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BIRT iHub

Managing Volumes and Users

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Contents

About <i>Managing Volumes and Users</i>	iii
Chapter 1	
Getting started	1
About volume management	2
Logging in to Information Console	2
Understanding volumes and users	5
Chapter 2	
Setting up application users and groups	7
Understanding iHub Administration	8
About user types	8
Accessing iHub Administration	9
About users	10
Creating a user	10
Editing a user	14
Viewing the list of users	16
Filtering the list of users using a search string	17
Filtering the list of users by user group	18
Deleting users	18
About User Groups	20
Creating a user group	21
Editing a user group	23
Viewing the list of user groups	24
Deleting user groups	25
Accessing Logout and My Profile	27
Chapter 3	
Managing volume-level operations	29
Working at the volume level	30
Setting volume privileges	31
Setting volume archiving and purging policies	32
Setting volume-level printer options	35
Understanding service requirements	37
Scheduling an archiving cycle	37
About user and user group limits	38
Chapter 4	
Exploring administrative capabilities	41
Using the /Applications folder	42
About locale maps	42

Using Advanced Jobs43
 Using the available job monitoring options43
 Filtering jobs49
 Editing a scheduled job50
 Deleting a scheduled job51
 Cloning a job52
Index 53

About Managing Volumes and Users

Managing Volumes and Users discusses how to administer a BIRT iHub System volume. The chapters in this guide are:

- *About Managing Volumes and Users*. This chapter provides an overview of this guide.
- *Chapter 1. Getting started*. This chapter discusses how to connect to a volume and how to use Information Console.
- *Chapter 2. Setting up application users and groups*. This chapter discusses how to create and work with users and user groups.
- *Chapter 3. Managing volume-level operations*. This chapter discusses volume-level management tasks, such as archiving files, setting volume privileges, enabling DHTML document caching, and setting volume-level printer options.
- *Chapter 4. Exploring administrative capabilities*. This chapter discusses miscellaneous administrative best practices, capabilities, and tasks.

1

Getting started

This chapter discusses the topic, About volume management.

About volume management

BIRT iHub is a document server that generates, manages and securely delivers BIRT documents stored in a volume. A volume is a disk-based repository containing designs, documents, information objects, shared libraries, and user information. You access a volume by logging in to Information Console.

BIRT iHub extracts data from common data sources, such as relational databases and other data sources. BIRT iHub includes the following components, which are accessible using a standard browser:

- Information Console
Use this console to perform volume management tasks such as:
 - Running designs
 - Scheduling designs based on time and events
 - Viewing and sharing documents
 - Managing user and user group access to designs and documents using privileges
 - Distributing documents
 - Accessing scheduled and completed jobs
- Information Console—iHub Administration
Use this console to perform user management tasks such as:
 - Create users.
 - Create user groups.
 - Manage user membership to user groups.

An out-of-the-box BIRT iHub installation comes with a default volume, named Default Volume. Default Volume contains samples of volume content. If you do not specify a volume name when logging in to Visualization Suite, you access Default Volume by default. To access a different volume, you specify the volume name when logging in.

Logging in to Information Console

The following section describes logging in to Information Console as the default user, Administrator, as a user having no home folder, and how to log in to access a volume other than Default Volume.

How to log in to Information Console

- 1 Open a web browser. In the address bar, type the following URL:
`http://localhost:8700/iportal`
- 2 The first time you log in, log in as the default volume administrator user, Administrator, accessing the Default Volume. On Account Login, in Username, type Administrator. Leave Password blank, as shown in Figure 1-1.

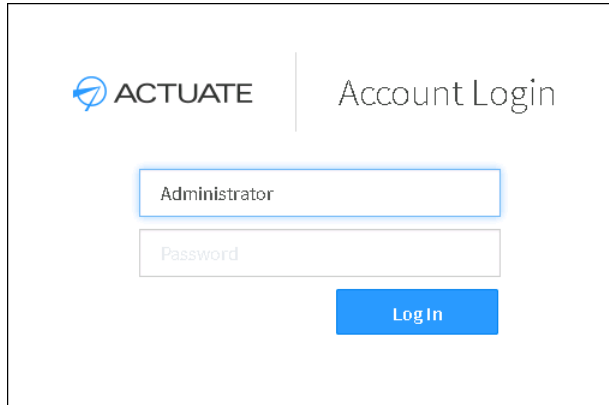


Figure 1-1 Logging in to Information Console as Administrator

The list of files and folders in the Administrator home folder appears. The list contains Examples, an HTML document giving an overview of the sample design and document files that the default volume contains, as shown in Figure 1-2.

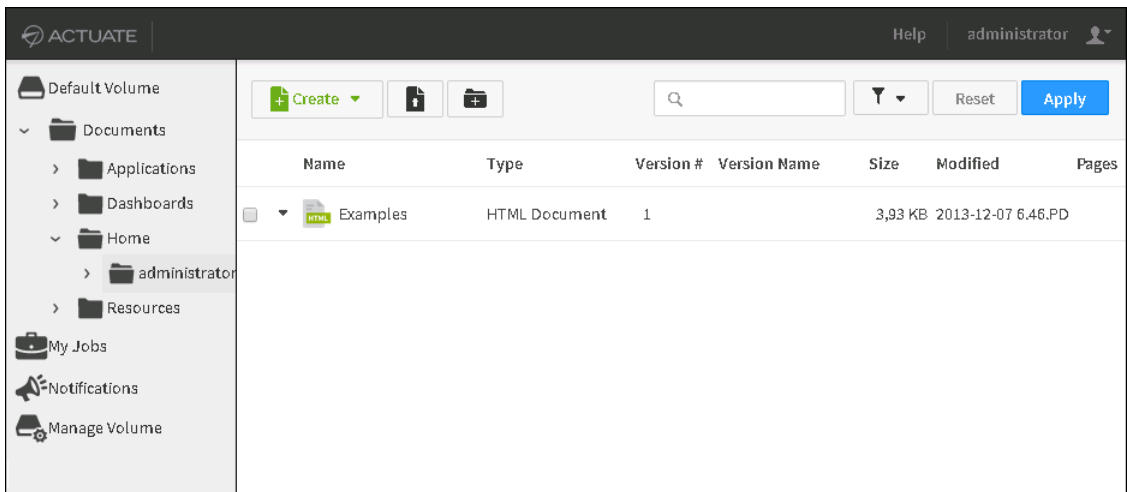


Figure 1-2 Viewing the Administrator home folder

Logging in as a user with no home folder

By default, Administrator has a home folder in Information Console, /Home/administrator, as shown in Figure 1-2. When a user having a home folder logs in to Information Console, the list of files and folders in that user's home folder appears. If a user does not have a home folder, the list of files and folders in the volume root folder, named Documents, appears, as shown in Figure 1-3. The volume administrator can create a home folder for a user when creating the user.

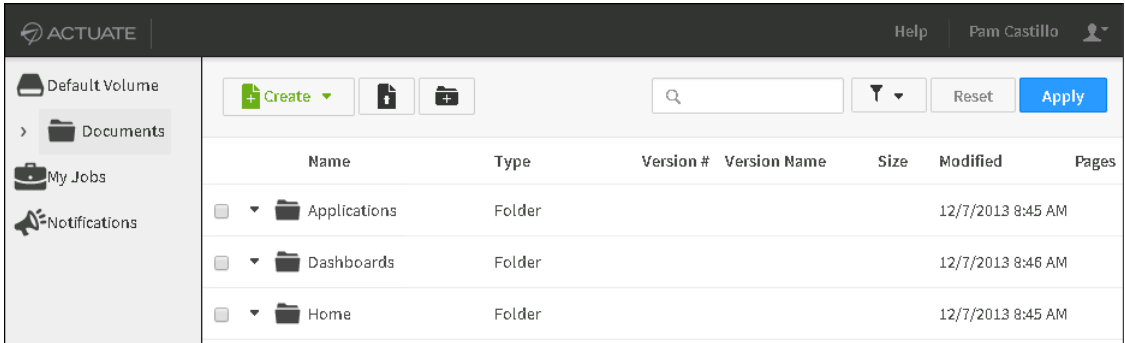


Figure 1-3 Logging in as a user that does not have a home folder

Accessing a volume other than Default Volume

To access a different volume, type the volume name, a backslash, and the user name in Username when logging in to Information Console. For example, in Figure 1-4, Administrator is logging in to Information Console accessing sales_volume.

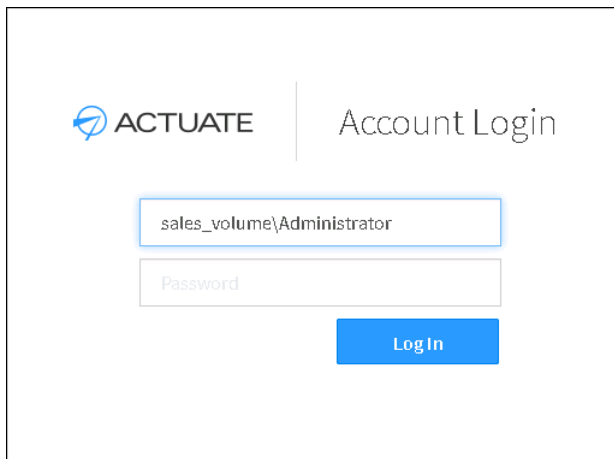


Figure 1-4 Logging in to Information Console accessing sales_volume

Understanding volumes and users

In System Console, the system administrator creates a cluster typically consisting of two or more machines, or nodes. Then, the system administrator can create one or more volumes in the cluster.

If the system administrator has enabled e-mail notification and specifies a volume administrator e-mail address when creating a volume, BIRT iHub creates a password with which to access the volume when it is created. Then, BIRT iHub e-mails the password to the volume administrator. The volume administrator accesses the volume by logging in to Information Console using the following credentials:

- Username: <volume name>\administrator
- Password: <volume password BIRT iHub creates and e-mails to the volume administrator>

Only the BIRT iHub default user, Administrator, can access a newly created volume. When logging in to Information Console, the user name is not case-sensitive.

If the system administrator does not specify a volume administrator e-mail address when creating a volume, BIRT iHub does not create a password. The volume administrator can access the volume without using a password, logging in to Information Console using the following credentials:

- Username: <volume name>\administrator
- Password: (blank)

In Information Console, the administrator can choose My Profile to create a password for the volume.

Users are specific to a volume. A newly created volume has no users except the default user, Administrator. The Administrator user logs in to Information Console, specifying the volume. Then, the Administrator user can create one or more users of the volume. One user can access only one volume, but the administrator can create a user having the same name and password on any number of volumes.

Setting up application users and groups

This chapter contains the following topics:

- Understanding iHub Administration
- Accessing iHub Administration
- About user types
- About users
- Creating a user
- Editing a user
- Viewing the list of users
- Deleting users
- About User Groups
- Creating a user group
- Editing a user group
- Viewing the list of user groups
- Deleting user groups
- Accessing Logout and My Profile

Understanding iHub Administration

An application administrator uses iHub Administration to create users and user groups, and assign users to user groups. Users perform tasks such as running designs to create documents, viewing, and working with documents. A user group supports assigning privileges on items such as designs, documents, and folders to a group of users.

