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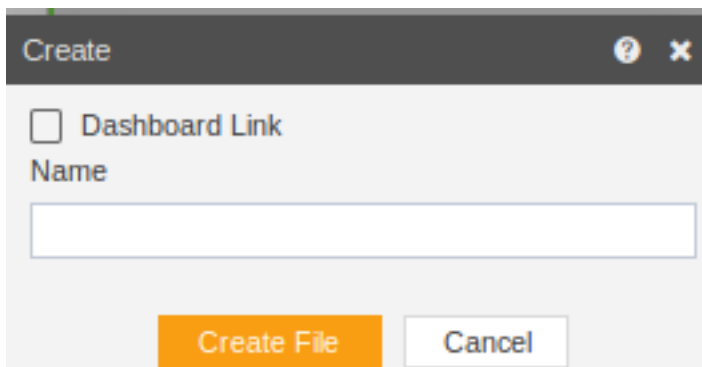
Visualization

Dashboard

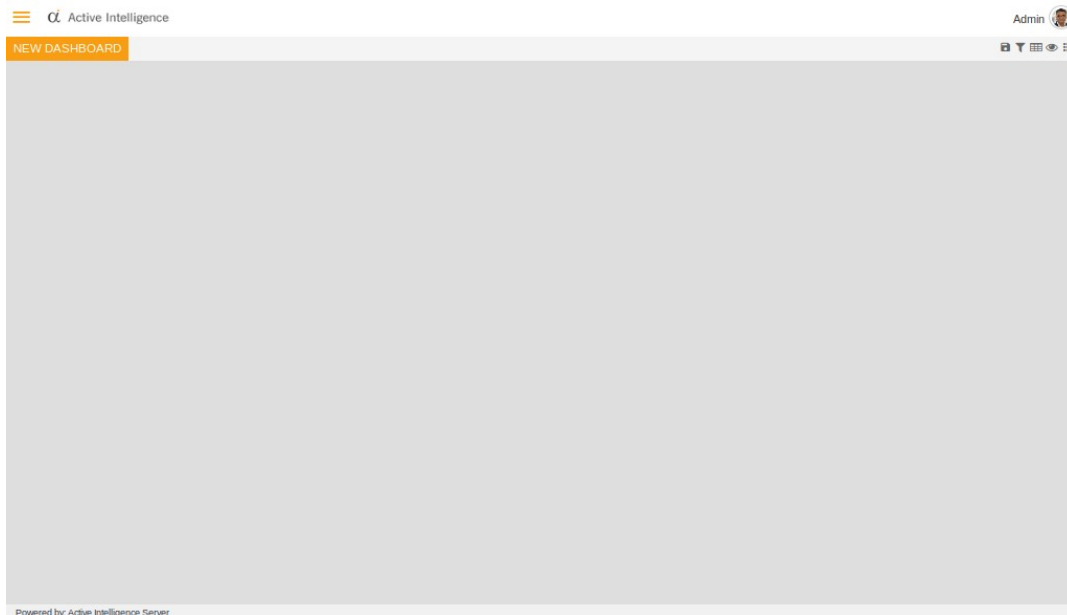
- A Dashboard provides data visualization and provide meaningful information in visual formats i.e. chart, graphs, maps and many more. You can create a dashboard using the different widget and a single dashboard can have any number of widgets including tables, charts, maps, analytic, tabs etc.
- A Dashboard can be easily created using drag and drop GUI so you can see the whole story from a central location right from your Desktop, Mobile, and Tablet.
- The Dashboard contains the following items:
 - Create a Dashboard
 - Dashboard Preview & Edit
 - Dashboard Widgets
 - Dashboard Filters & Tabs
 - Configure Dashboard
 - Dashboard Grid view Options

Create Dashboard


- Only users with Dashboard privilege have access to this section.
- To Create a new Dashboard follow the steps below:
 1. Select **Visualization** from the main menu bar and go to **Dashboard**
 2. Select **+**, box will appear as follows:

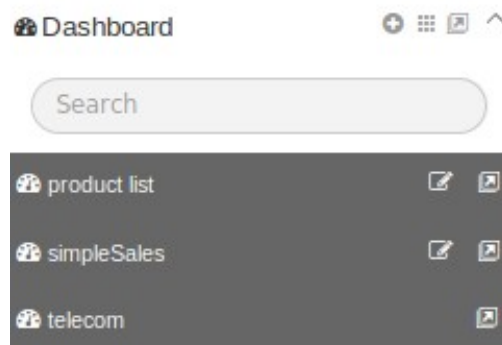


3. Provide the dashboard name and click on **Create File** button.
4. A newly created dashboard will appear as follows : -










Dashboard Preview and Edit

- Dashboard preview shows the view of dashboard.
- Edit option allows the user to edit the dashboard.
- To preview a dashboard a user should follow below steps:
- Note: In Preview Mode, users are not allowed to edit or make changes to the dashboard.
- For Previewing the Dashboard and Editing the Dashboard, follow the steps below:
 - By default when user opens or create a dashboard it is in preview mode.
 - To edit a dashboard a user should click on  icon from



- In Edit mode, User can make changes to the existing dashboard and choose from a variety of options as shown in the top right corner of the Dashboard.

| | |
|---|--------------------|
|  | Preview Mode |
|  | Dashboard Settings |
|  | Filter Pane |
|  | Instant Message |
|  | Clear Filter |
|  | Save Dashboard |
|  | Embed |





