

erwin Data Intelligence Suite

Report Management Guide

Release v10.0

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Managing Reports

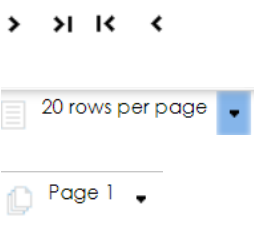
This section walks you through reports and dashboard configuration. The reports and dashboard configuration are managed via Reporting Manager. It enables you to evaluate team's productivity and create statistical reports. It involves creating and publishing reports and dashboards. The available list of tables allows you to generate custom reports of your data integration project using SQL queries.

Using Reporting Manager

To access the Reporting Manager, go to **Application Menu > Miscellaneous > Reporting Manager**. The Reporting Manager dashboard appears:



UI Section	Icon	Function
Reporting Workspace		Use this pane to browse through categories, reports, and dashboards. It enables you to create and categories reports and dashboards.
Right Pane		Use this pane to work on the data based on your selection in the Reporting Workspace.

UI Section	Icon	Function
Pagination Bar		Use this bar to navigate through the categories data displayed on the Right Pane.

Using the Reporting Manager involves:

- [Generating custom reports](#)
- [Exporting and importing reports](#)
- [Creating dashboard](#)
- [Adding components to a dashboard](#)
- [Creating additional fields at report level](#)

Generating Custom Reports

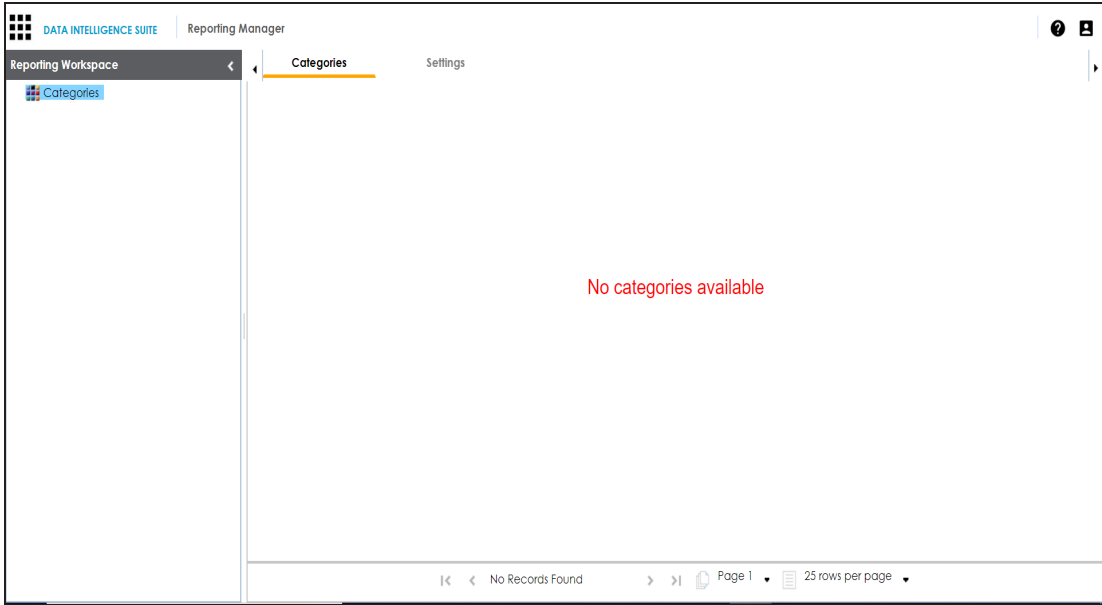
You can create custom reports and classify these reports into categories. The reports are generated by writing SQL queries and can be exported to excel sheet.

You can create reports under a new or existing category.

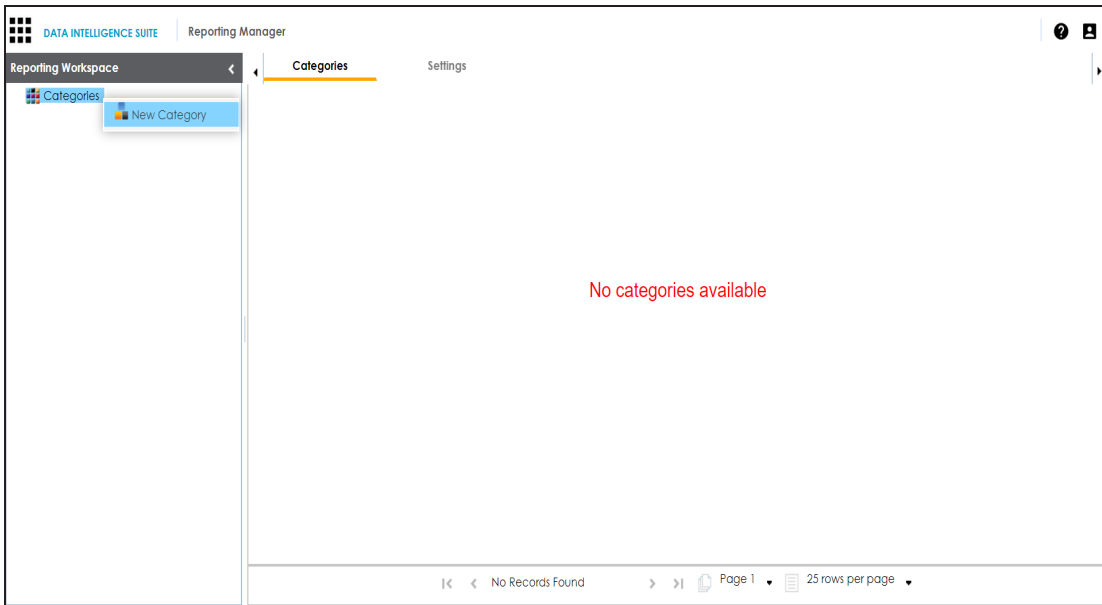
To create categories, follow these steps:

1. Go to **Application Menu > Miscellaneous > Reporting Manager**.

The following page appears showing the Categories node.

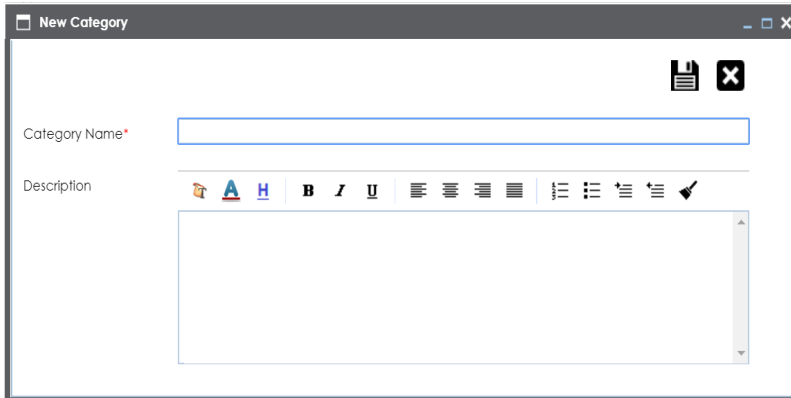


2. Right-click the **Categories** node.



3. Click **New Category**.

The New Category page appears.



4. Enter **Category Name** and **Description**.

For example:

- Category Name - Workflow_Status
- Description - The category contains workflow related reports.