About user types

Information Console supports the following types of users and user groups:

- **Administrator**
The default user. The Administrator user has privileges to perform all tasks in BIRT iHub System.
- **Administrators**
A user group. A user belonging to the Administrators user group has privileges to perform all tasks in the BIRT iHub System. Only the default user, Administrator, or a user belonging to the Administrators user group can:
 - Access iHub Administration and create users and user groups.
 - Access My Jobs—Advanced Jobs.
 - Assign privileges on any item in a volume.
 - Configure Datamart Security when scheduling a job.
 - Select a resource group when scheduling a job.
 - Use Information Console—Manage Volume to set properties pertaining to an entire volume.

This book refers to a user having Administrators user group privileges as the administrator.

- **All**
A user group. All users belong to the All user group by default. The administrator assigns a privilege to the All user group to assign the privilege to all users.
- **User**
When differentiating between a user that has Administrators user group privileges in Information Console and a user that does not, a user is any user that does not have Administrators user group privileges, and an administrator is a user that does have Administrators user group privileges. Otherwise, user is a term that can refer to any user. In Information Console, a user with

appropriate privileges can schedule jobs, view documents, and administer files and folders.

Accessing iHub Administration

Only an application administrator can access iHub Administration. The application administrator accesses iHub Administration from Information Console.

How to access iHub Administration

- 1 Open a web browser. In the address bar, type the following URL:
`http://localhost:8700/iportal`
- 2 The first time you log in, log in as the default application administrator user, Administrator. On Account Login, in Username, type Administrator. Leave Password blank, as shown in Figure 2-1.

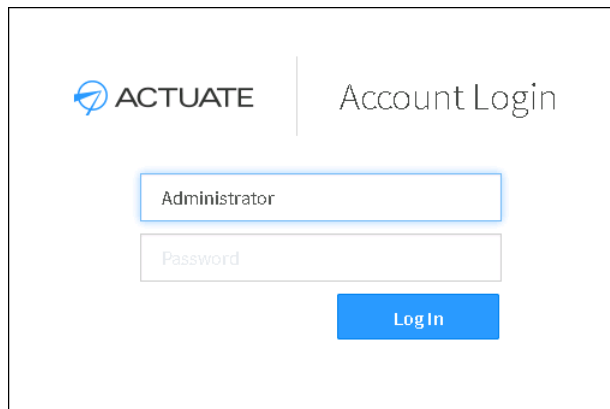


Figure 2-1 Logging in to Information Console as Administrator

- 3 In Information Console, left-click administrator and choose iHub Administration, as shown in Figure 2-2.

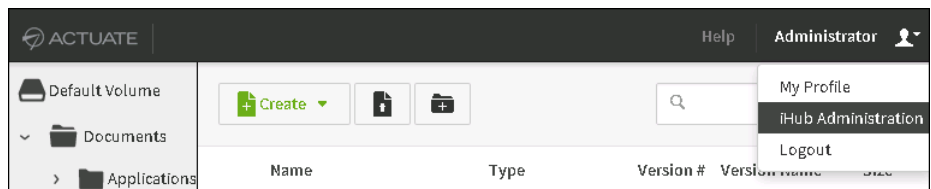


Figure 2-2 Choosing iHub Administration

Users appears, as shown in Figure 2-3.

About users

In iHub Administration, choose Users to perform the following tasks, as shown in Figure 2-3:

- Create a user.
- Edit an existing user.
- View or filter the list of users.
- Delete users.

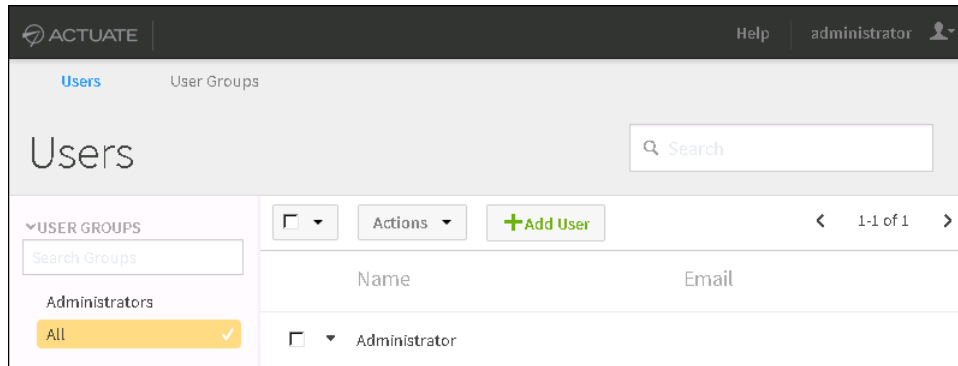


Figure 2-3 Viewing Users

The following sections describe how to perform these tasks.

Creating a user

On Users, the administrator chooses Add User to create a new user, as shown in Figure 2-3. On Create New User—General, a side menu lists the following categories for which the administrator performs tasks to create a user, as shown in Figure 2-4:

- General
Configure general properties, such as user name, password, user e-mail address.
- Assign User Groups
Assign one or more user groups to the user. Select applications that members of the user group can access.

The screenshot shows a web interface for creating a new user. At the top, there is a header with a back arrow and the title "Create New User". Below the header is a side menu with two options: "General" (which is highlighted in black) and "Assign User Groups". To the right of the side menu is a form with four input fields, each with a label: "*Name:", "Description:", "Password:", and "Confirm Password:". The asterisk next to "Name" indicates it is a required field.

Figure 2-4 Viewing the side menu on Create New User

How to create a new user

This section demonstrates creating a user named Pam Castillo.

- 1 On Users, choose Add User.
- 2 Set the following properties on Create New User—General, as shown in Figure 2-5. A property name appearing with an asterisk (*) next to the name is a required property.
 - Name
Type the user name. The user name must not exceed 255 characters.
 - Description
Type a description for the user, such as job title.
 - Password
Type a password for the user. The password must be at least eight characters long, and must contain at least one lowercase letter, one uppercase letter, and one digit. Passwords can be up to 256 characters in length and can contain any characters except control characters or spaces. Passwords are case-sensitive. If you create a user using IDAPI, there is no restriction on what the password can be.
 - Confirm Password
Type the password again.
 - Email
Type the user's e-mail address.
 - Home Folder
Type a path for the user's home folder, such as /home/username. The user's home folder appears in Information Console.
 - Default Dashboard
Type the name of a dashboard. Alternatively, leave Default Dashboard blank.

To create a `.dashboard` file that is the default dashboard for all users, save any `.dashboard` file to the root folder of the volume, giving the file the following name:

```
default_dashboard.dashboard
```

If a user has a different dashboard URL set in the user's My Profile, that dashboard is the default dashboard for that user.

- **Language**
Select a language for which to display the user interface to the user. Alternatively, accept the default value, English (United States).
- **Time Zone**
Select a time zone. Alternatively, accept the default value of America/Los Angeles.

The screenshot shows a web form titled "Create New User". The form contains the following fields and values:

- *Name:** Pam Castillo
- Description:** Sales Manager
- Password:** [masked with 8 dots]
- Confirm Password:** [masked with 8 dots]
- *Email:** pcastillo@company.com
- Home Folder:** /Home/pcastillo (Example: /Home/administrator)
- Default Dashboard:** /dashboard/pcastillo.dashboard (Example: /dashboard/mydashboard.dashboard)
- Language:** English (United States) (dropdown menu)
- Time zone:** Americas/Los Angeles (dropdown menu)

At the bottom of the form are two buttons: "Cancel" and "Save".

Figure 2-5 Configuring user properties on General

- 3 Choose Assign User Groups from the side menu.
- 4 On Create New User—Assign User Groups, assign Pam Castillo to the Sales user group by moving the Sales user group from the left-hand list of user groups to the right-hand list of user groups, as shown in Figure 2-6. Use Search available user groups to isolate a particular user group or subset of user groups from which to choose, if necessary.

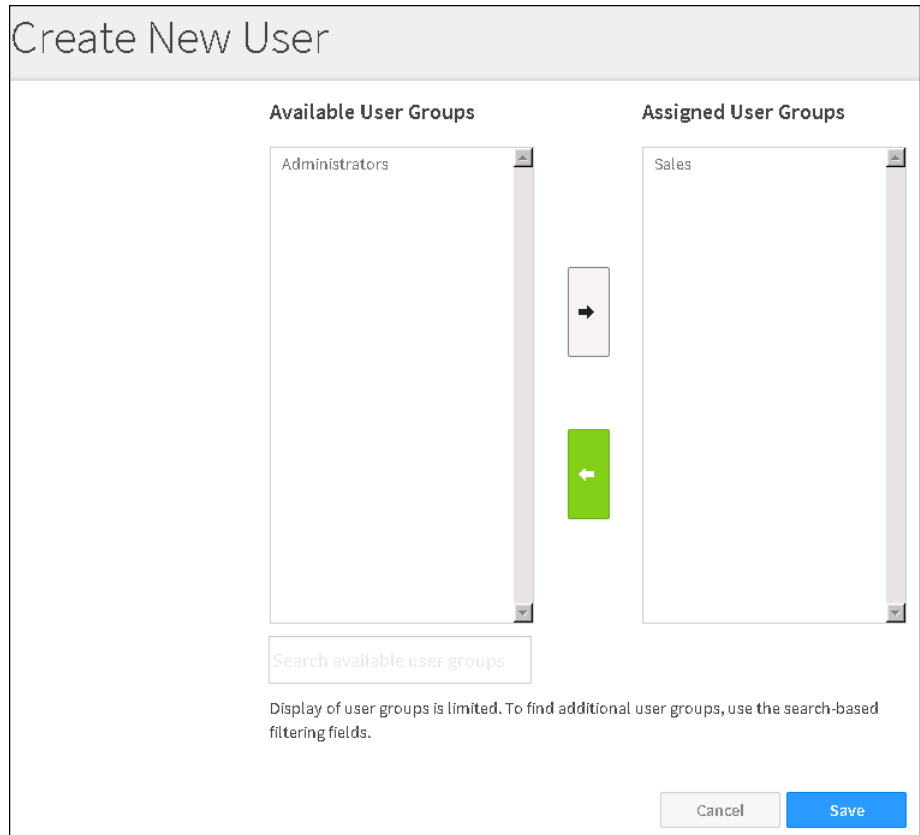


Figure 2-6 Assigning a user group to a user

- 5 Choose Assign User Groups from the side menu. Choose Save. Confirm that you want to save the changes.

Pam Castillo appears in the list of users on Users, as shown in Figure 2-7.



Figure 2-7 Viewing the new user in the users list

Editing a user

The administrator has the same level of control over a user when editing the user as when creating it, including assigning a user group to a user and removing a user group from the user.

How to edit a user

- 1 On Users, left-click the arrowhead next to a user name and choose Edit, as shown in Figure 2-8.

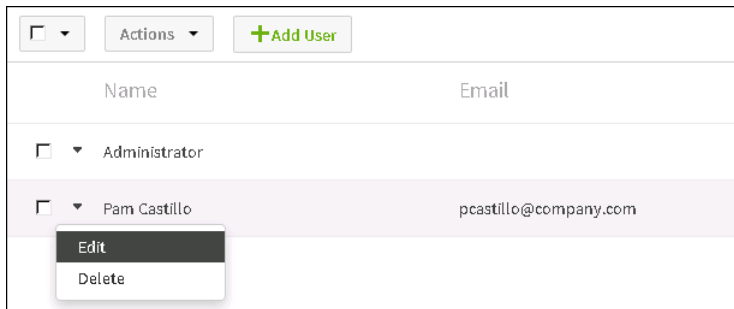


Figure 2-8 Choosing to edit a user

- 2 Make any necessary property changes on Edit <user name>—General, as shown in Figure 2-9.