Dashboard Widgets

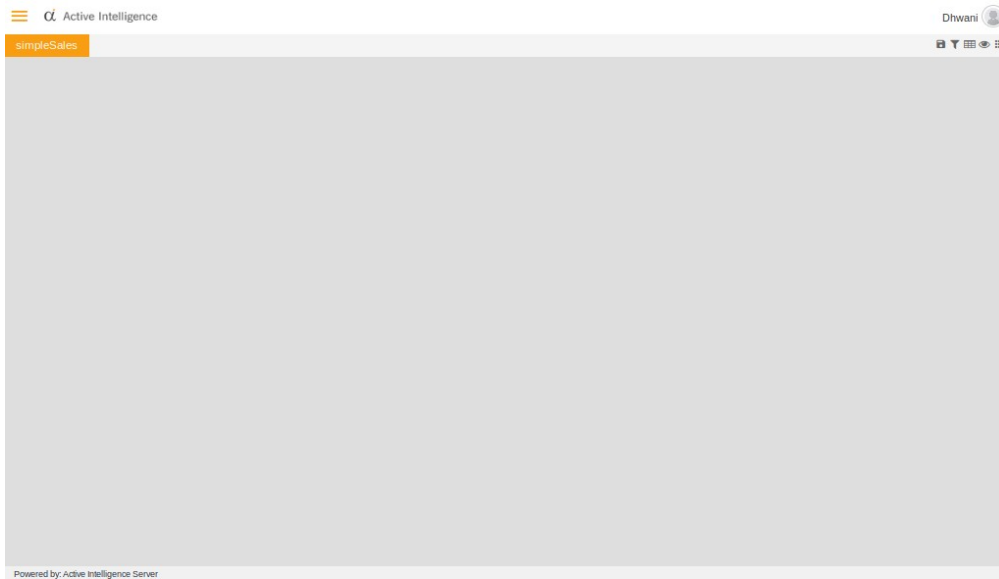
- Dashboard Widgets enable users to create different visualization which can be used in the dashboard to see collective information in a single view.
- Widget makes it easy to customize the content and to arrange the data in different formats.
- The Widget can be linked with each other or users can create a common filter to apply the values to all the widgets in the open dashboard.
- The common values must be available in order to link or filter all the widgets.

Dashboard Widgets contains following items:

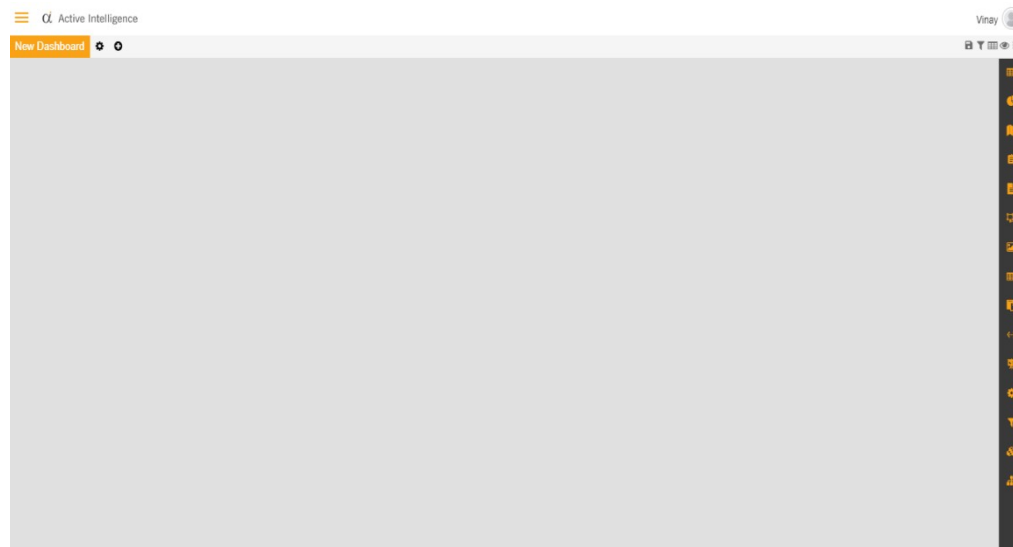
- Tables
- Charts
- Maps
- Reports
- KPI
- Custom Visualisation
- Image & Text
- Pivot
- Report Management
- Dynamik Link
- Scratch Pad
- Form Builder
- Dashboard Settings
- Filter
- OLAP
- Drill

To Add Widgets, follow these steps:

1. Click on  Edit Mode and click on  Component icon/button from the top right corner menu, it will open up the list of the available components which user can use to create a dashboard.




2. Click on the desired component from the available list to add a component to the dashboard canvas.



3. Click on the component from the menu, the widget configuration box would open up, connect with the data source and customize the widget properties using the options available.


| Country | Phone | City |
|-----------|------------------|------------|
| USA | 6175557555 | Brickhaven |
| Japan | +81 06 6342 5555 | Osaka |
| Finland | 981-443655 | Oulu |
| Belgium | (02) 5554 67 | Bruxelles |
| Canada | (514) 555-8054 | Montréal |
| France | 26.47.1555 | Reims |
| Italy | 035-640555 | Bergamo |
| Canada | (604) 555-4555 | Tsawassen |
| Belgium | (071) 23 67 2555 | Charleroi |
| Austria | 6562-9555 | Salzburg |
| France | 78.32.5555 | Lyon |
| Sweden | 0695-34 6555 | Bråcke |
| USA | 4155554312 | Brisbane |
| USA | 7025551838 | Las Vegas |
| Australia | +61 2 9495 8555 | Chatswood |

- After adding Widgets to the dashboard, remember to Click  Save icon from the top right corner menu to save your dashboard as shown in the above image.


