# erwin Data Intelligence Suite

**Report Management Guide** 

Release v10.0

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# Contents

Legal Notices	2
Contents	5
Managing Reports	6
Using Reporting Manager	6
Generating Custom Reports	7
Extending Report Properties	5
Exporting and Importing Reports	8
Creating Dashboard	0
Adding Components to a Dashboard	2
Creating Additional Fields at Report Level	5

# **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:

DATA INTELLIGENCE SUITE Reporting	Manager							0	9 0
Reporting Workspace <	٠	Categories Settings	1						•
Categories     Workflow_Status	#	Category Name	Category Hierarchy	Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Histor
	1	Workflow_Status		Report to visualise workflow status.	Administrator	2019-11-22 14:35:26.017	Administrator	2019-11-22 14:35:26.017	Ð
Reporting Workspace				Right Pane					
				Pagination Bar					
			∢ ∢ Records fro	mitoi > >  🜔 Pagei .	20 rows p	erpage 🔹			

<b>UI Section</b>	lcon	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.

<b>UI Section</b>	lcon	Function
	> >I K <	
Pagination Bar	20 rows per page 🔽	Use this bar to navigate through the categories data dis- played on the Right Pane.
	Page 1 🔸	

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.

DATA INTELLIGENCE SUITE Reporting	Manager	08
Reporting Workspace 🗸	Categories Settings	•
Categories		
	No categories available	
	I< ≺ No Records Found → >I D Page 1 • 25 rows per page •	

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

DATA INTELLIGENCE SUITE Reporting N	lanager		0	8
Reporting Workspace <	Categories	Settings		•
New Category				
		No categories available		
		K ≪ No Records Found >> >> □ Page 1 • □ 25 rows per page •		

3. Click New Category.

The New Category page appears.

New Category		_ 🗆 ×
		li ×
Category Name*		
Calegory Name		
Description	A H     B I U     E ■ ■     E = ■	≣ ∢
		-

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.

DATA INTELLIGENCE SUITE	Reporting Manage	r							0	
Reporting Workspace	_ ۲	Categories	Settings							•
<ul> <li>Categories</li> <li>Workflow_Status</li> <li>Reports</li> </ul>	#	Category Name	Cat	tegory Hierarchy	Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Histo
Mashboards										
	1	Workflow_Status			Report to visualise workflow status.	Administrator	2019-11-22 14:36:25.673	Administrator	2019-11-22 14:36:25.673	Ð
			<	< Records fr	rom 1 to 1 🔹 👌 Page	1 🔹 📄 25 rov	vs per page 🖕			

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

Image: Category Name       Category Hierarchy       Description       Created By       Created By       Last Modified By       Last Modif	DATA INTELLIGENCE SUITE Report	ng Manage	51					0	8
A generative status	eporting Workspace	< .	Categories	Settings					
A Dashbo with New Report     Dimport Report	Reports	#	Category Name	Category Hierarchy	Description	Created By			Hist
	🛹 Dashbo 🛯 🛄 New Report								
	Import Report	1	Workflow_Status			Administrator	Administrator		Ð

3. Click New Report.

The following page appears.

DATA INTELLIGENCE SUITE Reporting	Manager		08
Reporting Workspace 🗸	Save & Continue	Save & Exit Cancel	
Categories     Workflow_Status	4 Overview	Design Extended Properties	,
📊 Reports 🛩 Dashboards	Report Name*		
	Description	<b>a</b> <u>H</u> <b>b</b> <i>I</i> <u>U</u> <b>b b c b c b c c c c c c c c c c</b>	
		A	
		*	
	Enable (	OFF	
	Activate Report (	OFF	
	Activate Chart (	OFF	

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.

DATA INTELLIGENCE SUITE Reporting A	Manager	08
Image: Contegration of the second	Save Cancel Cuery Editor Switch to Criad Mode Switch to Chart Mode  Type your query here	Validate Query
	Note: Hit Ctrl + Space to show list of tables	

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

DATA INTELLIGENCE SUITE Reporting	) Manager	08
Data IntEllicence sum     Reporting       Reporting Workspace        Categories        Reports        Workflow_Status        Workflow_Status        Data holds        Parts        Dath boards	Sve Cancel  Cverview Design Extended Properties  Cverview Design Extended Properties  Select* from  ADS_WORKFLOW ADS_WORKFLOW_ASSIGNMODE_CONFIX ADS_WORKFLOW_FOLDER ADS_WORKFLOW_FOLDER ADS_WORKFLOW_NODE_ROLE ADS_WORKFLOW_STAGE ADS_WORKFLOW_TATGSEN_ACTION AMM_DATATYPES	Validate Query
	AMM_MASTER_CONFIGURATION AMM_PROTOCOLS	

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.

view 14	DESCRIPTION STATUS_TITLE teview Pending Review	Design Extended Properties Aode View Query Editor STAGE_NAME	Grid Mode Switch to Chart	Workflow_Status
view 14		STAGE_NAME		
	Dending Devices		# WFS_ID	Worflow_Stages
prove 14	review Fending keview	Review	1 1	1
	Approve Pending Approve	Approve	2 2	2
blish 14	Pending Publish Pending Publish	Pending Publish	3 3	3
al Approval 14	Pending Final Approval	First Approval	4 4	4
14	Status_Title	Add_Stage	5 5	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.

