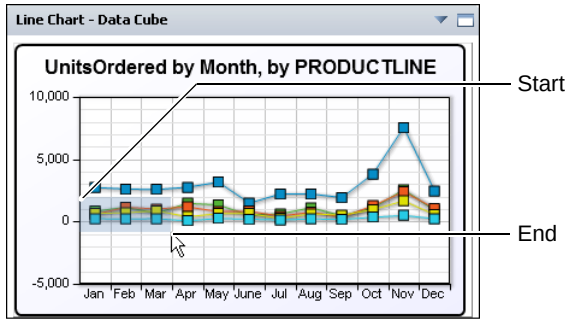


Figure 3-67 Zooming on the *x*- and *y*-axis

Figure 3-68 shows the results of an *x*- and *y*-axis zoom.

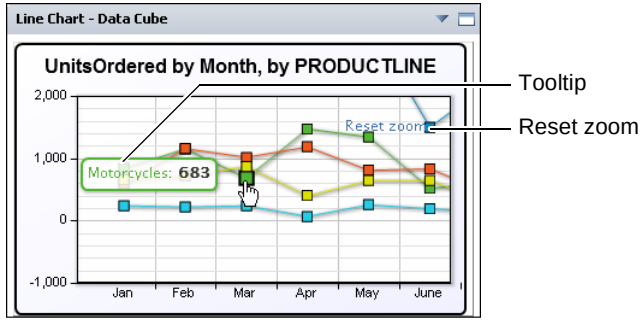


Figure 3-68 Finished zoom on the *x*- and *y*-axis

Choose Reset zoom to return the chart to the default display or zoom again to view additional detail.

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 3-69.

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

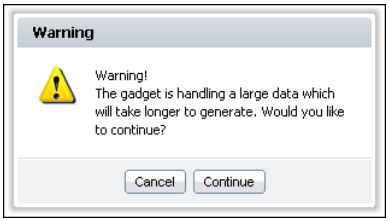


Figure 3-69 Cancelling generation of gadget content

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 or schedule items such as BIRT designs and spreadsheet executable files as file jobs. A file job generates a new document file version. When a file job is run, data that appears in the document is updated. Parameter 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 file can be viewed or downloaded. A document file generated from some Actuate file types can be converted to other document formats such as 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 can schedule jobs to run immediately, 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.

An Information Console user can track or cancel a scheduled file job that appears in My Jobs. Users can also select e-mail 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 such as 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 view a new 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 privileges 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 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.

A new document inherits permissions from the privilege template of the user running the file job that generates the document. Optionally, the user scheduling or running and saving a job can choose to copy file permissions from the output folder or from the latest version of the file.

How to run a file job without saving

To generate a document without saving it in a volume, using Categories view:

1 In Items You Can Run, navigate to the design or report executable file.

2 Choose the file name or version number.

Optionally, using Details, Icons, or List view, choose File➛Run. In Icons and List view, File menu appears when the cursor is over a file icon.

For a file requiring parameters, Parameters appears, as Figure 4-1 shows.

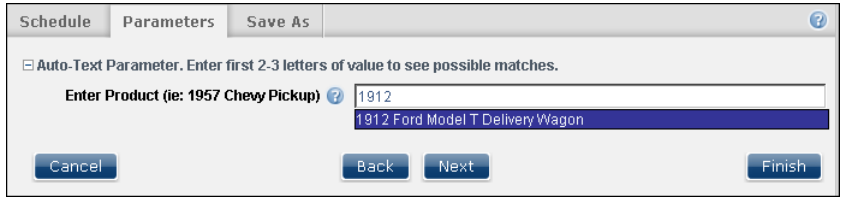


Figure 4-1 Selecting parameters

3 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.

Choose Finish. The generated document appears in a file viewer.

How to run a file job and save a document

To generate a document and save it in a volume, using Categories view:

1 In Items You Can Run, navigate to the design or report executable file.

2 Choose Run and Save.

Optionally, using Details, Icons, or List view, choose File➛Run and Save. In Icons and List view, File menu appears when the cursor is over a file icon.

For a file requiring parameters, Parameters appears, as Figure 4-2 shows.

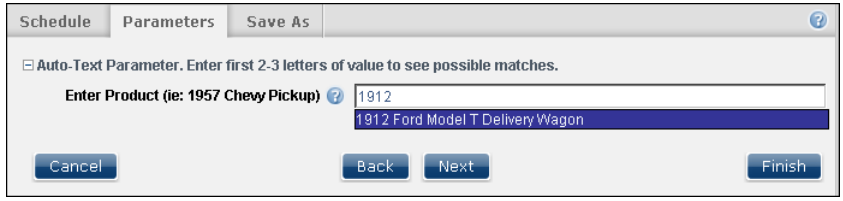


Figure 4-2 Selecting parameters

3 Select or type values for any required parameters. Choose Next.

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

4 Provide the information necessary to save the scheduled file, as shown in Figure 4-3.

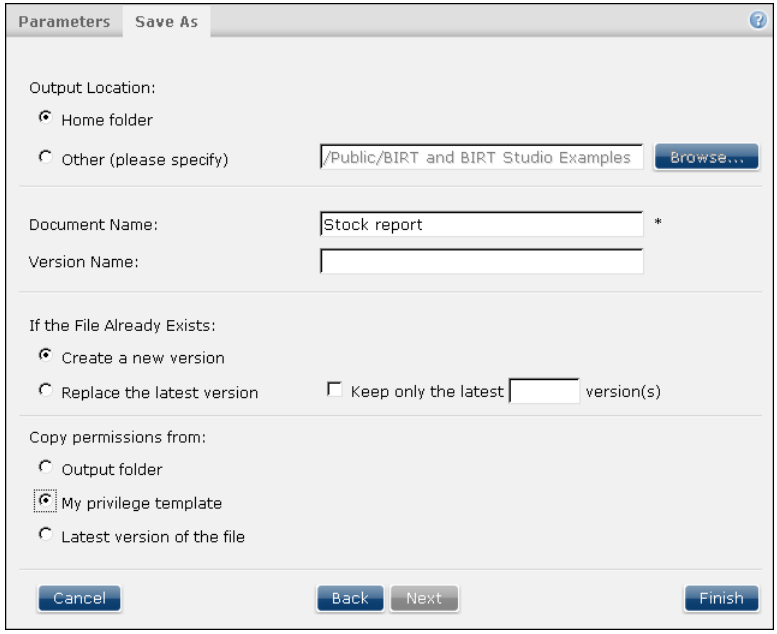


Figure 4-3 Adding information to save a file job

1 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.

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

3 In Version Name, optionally type a custom version name.

4 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.

5 Optionally, in Copy permissions from, choose Output folder or Latest version of the file.

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

Running a BIRT Spreadsheet executable job

BIRT Spreadsheet executable files are available in Items You Can Run. They run as file jobs to create new spreadsheet documents. Developers create spreadsheet executable files using 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 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.
- Run and Save: prompts for parameters, if required, and save-as details before opening the resulting document.
- 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 a spreadsheet document without saving it in the Encyclopedia volume, using Categories view:

1 In Items You Can Run, navigate to the spreadsheet executable file and select the file name to generate the latest version. The generated document appears unless the file job requires parameters.

For a file requiring parameters, Parameters appears, as shown in Figure 4-4.