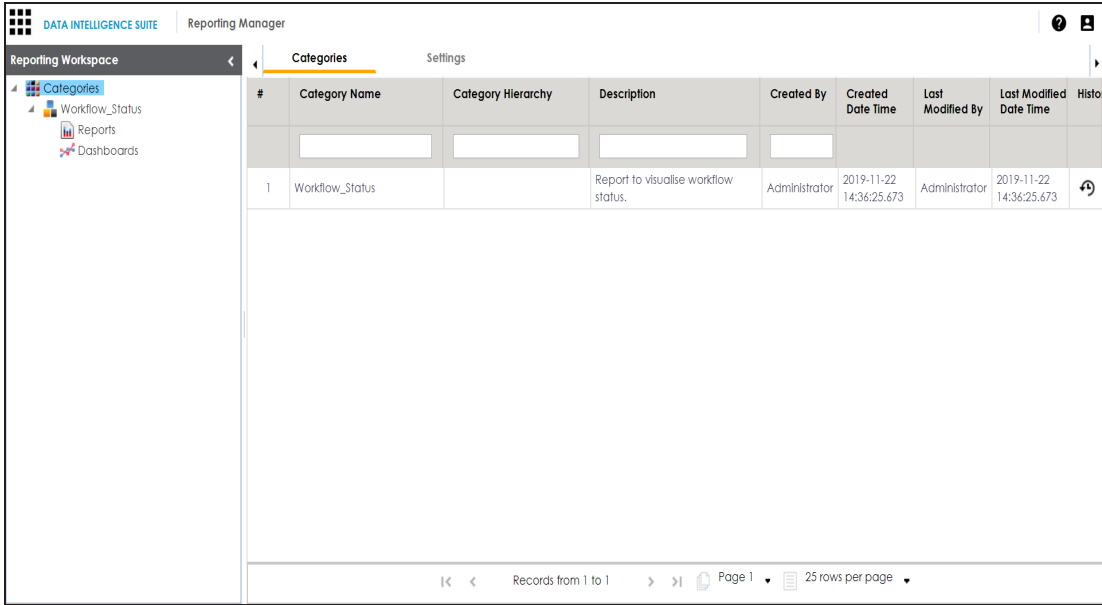
5. Click .

The category is created and saved in the Categories tree.

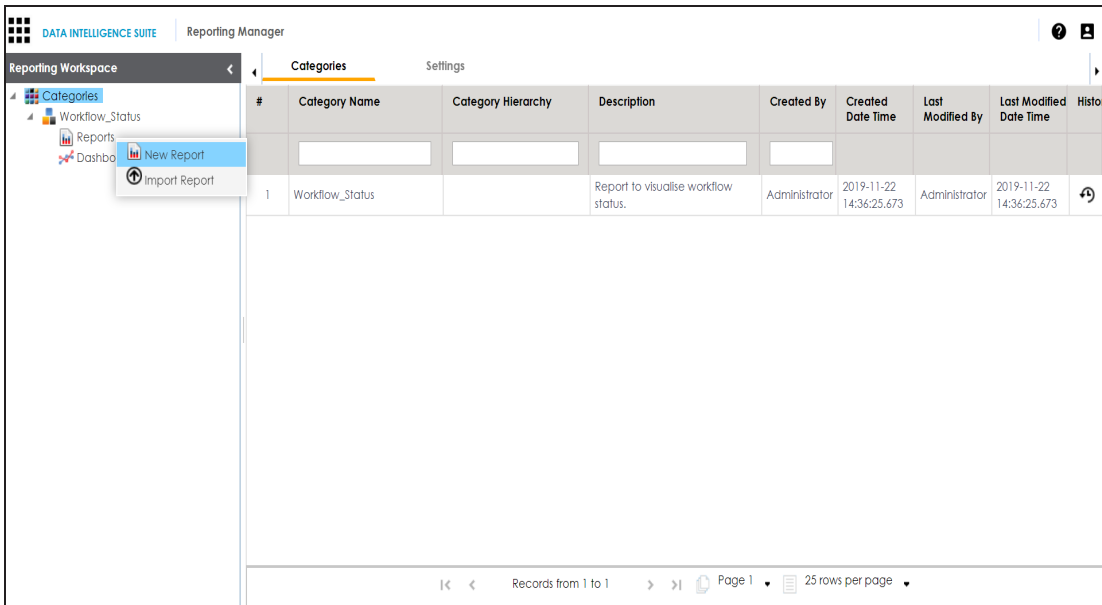
To create a report, follow these steps:

1. Expand the desired category node.

The following page appears.

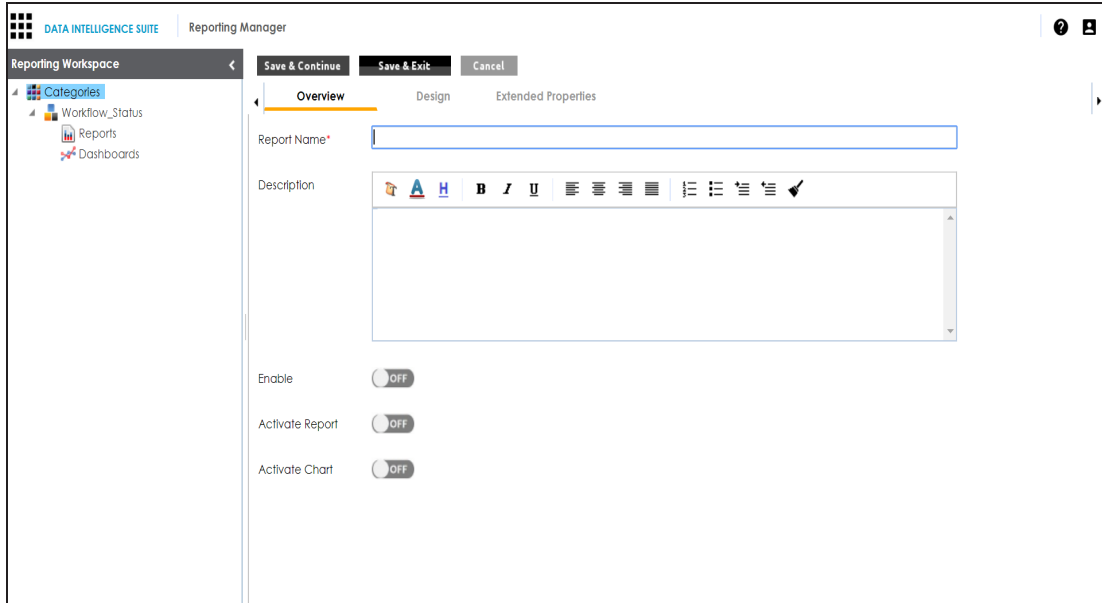


2. Right-click the **Reports** node.



3. Click **New Report**.

The following page appears.



4. Enter **Report Name** and **Description**.

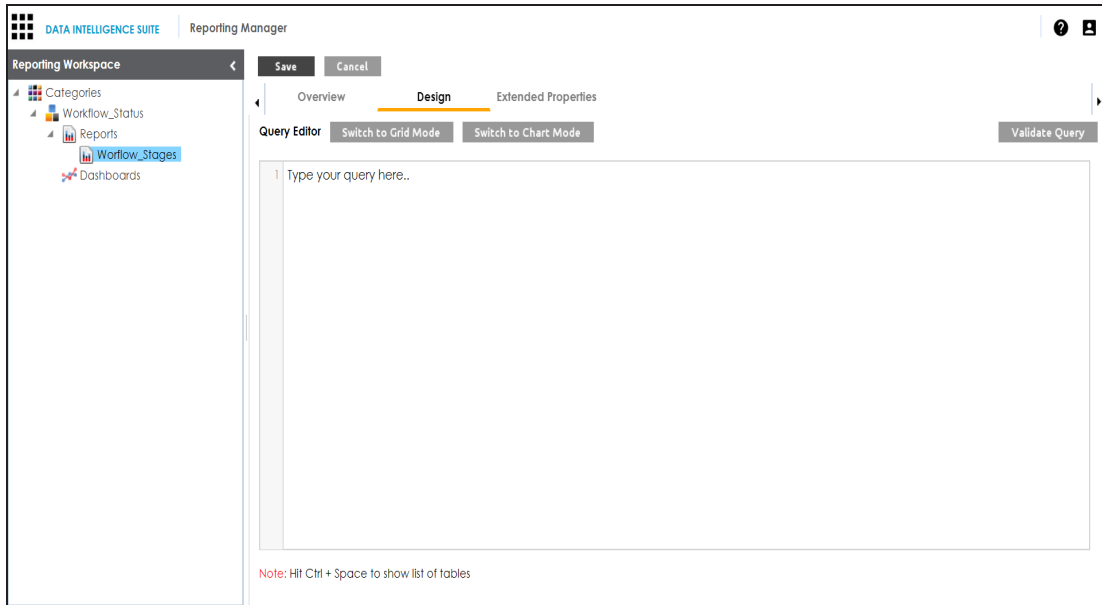
For example:

- Report Name - Workflow_Assignment
- Description - This report is about the workflow assignment to users.