Edit Pam Castillo

*Name:	<input type="text" value="Pam Castillo"/>
Description:	<input type="text" value="Sales Manager"/>
Password:	<input type="password" value="••••••••••"/>
Confirm Password:	<input type="password" value="••••••~"/>
*Email:	<input type="text" value="pcastillo@company.com"/>
Home Folder:	<input type="text" value="/Home/pcastillo"/> Example:/Home/administrator
Default Dashboard:	<input type="text" value="/dashboard/pcastillo.dashboard"/> Example:/dashboard/mydashboard.dashboard
Language:	<input type="text" value="English (United States)"/> ▼
Time zone:	<input type="text" value="Americas/Los Angeles"/> ▼

Figure 2-9 Editing a user

- 3 Choose User Groups from the side menu.
- 4 On Edit <user name>—User Groups, assign one or more user groups to a user by moving one or more user groups from the left-hand user group list to the right-hand user group list using the right arrow. Remove one or more user groups from a user by moving one or more user groups from the right-hand user group list to the left-hand user group list using the left arrow, as shown in Figure 2-10. Use Search available user groups or Search assigned user groups to isolate a particular user group or subset of user groups from which to choose, if necessary.



Figure 2-10 Assigning a user to or removing a user from a user group

- 5 Choose Assign User Groups from the side menu. Choose Save.

Viewing the list of users

Users displays all existing users. The account administrator can view the entire list, or a subset of the list. Choose Users to view the entire list. The administrator can filter the users list to display only the following user subsets:

- Users where the user name contains a specified search string
- Users belonging to a particular user group

The following sections describe how to filter the users list. These sections use the following example users:

- Pam Castillo
Belongs to a user group named Sales

- Walter Osborne
Belongs to a user group named Engineering

Filtering the list of users using a search string

The account administrator can filter the users list to display only users whose names contain a specified search string in the name. In Search, type the first letter or letters of a user name to display the names that start with the specified letter or letters. Search is not case-sensitive.

iHub Administration supports using an asterisk (*) in a search string as a wildcard character. The asterisk represents zero or more characters, excluding spaces and punctuation.

How to filter the list of users using a search string

Using the Users list shown in Figure 2-11, type 'w' in Search to find all user names that begin with this letter. iHub Administration automatically filters the list and displays the results, as shown in Figure 2-12.

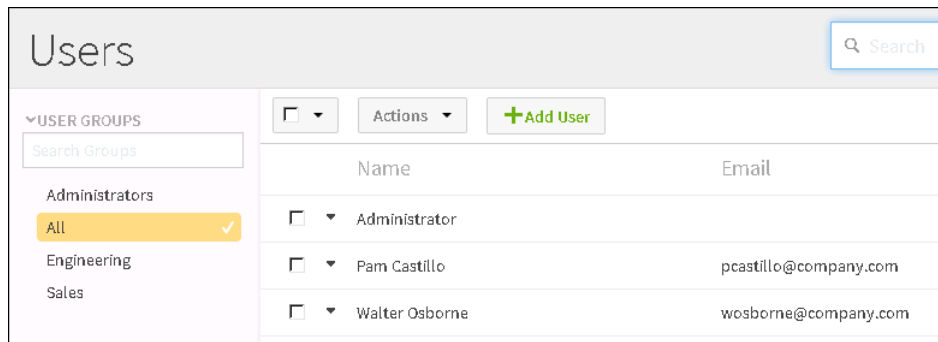


Figure 2-11 Viewing the users list before filtering

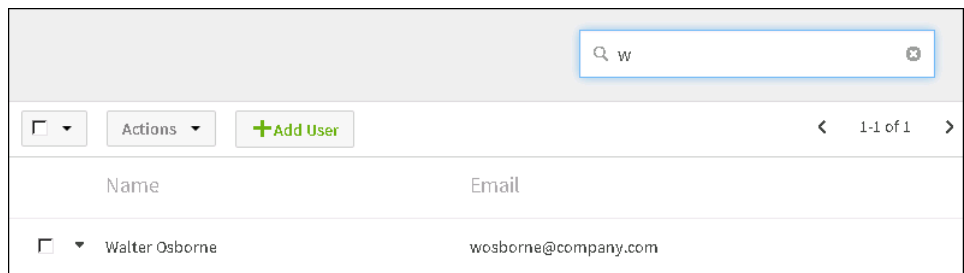


Figure 2-12 Viewing the results of filtering the users list

To display all list entries again, press the Backspace key or choose the 'x' icon in Search.

Filtering the list of users by user group

The account administrator can filter the users list to display only the users belonging to a selected user group.

How to filter the list of users by user group

- 1 In Users, choose a user group from the list of user groups appearing to the left of the users list to display only the users belonging to the chosen user group. For example, choose Sales to display Pam Castillo, the user belonging to the Sales user group, as shown in Figure 2-13.

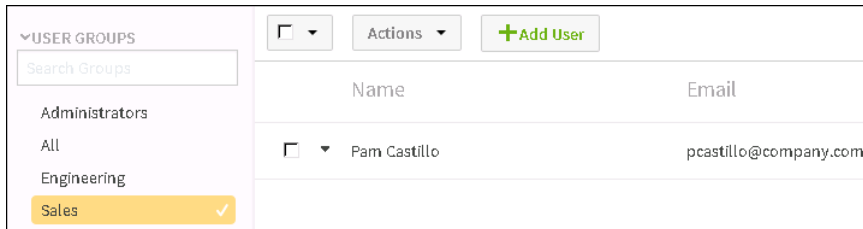


Figure 2-13 Left-clicking User Groups

Search Groups filters the list of user groups appearing to the left of the users list on Users similarly to the way Search filters the list of users.

- 2 Refresh the users list by choosing All from the list of user groups.

Deleting users

The administrator can delete one user only, or all users simultaneously.

How to delete a single user

Left-click the arrowhead icon next to the user name in the users list and choose Delete to delete a user, as shown in Figure 2-14.

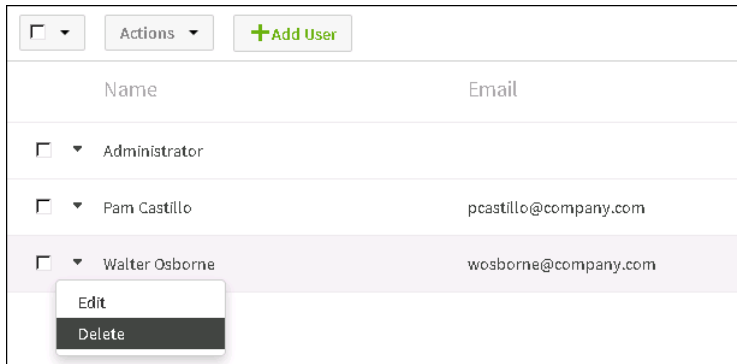


Figure 2-14 Deleting a single user

How to delete selected users

Check the boxes next to the users you want to delete. Then, left-click Actions and choose Delete. Using the users list shown in Figure 2-15 for example, System Console deletes Caroline Rojas and Jean Gaspard.

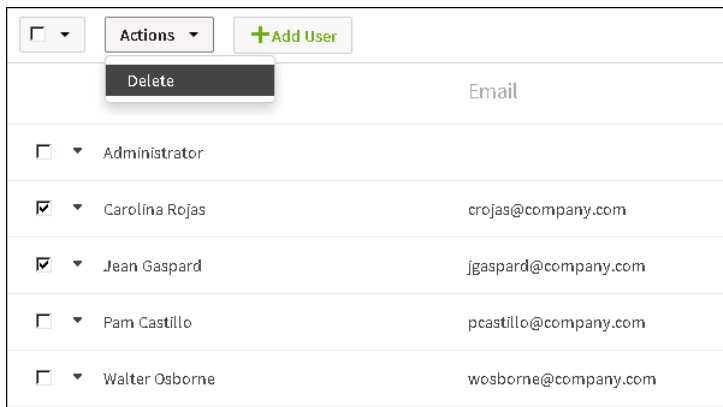


Figure 2-15 Deleting selected users

If the names of the users you want to delete share a common string, you can use the search feature to isolate the users, then use the Select All and Delete All features to delete the users. For example, using the users shown in Figure 2-15, perform the following tasks:

- 1 Type *ar in Search. Then choose the arrowhead icon in the check box to the left of Actions and select Select All, as shown in Figure 2-16.

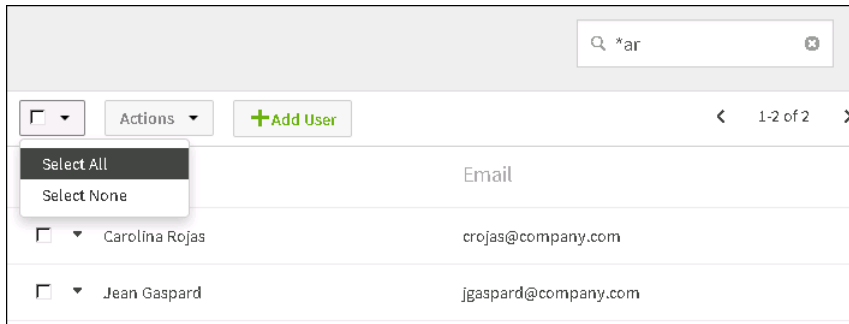


Figure 2-16 Choosing Select All to select all unhidden users

- 2 Choose Actions. Then, select Delete, as shown in Figure 2-17.

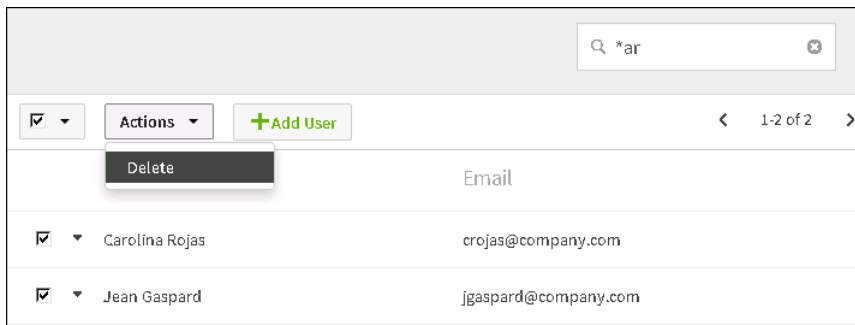


Figure 2-17 Choosing Delete All to delete all unhidden users

- 3 Choose All in the list of user groups or the 'x' icon in Search to display the entire users list. Caroline Rojas and Jean Gaspard no longer appear in the list.

About User Groups

In iHub Administration, choose User Groups to perform the following tasks, as shown in Figure 2-18:

- Create a user group.
- Edit a user group.
- View or filter the list of user groups.
- Delete user groups.