Tips:

- You can add multiple tabs and widgets in a single dashboard.

Tables

- Tables widget enable users to add any numbers of columns from the existing database tables simply by selecting the columns, tables widget is really helpful when accessing a large number of data.
- To add a Table Widget in the dashboard, follow the steps below:
 - Click on  the Component icon from the top right corner menu, a list of the available component will open up as follows:



2. Click on  Component from the list of the component into the dashboard, a configuration box would open as follows:

The screenshot shows the configuration panel for 'Table Widget 2'. The panel has a title bar with the name 'Table Widget 2' and a close button. Below the title bar are four tabs: 'General', 'Theme', 'Column Hierarchy', and 'Settings'. The 'General' tab is active. It contains the following settings:

- Datasets:** A drop-down menu with a home icon.
- Header Height:** A text input field with the value '40' and up/down arrow icons.
- Row Height:** A text input field with the value '30' and up/down arrow icons.
- Row Height:** A text input field with the value '#f8f8f8'.

Below the settings are two table views:

| Field | Alias | Type |
|-----------------|-------|------|
| No Rows To Show | | |

| Expression | Alias | Wi |
|-----------------|-------|----|
| No Rows To Show | | |

3. Select the dataset from the drop-down list.
4. Adjust row height and header height.
5. Following images are the example of a table.

Name: Table Widget 2

General | Theme | Column Hierarchy | Settings

Datasets: Overall Sales.cds | Header Height: 40

Path: /test_dataset_brij/

Row Height: 34 | Row Height: #f8f8f8

| Field | Alias | Type |
|----------------------------------|---------|--------|
| <input type="checkbox"/> city | city | String |
| <input type="checkbox"/> state | state | String |
| <input type="checkbox"/> stateId | stateId | String |
| <input type="checkbox"/> country | country | String |
| .. | .. | .. |


| Expression | Alias | Wi |
|---------------------------------------|----------|----|
| <input type="checkbox"/> = [city] | city | 20 |
| <input type="checkbox"/> = [jobTitle] | jobTitle | 20 |
| <input type="checkbox"/> = [Years] | Years | 20 |

Table Widget 2


| City | JobTitle | Years |
|---------|-----------|-------|
| Bergamo | Sales Rep | 2013 |
| Bergamo | Sales Rep | 2013 |
| Bergamo | Sales Rep | 2013 |
| Bergamo | Sales Rep | 2013 |
| Bergamo | Sales Rep | 2013 |
| NYC | Sales Rep | 2013 |
| NYC | Sales Rep | 2013 |
| NYC | Sales Rep | 2013 |
| NYC | Sales Rep | 2013 |
| NYC | Sales Rep | 2013 |
| NYC | Sales Rep | 2013 |
| NYC | Sales Rep | 2013 |

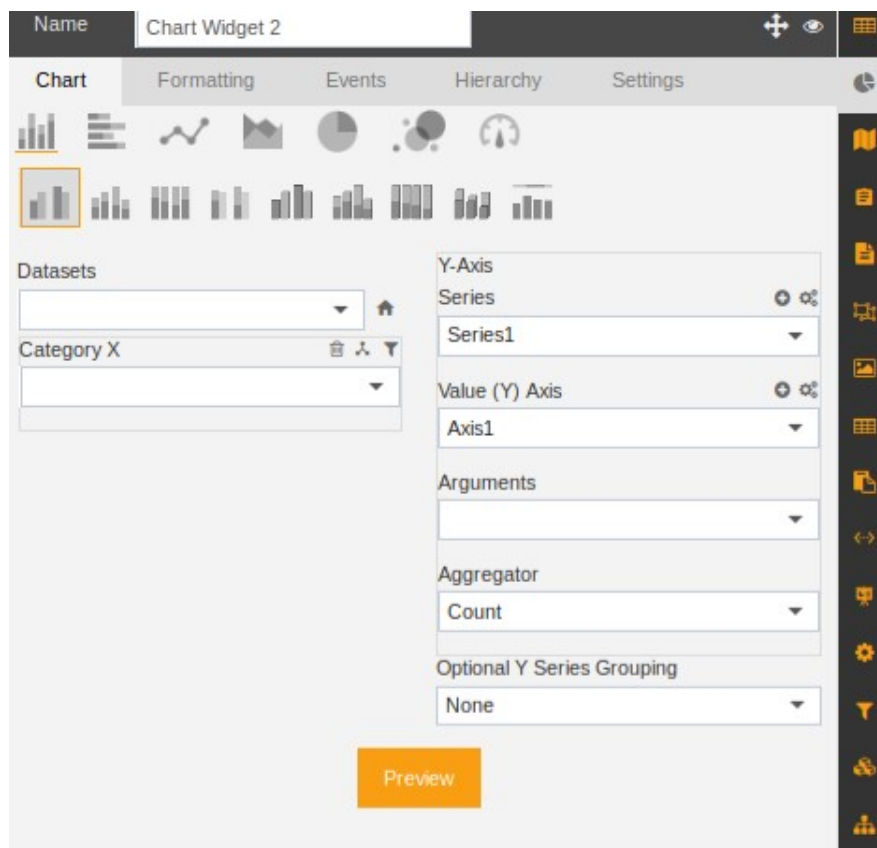
6. Provide a name to your widget and select the desired source of data.
7. Click on **Submit** button to create the Table widget.