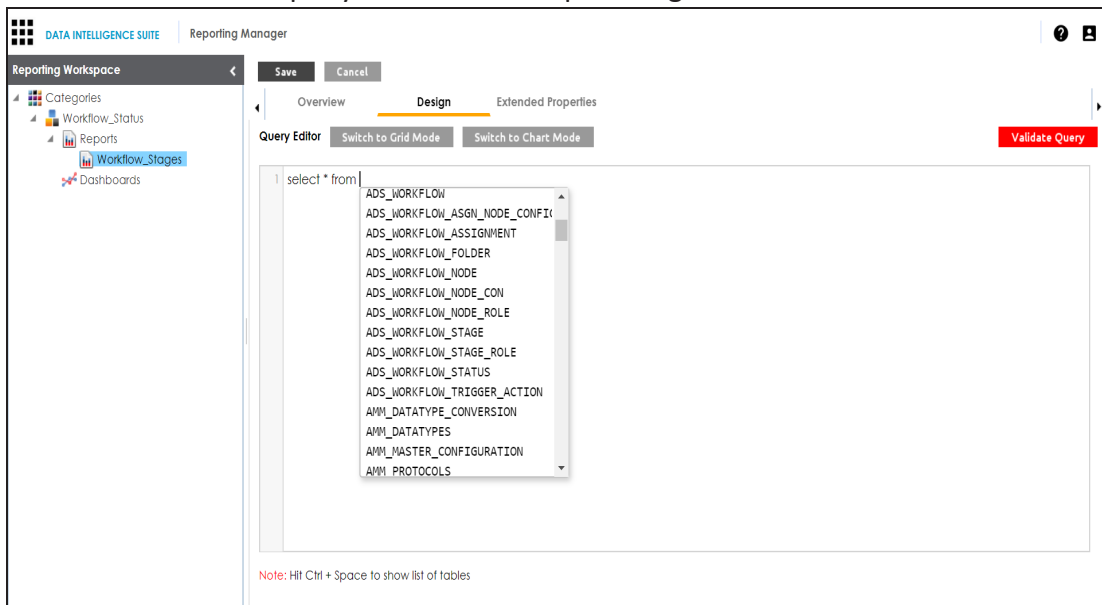
5. Click **Save and Continue**.

The report is created and saved in the Reports tree.

By default, the **Design** tab opens.



6. Write a suitable SQL query and use Ctrl + Space to get the list of tables.



7. Click **Validate Query** to validate the query.

The query is validated.

8. Click **Switch to Grid Mode** to view the report in grid view.

DATA INTELLIGENCE SUITE Reporting Manager

Reporting Workspace

Workflow_Status

Reports

Workflow_Stages

Dashboards

Overview Design Extended Properties History

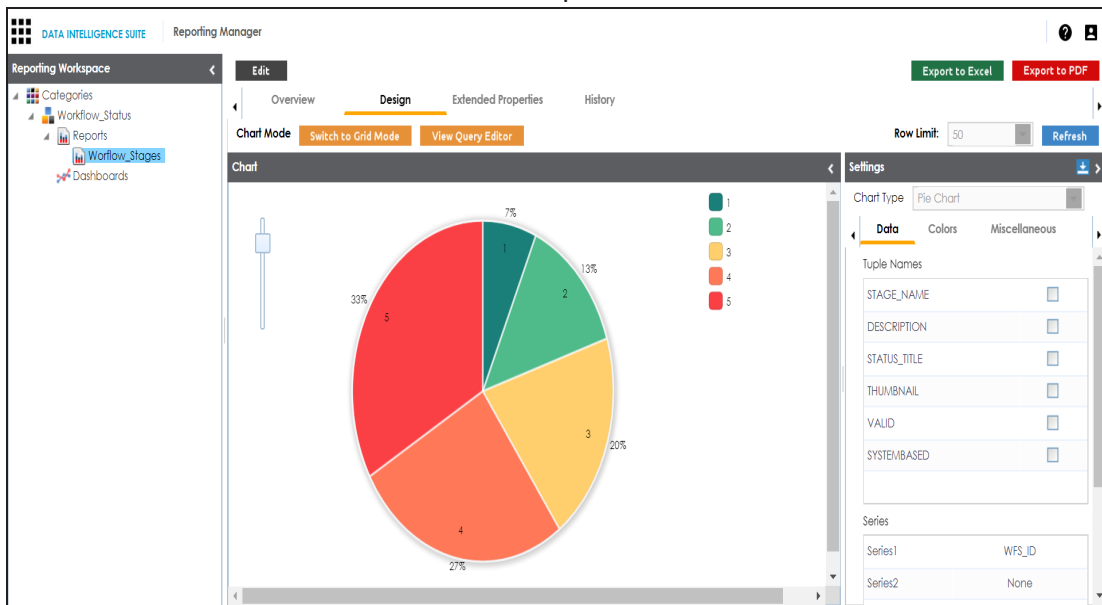
Grid Mode Switch to Chart Mode View Query Editor

Row Limit: 50

#	WFS_ID	STAGE_NAME	DESCRIPTION	STATUS_TITLE	MODULE_ID
1	1	Review	Review	Pending Review	14
2	2	Approve	Approve	Pending Approve	14
3	3	Pending Publish	Pending Publish	Pending Publish	14
4	4	First Approval		Pending Final Approval	14
5	5	Add_Stage		Status_Title	14

Records from 1 to 5 of 5

9. Click **Switch to Chart mode** to view the report in chart mode.

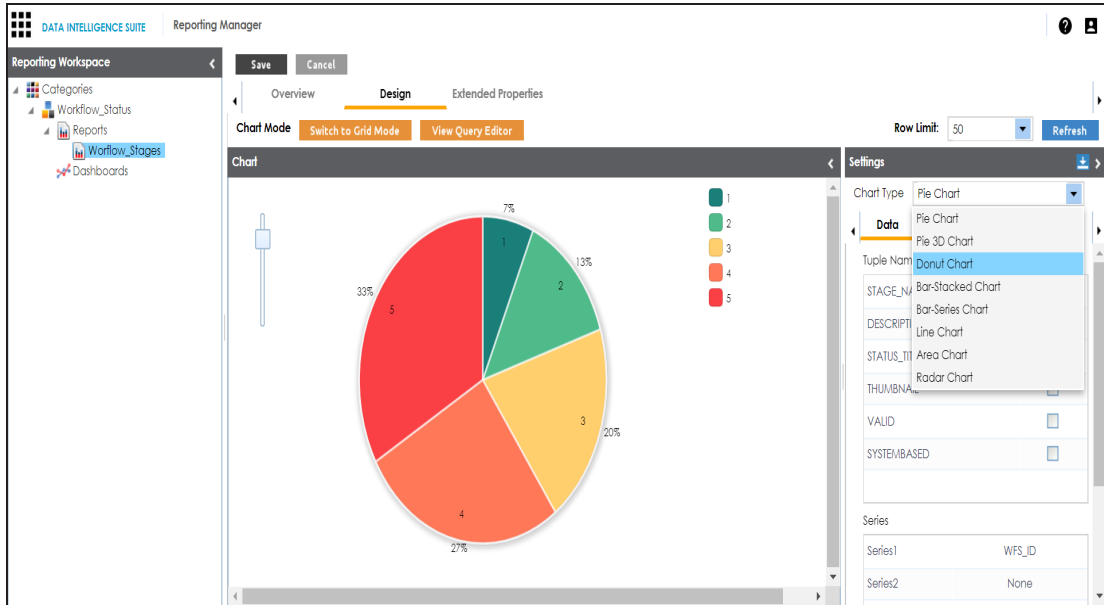


10. Click **Export to Excel** to download the report in .xlsx format.

11. Click **Export to PDF** to download the report in .pdf format.

To view the report in a different chart type, follow these steps:

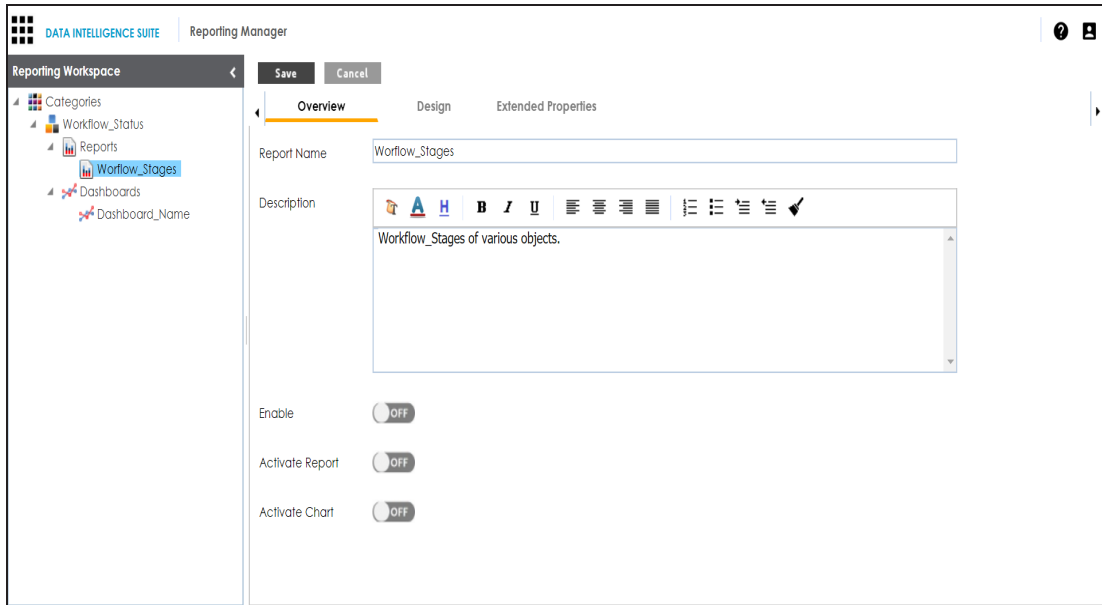
1. click **Edit**.
2. In **Settings** tab, select the appropriate chart type and click **Save**.



To enable and activate the report, follow these steps:

1. Click **Edit**.
2. Click the **Overview** tab.

The following page appears.



3. Turn the **Enable** switch to **ON**.
4. Turn the **Activate Report** switch to **ON**.
5. Click **Save**.

The report is enabled and activated.

Note: Only, an enabled and activated report can be added to a dashboard.

6. To activate chart, turn the **Activate Chart** switch to **ON** and click **Save**.

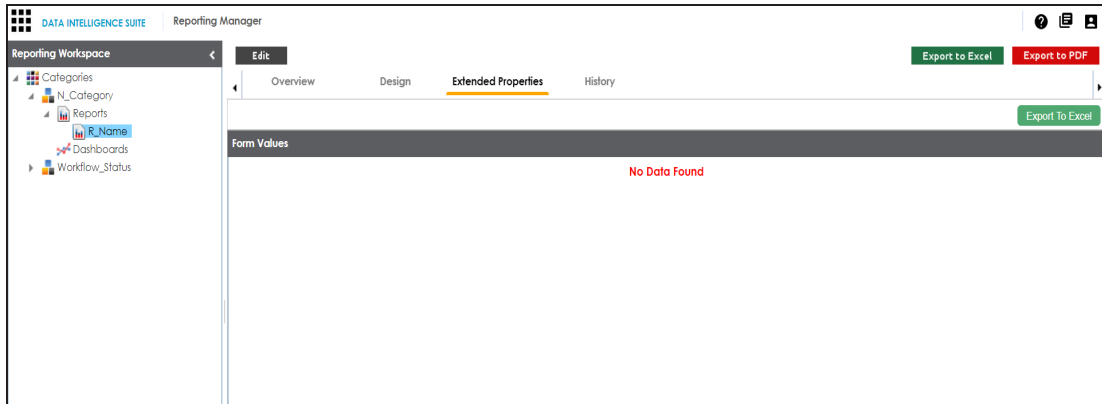
Note: Only, an activated chart can be added to a dashboard.

Extending Report Properties

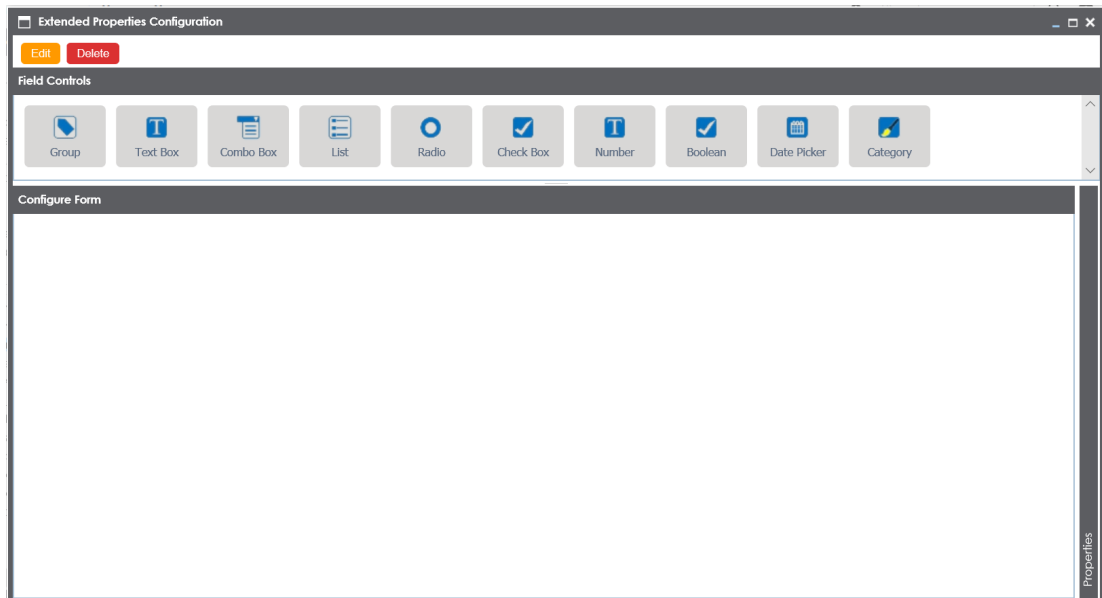
You can configure extended properties of a report by designing a form and access the form under the **Extended Properties** tab.

To configure extended properties of reports, follow these steps:

1. Under the **Reporting Workspace** pane, click a report and click the **Extended Properties** tab.



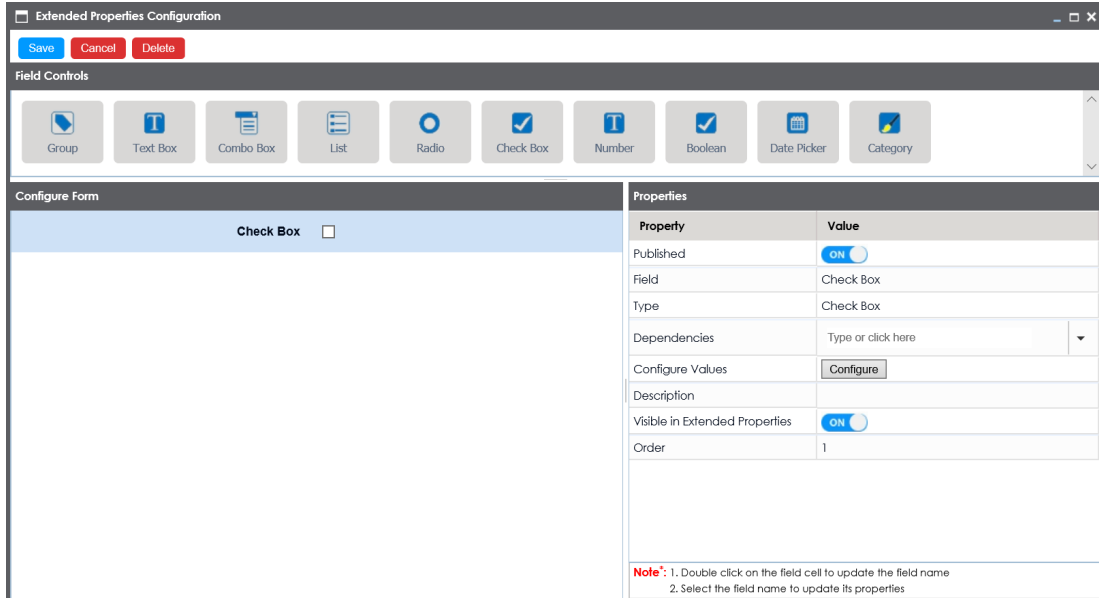
2. Click **Edit**.
3. Click **Configure**.