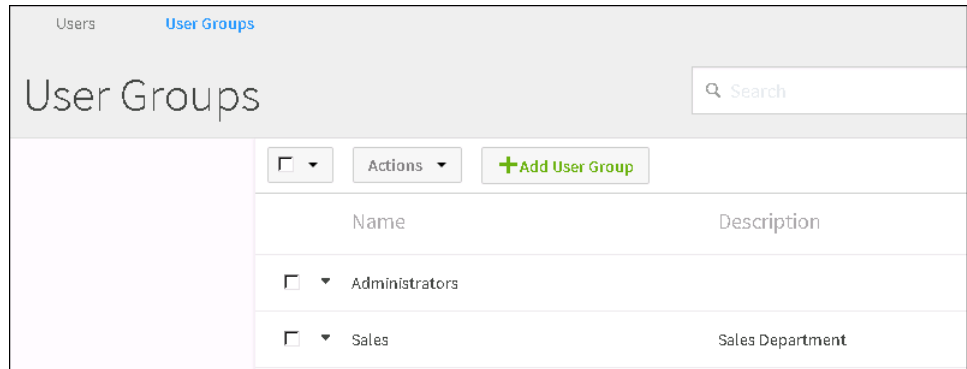


Figure 2-18 Viewing User Groups

The following sections describe how to perform these tasks.

Creating a user group

On User Groups, the administrator chooses Add User Group to create a new user group, as shown in Figure 2-18. On Create New User Group, a side menu lists the following categories, for which the administrator performs tasks to create a user group, as shown in Figure 2-19.

- **General**
Configure General properties, such as user group name and description.
- **Users**
Assign one or more users to the user group.

How to create a new user group

This section demonstrates creating a user group named Engineering.

- 1 On User Groups, choose Add User Group, as shown in Figure 2-18.
- 2 Set the following properties on Create New User Group—General, as shown in Figure 2-19:
 - **Name**
Type the user group name.
 - **Description**
Type a description for the user group, such as the department name.
 - **Email**
Type an e-mail address for the user group.

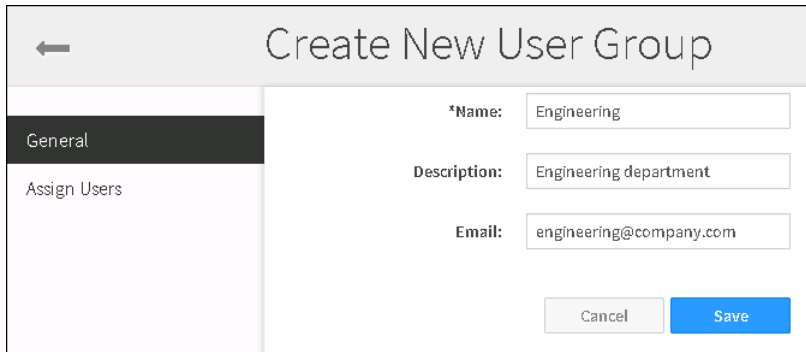


Figure 2-19 Specifying user group properties on General

- 3 Choose Assign Users from the side menu.
- 4 On Create New User Group—Users, assign Walter Osborne to the new user group by moving Walter Osborne from the left-hand list of users to the right-hand list of users, as shown in Figure 2-20. Use Search available users to isolate a particular user or subset of users from which to choose, if necessary.

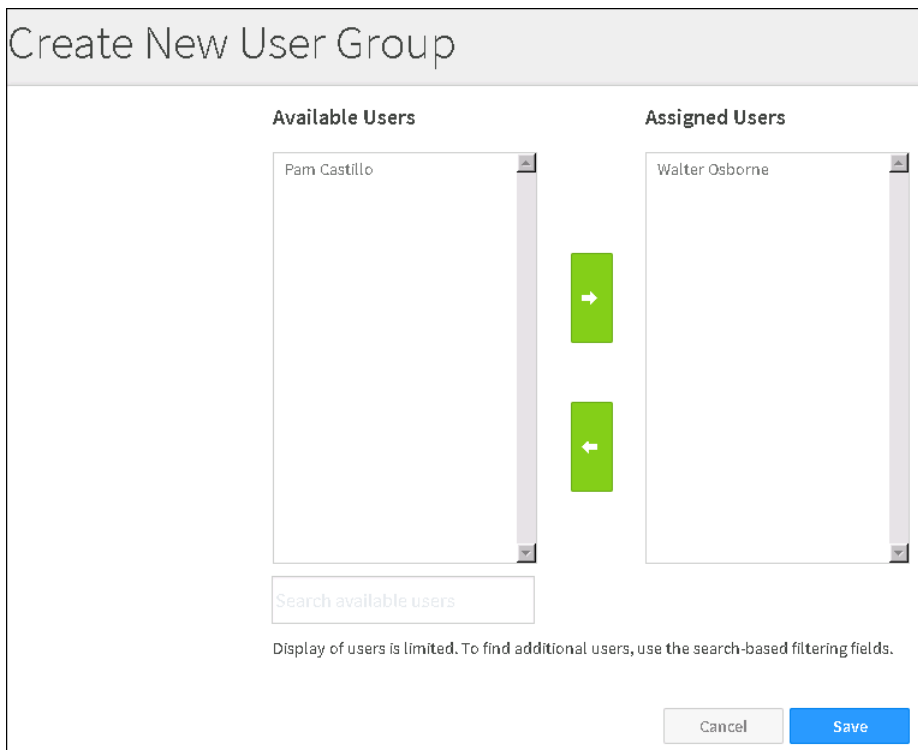


Figure 2-20 Assigning a user to a user group

Choose Save. Confirm that you want to save the changes.

Engineering appears in the list of user groups on User Groups.

Editing a user group

The administrator has the same level of control over a user group when editing the user group as when creating it, including adding or removing one or more users from the group.

How to edit a user group

- 1 Left-click the arrowhead icon next to a user group name and choose Edit, as shown in Figure 2-21.

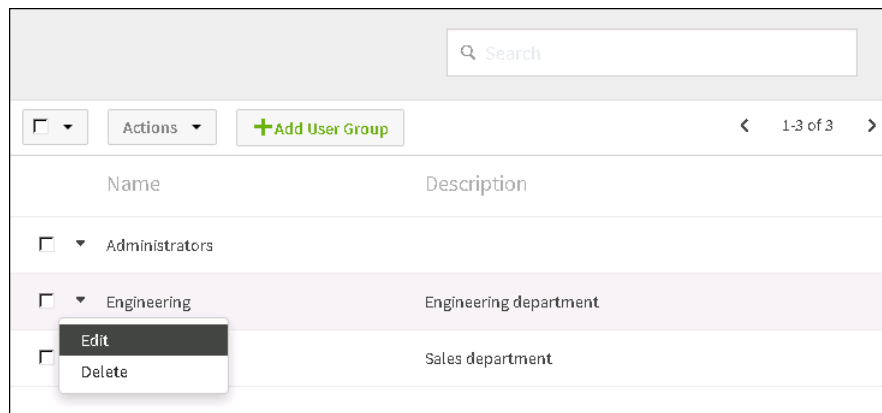


Figure 2-21 Choosing to edit a user group

- 2 On Edit <user group name>—General, make any necessary changes to any user property on Edit <user group name>, as shown in Figure 2-22.

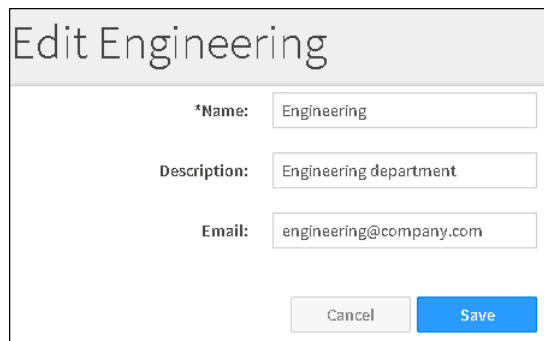
A screenshot of the 'Edit Engineering' form. The title 'Edit Engineering' is at the top. Below it are three input fields: '*Name:' with the value 'Engineering', 'Description:' with the value 'Engineering department', and 'Email:' with the value 'engineering@company.com'. At the bottom are two buttons: 'Cancel' and 'Save'.

Figure 2-22 Editing a user group

- 3 Choose Assign Users from the side menu.
- 4 On Edit <user group name>—Assign Users, assign one or more users to a user group by moving one or more users from the left-hand user list to the right-hand user list using the right arrow. Remove one or more users from a user group by moving one or more users from the right-hand user list to the left-hand user list using the left arrow., as shown in Figure 2-23. Use Search available users or Search assigned users to isolate a particular user or subset of users from which to choose, if necessary.

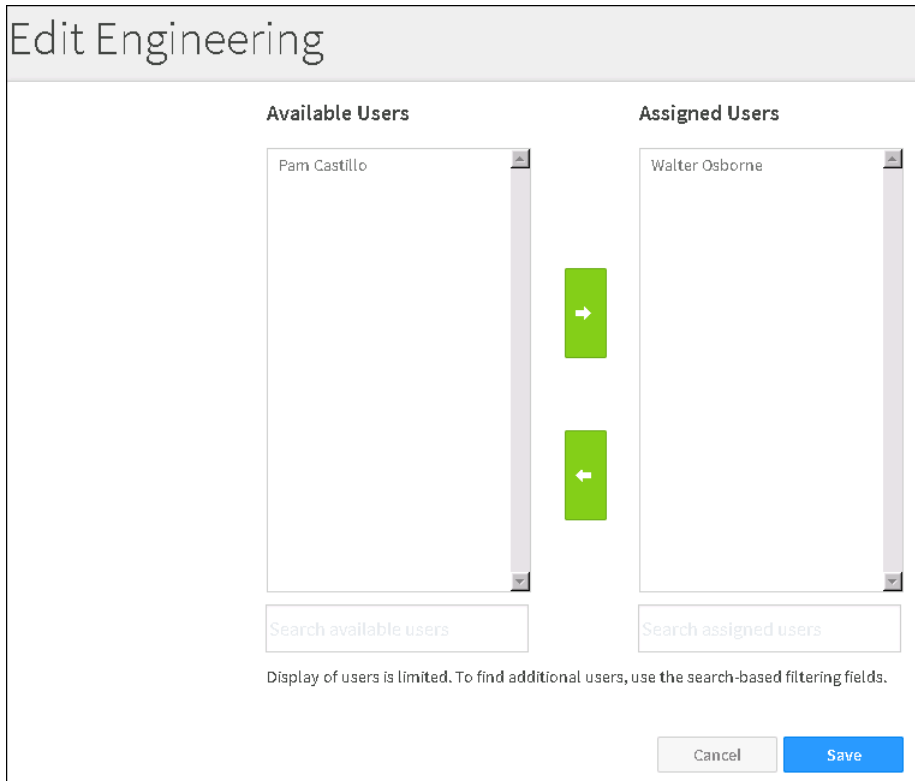


Figure 2-23 Assigning or unassigning a user to or from a user group
Choose Save to save any changes to the user group.