Charts

- Charts widget will enable users to create a variety of charts using their own data to create customized charts to see the data in different visualization.
- To Add a Chart Widget in the dashboard, follow the steps below:
 1. Click on  Component icon from the top right corner menu, a list of the available component will open up as follows:



2. Click on  Charts Component from the list of component into the dashboard, a configuration box would open as follows:

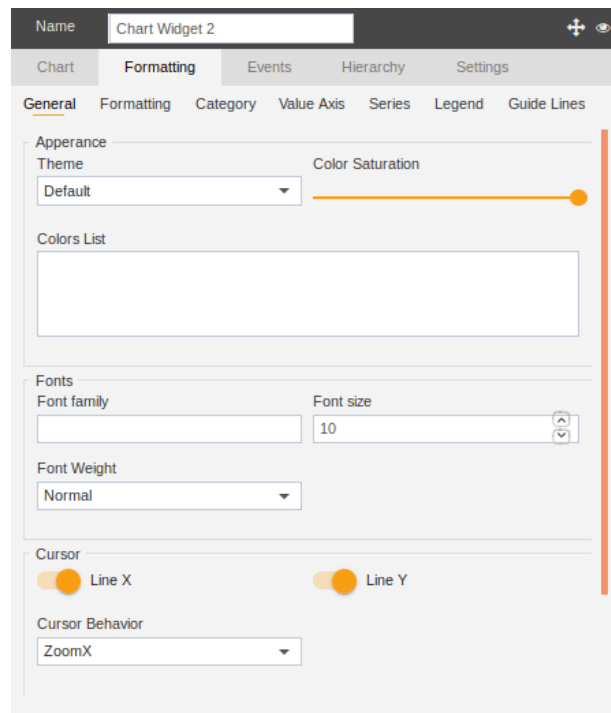


3. Select the type of chart you want to use and select datasets from the drop-down menu.
4. From available Data Columns drag and drop columns or hierarchy to Category (X) Series.
5. Select appropriate Aggregator from drop down.
6. Select Arguments from the drop-down.
7. Click on preview.

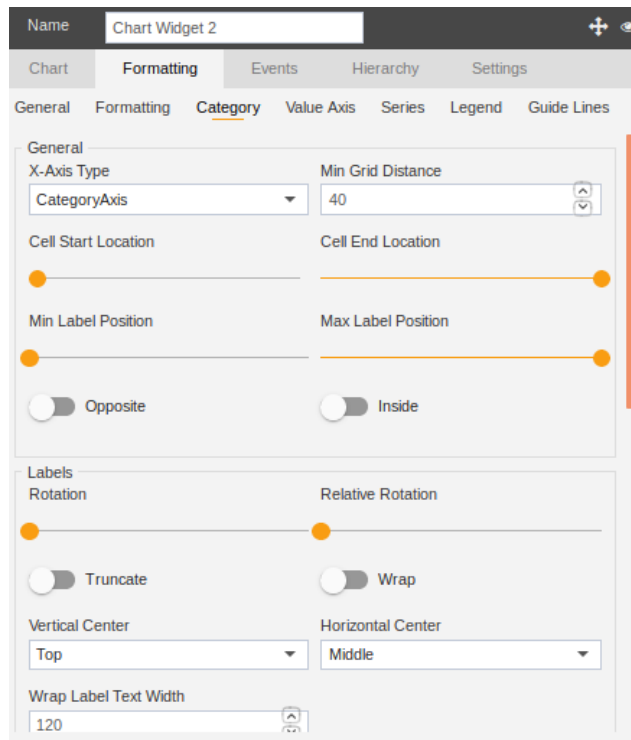
The screenshot shows a configuration interface for a chart widget. At the top, the widget is named "Chart Widget 2". Below the name are tabs for "Chart", "Formatting", "Events", "Hierarchy", and "Settings". The "Chart" tab is active, displaying a row of chart type icons. The first icon, a bar chart, is highlighted with an orange border. Below the icons are two main configuration panels. The left panel, titled "Datasets", has a dropdown menu set to "Overall Sales.cds" and a "Path" field containing "/test_dataset_brij/". Below this is a "Category X" section with a dropdown menu set to "country". The right panel, titled "Y-Axis", contains several settings: "Series" is set to "Series1", "Value (Y) Axis" is set to "Axis1", "Arguments" is set to "productLine", "Aggregator" is set to "Count", and "Optional Y Series Grouping" is set to "None". At the bottom center of the interface is an orange "Preview" button.