DATA INTELLIGENCE SUITE Reporting A	Manager		08
Reporting Workspace 🗸	Save Cance	3	
<ul> <li>Categories</li> <li>Workflow_Status</li> </ul>	Overview	Design Extended Properties	•
A      Beports     Bepor	Report Name	Worflow_Stages	
	Description		
		Workflow_Stages of various objects.	
	Enable	OFF	
	Activate Report	OFF	
	Activate Chart	OFF	

- 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**

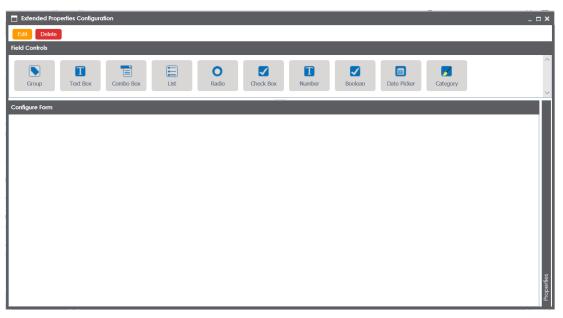
You can configure extended properties of a report by designing a form and access the form under the **Extended Properties** tab.

To configure extended properties of reports, follow these steps:

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

DATA INTELLIGENCE SUITE	Reporting Manager	0 E B
Reporting Workspace  Categories  Category  Category  Reports	Edit     Overview Design Extended Properties History	Export to Excel Export to PDF Export To Excel Export To Excel
▶ ♣ Workflow_Status	Form Values No Data Found	

- 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.

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

pane.			
Extended Properties Configuration			_ <b>_</b> ×
Save Cancel Delete			
Field Controls			
Group Text Box Combo Box List	Radio Check Box Number	Boolean Date Pick	er Category ~
Configure Form	F	Properties	
Check Box		Property	Value
	F	Published	
	F	Field	Check Box
	T	Гуре	Check Box
	c	Dependencies	Type or click here
	C	Configure Values	Configure
	E	Description	
	N	Visible in Extended Properties	ON O
	(	Order	1
	· · · · · · · · · · · · · · · · · · ·	Note <sup>*</sup> : 1. Double click on the field ce 2. Select the field name to up	

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

Refer to the following table for property descriptions:

Property	Description					
Published	Turn <b>Published</b> to <b>ON</b> to publish the field.					
Field	Double-click the corresponding <b>Value</b> cell to change the label of the field.					
Туре	ouble-click the corresponding <b>Value</b> cell to select different types the field.					
Configure Values	<ul> <li>Click Configure Values to enter option values. You can use:</li> <li>Default connector: It enables you to enter options manually.</li> <li>Reference Data Manager : It enables you to pull the data from reference tables in the Reference Data Manager.</li> </ul>					
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 Exten-	urn <b>Visible in Extended Properties</b> to ON to make it visible.						
ded Properties	rum 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						
Urder	the <b>Configure Form</b> 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 Prop**erties 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.

DATA INTELLIGENCE SUITE	Reporting Manage	er						08
Reporting Workspace	< و	Edit					Export to Excel	Export to PDF
Categories     Sew_Category     Workflow_Status     Reports	Rep	Overview ort Name	Design Worflow_Stages	Extended Properties	History			•
<ul> <li>■ Kepats</li> <li>■ Wortlow_Stages</li> <li>&gt; se<sup>4</sup> Dashboards</li> </ul>	Copy Report	sj	Workflow_Stages of va	arious objects,			•	
	Enal	ble vate Report					Ŧ	
		vate Chart ated By	ON Administrator		Created Date	2019-11-22 14:41:24.67		Ţ

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.

	Manager								0	8
orting Workspace <		Categories	Settings							•
<ul> <li>Categories</li> <li>New. Category</li> <li>Reports</li> <li>Category</li> <li>New Report</li> <li>Workflow_S</li> </ul>	#	Category Name	Categor	y Hierarchy	Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Histo
	1	New_Category				Administrator	2019-11-27 11:49:18.59	Administrator	2019-11-27 11:49:18.59	Ð
	2	Workflow_Status			Report to visualise workflow status.	Administrator	2019-11-22 14:36:25.673	Administrator	2019-11-22 14:36:25.673	Ð

4. Click Import Report.

The Import Report page appears.

Import Report	_ 🗆 ×
Drag-n-Drop files here or click to select files for upload.	<b>_</b>
1	

- 5. Drag and Drop the exported report (.arp format) or use  $\triangleq$  to browse the report (.arp format).
- 6. Click 1

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.