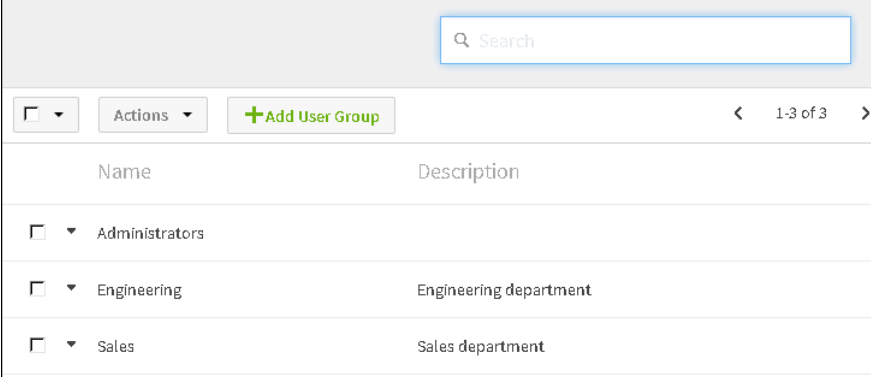
Viewing the list of user groups

User Groups displays all existing user groups. Choose User Groups to view the entire user groups list, or filter the list to display only the user groups where the user name contains a specified search string.

iHub Administration supports using an asterisk (*) in a search string as a wildcard character. The asterisk represents zero or more characters, excluding spaces and punctuation.

How to filter the list of user groups using a search string

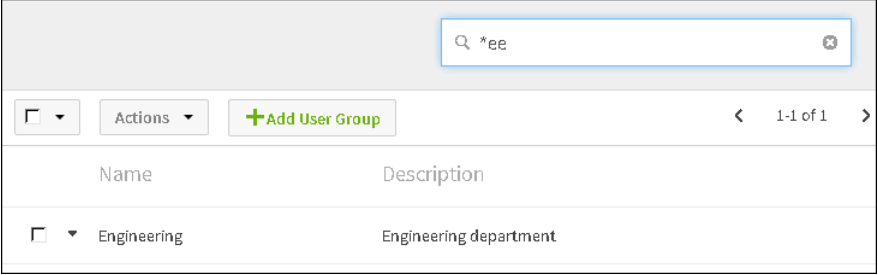
Using the User Groups list shown in Figure 2-24 as an example, type *ee, one character at a time, in Search. Watch the effect of the filtering on the list of user groups after typing each character of the string. BIRT iHub automatically filters the list based on the string that Search contains. After typing the entire string in Search, the list contains one entry, the Engineering user group, as shown in Figure 2-25.



The screenshot shows a web interface for managing user groups. At the top right is a search box containing the text "Search". Below the search box is a toolbar with a list view icon, an "Actions" dropdown, and a "+Add User Group" button. To the right of the toolbar is a pagination indicator showing "1-3 of 3". The main content area is a table with two columns: "Name" and "Description". The table contains three rows: "Administrators", "Engineering" (with description "Engineering department"), and "Sales" (with description "Sales department"). Each row has a checkbox and a dropdown arrow to its left.

Name	Description
Administrators	
Engineering	Engineering department
Sales	Sales department

Figure 2-24 Viewing the user groups list before filtering



The screenshot shows the same web interface as Figure 2-24, but the search box now contains the text "*ee". The pagination indicator now shows "1-1 of 1". The table now only contains one row: "Engineering" with the description "Engineering department".

Name	Description
Engineering	Engineering department

Figure 2-25 Viewing the results of filtering the user groups list

To display all list entries again, delete the string in Search by choosing the 'x' icon in Search, or press the Backspace key.

Deleting user groups

The administrator can delete one user group only, or all user groups simultaneously.

How to delete a single user group

Left-click the arrowhead icon next to the user group name in the list of user groups and choose Delete to delete a user group, as shown in Figure 2-26.

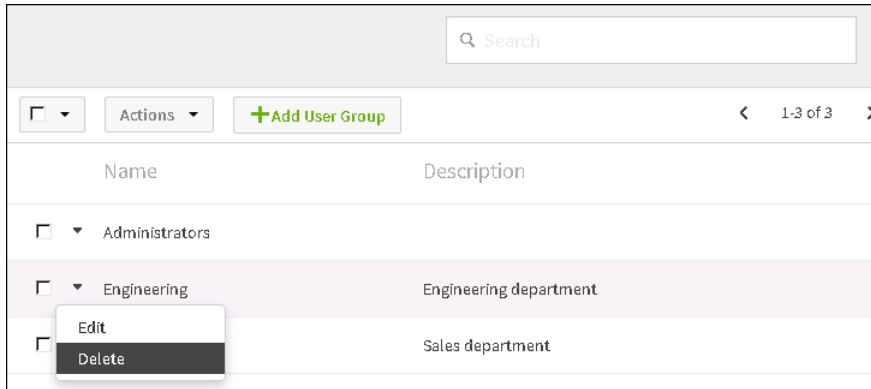


Figure 2-26 Deleting a single user group

How to delete selected user groups

Check the boxes next to the user groups you want to delete. Then, left-click Actions and choose Delete All. Using the user groups list shown in Figure 2-27 for example, System Console deletes Eastern and Western.

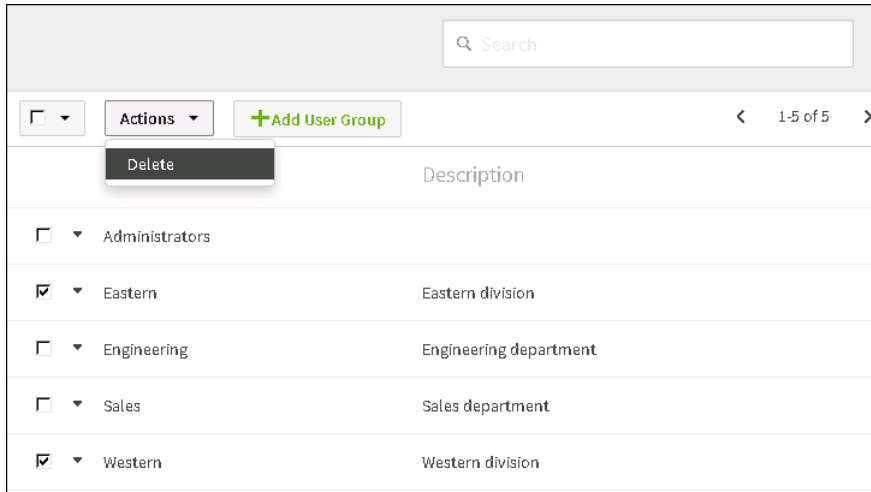


Figure 2-27 Deleting selected user groups

If the names of the user groups you want to delete share a common string, you can use the search feature to isolate the user groups, then use the Select All and Delete All features to delete the user groups. For example, using the user groups shown in Figure 2-27, perform the following tasks:

- 1 Type *ern in Search. Then choose the arrowhead icon in the check box to the left of Actions and select Select All, as shown in Figure 2-28.

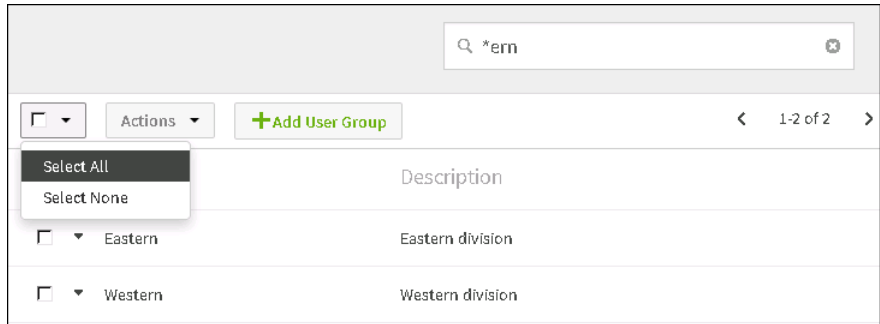


Figure 2-28 Choosing Select All to select all unhidden user groups

- 2 Choose Actions. Then, select Delete, as shown in Figure 2-29.

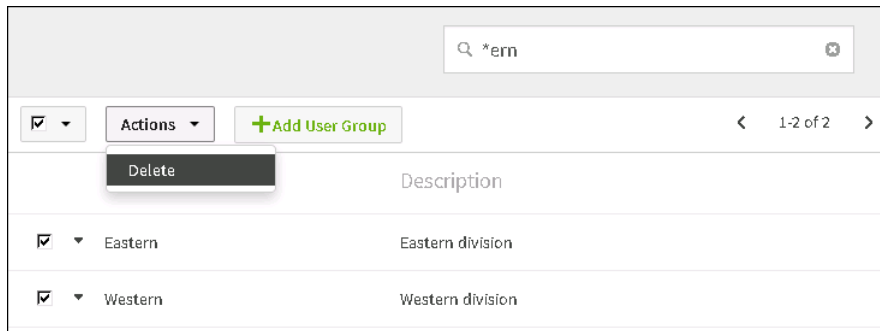


Figure 2-29 Choosing Delete All to delete all unhidden user groups

- 3 Choose the 'x' icon in Search to display the entire user groups list. The Eastern and Western user groups no longer appear in the list.

Accessing Logout and My Profile

Left-click the icon shown in Figure 2-30 to access Logout and My Profile.

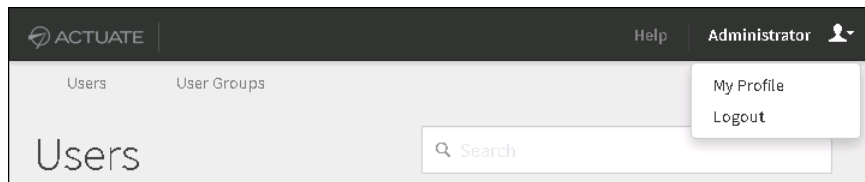


Figure 2-30 Accessing My Profile and Logout

The following descriptions of Logout and My Profile detail these features:

- Logout
Supports logging out of iHub Administration
- My Profile
Displays the properties of the logged in user, as shown in Figure 2-31

The screenshot shows a web form titled "My Profile". The form contains the following fields and controls:

- *Name:** A text input field containing the value "Administrator".
- Description:** An empty text input field.
- *Email:** An empty text input field.
- Language:** A dropdown menu with "English (United States)" selected.
- Time zone:** A dropdown menu with "America/Los_Angeles" selected.
- Home Folder:** A text input field containing the value "/Home/administrator".
- Dashboard URL:** An empty text input field.
- Change Your Password:** A section header followed by the text "Passwords are case sensitive." and three text input fields labeled "Current Password:", "Password:", and "Confirm Password:", all of which are empty.

At the bottom of the form, there are two buttons: "Cancel" and "Save".

Figure 2-31 Viewing the properties of the logged-in user

3

Managing volume-level operations

This chapter contains the following topics:

- Working at the volume level
- About user and user group limits

Working at the volume level

The application administrator performs management tasks for a volume by logging in to Information Console and accessing Manage Volume. Manage Volume is visible only when logged in to Information Console as an application administrator.

How to access Manage Volume

- 1 Log in to Information Console. For more information on this task, see “How to log in to Information Console” in Chapter 1, “Getting started.”
- 2 From the side menu, choose Manage Volume. Manage Volume—General appears, as shown in Figure 3-1.