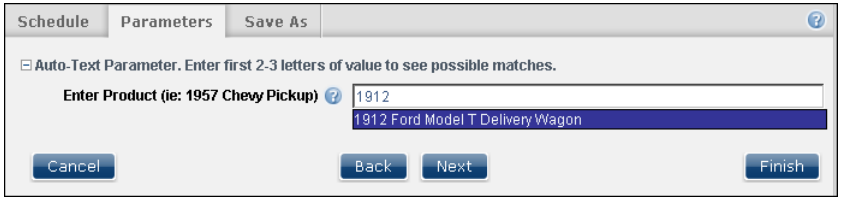


Figure 4-4 Selecting parameters

2 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 to generate the spreadsheet.

How to run and view a spreadsheet executable

To generate and open a spreadsheet document without saving it in the Encyclopedia volume, using Categories view:

1 In Items You Can Run, navigate to the spreadsheet executable file.

2 Select Run and View, as shown in Figure 4-5.

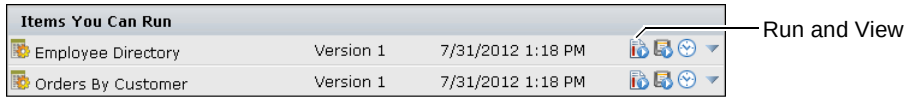


Figure 4-5 Choosing Run and View

Optionally, using Details, Icons, or List view, choose File➛Run and View.

In Icons and List view, File menu appears when the cursor is over a file icon. The spreadsheet output format appears.

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.

For a file requiring parameters, Parameters appears, as shown in Figure 4-6.

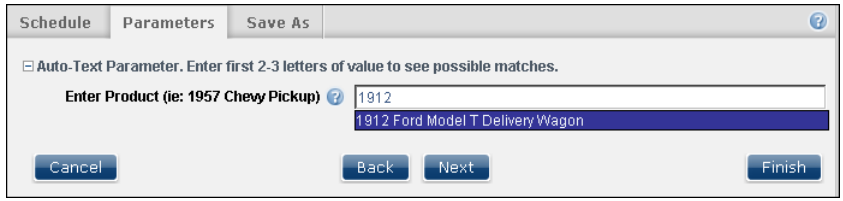


Figure 4-6 Selecting parameters

4 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 prompts you to download the spreadsheet file.

How to run and save a spreadsheet executable

To generate a spreadsheet file and save it in the Encyclopedia volume, using Categories view:

1 In Items You Can Run, navigate to the spreadsheet executable file.

2 Select Run and Save, as shown in Figure 4-7.

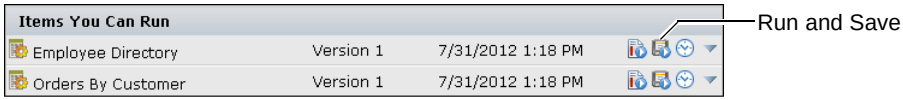


Figure 4-7 Choosing Run and Save

Optionally, using Details, Icons, or List view, choose File➛Run and Save. In Icons and List view, File menu appears when the cursor is over a file icon.

For a file requiring parameters, Parameters appears, as Figure 4-8 shows.

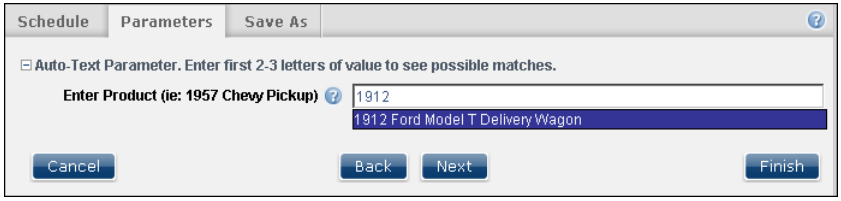


Figure 4-8 Selecting parameters

3 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.

4 Provide the information necessary to save the scheduled file, as shown in Figure 4-9.

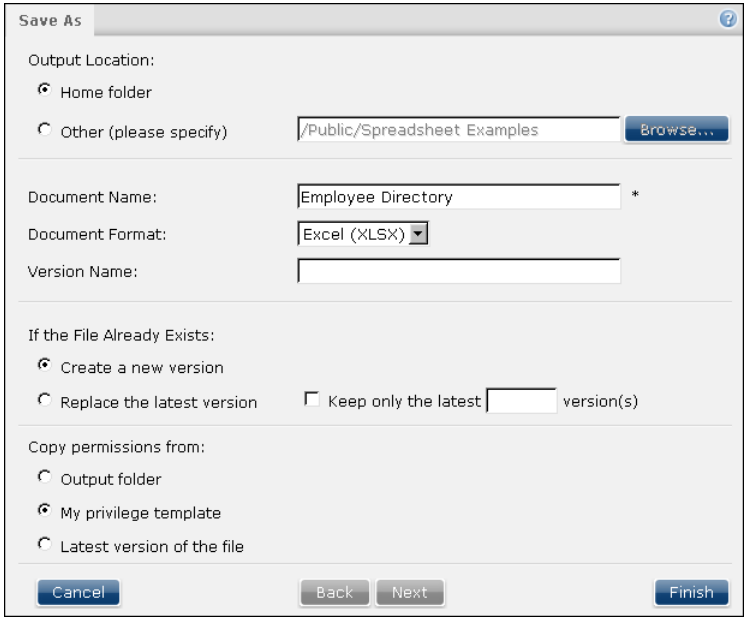


Figure 4-9 Selecting options to save a spreadsheet file job

1. 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.
2. In Document Name, accept the default or type a new name. Optionally, use date-and-time expressions, as explained later in this chapter.
3. 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.
4. In Version Name, optionally type a custom version name.
5. 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.
6. Optionally, in Copy permissions from, choose Output folder or Latest version of the file.

Choose Finish. The generated spreadsheet document is saved in the selected output location and opens in a viewer. Typically, a spreadsheet opens in Microsoft Excel.

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 file job

To schedule a file job using Categories view:

1 In Items You Can Run, navigate to the document file.

2 Choose Schedule.

Optionally, using Details, Icons, or List view, choose File➤Schedule. In Icons and List view, File menu appears when the cursor is over a file icon.

3 In Schedule, provide scheduling information, as shown in Figure 4-10.

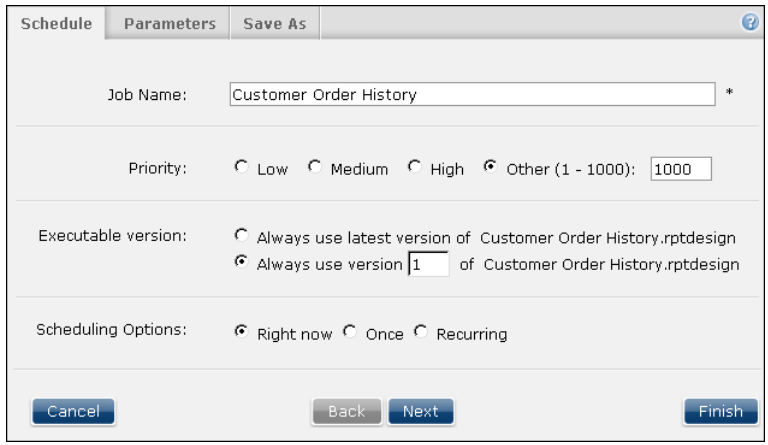


Figure 4-10 Scheduling a file job

- 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 the Calendar to select a date.
  - To repeat generating the report, select Recurring, as Figure 4-11 shows.