Formatting

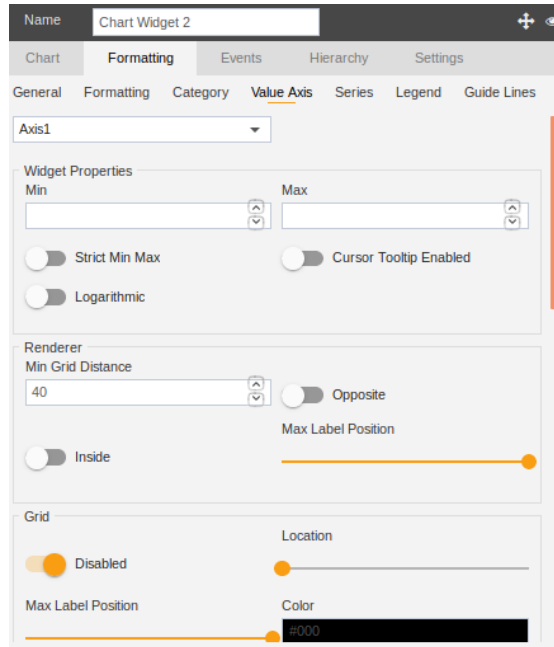
- Formatting tab shows the following options:



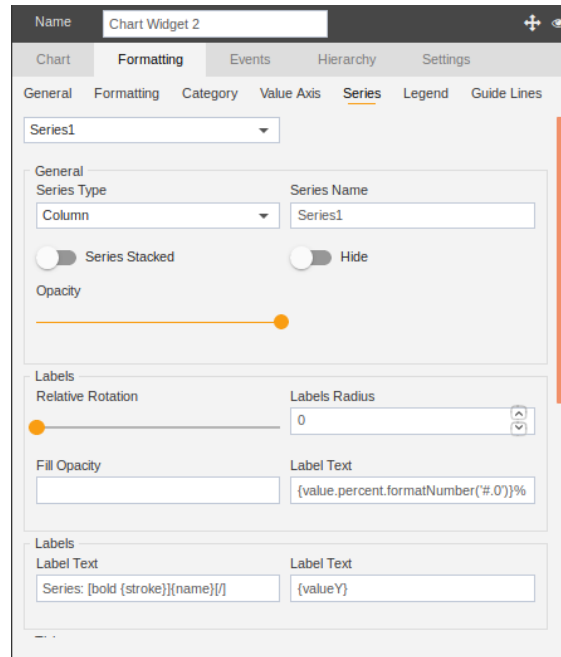
- In the General tab, the user can change the appearance theme, can change the colour saturation, font size, font family and font weight.
- Cursor behaviour can be changed by selecting the drop-down menu.
- Chart Scrollbar can be adjusted by selecting the drop-down list.
- Also, a value can be selected from value scrollbar the drop-down list.
- Category tab includes following options.



- The User can change the X-axis type, min grid distance, cell start, and end location, min-max label position, the user can wrap and truncate if overlapping issues arise.
- The User can also change the axis colour, line colour, and grid colour.
- Value axis tab includes the following options:



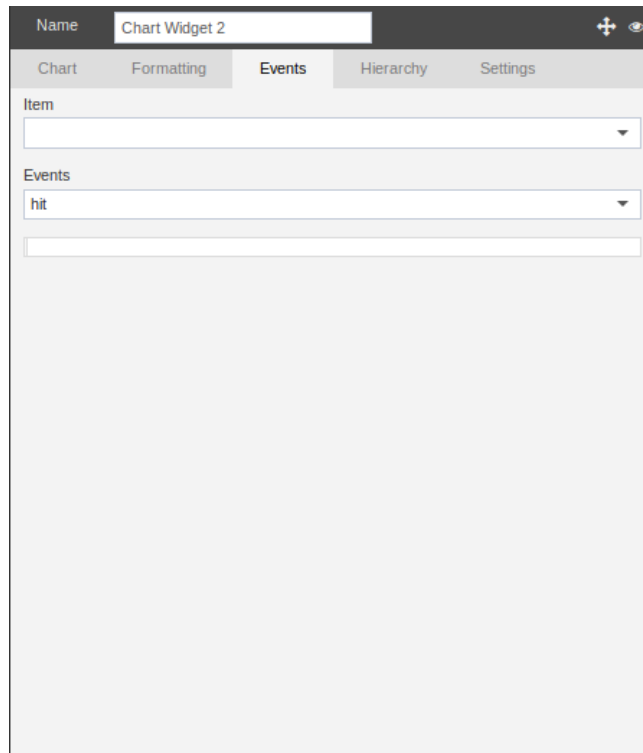
- Here, the user can change the widget properties, can renderer, can change the grid properties, can change the label properties, also can do the title formatting.
- The series tab includes the following options:



- Here, the user can change the series type, series name, opacity, series' label properties, tooltips, ticks and so on.