DATA INTELLIGENCE SUI	TE Reporting A	≬anager							0	8
Reporting Workspace	<	•	Categories Set	tings						•
Categories		#	Category Name	Category Hierarchy	Description	Created By	Created Date Time	Last Modified By	Last Modified Date Time	Histo
▶	A									
New DashBoard		Workflow_Status		Report to visualise workflow status.	Administrator	2019-11-22 14:35:26.017	Administrator	2019-11-22 14:35:26.017	Ð	
				K Kecords from 1	to 1 >>I D Page 1	<ul> <li>25 row</li> </ul>	s per page 🖕			

4. Click New Dashboard.

The New Dashboard page appears.

New Dashboard						_ □	×
					Ľ	×	
Dashboard Name* :							
Description:	<b>≥</b> r <u>A</u>	H	B /	<u>U</u> ≣			
						•	
						*	

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.

DATA INTELLIGENCE SUITE Reporting Man	nager			0	J
Reporting Workspace 🗸	Dashboard	Summary			,
- WOIKIIOW_DIGIOS	C Actions				I
<ul> <li>▶ Peports</li> <li>&gt;&gt;* Dashboards</li> <li>&gt;&gt;* Dashboard_Name</li> </ul>		Ν	lo components available		

6. Click **Actions**.

DATA INTELLIGENCE SUITE Reporting	Aanager	08
Reporting Workspace ( Categories Workflow_Status Reports Mashboards Mashboard_Name	Dashboard     Summary       Actions     Summary       Add Components     Delete All Components       Delete All Components     No components available	

7. Click Add Components.

The Add Components page appears.

Add Components			_ 🗆 X
		Save	Cancel
Component Name			
			*
			~

The Category List page appears.

Category List		_ 🗆 ×
l	Select	Cancel
Categories		

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.

DATA INTELLIGENCE SUITE Reporting A	Manager					08
Reporting Workspace 🗸	Edit				Export to Excel	Export to PDF
<ul> <li>EON</li> </ul>	Overview	Design	Extended Properties	History		۱.
Farmer Custom Reports     Farmer Custom Reports	Report Name	Worflow_Stages				
envin_Workflows     Im Reports     Im Workflow_Stages     yof Dashboards     Test	Description					
	Enable					
	Activate Report	ON				
	Activate Chart	ON				
	Created By	Administrator		Created Date	2019-11-27 15:27:22.053	
	Modified By	Administrator		Modified Date	2019-11-27 15:32:47.87	

#### 5. Click Extended Properties.

The Extended Properties page appears.

DATA INTELLIGENCE SUITE Repo	ing Manager		0 E
eporting Workspace	< Edit		Export to Excel Export to PDF
EON	Overview Design	Extended Properties History	
🕨 嚞 erwin Custom Reports			Export To Excel
A erwin_Training     A B erwin_Workflows	Form Values		
Reports     Reports     Worflow_Stages		No Data Found	
🚧 Dashboards			
🕨 📲 Test			

6. Click Edit.

The following page appears.

DATA INTELLIGENCE SUITE	Reporting Manager	08
ATA INTELLIGENCE SUITE Reporting Workspace Categories C	Save Cancel      Overview Design Extended Properties      Configure Edit Delete     Form Values      No Data Found	ŀ

7. Click Configure.

The Extended Properties Configuration page appears.

#### Extended Properties Configuration Delete ld Cont **O** Radio Date Picker e $\checkmark$ Τ $\checkmark$ Τ Check Bo Category Group Text Box Lis Boolean

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.

Extended Properties Configuration			_ 🗆 ×
Save Cancel Delete			
Field Controls			
Text Box Check Box Number Boolean Date Picker Category			<ul> <li>▲</li> </ul>
Configure Form	Properties		
Check Box	Property	Value	
	Published		
	Field	Check Box	
	Туре	Check Box	
	Dependencies	Type or click here	•
	Configure Values	Configure	
	Description		
	Visible in Extended Properties		
	Order	1	
	Note*: 1. Double click on the field 2. Select the field name to		

- 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.

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

The Configure Form appears as shown.

Extended Properties Configuration		_ <b>_</b> ×
Save Cancel Delete		
Field Controls		
Text Box Check Box Number Boolean Date Picker Category		A
Configure Form	Properties	
Approved	Property	Value
	Published	ON
Not Approved	Field	Not Approved
	Туре	Check Box
		Type or click here
	Dependencies	Approved
	Configure Values	Configure
	Description	
	Visible in Extended Propert Speci	fy the description value for this field.
	Order	2
	Note <sup>*</sup> : 1. Double click on the field ce 2. Select the field name to up	

14. Click Save.

The Extended Properties are updated.

DATA INTELLIGENCE SUITE Reporting	Manager	08
Reporting Workspace 🗸	Save Cancel	
Categories     EON	Overview Design Extended Properties	•
🕨 📲 erwin Custom Reports	Configure Edit Delete	Import From Excel Export To Excel
Figure 4 Section 2 Se	Form Values	
Reports     Reports     Reports     Reports     Reports     Add the second	Approved	
Test	Not Approved	

### 15. Click Save.

The report is updated.