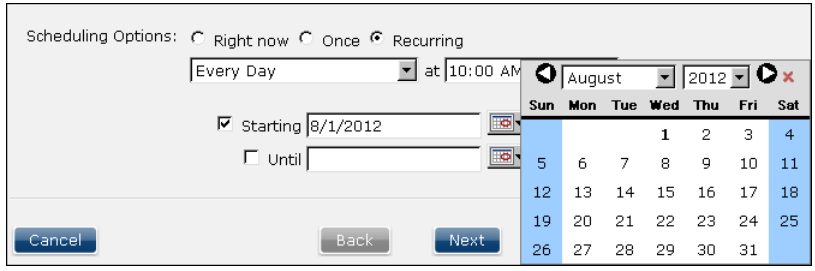


Figure 4-11 Scheduling options

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. For a file requiring parameters, Parameters appears, as shown in Figure 4-12. Otherwise, Save As appears.

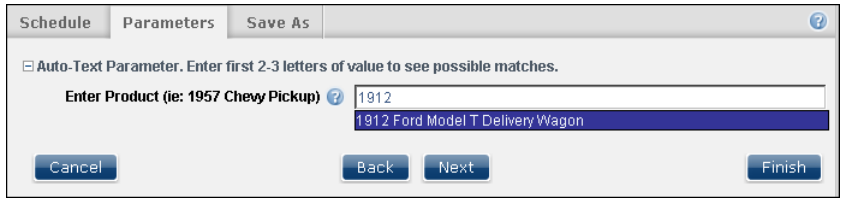


Figure 4-12 Selecting parameters

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 4-13.

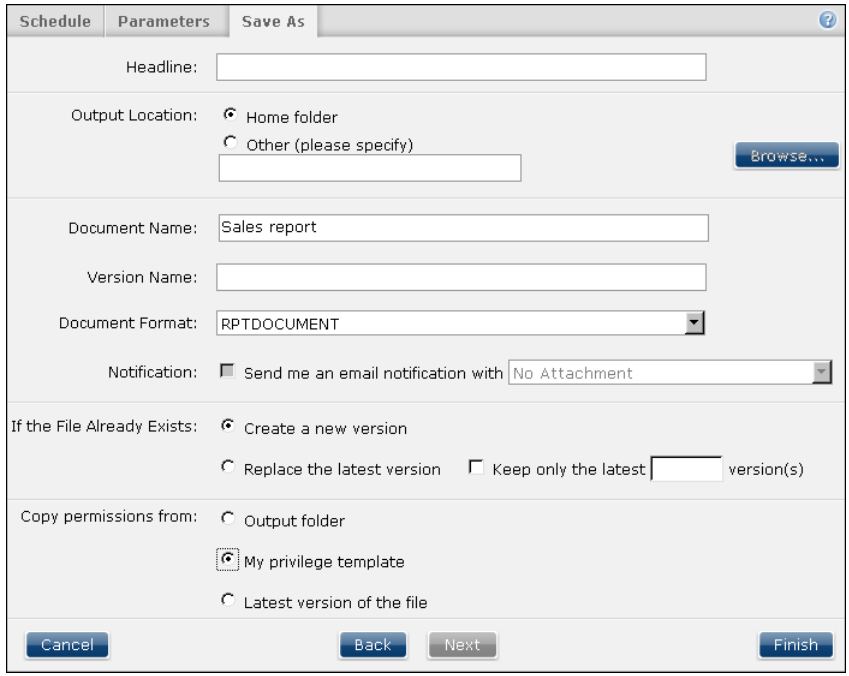


Figure 4-13 Adding information to save a file job

- 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.

7 Select the document format to generate. Each output type has various conversion options, as shown in Figure 4-14. Additional conversion options appear, depending on the selected document format.

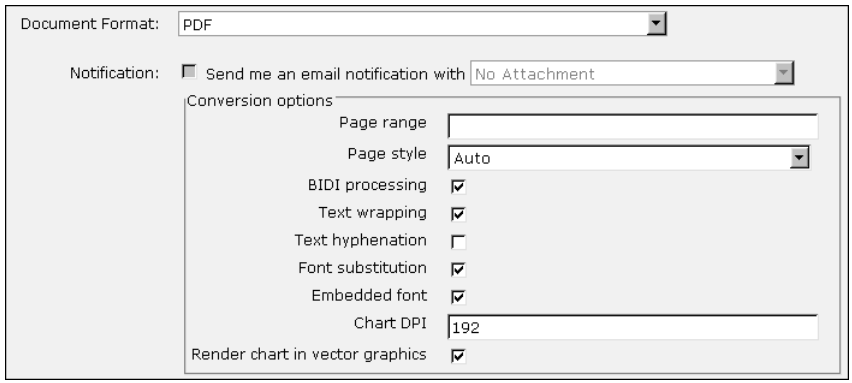


Figure 4-14 Selecting output conversion options

8 Optionally, to receive an e-mail notification when the file job runs, select Send me an e-mail notification. Select the attachment format to attach a copy of the file job output to the e-mail notification. The user's e-mail address as configured from the Information Console's user options is used to send the e-mail. If the e-mail 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.

10 Optionally, in Copy permissions from, choose Output folder or Latest version of the file.

Choose Finish. Confirmation of job submission appears, as Figure 4-15 shows.

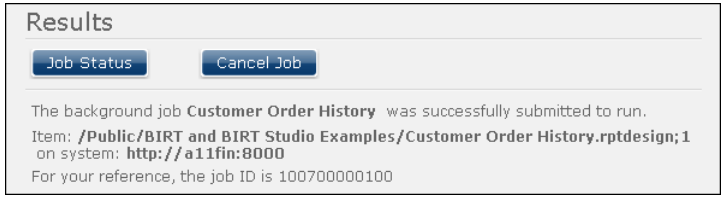


Figure 4-15 Confirming submission of a scheduled job

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. User input may define which records are retrieved, the sorting sequence of the data, and the output format for a report.

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 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 set by the design developer.
- 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 4-16 shows Parameters prompting input of values.

Figure 4-16 Using parameters to customize a report

Using multiple-value parameters

Multiple-value parameters are drop-down lists, radio buttons, or checklists. 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 two types of ad hoc parameters available to Information Console users; dynamic filters and Query by Example (QBE). Dynamic filters request 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 4-17 shows an example of using dynamic filter operators to make an ad hoc expression.

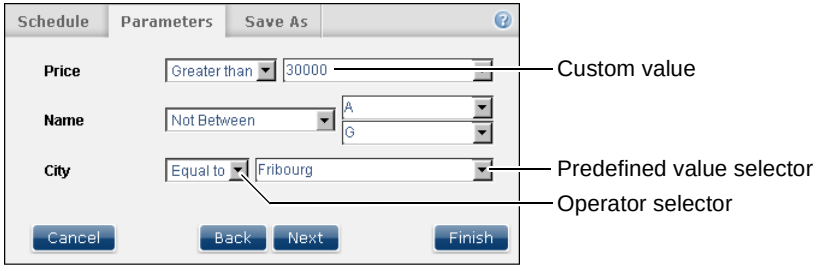


Figure 4-17 Using dynamic filters

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.

Table 4-3 Dynamic filter operators

Operator	Usage
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.
\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' 'D'	'Barcelona' 'Dublin'	'Zurich' 'Seattle'
Greater than	'Oslo'	'Oulu' 'Paris'	'Oslo' 'NYC'
In	'Lyon' 'New York'	'Lyon' 'New York'	'London' 'New Haven'
Is false		'0'	'11'
Like	'A%'	'Amsterdam' 'Auckland'	'Zurich'
Like	'B___'	'Bern'	'Berlin' or 'Boston'
Like	'Be%n'	'Berlin' or 'Bern'	'Bergamo'
Like	'%& Co%n'	'Handji Gifts& Co' 'Models & Co.'	'Boards & Toys Co' 'Cruz & Sons Co.'
Match	'es.'	'Manchester'	'Nantes'
Match	'ity'	'City' 'Makati City'	'Nantes' 'Paris'
Match	'ern'	'Stavern' 'Bern'	'Liverpool' 'Bergen'
Match	'(ern)|(New)'	'Bern' 'Newark' 'New Bedford'	'Glendale' 'Cunewalde'
Match	'A'	'Allentown' 'Los Angeles'	'Nantes' 'Paris'
Match	'.A'	'Los Angeles'	'Allentown'
Match	'[A-C]'	'Burbank' 'Los Angeles' 'NYC'	'Frankfurt' 'Singapore'
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 10. 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]
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 4-18.