Events

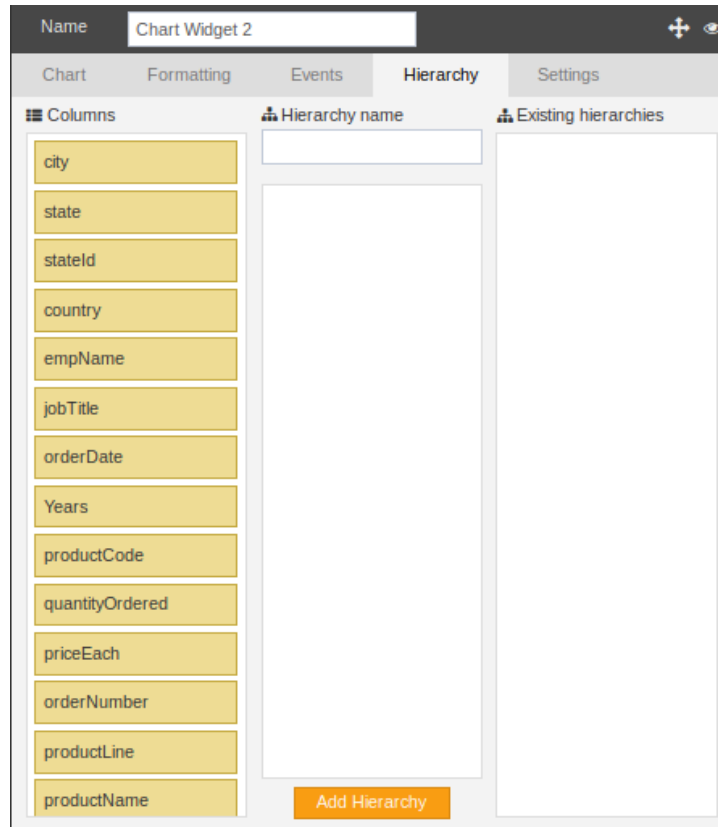
- Events show the events on axis.
- Following image describes the use of events.



- Select the item on which event is to be fired.
- Then, select the type of event from the drop-down list.

Hierarchy

- A Hierarchy describes the order of dataset columns.
- The user can set the hierarchies according to their need.
- Below image shows the hierarchy.



Settings

- Settings tab helps the user to set the widget properties, background properties, widget title properties, sub-title properties, and border properties.
- Following image shows all options.


The screenshot shows the 'Settings' tab for a widget named 'Chart Widget 2'. The interface includes a top bar with the widget name and a '+' icon. Below the name are tabs for 'Chart', 'Formatting', 'Events', 'Hierarchy', and 'Settings'. The 'Settings' tab is active and contains the following sections:

- Widget Properties:**
 - Refresh Widget:** A checkbox and a dropdown menu.
 - Maximize Widget Bg Color:** A color selection field.
 - Box Shadow Color:** A color selection field.
 - BoxShadow Vertical:** A numeric input field with up/down arrows, set to 0.
 - BoxShadow Horizontal:** A numeric input field with up/down arrows, set to 0.
 - BoxShadow Blur:** A numeric input field with up/down arrows, set to 0.
 - BoxShadow Spread:** A numeric input field with up/down arrows, set to 0.
 - Panel Background Color:** A color selection field.
 - Widget Icon Color:** A color selection field showing a black swatch.
- Background Properties:**
 - Background Image:** A checkbox.
- Title Properties:**
 - Title Hide:** A checkbox.
 - Title Move To:** A dropdown menu set to 'Left'.
 - Title Color:** A color selection field showing a black swatch.
 - Title Font Size:** A numeric input field with up/down arrows.
 - Title Font Style:** A text input field.


Maps

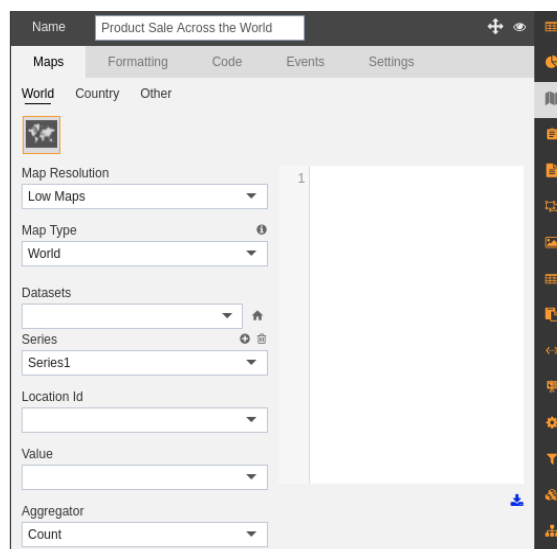
- **Maps** widget will enable users to create a variety of maps using their own data to create customized maps to see the data in map visualization.
- Maps provide the following functionalities:-
 1. Create Map
 2. Refresh
 3. Copy
 4. Move
 5. Dynamic Link
 6. Maximize
 7. Delete
 8. Move to scratch pad
 9. Help

Create Map

- To Add a **Map Widget** in the dashboard, follow the steps below:
 1. Click on  **Component** icon from the top right corner menu, a list of the available component will open up as follows:

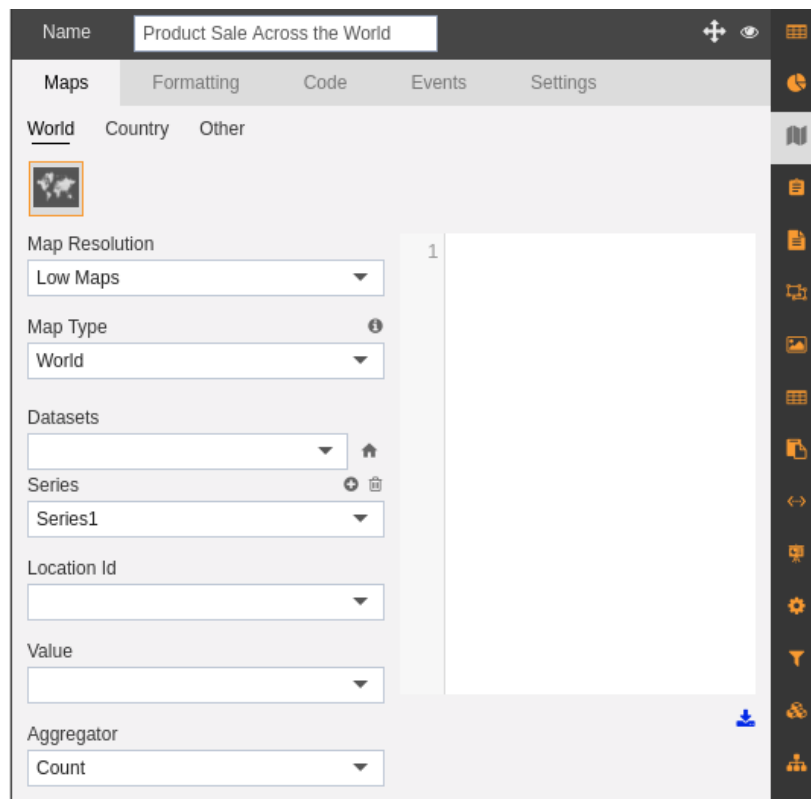


2. Click on  Component from the list of the component into the dashboard, a configuration box would open as follows:



3. Following sub-tabs are included in create map as shown in the figure above:-
- Maps
 - Formatting
 - Code
 - Events
 - Settings

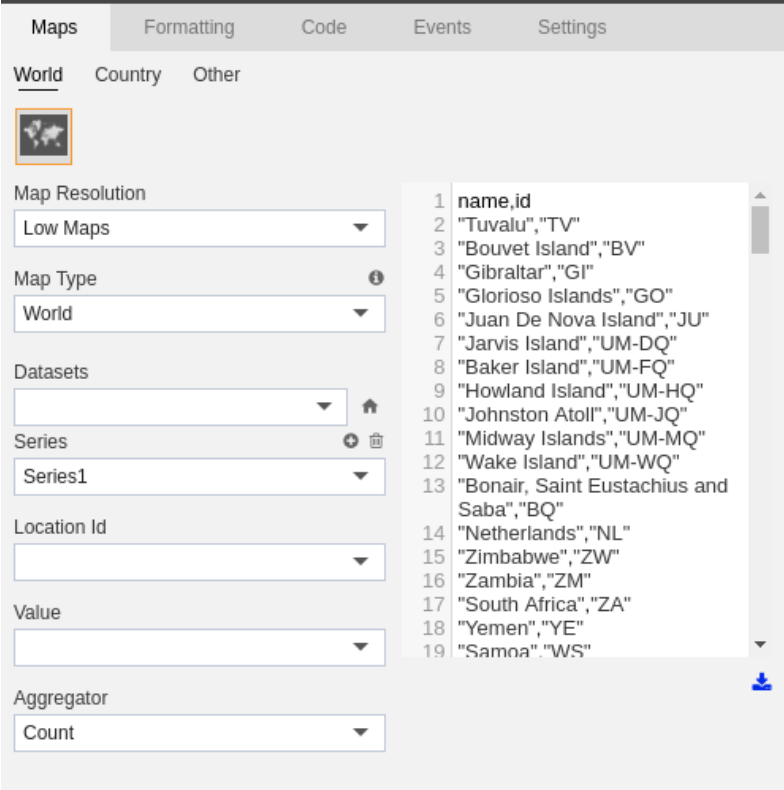
The main purpose of the Maps tab is to enable the user to make a selection of the type of map he/she wants to create as shown below:-



- You can specify the name of your map widget in the Name section as mentioned above.
- You can select from the choices of Maps as follows:-
 1. World
 2. Country
 3. Other
- You can understand each of them in detail in following subtabs:-

World

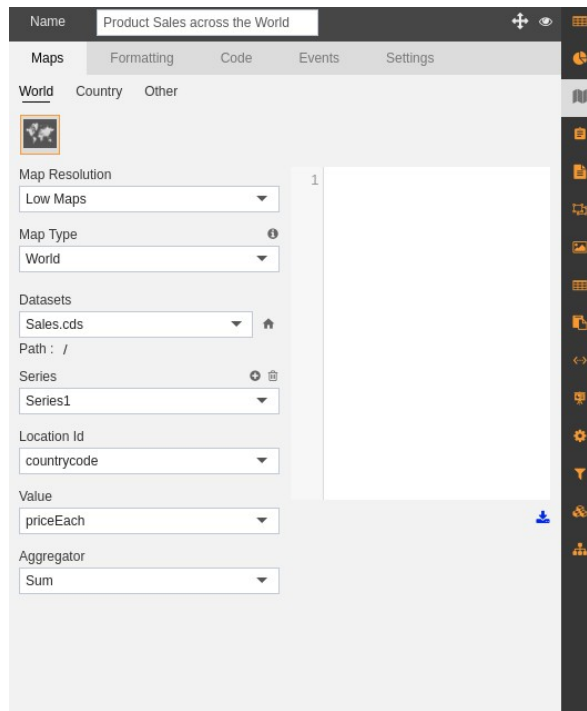
1. We will be working with the World Map in this case.
2. You can mention the resolution of your Map to be Low/High from the drop-down in Map Resolution. (By default Low Maps is selected)
3. You can select Map Type from the dropdown as follows:-
 - a. **World**:- To create a map that depicts data for whole world
 - b. **World India**:- To create a map that depicts data for the whole world including POK region.
4. You can also generate ID and name of different countries across the world that you want to include in your World Map by clicking on ⓘ which will generate all the ID's as follows:-