The **Extended Properties Configuration** page contains the following sections:

- **Field Controls:** This pane displays the available UI elements.
- **Configure Form:** Use this pane to design forms using the available UI elements in the **Field Controls** pane.
- **Properties:** This pane displays the properties of the selected UI element in the **Configure Form** pane.

- Click **Edit** and double-click or drag and drop the required UI elements from the **Field Controls** pane to the **Configure Form** pane.
- Select UI elements, one at a time, and configure their properties in the **Properties** pane.



Note: The available properties differ based on the type of UI element.

Refer to the following table for property descriptions:

Property	Description
Published	Turn Published to ON to publish the field.
Field	Double-click the corresponding Value cell to change the label of the field.
Type	Double-click the corresponding Value cell to select different types of the field.
Configure Values	Click Configure Values to enter option values. You can use: <ul style="list-style-type: none"> ▪ Default connector: It enables you to enter options manually. ▪ Reference Data Manager : It enables you to pull the data from reference tables in the Reference Data Manager.
Mandatory	Select the check box to make the field mandatory in the form.

Property	Description
Description	Double-click the corresponding Value cell to enter a description of the field.
Visible in Extended Properties	Turn Visible in Extended Properties to ON to make it visible.
Order	Displays the order of the field. You can drag and drop the field in the Configure Form pane to change its order.

6. Click **Save**.

The form is saved under the **Extended Properties** tab.

To use the form, follow these steps:

1. Under the **Reporting Workspace** pane, click a report and click the **Extended Properties** tab.
2. Click **Edit** and use the form.
3. Click **Save**.

The form is updated.

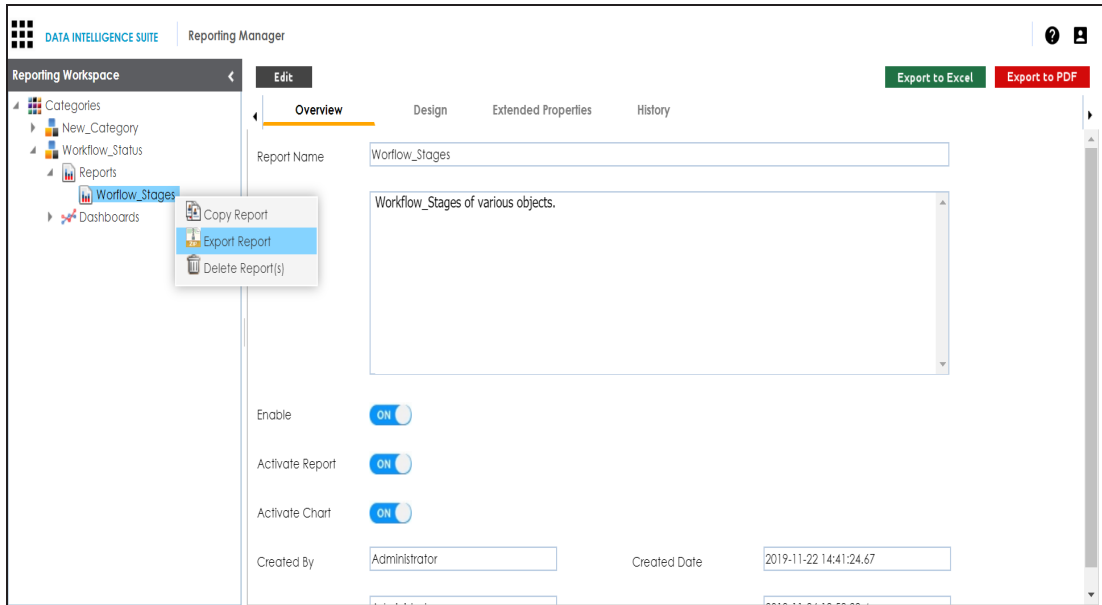
Exporting and Importing Reports

You can export reports in .xml format and share it with your clients. You can also import reports from a different category.

To export reports, follow these steps:

1. Go to **Application Menu > Miscellaneous > Reporting Manager**.
2. Expand the **Categories** node.
3. Expand the desired category.
4. Expand the **Reports** node nested in the category node.
5. Right-click the report to be exported.

The following page appears.



6. Click **Export Report**.

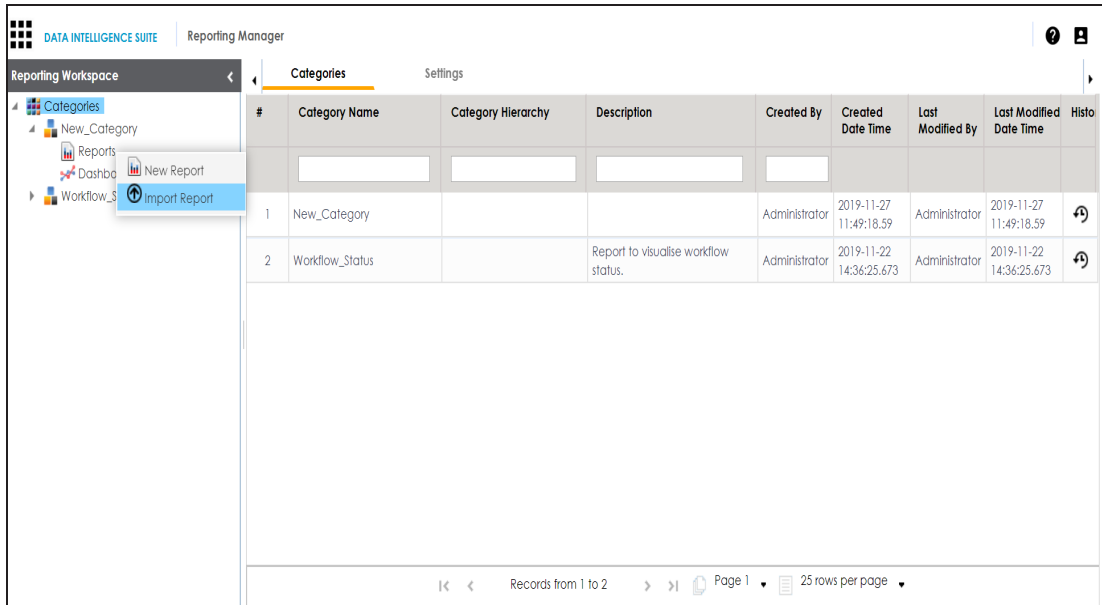
The report is downloaded in .arp format.

You can extract the report in .xml format.

You can import the reports from other categories.

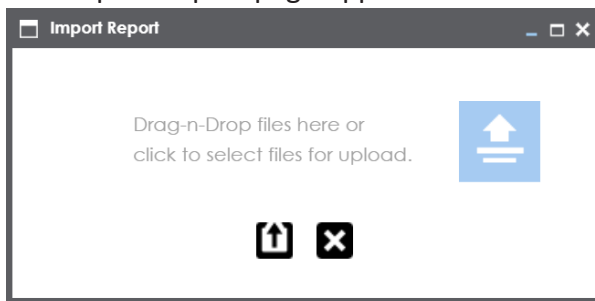
To import reports from different categories, follow these steps:

1. Export a report from a category.
2. Expand the category node where you wish to import the report.
3. Right-click the **Reports** node.



4. Click **Import Report**.

The Import Report page appears.