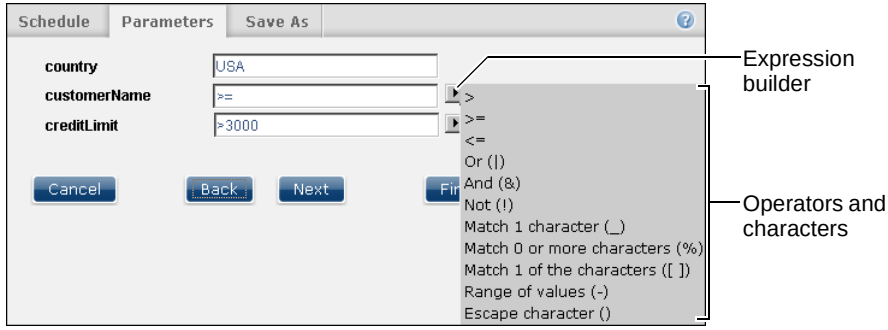


Figure 4-18 Using the ad hoc expression builder

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

Figure 4-19 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 4-19 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' 'Smath'	'Smooth' 'Smth'
ab[%]c	'ab%c'	'abac' 'ab[%]c'
Smith%	'Smith' 'Smithsonian' 'Smith '	'Smit'
ab%c	'abac' 'ab%c' 'abc'	
Sm_th	'Smith' 'Smoth'	'Smooth' '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'	

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

QBE expression	Matches	Does not match
'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 4-20.

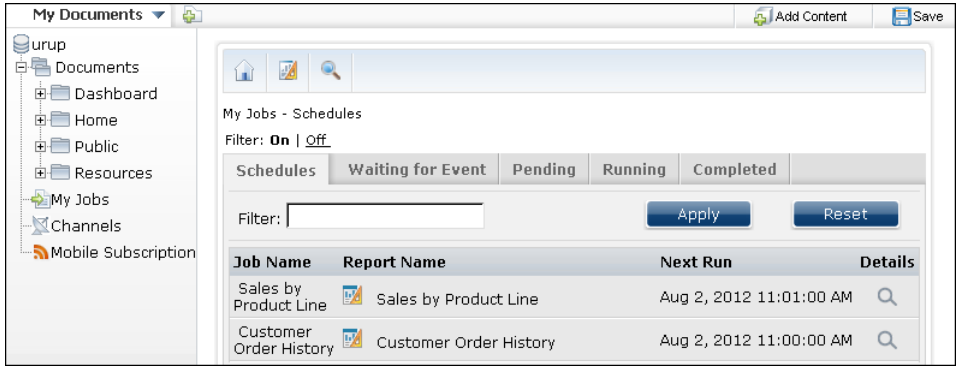


Figure 4-20 Tracking reports in My Jobs

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 4-21.

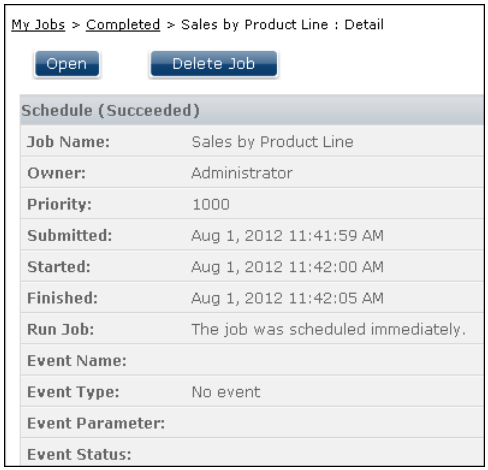


Figure 4-21 Displaying details about a file job

- Information about the original file used in the file job, as shown in Figure 4-22.

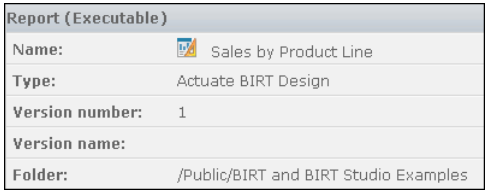


Figure 4-22 Displaying details about the original file used in the file job

- Information about the output document from the job, as Figure 4-23 shows.

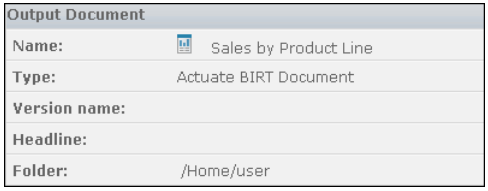


Figure 4-23 Displaying details about the output document from a file job

- Status of the file job, as shown in Figure 4-24.

Figure 4-24 Displaying details about the status of a scheduled file job

- Notification settings for the file job, as shown in Figure 4-25.

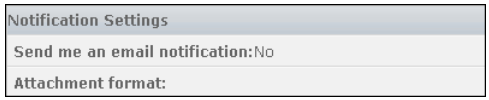


Figure 4-25 Displaying details about notification settings of a file job

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 job names that start with Sales, type:

   ```
   Sales*
   ```

4. Choose Apply. The resulting filtered jobs appear. For example, in Figure 4-26, only jobs that start with Sales appear.

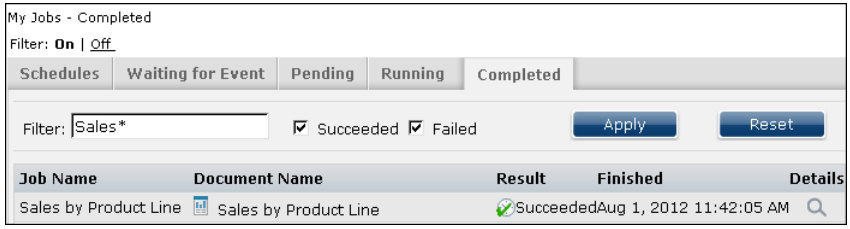


Figure 4-26 Filtering jobs

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 4-27.

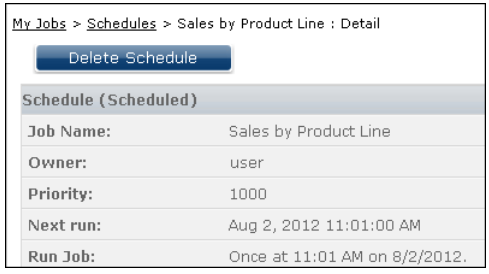


Figure 4-27 Deleting a scheduled report

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 4-28.

Figure 4-28 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, to display 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 three 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

(continues)

Table 4-13 Date format symbols (continued)

Symbol	Description	Example	Result
ddd	Returns the three-letter abbreviation for the weekday	{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
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} {hh:nn:ss AM/PM}	08:45:03 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} {h:n:s A/P}	8:45:3 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
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

Using BIRT Mobile

This chapter contains the following topics:

- About BIRT Mobile software
- Using Mobile Subscriptions
- Configuring a connection profile
- Viewing files with BIRT Mobile
- Restarting BIRT Mobile

About BIRT Mobile software

You can view BIRT content on Apple® and Android™ mobile devices using BIRT Mobile software. This software connects your mobile device to an enterprise BIRT iServer over your virtual private network (VPN) or wireless network. Figure 5-1 shows BIRT content displayed on mobile devices.