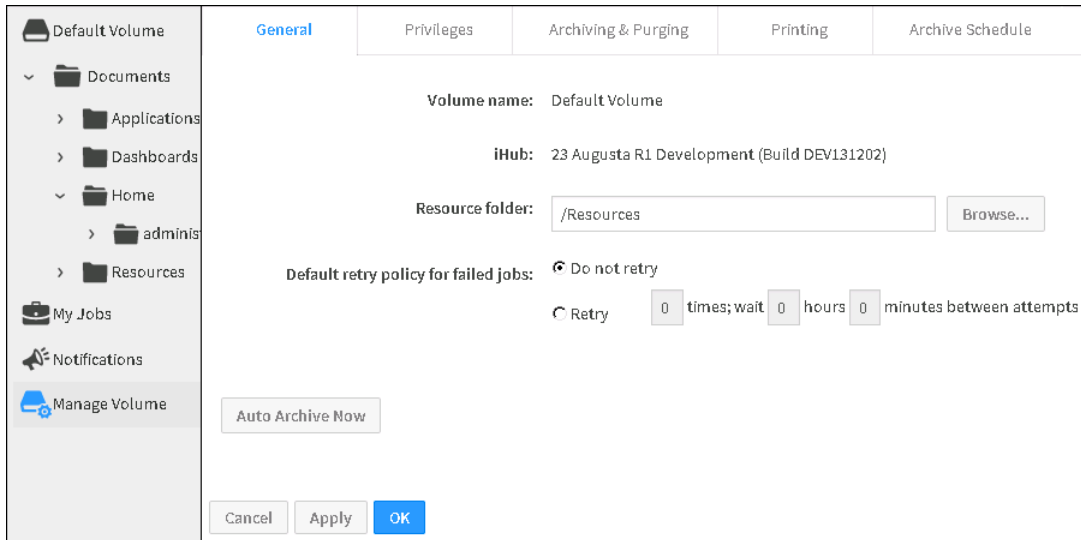


Figure 3-1 Choosing Manage Volume

Information Console groups the tasks the application administrator performs in Manage Volume into the following categories:

- **General**
Includes the following elements, as shown in Figure 3-1:
 - **Volume name**
Displays the name of the volume with which the application administrator logged in to Information Console.
 - **iHub**
Displays the name of the BIRT iHub version.

- **Resource folder**
Displays the name of the folder containing sample resources. /Resources is the default.
- **Default retry policy for failed jobs**
Choose whether to retry a job that has failed. If choosing to retry a failed job, specify the number of times to retry the job, and the hours and minutes between attempts.
- **Auto Archive Now**
Choose Auto Archive Now to run an archiving cycle immediately. Auto Archive Now changes to Stop Archive Thread after choosing. Choose Stop Archive Thread to stop the archiving cycle.
- **Privileges**
Assign privileges such as read, write, and execute on the volume root folder to users and user groups. For more information, see “Setting volume privileges,” later in this chapter.
- **Archiving and Purging**
 - Set an autoarchiving policy for the volume.
 - Set a volume-level purge policy for job notices.

For more information, see “Setting volume archiving and purging policies,” later in this chapter.
- **Printing**
Set volume-level printing properties. For more information, see “Setting volume-level printer options,” later in this chapter.
- **Archive Schedule**
Schedule an archiving cycle. For more information, see “Scheduling an archiving cycle,” later in this chapter.

The following sections describe these categories.

Setting volume privileges

By default, all volume users have visible and read privilege on the volume root folder. The All user group represents all users. Assigning visible and read privileges to the All user group assigns these privileges to all users. The application administrator can assign privileges on the root folder to any user or user group.

How to set privileges on the volume root folder

- 1 Choose Manage Volume from the side menu in Information Console. Then, select Privileges.

- 2 On Privileges, select a user or user group from Available and move it to Selected using the right arrow.
- 3 Assign privileges to a selected user or user group by selecting from the list of privileges. For example, Figure 3-2 shows assigning write privilege on the volume root folder to the Engineering user group. Choose OK.

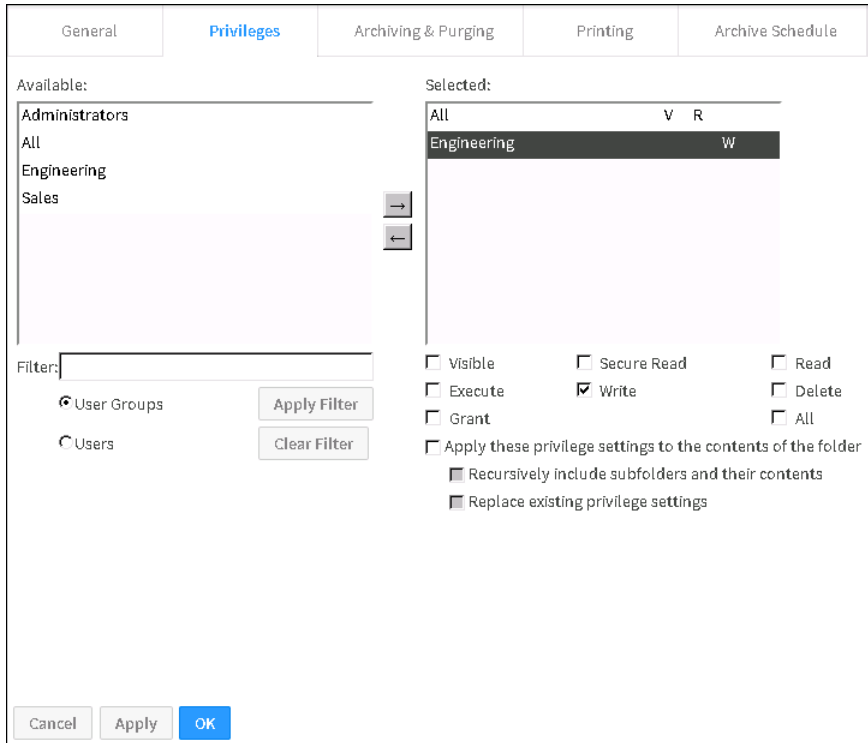


Figure 3-2 Setting privileges on the volume root folder

Setting volume archiving and purging policies

On Manage Volume—Archiving and Purging, shown in Figure 3-3, the administrator can set the autoarchive policy for all the files and empty folders in the volume or for a specific file type.

The default policy for the volume is Do not automatically delete this file and Do not archive the file before deletion. Use File Type to set the autoarchive policy for a file type. The policy you set for that file type is the default policy for every file of that type on the volume. When you select a file type in File Type, BIRT iHub displays the current autoarchive settings for the file type you select.

You can modify settings for one file type after another before choosing OK to implement those changes. BIRT iHub retains the values you set for multiple file types and applies the values when you choose OK.

Figure 3-3 Setting the default archiving and purging policy for the volume

Manage Volume—Archiving and Purging also displays the settings for the volume’s default purging policy. Using the options described in Table 3-1, the application administrator sets the volume default policy specifying how long a job completion notice remains on the volume before BIRT iHub can delete the notice.

Table 3-1 Purge settings

Property	Description
Purge success notices after n days n hours	Enable deleting job completion notices for jobs that succeed. Set the time after which BIRT iHub can delete the notice. If the administrator specifies 0 days 0 hours, or does not select this option, BIRT iHub does not purge success notices.

(continues)

Table 3-1 Purge settings (continued)

Property	Description
Purge failure notices after <i>n</i> days <i>n</i> hours	Enable deleting job completion notices for jobs that fail. Set the time after which BIRT iHub can delete the notice. If the administrator specifies 0 days 0 hours, or does not select this option, BIRT iHub does not purge failure notices.

Archiving files and removing empty folders

By performing the following volume autoarchiving tasks, application administrators and users specify the policy that BIRT iHub uses to delete files and empty folders, and archive files and folders in the volume:

- Using Information Console, an administrator can set the autoarchive policy for the entire volume and for specific files and folders.
- A user can set the autoarchive policy for specific files and folders. A user must have read, write, and delete privileges on the file or folder. When submitting a job, a user can also set the autoarchive policy on the output document.

The following points are useful to know when setting autoarchive policy:

- The volume autoarchive policy is the default policy for every file and folder in the volume. If you change the policy for a file type, specific file, or folder, that policy supersedes the volume policy.
- If you specify a policy for a particular folder that differs from its parent folder policy, all the files and folders in that particular folder inherit its policy as the default policy.
- If you specify a policy for a particular file, that policy supersedes the policy the file inherits from its containing folder.
- If you do not specify a policy for a file type on Properties—Auto Archive for a folder, any file of that file type within the folder inherits the folder policy.
- The autoarchive process removes a folder if it is empty or if the following conditions are true:
 - Every subfolder is empty.
 - The age of every file in the folder has expired.

BIRT iHub determines whether to perform autoarchiving on an item by processing volume contents using the following order of precedence and evaluating:

- The policy on an individual file or empty folder
- The policy for the specific file type or folder, from the containing folder's File Type list

- The containing folder's default policy
- The policy for the specific file type or folder, from the File Type list of the folder containing the folder
- The policy for the specific file type or folder, from the File Type list of folders that are higher in the hierarchy
- The policy for the volume

To see a folder's autoarchive policy, point to the arrowhead icon next to a folder and choose Auto Archive. On Auto Archive policy for this folder, choose View Policy.

To see a file's auto archive policy, left-click the arrowhead icon next to the file and choose Details. The policy appears under the Auto Archive heading.

When BIRT iHub performs autoarchiving, it starts from the volume's root folder. For each file whose age has expired, BIRT iHub deletes the file. If the Archive files before deletion option is selected, BIRT iHub calls the archive application for the volume, then deletes the file if the archive process succeeds. If the archive process fails, BIRT iHub does not delete the file.

Setting volume-level printer options

The volume recognizes and supports printers that are set up for BIRT iHub. You do not have to install printers specifically for the volume. You do, however, customize printer settings for each printer that is available to the volume.

Only an application administrator can set printer options at the volume level. Users can accept values for these printer properties as defaults, or set them on individual print jobs.

Table 3-2 describes these properties.

Table 3-2 Volume-level printer properties

Property	Description
Scale	The scale at which to print the output, expressed as a percentage.
Resolution	The resolution at which to print the output.
Mode	Black and white or color.
Number of copies	The number of copies to print.
Collate	Collate the copies.

(continues)

Table 3-2 Volume-level printer properties (continued)

Property	Description
2-Sided printing	Select: <ul style="list-style-type: none">■ 1-Sided Print■ Flip on long edge (double-sided, side by side)■ Flip on short edge (double-sided, top to top)
Page size	An extensive drop-down list of standard international formats.
Paper tray	The paper source.

Some printers do not support all these options.

When a user prints a document, BIRT iHub adheres to printing specifications from the following sources, in order of precedence:

- Printer property values set for the current print job.
- Printer property values that are set at the volume level by the application administrator.

For a print request when scheduling a job, BIRT iHub uses the page size that the user explicitly selects. If the user does not select a page size, BIRT iHub uses the page size that the scheduled design or document specifies. If the scheduled design or document does not specify a page size, BIRT iHub uses the volume default setting.

Using Manage Volume—Printing, an application administrator can set property values for any BIRT iHub printer and specify the default printer for an volume.

How to set volume-level printer properties

- 1 Choose Manage Volume from the side menu in Information Console. Then, select Printing.
- 2 On Printing, specify a default printer and printer settings for the volume, as shown in Figure 3-4.