5. Drag and Drop the exported report (.arp format) or use to browse the report (.arp format).

6. Click .

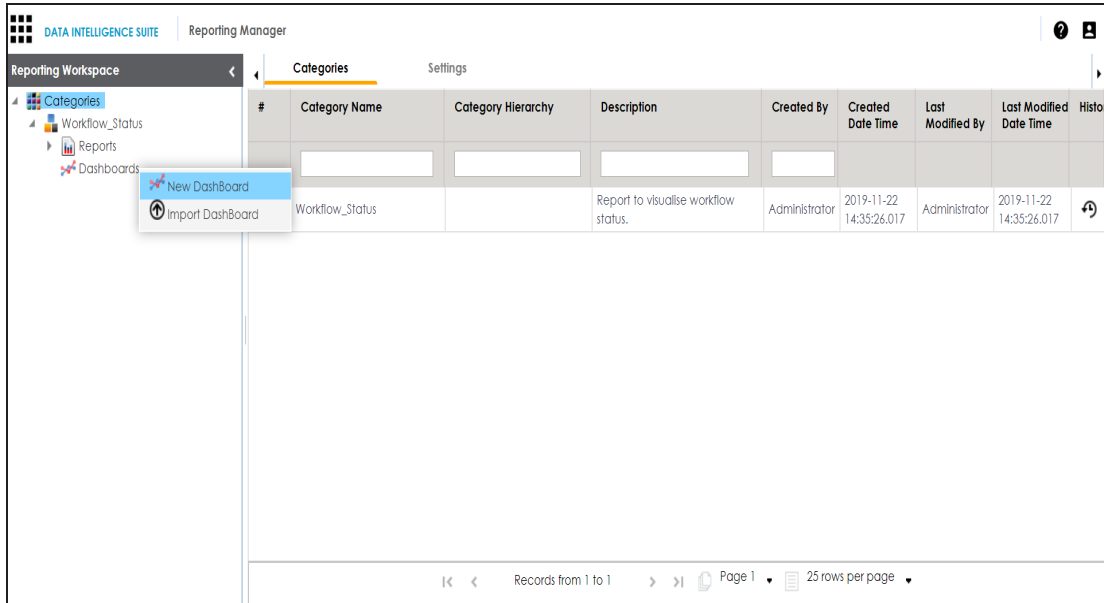
The report is uploaded in the category.

Creating Dashboard

A dashboard is a collection of charts and reports. Dashboards are categorized under categories.

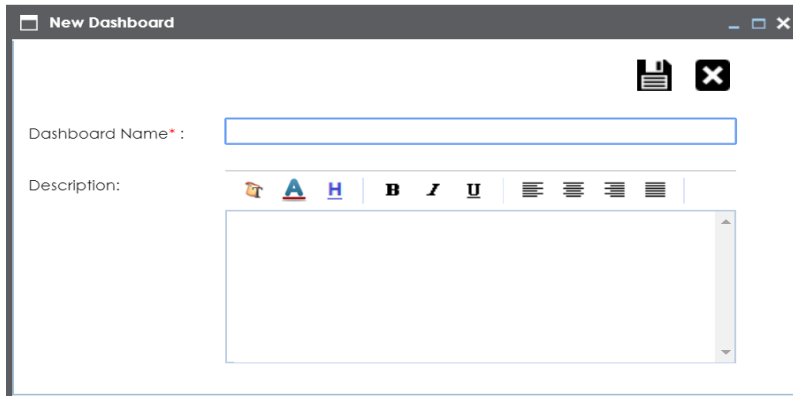
To create a dashboard, follow these steps:

1. Go to **Application Menu > Miscellaneous > Reporting Manager**.
2. Expand the required category.
3. Right-click the **Dashboards** node.



4. Click **New Dashboard**.

The New Dashboard page appears.



5. Enter **Dashboard Name** and **Description**.

For example:

- Dashboard Name - Workflows
- Description - The dashboard is a collection of reports related to workflows.

6. Click .

A new dashboard is created and saved in the dashboard tree.

Once a dashboard is created, you can [add components to the dashboard](#).

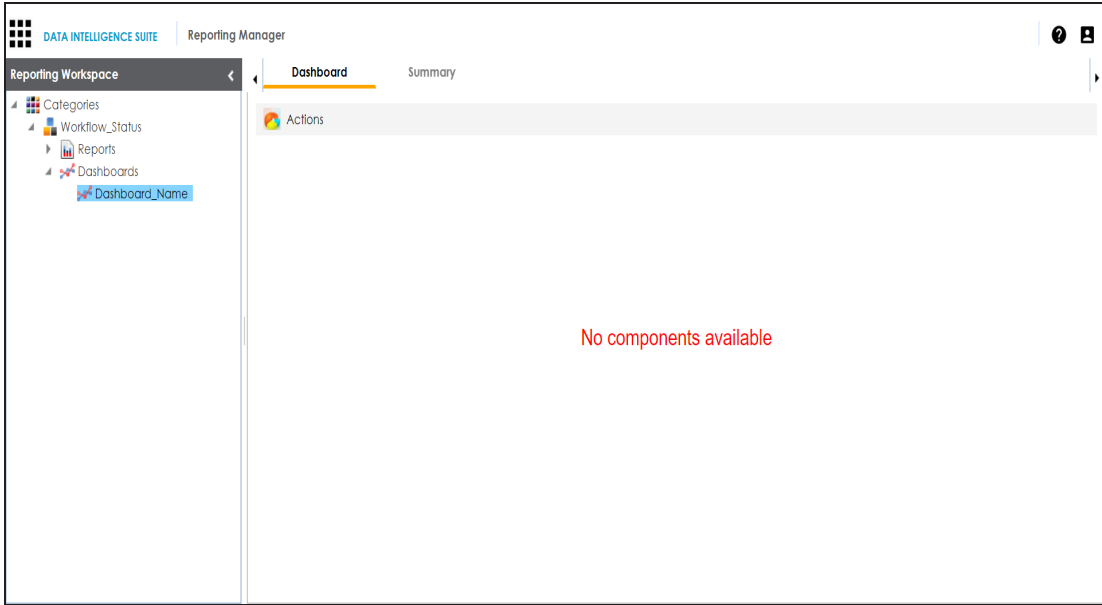
Adding Components to a Dashboard

You can add reports in a category to a dashboard.

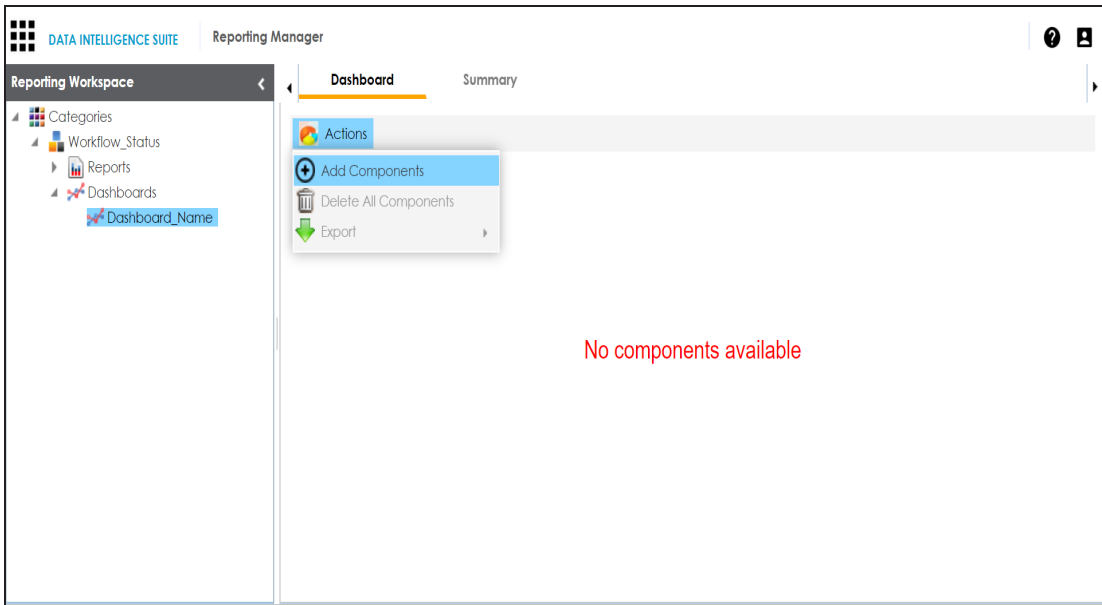
To add components to a dashboard, follow these steps:

1. Go to **Application Menu > Miscellaneous > Reporting Manager**.
2. Expand the **Categories** node.
3. Expand the desired category.
4. Expand the **Dashboards** node.
5. Click the dashboard where you wish to add components.

The following page appears.