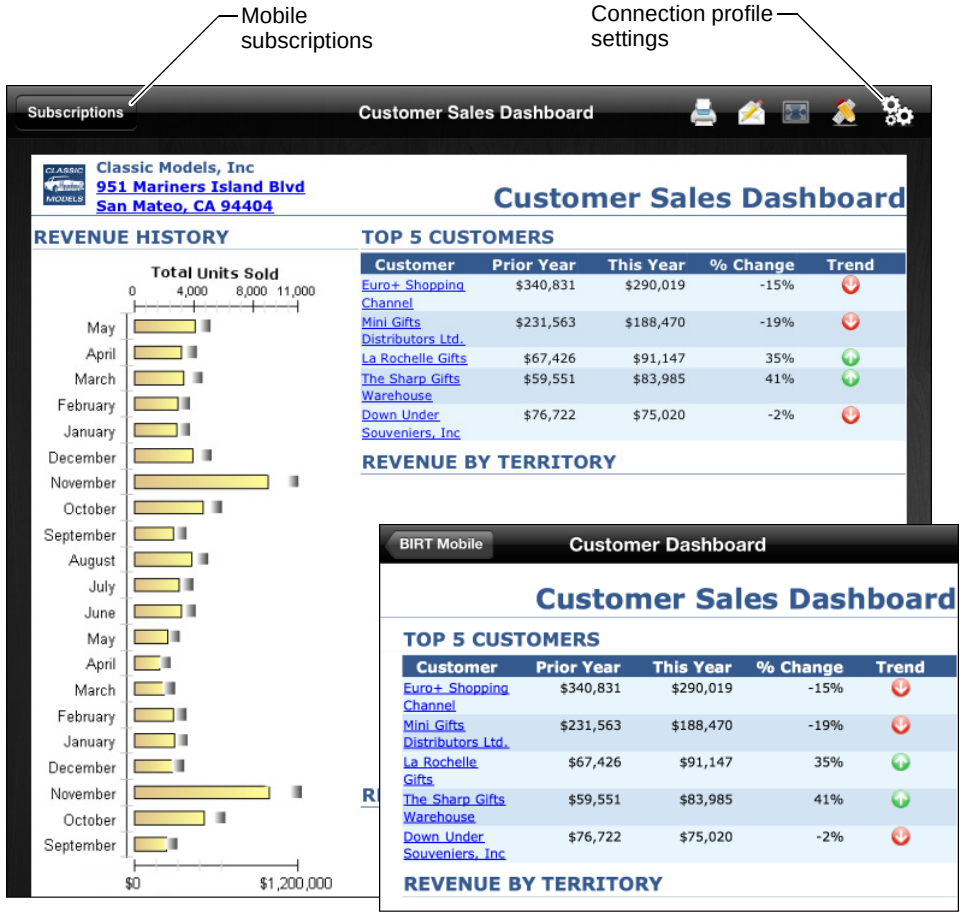


Figure 5-1 BIRT content viewed on tablet and phone mobile devices

BIRT Mobile software supports the following user activities:

- Viewing BIRT reports
- Printing to network printers supported by the mobile device
- Using parameters to run custom reports

- Using hyperlinks to view report details, access external web sites, and send e-mail
- Adding contacts or make phone calls to phone numbers in a report
- Adding events to the device calendar from dates in the report

After installing BIRT Mobile on your mobile device, configure a connection profile to access your Information Console URL. After BIRT Mobile connects to your Information Console account, you can use BIRT Mobile to view BIRT content.

The BIRT Mobile software requires a network connection to Information Console. If your Information Console server is protected by a network firewall, open a virtual private network (VPN) connection first, if necessary. Consult your network administrator.

If you use BIRT Mobile from a remote network, data usage charges apply depending how your mobile device connects to you network. For example, your cellular data provider may charge for data activity over their 3G network. Public wireless (Wi-Fi) access may also charge for data activity. The version of BIRT Mobile optimized for tablet devices is BIRT Mobile HD.

Using Mobile Subscriptions

Use Mobile Subscriptions in Information Console to select which reports are available for viewing in BIRT Mobile. Figure 5-2 shows Mobile Subscriptions.

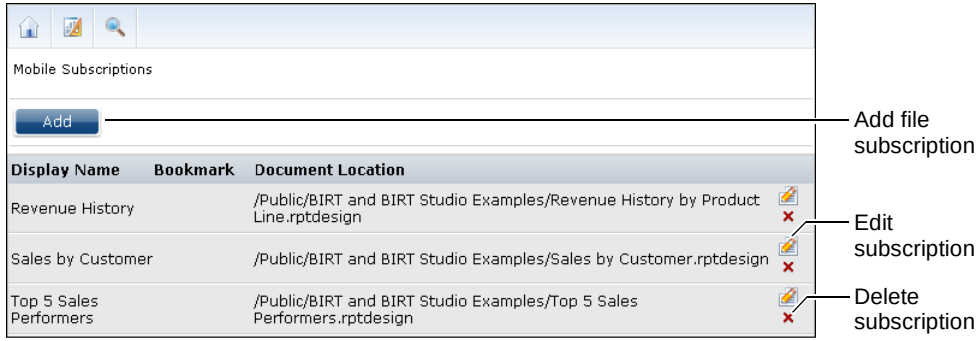


Figure 5-2 Managing files using Mobile Subscriptions

Each BIRT file added in Mobile Subscriptions includes a display name and viewing orientation. Mobile Subscriptions enables the following additional options:

- Display the entire file or only a bookmarked element of it.
- Add default parameter 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 In My Documents, choose Mobile Subscriptions. The Mobile Subscriptions page appears, as shown in Figure 5-3.

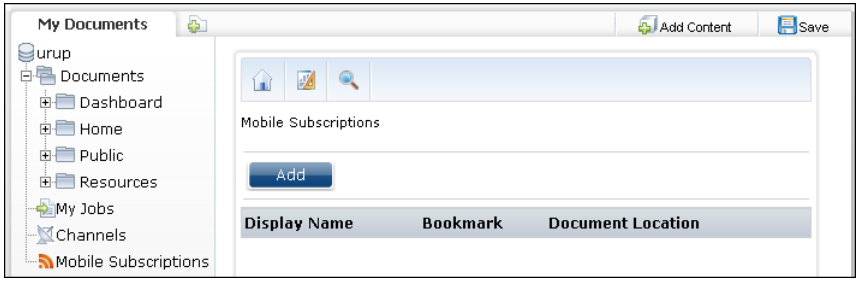


Figure 5-3 Adding files to Mobile Subscriptions

3 Choose Add. Mobile Subscription appears, enabling you to select a file for mobile viewing, as shown in Figure 5-4.

Figure 5-4 Selecting BIRT content to display on a mobile device

4 Choose Browse. A browser appears for you to select a file, as shown in Figure 5-5. You can specify a filter value to limit displayed files or navigate to a different folder.

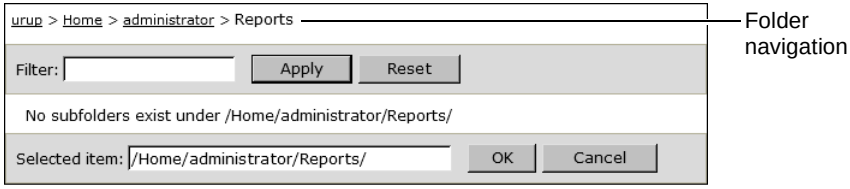


Figure 5-5 Selecting a file for mobile viewing

5 Type a letter or word in Filter and choose Apply to display only BIRT documents that match the filter. You can use an asterisk * as a wildcard character.