If available, BIRT iHub displays the following information from the printer and operating system:

- Manufacturer
- Model
- Description
- Location

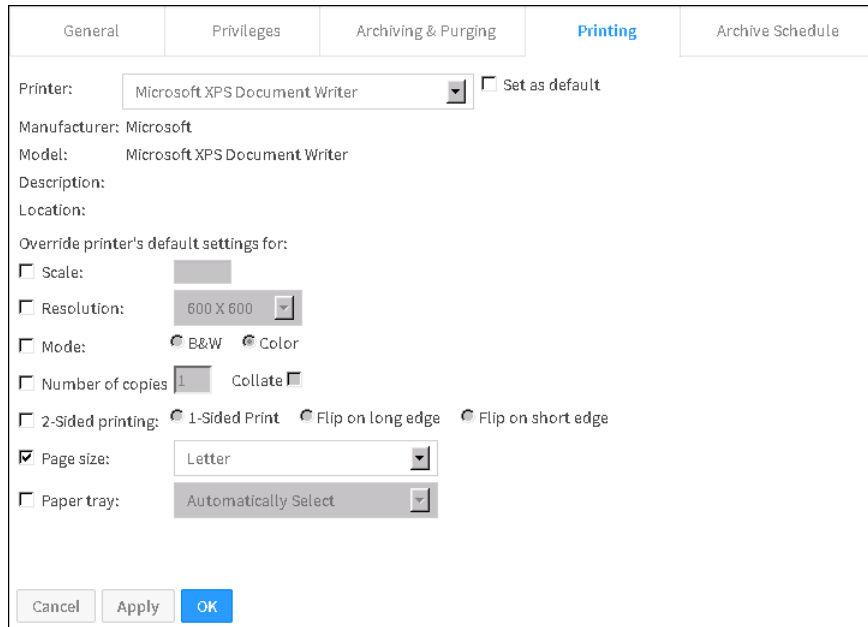


Figure 3-4 Setting print properties on Volume—Properties—Printing

When you finish setting the properties for a printer, you can set properties for a different printer by selecting it from the Printer drop-down list. You do not need to choose OK between printer selections.

When you have specified settings for all printers, choose OK.

Understanding service requirements

Running jobs in a volume requires the following BIRT iHub services, which the installation program configures by default:

- View and Factory services for running designs unscheduled
- The Factory service for running scheduled jobs

BIRT iHub must have access to a printer to print the output of a scheduled job.

The install program configures access to printers in Windows, but not in UNIX.

Scheduling an archiving cycle

Choose Archive Schedule, as shown in Figure 3-5, to schedule regular archive sweeps. You can specify the time zone, frequency, date, and time. You can exclude specific dates from the pattern that you create using Excluding these dates. You specify duration using the Start date and End date. Add the schedule to the list

of schedules by choosing Add Schedule Line. Remove a schedule by selecting the schedule from the list of schedules and choosing Delete Schedule Line.

By default, BIRT iHub performs an autoarchive sweep once daily.

General Privileges Archiving & Purging Printing **Archive Schedule**

TimeZone: America/Los_Angeles

Every day at 2:15 AM starting 12/6/2013

Frequency :

Once

Every 1 days

Every [] weeks on: Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Day [] of every [] months

The First [] Day [] of every [] months

Time: 2:15 AM (h:mm a)

Start date: 12/6/2013 # (M/d/yyyy)

End date: [] # (M/d/yyyy)

Excluding these dates: [] # [] > [] < [] (M/d/yyyy)

Cancel Apply **OK** Add Schedule Line Delete Schedule Line

Figure 3-5 Configuring an archiving schedule

About user and user group limits

Some of the relationships in the volume have recommended and hard limits. If you adhere to the recommended limits, the appearance, behavior, and performance of Information Console is acceptable. Your web browser imposes the hard limits. Table 3-3 shows the limits for the volume.

Table 3-3 Limits for the volume

Relationship	Recommended limit	Hard limit
User groups of which a particular user is a member	100	2000
Users and user groups notified about a particular job	100	1000
Users and user groups in a single access control list (ACL) for a file or folder, including ACLs that jobs create	100	2000
Users who are members of a particular user group	Unlimited (greater than 1,000,000)	

4

Exploring administrative capabilities

This chapter contains the following topics:

- Using the /Applications folder
- About locale maps
- Using Advanced Jobs

Using the /Applications folder

In Information Console, /Applications is a folder for BIRT iHub applications that developers publish. Actuate recommends that the administrator perform the following actions regarding the /Applications folder as a best practice:

- Create a user group named Developers for example, then assign read, execute, and write privilege on the /Applications folder to the Developers user group.
- Assign only execute privilege on the /Applications folder to users who are not developers and to the default All user group so that the /Applications folder is visible only to users belonging to the Developers user group. Users who do not belong to the Developers user group can still access an application in /Applications using a URL such as `http://localhost:8700/iportal/Applications/<application name>` after logging in to Information Console. The application developer or administrator provides this URL.

About locale maps

The administrator can customize a date, time, or currency expression for a particular locale by modifying a date, time, or currency format for that locale in a locale map. A localemap.xml file contains a Locale ID element for each language in which Information Console displays content. The Locale ID element contains subelements specifying the date, time, and currency formats for each language. BIRT iHub uses the following locale maps:

- `AC_SERVER_HOME\web\iportal\WEB-INF\localemap.xml`
Formats time stamps that Information Console displays in:
 - The Modified column of a file or folder listing
 - The Finished column of a My Jobs or Notifications listing
- `AC_SERVER_HOME\etc\localemap.xml`
Formats a date or time that one of the following items generates when used in an output document name or output document version name:
 - A predefined date-and-time format keyword
 - A date format symbol
 - A time format symbol

If you update localemap.xml, you must restart the cluster for the changes to take effect. In a cluster, the same localemap.xml files must reside on every BIRT iHub machine to achieve consistency among nodes. For information about starting and stopping a cluster, see Chapter 5, “Managing Clusters,” in *System Administration Guide*.

A locale definition in `localemap.xml` does not necessarily specify a value for every date, time, or currency field. For a field with no specified value, BIRT iHub uses the default locale's value for that field. In a `localmap.xml` file, the Locale ID named "default" specifies the default date, time, and currency formats.

For more information about date and time formats, see Chapter 3, "Scheduling and managing jobs," in *Using Information Console*.

Using Advanced Jobs

My Jobs displays basic information about the status of jobs. For each category in My Jobs, there is a basic view available to all users and an Advanced Jobs view available only to the administrator. The administrator can cancel a scheduled job or override settings specified by a user. Additionally, when performing advanced scheduling tasks, the administrator can use the file menu next to each job to perform additional actions. For more information on My Jobs, see Chapter 3, "Scheduling and managing jobs," in *Using Information Console*.

Using the available job monitoring options

For scheduled jobs, administrators can perform the following tasks:

- View details for a job.
- View and modify scheduling properties for one or more jobs.
- Clone a job.
- Delete a job.

For scheduled jobs waiting for an event, pending, or running administrators can cancel one or more of these jobs simultaneously.

For completed jobs administrators can perform the following tasks:

- Retry one or more jobs
- Delete one or more jobs
- Open Document
Opens the output document. You can also choose the output document name to view the output document.
- Print Document on Server
Displays the same printing properties as on Advanced Scheduling—Print. Configure print properties and choose OK to print the output document on the server.

- Schedule
Displays Advanced Scheduling job properties. Modify any scheduled job property. Then choose OK to submit the job.
- Delete
Deletes this job from Completed.

Table 4-1 describes the available options in the categories in My Jobs and lists whether the option is available in the basic or advanced jobs view.

Table 4-1 Options for job schedules

Option	Description	Basic	Advanced
Cancel	Cancels this job and moves it from Waiting for Event to Completed.		✓
Clone	Creates a copy of the job. Displays Advanced Scheduling job properties. Modify any scheduled job property.		✓
Document Pages	Number of pages in the output document.		✓
Event Name	Name the user gives to the event that triggers job execution.	✓	✓
Event Parameter	Identifies the event criteria BIRT iHub uses to determine whether to trigger job execution. For example, if Event Type is FileEvent and Event Parameter is a file name, BIRT iHub executes the job when iHub detects that the file that Event Parameter specifies has been created.	✓	✓
Event Status	Status of the state between BIRT iHub and the event that triggers job execution. Possible states are: <ul style="list-style-type: none"> ■ Uninitialize BIRT iHub did not start monitoring the system for the event. ■ Polling While monitoring the system for event criteria that triggers job execution BIRT iHub has not found matching criteria. ■ Satisfied BIRT iHub found matching event criteria and executed the job. ■ Expired BIRT iHub did not find matching event criteria within the polling interval or a user canceled the job. 	✓	✓

Table 4-1 Options for job schedules

Option	Description	Basic	Advanced
Event Type	Can be one of the following: <ul style="list-style-type: none"> ■ File Event BIRT iHub runs the job when a file the user specifies is created. ■ Job Event BIRT iHub runs the job when a job the user specifies succeeds or fails. The user specifies whether job event success or failure triggers execution of the job being scheduled. ■ Custom Event BIRT iHub runs the job when a web service the user specifies returns a signal to BIRT iHub. 	✓	✓
Executable Name	Name of the design being run.		✓
Finished	Date and time the job finished.	✓	✓
Job Name	By default, the name of the design being run. Alternatively, a job name the user specifies.	✓	✓
Next Run	Date and time the job runs next.		✓
Owner	The name of the user who submitted the job		✓
Priority	Job priority. The higher the number, the higher the priority.		✓
Properties	Displays Advanced Scheduling job properties. Modify any scheduled job property.		✓
Report Name	Name of the design being run.	✓	✓
Result	Succeeded or Failed.	✓	✓
Retry	Submits the job again, making no changes to any job property.		✓
Started	Date and time the job was started.	✓	✓
Submitted	Date and time the user submitted the job.	✓	✓

The following section describes the actions an administrator can perform in Advanced Jobs, for each job phase category.

Working with scheduled jobs

For a single job, point to the arrowhead icon next to a job name and select one of the following options:

- Details

In Advanced Jobs, Details consists of the following categories:

- Summary

Details about the following job components:

- Job
- Executable
- Output document

- Properties

Details about the following scheduled job properties:

- Job
- Executable
- Schedule
- Parameters
- Output Document
- Privileges
- Notifications
- Email Notification
- Print

- Properties

Displays Advanced Scheduling job properties. Modify any scheduled job property.

- Clone

Creates a copy of this job. Displays Advanced Scheduling job properties. Modify any scheduled job property.

- Delete

Deletes this job from Schedules.

Select two or more jobs. Then, point to Act upon selected schedules and select one of the following options:

- Properties

Displays Advanced Scheduling job properties for the jobs you select. BIRT iHub displays only the properties that do not need to be unique to each job.

For example, BIRT iHub does not show job name or output document name because these properties must remain unique for each job. Modify any scheduled job property that appears.

- Delete
Deletes the jobs you select from Schedules.

Working with jobs waiting for an event

For a single job, point to the arrowhead icon next to the job name and select one of the following options:

- Details
In Advanced Jobs, Details consists of the following categories:
 - Summary
Details about the following job components:
 - Job
 - Executable
 - Output document
 - Properties
Details about the following scheduled job properties:
 - Job
 - Executable
 - Schedule
 - Parameters
 - Output Document
 - Privileges
 - Notifications
 - Email Notification
 - Print
- Cancel
Cancels this job and moves it from Waiting for Event to Completed.

For two or more jobs, select the jobs. Then, select Actions➤Cancel to cancel the jobs you select. BIRT iHub moves the jobs from Waiting for Event to Completed.

Working with pending jobs

The selectable options on Pending for a single job and for two or more jobs are the same options as on Waiting for Event.

Working with running jobs

The selectable options on Running for a single job and for two or more jobs are the same options as on Waiting for Event.