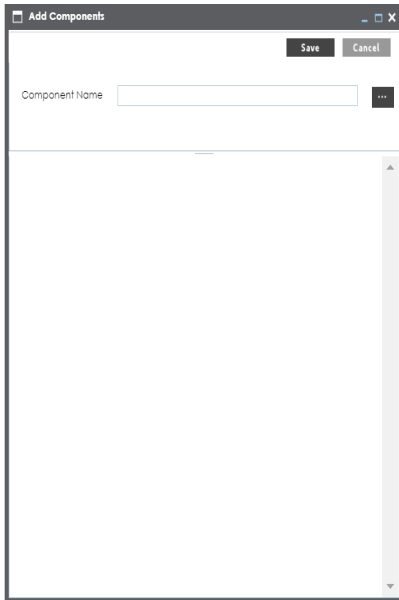


6. Click **Actions**.



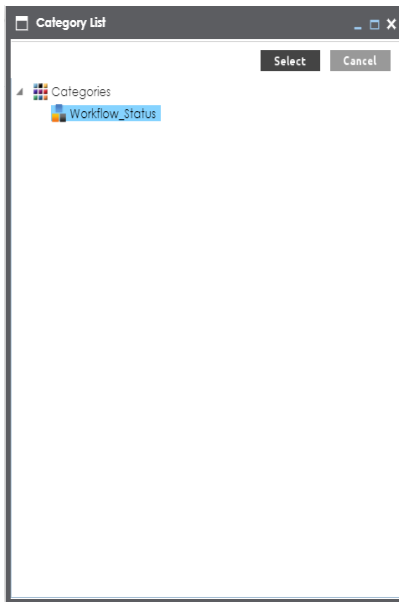
7. Click **Add Components**.

The Add Components page appears.



8. Click .

The Category List page appears.



9. Select the desired category and click **Select**.

The reports in the category are added to the dashboard.

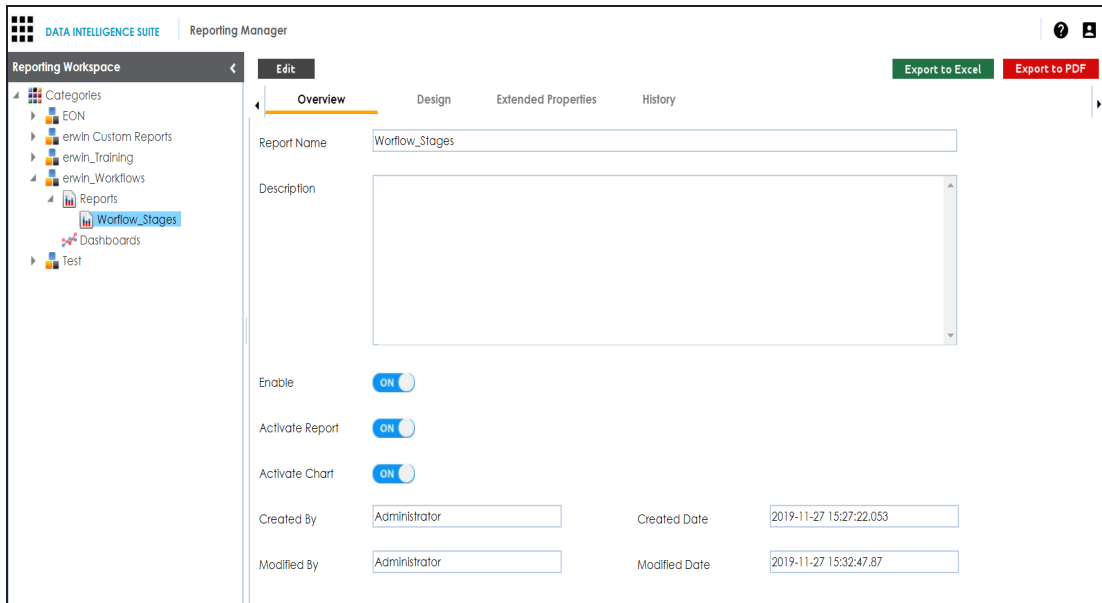
Creating Additional Fields at Report Level

The extended properties option at report level allows you to create additional fields. For example, you can create additional fields to describe the approval status of the report.

To add additional fields at report level, follow these steps:

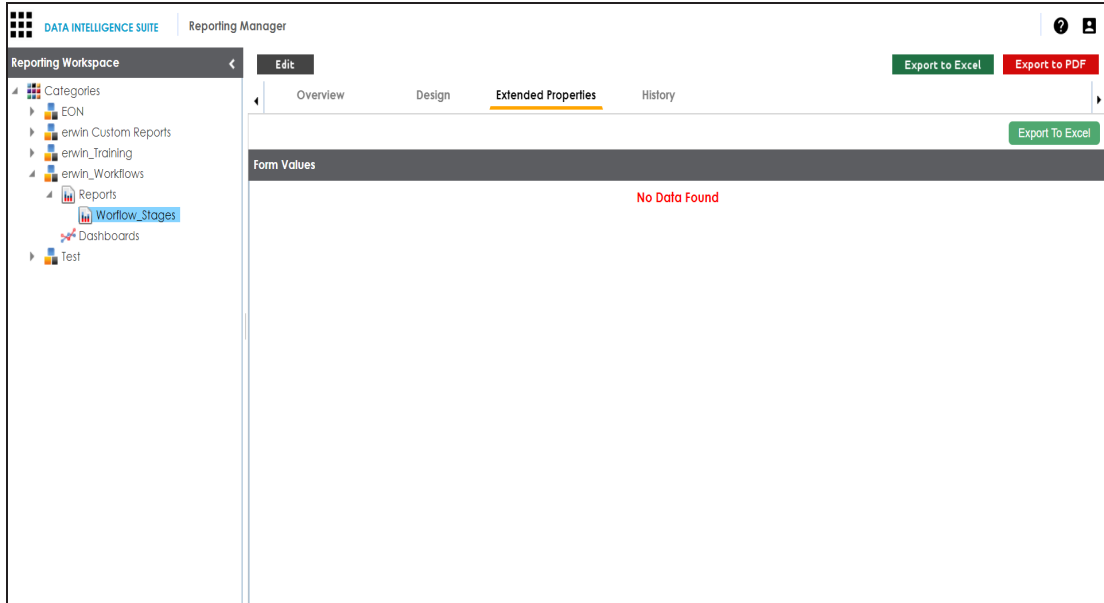
1. Go to **Application Menu > Miscellaneous > Reporting Manager**.
2. Expand the desired category.
3. Expand the **Reports** node.
4. Click the desired report.

The following page appears.



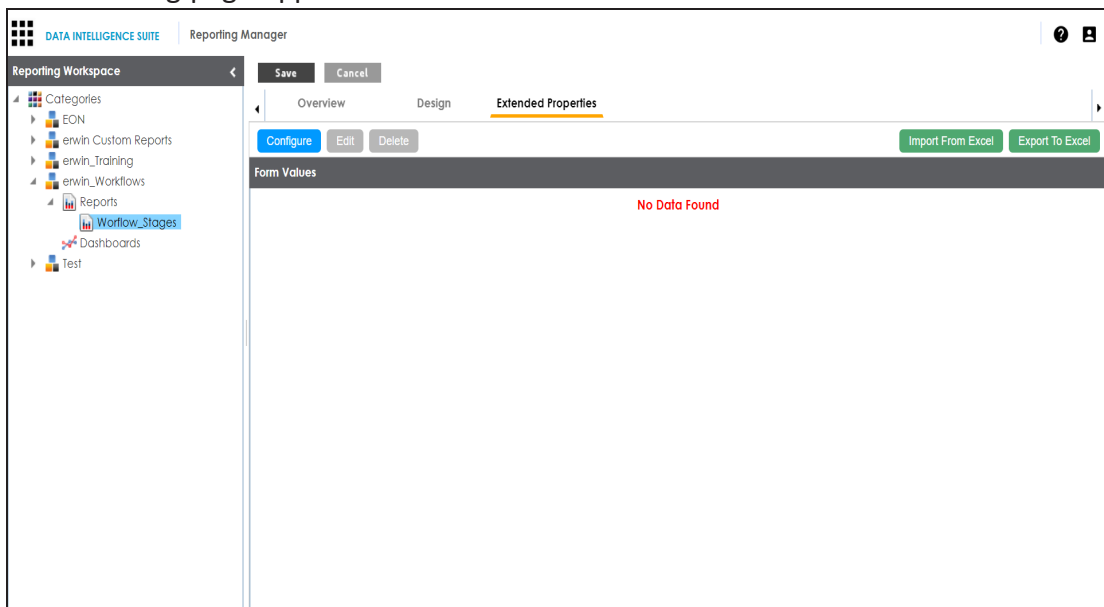
5. Click **Extended Properties**.