6 Select the file that you want to view on a mobile device. If the file is in a different folder, navigate to the correct folder path. This example selects the Customer Order History.rptdesign file, as shown in Figure 5-6.

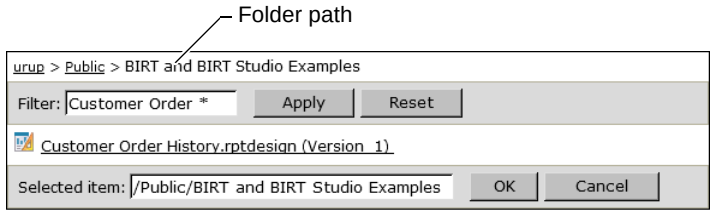


Figure 5-6 Selecting a file for mobile viewing

Choose OK to subscribe to the selected file. Mobile Subscription appears and displays the name and folder path of the selected file.

7 Add the following values to the selected file:

- In Display Name add a name to appear in the mobile device in place of the file name. The example shown in Figure 5-7 adds the display name Customer order history.

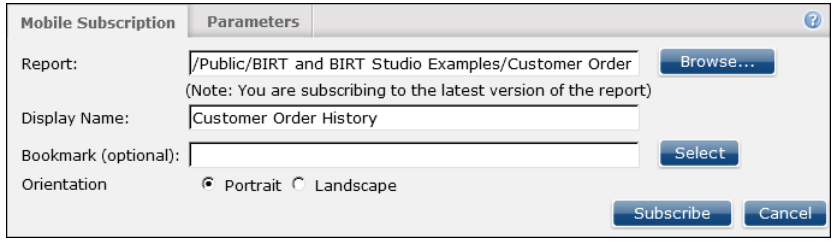


Figure 5-7 Adding a mobile display name to the selected BIRT file

- In Bookmark (optional) select a bookmark to display a single element of a BIRT file, instead of the entire file. Choose Select to view a list of bookmarks in the file. Bookmarks are added to the file by BIRT developers using BIRT Designer Professional or BIRT Studio.
- In Orientation, select a default orientation to display the file when viewed on a mobile device; portrait or landscape mode.

If your report does not require parameters values, go to step 9.

8 If a BIRT file requires parameters, choose Parameters, as shown in Figure 5-8. Select a value from the list. Required parameters appear highlighted.

Figure 5-8 Adding a parameter value to use when viewing the file

9 Choose Subscribe. The Mobile Subscriptions page appears and displays the new mobile subscription, as shown in Figure 5-9.

Figure 5-9 Reviewing a new mobile subscription

Repeat steps 1–9 to add additional mobile subscriptions.

Configuring a connection profile

BIRT Mobile viewing software supports multiple connection profiles when used on a tablet device. Each profile contains the information needed to log in to an Information Console user account. This information is available from your BIRT iServer administrator.

How to create a new profile

To create a new connection profile in BIRT Mobile, complete the following steps:

1 Choose Settings.

2 Select New Profile if using a tablet device.

3 In the empty profile, add the following information, available from your BIRT iServer administrator:

- Profile Name
  Available on tablet devices, this is a name for the connection profile.
- User Name
  The name you use to log in to Information Console.
- Password
  The password you use to log in to Information Console.
- Server
  Select Actuate iServer.
- Mobile URL
  The URL to access Information Console.
- Volume
  The name of the Encyclopedia volume that stores the BIRT content you selected in Mobile Subscriptions.

4 Choose Save, as shown in Figure 5-10.

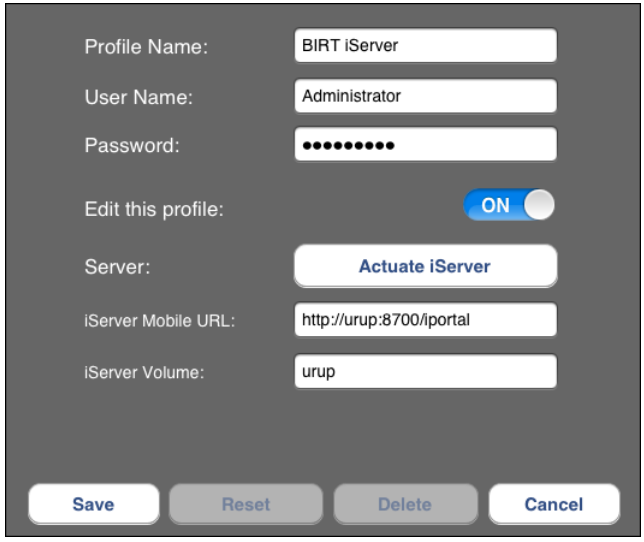


Figure 5-10 Configuring a new connection profile

If you select an existing profile you can update the profile to change the settings or reload it.

Viewing files with BIRT Mobile

When connecting to an Actuate iServer system, the following features are available when using a phone device:

- Viewing files
- Choosing static parameter values

The following additional features are available when using a tablet device:

- Printing files
- Sending reports in an e-mail
- Selecting a connection profile

Selecting a file to view

You can view files using BIRT Mobile once your BIRT Mobile connection profile is configured and you have added files to Mobile Subscriptions. The iPhone version of BIRT Mobile displays mobile subscriptions immediately due to the small screen size, as shown in Figure 5-11.

Figure 5-11 Displaying available files on an Apple iPhone

Tablet devices display files as a list.

In a tablet device in portrait mode, choose Subscriptions to see the list of available files in BIRT Mobile, as shown in Figure 5-12. In a tablet device in landscape mode, the available files are displayed on the side of the report.

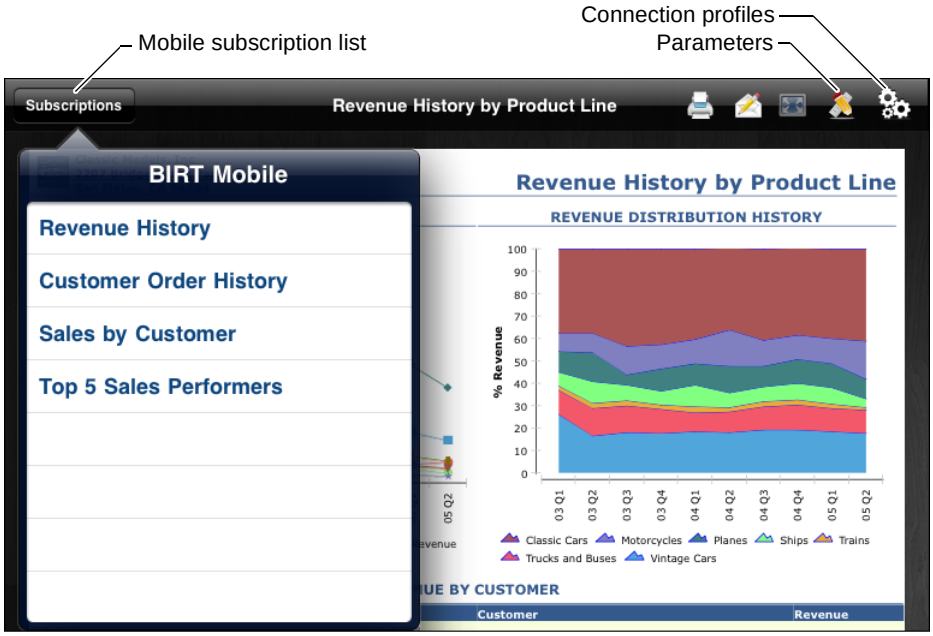


Figure 5-12 Displaying available files on an Apple iPad

Select a file to view it. Update the file list by reloading your BIRT Mobile connection profile. A network connection to your BIRT iServer is required for BIRT Mobile to access files.