Working with completed jobs

For a single job that succeeds, point to the arrowhead icon next to the job name and select one of the following options:

- Details
 - In Advanced Jobs, Details consists of the following categories:
 - Summary
 - Details about the following job components:
 - Job
 - Executable
 - Output document
 - Status
 - Details about the outcome of the completed job include the following information:
 - Results
 - Status
 - Properties
 - Details about the following scheduled job properties:
 - Job
 - Executable
 - Schedule
 - Parameters
 - Output Document
 - Privileges
 - Notifications
 - Email Notification
 - Print
 - Open Document
 - Opens the output document. You can also choose the output document name to view the output document.

- **Print Document on Server**
Displays the same printing properties as on Advanced Scheduling—Print. Configure print properties and choose OK to print the output document on the server.
- **Schedule**
Displays Advanced Scheduling job properties. Modify any scheduled job property. Then, choose OK to submit the job.
- **Delete**
Deletes this job from Completed.

For a single job that fails, point to the arrowhead icon next to the job name and select one of the following options:

- **Details**
Displays the same details as for a single job that succeeds.
- **Retry**
Submits the job, making no changes to any job property.
- **Schedule**
Displays Advanced Scheduling job properties. Modify any scheduled job property. Then, choose OK to submit the job.
- **Delete**
Deletes this job from Completed.

For two or more jobs, select the jobs. Then, point to Actions and select one of the following options:

- **Retry**
- **Delete**

Filtering jobs

Users can specify filter conditions in any job category to view specific jobs. This feature is useful when a job category contains a long list of jobs. Additionally, an administrator can specify filters in Advanced Jobs—Schedules and Advanced Jobs—Completed to view scheduled jobs that meet the following conditions:

- **Active**
- **Canceled**
- **Expired**
- **Failed**
- **Succeeded**

For example, in Advanced Jobs—Schedules, to view all Active jobs, deselect Canceled and Expired as shown in Figure 4-1.

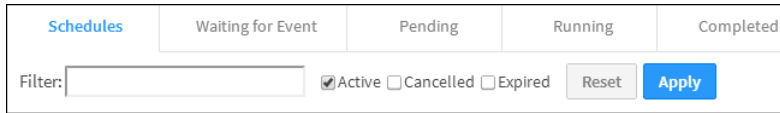


Figure 4-1 Creating a filter to view active jobs

Information Console excludes all jobs that were canceled and all jobs that were run in the past from the displayed results.

To view Failed jobs, in Advanced Jobs—Completed, deselect Succeeded and Canceled, as shown in Figure 4-2.

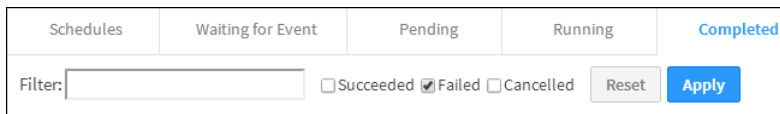


Figure 4-2 Creating a filter to view failed jobs

Information Console excludes all jobs that were canceled and all jobs that were run successfully from the displayed results.

Editing a scheduled job

The administrator can edit a scheduled job. A user can only delete a scheduled job.

How to edit a scheduled job

- 1 Log in to Information Console as Administrator.
- 2 In the navigation pane, choose My Jobs.
- 3 In the inner banner, choose Advanced Jobs, as shown in Figure 4-3.

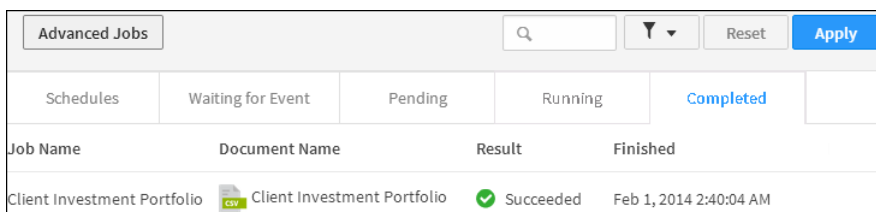


Figure 4-3 Choosing Advanced Jobs

- 4 In Schedules, from the menu icon next to a job, choose Properties, as shown in Figure 4-4.

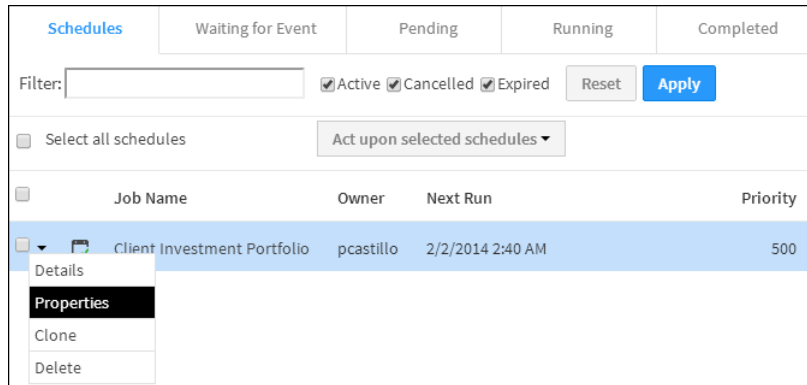


Figure 4-4 Viewing properties for a scheduled job

- Information Console displays the Advanced Scheduling job categories for the job. Make any desired job property modifications and choose OK.

Deleting a scheduled job

The administrator can delete a job before BIRT iHub processes it. You cannot recover a deleted job. After BIRT iHub processes a job, iHub removes the job from Jobs—Schedules and moves it to Jobs—Completed.

How to delete a scheduled job

In Advanced Jobs—Schedules, from the file menu for the job to delete, choose Delete, as shown in Figure 4-5.

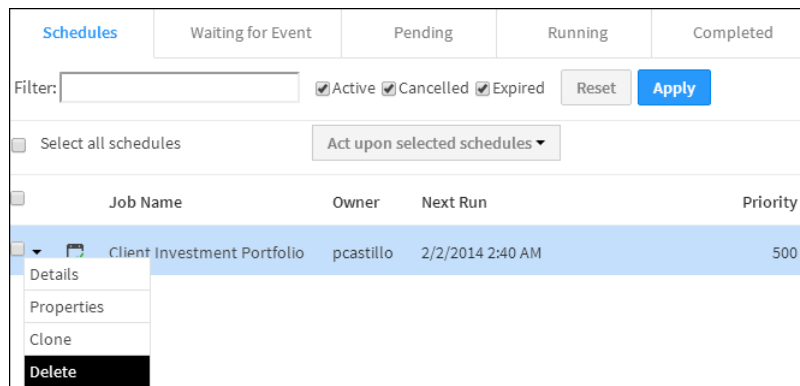


Figure 4-5 Deleting a scheduled job

The administrator can also cancel a job in Waiting for Event, Pending, and Running using the file menu for the job and choosing Cancel from the menu that appears.

Cloning a job

The administrator can create a copy of a job by selecting Clone in the file menu. Information Console displays Advanced Scheduling job properties. You can modify any scheduled job property.

How to clone a job

In Advanced Jobs—Schedules, from the file menu for the job to clone, choose Clone. Information Console displays the Advanced Scheduling job categories for the new job. Make any desired job property modifications and choose OK to schedule the job.

Index

A

- access control lists
 - creating 39
- access permissions. *See* privileges
- accessing
 - console applications 2
- adding
 - archiving policies 34
 - security roles 39
- Administrator user 8
- Administrator user group 8
- administrators
 - managing volumes and 2
- Archive Schedule button 37
- archiving
 - folders 34
 - report files 34–37
- Archiving and Purging page (Volume Properties) 32
- archiving policies
 - creating 34
 - inheriting 34
 - setting on volumes 32
- archiving rules 32
- area charts
 - See also* charts
- autoarchiving 34–37
- axes values
 - See also* charts

B

- bar charts
 - See also* charts
- BIRT iHub. *See* iHub System
- BIRT reports
 - See also* reports
- BIRT repository. *See* volumes
- browsers. *See* web browsers

C

- canceling jobs 51
- character strings. *See* strings

- clusters 42
- Collate property 35
- columns
 - See also* fields
- configurations
 - printing and 37
 - specifying locale-specific formats and 43
- creating
 - access control lists 39
 - archiving policies 34
 - security roles 39
- customizing
 - date-and-time formats 42
 - printer settings 35

D

- data
 - See also* values
 - retrieving from
 - data sources 2
- data filters. *See* filters
- data points
 - See also* charts
- data repository
 - See also* volumes
- data rows. *See* rows
- data series
 - See also* charts
- data sources
 - retrieving data from 2
- default archiving policy 32
- default printer 36
- deleting
 - jobs 51, 52
 - notifications 33
- displaying
 - printer information 36
- Do not archive file before deletion setting 32
- Do not automatically delete setting 32
- documentation iii
- documents
 - See also* reports
- Duplex property 36

F

Factory service 37

fields

See also columns

File type property 32

file types

archiving specific 32, 34

files

archiving 34–37

folders

archiving 34

formats

customizing 42

functions

See also methods

G

graphs. *See* charts

I

iHub

autoarchiving and 34

localizing reports and 43

printing reports and 36

iHub services 37

Information Console

archiving and 34

localizing reports and 42

inheriting

archiving policies 34

installing system printers 35

J

jobs

canceling 51

deleting 51, 52

printing reports and 36, 37

running scheduled 37

running unscheduled 37

L

line charts

See also charts

locale maps 42

locales

formatting date and time values for 42

M

Management Console

localizing reports and 42

managing users and 8

setting volume properties and 38

manuals. *See* documentation

methods

See also functions

Mode property 35

N

notifications

deleting 33

Number of copies property 35

O

online documentation iii

output

printing and 37

P

Page size property 36

permissions. *See* privileges

print options 36

printer settings 35

printers

scheduling jobs and 37

setting properties for 35

specifying default 36

viewing information about 36

printing

report documents 36

Printing page (Volume Properties) 36

privileges

archiving reports and 34

properties

autoarchive 34

printing 35

volumes 33

Properties page (Job Schedules) 51

protecting data. *See* security

Purge failure notices after property 34

Purge success notices after property 33

purging notifications 33
purging rules 32

Q

queries
See also SQL statements

R

records. *See* rows
relational databases
See also databases
report documents
See also reports
Report Encyclopedia. *See* volumes
report files
 archiving 34–37
reporting system. *See* iHub System
reports
 printing 36
repository
See also volumes
Resolution property 35
roles
 accessing reports and 8
 assigning to users 39
 creating 39
running
 scheduled jobs 37
 unscheduled jobs 37

S

Scale property 35
scatter charts
See also charts
scheduled jobs
 canceling 51
 running 37
Schedules page (Job Schedules) 51, 52
security roles
 accessing reports and 8
 assigning to users 39
 creating 39
series
See also charts
servers
See also iHub servers

SQL statements
See also queries
summary values
See also aggregate data
system printers 35

T

text strings. *See* strings
types. *See* data types

U

Uniform resource locators. *See* URLs
UNIX systems
 printing reports and 37
updating
 locale maps 42
users
 assigning security roles 39
 setting printer options for 35

V

values
See also data
View service 37
viewing
 printer information 36
volumes
 aging items in 34
 archiving items in 34–37
 printing reports and 35–37
 removing items from 34
 running jobs and 37
 setting properties for 33

W

web browsers
 accessing console applications and 2
 setting volume properties and 38
Windows systems
 printing reports and 37

X

x-axis values
See also charts

Y

y-axis values

See also charts