The Extended Properties page appears.



6. Click **Edit**.

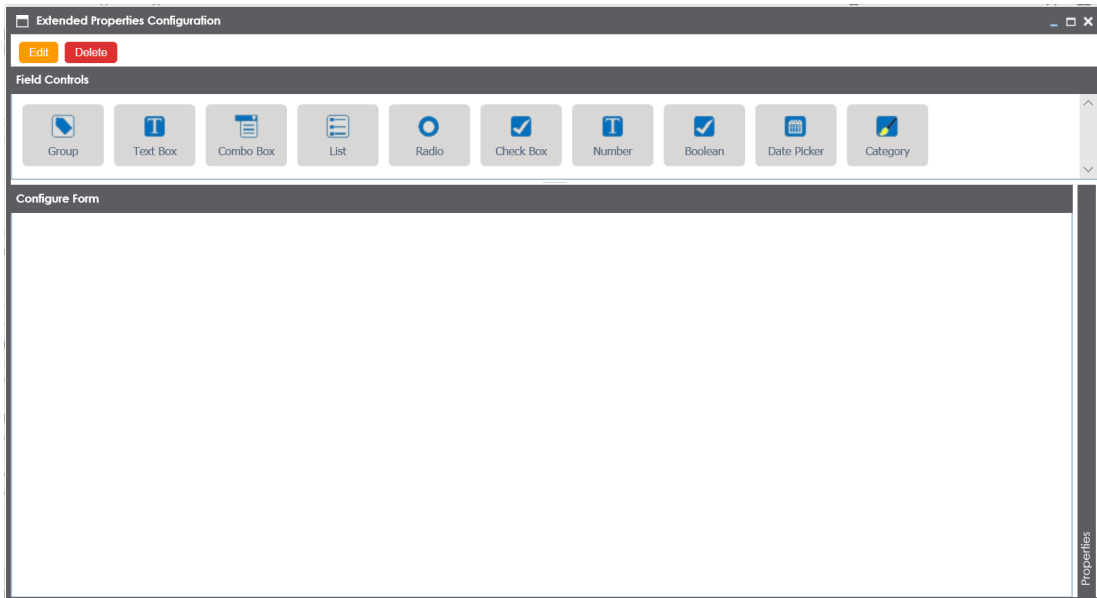
The following page appears.



7. Click **Configure**.

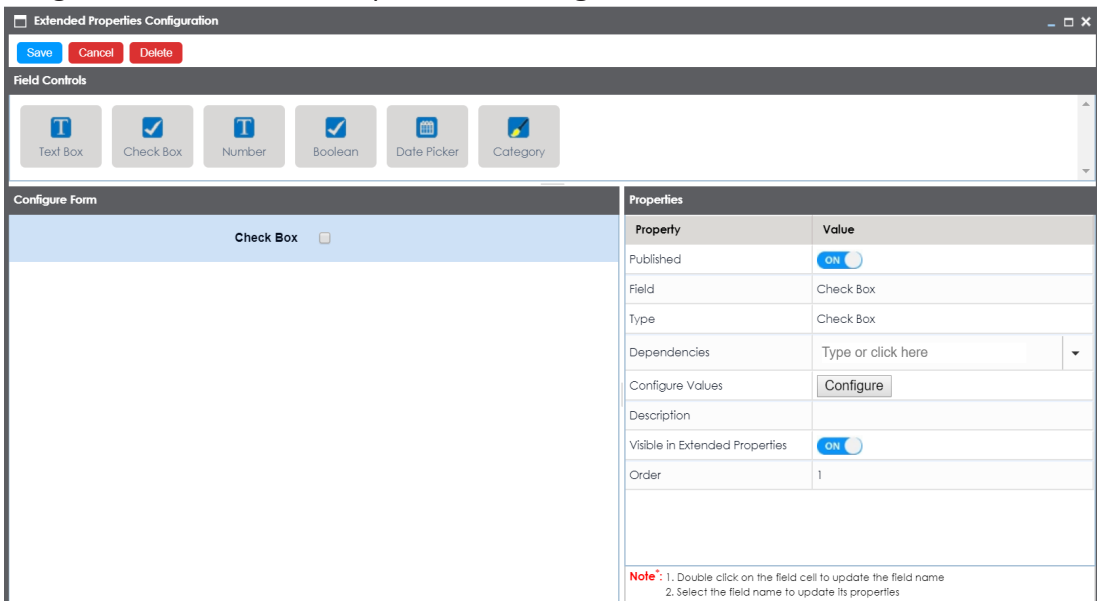
The Extended Properties Configuration page appears.

For an illustration, add fields to describe the approval status of the report.



8. Click **Edit**.

9. Drag the **Check Box** and drop it in the **Configure Form**.



10. In Properties, double-click the **Field** cell and edit the value to **Approved**.

11. Toggle the **Published** switch to **ON** to publish the check box.

- Toggle the **Visible in Extended Properties** to **ON** to make the check visible in the **Extended Properties** tab.
- Similarly, add one more check box, with **Field** value, Not Approved.

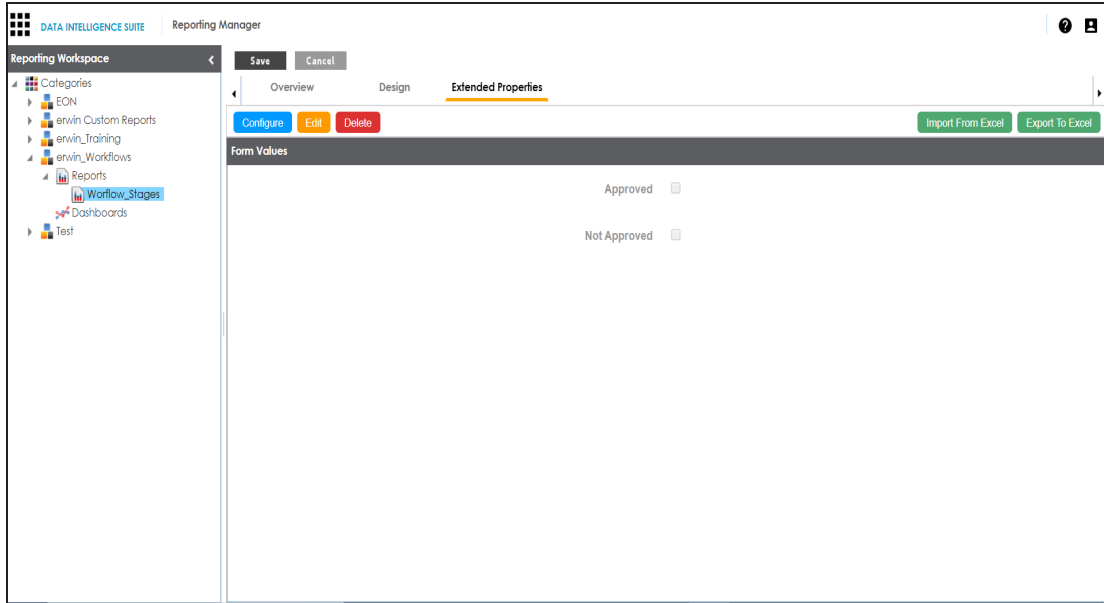
The Configure Form appears as shown.

Property	Value
Published	ON
Field	Not Approved
Type	Check Box
Dependencies	Type or click here Approved
Configure Values	Configure
Description	
Visible in Extended Properties	Specify the description value for this field.
Order	2

Note: 1. Double click on the field cell to update the field name
2. Select the field name to update its properties

- Click **Save**.

The Extended Properties are updated.



15. Click **Save**.

The report is updated.