Using report parameters

Change report parameter values to create custom reports. You can change parameter values in the following ways:

- Use Mobile Subscriptions in Information Console to set parameters for a selected report.
- Enter parameter values in BIRT Mobile. BIRT Mobile accepts text values as parameters.
- Use Information Console to run a BIRT design with your parameter values. Save a BIRT document for each different set of parameter values. Add these documents into Mobile Subscriptions using names related to the selected values.

How to use parameter values

To run a custom report using parameter values, complete the following steps:

1. From Subscriptions, select a file that uses parameters.
2. In BIRT Mobile, choose parameters button depending on the tablet device.
   - From an Apple tablet device
   - From an Android tablet device
3. Enter values for available parameters, as shown in Figure 5-13.

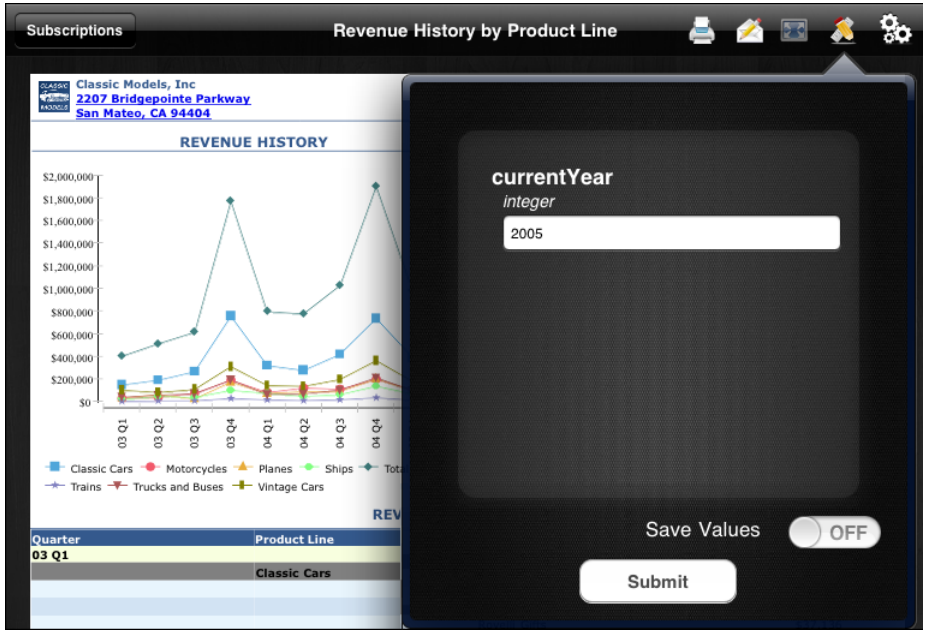


Figure 5-13 Typing an integer value for a report parameter

4. Set Save Values to On if you want to always use the same parameter value when opening this file.

5 Choose Submit to run the report with specified parameters.

Apple iPhone or iPod devices display the option to set parameters next to each report name in the file list.

Printing from BIRT Mobile

BIRT Mobile supports printing from tablet devices. Your network administrator can provide instructions on configuring your mobile device to use network printers. Android devices require third-party software to print. You can obtain this software from http://www.mobiledynamix.com. Apple devices use AirPrint, included with the device.

How to print from an Apple tablet device

To print a file from an Apple tablet device, complete the following steps:

1 From Subscriptions, select a file to view.

2 In BIRT Mobile, choose Print. Printer Options appears.

3 Select an available printer and change printer options, if necessary. Choose Print, as shown in Figure 5-14.

Figure 5-14 Printing from an Apple tablet device

How to print from an Android tablet device

To print a BIRT document from an Android tablet device requires the third-party software PrinterShare. Complete the following steps to print from BIRT Mobile:

1 From Subscriptions, select a file to view.

2 In BIRT Mobile, choose Print. The print option appears, shown in Figure 5-15.

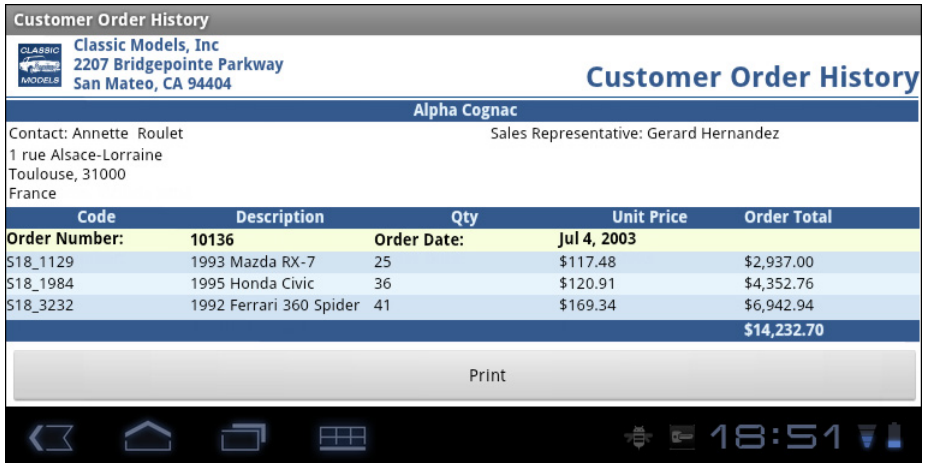


Figure 5-15 Printing from an Android tablet device

3 Choose Print again. Print Preview appears, as shown in Figure 5-16. Select a printer if necessary.

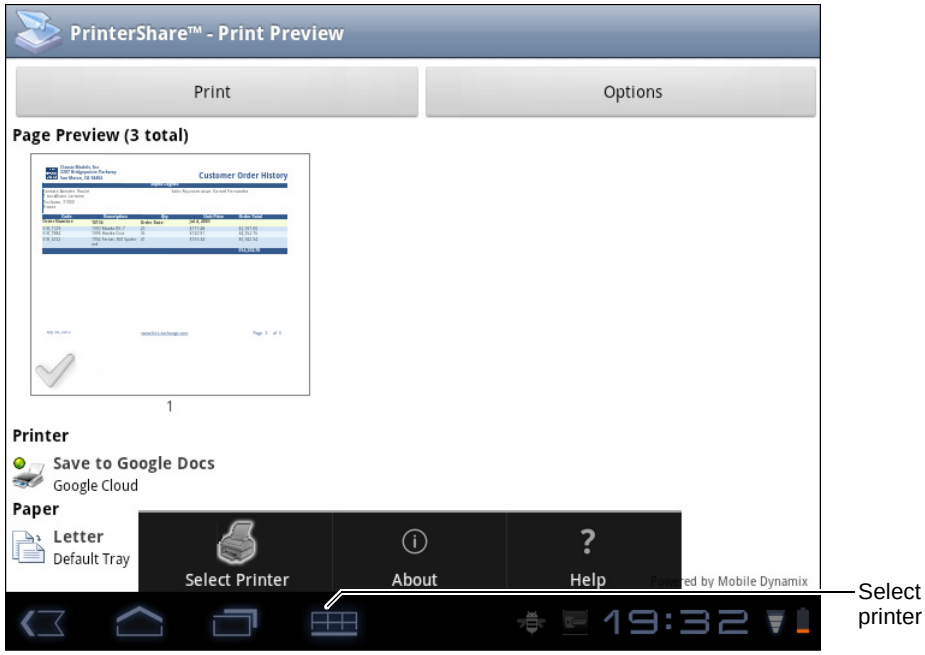


Figure 5-16 Selecting print options

4 Choose Print to use the current settings.

5 Select your print options, as shown in Figure 5-17. Choose OK.

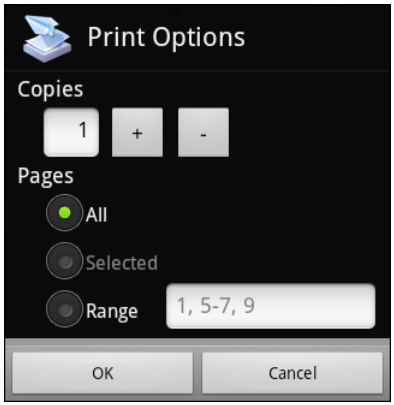


Figure 5-17 Choosing print options

6 Choose OK when a message appears informing you that printing is completed, as shown in Figure 5-18. Print Preview appears.

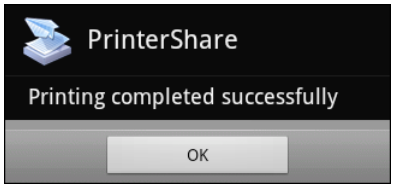


Figure 5-18 Closing the print options

7 Choose Back to return to BIRT Mobile, as shown in Figure 5-19.

Figure 5-19 Returning to BIRT Mobile

Restarting BIRT Mobile

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

How to reset BIRT Mobile using an Apple device

To reset BIRT Mobile on an Apple device, complete the following steps:

1 Verify if BIRT Mobile is not running in the background by double-clicking the Home button. A list of active 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 5-20 shows the BIRT Mobile application running.

Figure 5-20 Closing BIRT Mobile

2. Choose the minus sign on the BIRT Mobile icon to close BIRT Mobile. This does not delete it from the device.

2. Choose Settings from the home screen.

3. Choose BIRT Mobile. The BIRT Mobile settings appear, as shown in Figure 5-21. This example is using BIRT Mobile HD.

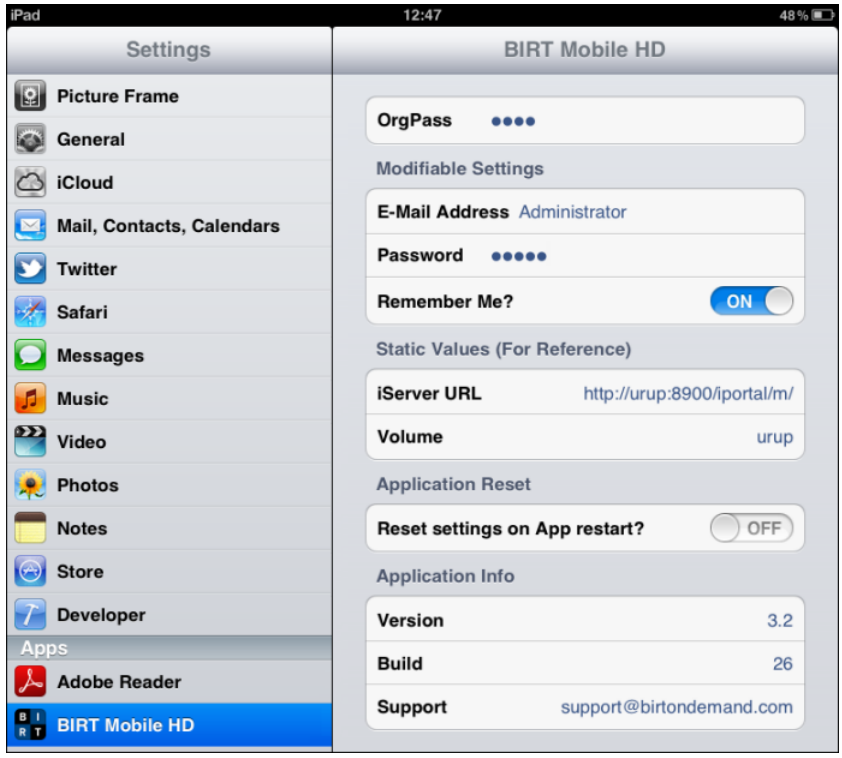


Figure 5-21 Resetting the configuration of BIRT Mobile

4 Enable Reset settings on App restart.

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

6 Change Reset settings on App restart to ON. The next time that you start BIRT Mobile it will use the default settings.

How to reset BIRT Mobile using an Android device

To reset BIRT Mobile on an Android device, complete the following steps:

1 Choose Settings from the Android mobile device.

2 Select Applications and choose Manage applications.

3 Choose BIRT Mobile, as shown in Figure 5-22. Application info appears.

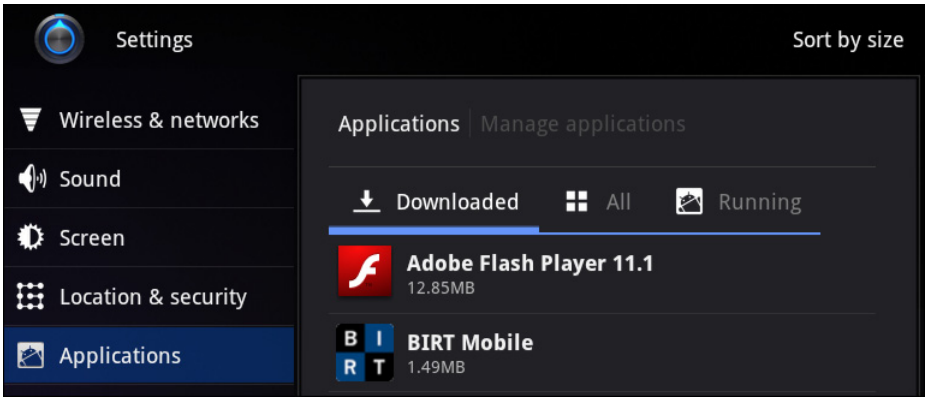


Figure 5-22 Selecting the BIRT Mobile application

4 Choose Clear data, as shown in Figure 5-23.

5 Choose OK when asked to verify that you will delete the application's data.

6 Choose Force Stop.

7 Choose OK when asked if you are sure that you want to force the application to stop.

8 Return to the Home screen.

9 Choose BIRT Mobile to restart the BIRT Mobile application using default settings.

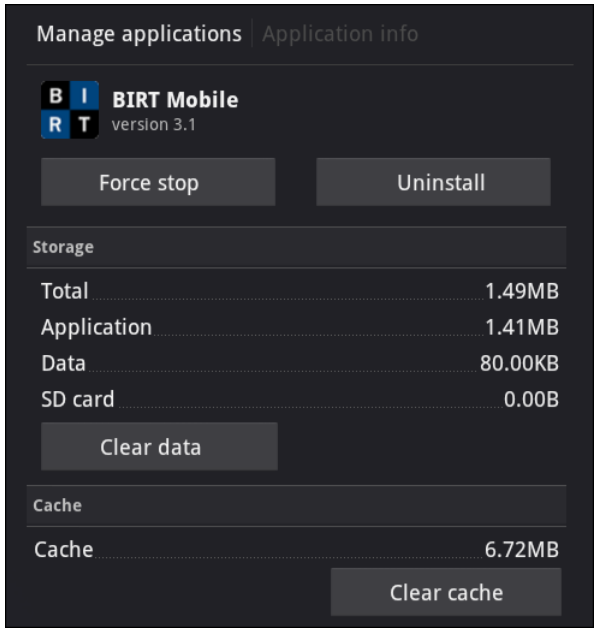


Figure 5-23 Clearing application settings

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