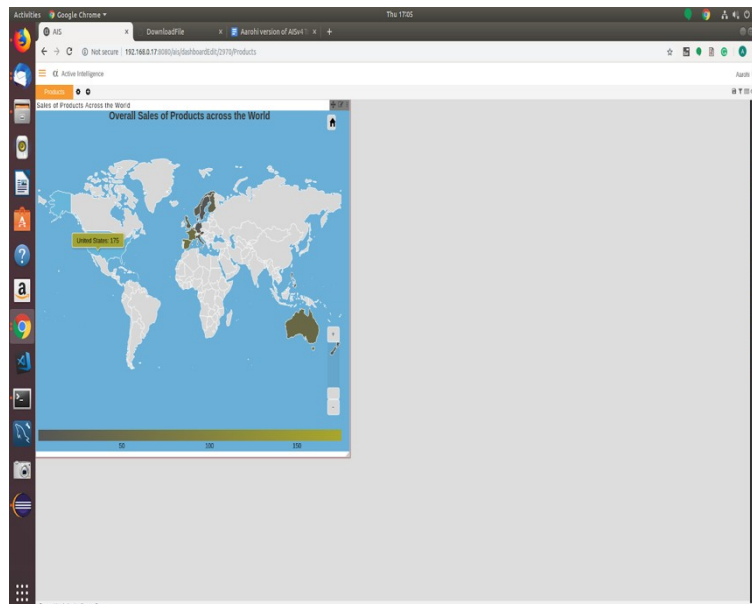
The screenshot shows a map configuration interface with the following elements:



- Navigation tabs: Maps, Formatting, Code, Events, Settings
- Map Type: World (selected)
- Map Resolution: Low Maps (selected)
- Datasets: (empty)
- Series: Series1 (selected)
- Location Id: (empty)
- Value: (empty)
- Aggregator: Count (selected)
- Country list (19 items):
 - 1 name,id
 - 2 "Tuvalu", "TV"
 - 3 "Bouvet Island", "BV"
 - 4 "Gibraltar", "GI"
 - 5 "Glorioso Islands", "GO"
 - 6 "Juan De Nova Island", "JU"
 - 7 "Jarvis Island", "UM-DQ"
 - 8 "Baker Island", "UM-FQ"
 - 9 "Howland Island", "UM-HQ"
 - 10 "Johnston Atoll", "UM-JQ"
 - 11 "Midway Islands", "UM-MQ"
 - 12 "Wake Island", "UM-WQ"
 - 13 "Bonair, Saint Eustachius and Saba", "BQ"
 - 14 "Netherlands", "NL"
 - 15 "Zimbabwe", "ZW"
 - 16 "Zambia", "ZM"
 - 17 "South Africa", "ZA"
 - 18 "Yemen", "YE"
 - 19 "Samoa", "WS"
- Download icon (blue arrow pointing down) at the bottom right of the list.

5. You can also download this list by clicking on ⬇️ as shown in the figure above.
6. Select **Sales.cds** from the Datasets dropdown as shown below to depict the details of the products from across the world:-



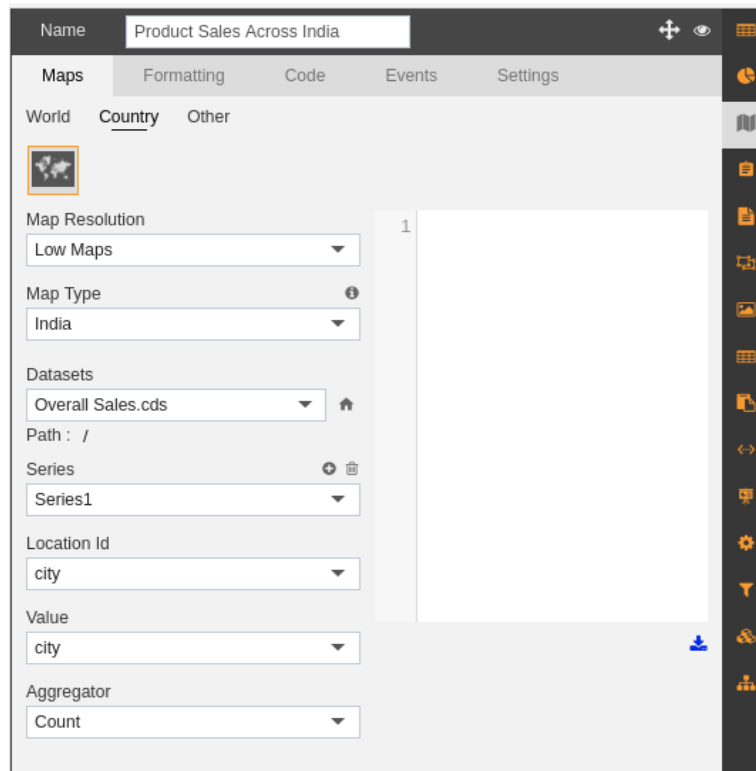
7. Similarly, select Series as Series1,
8. Location Id as country code in order to map by the code of the country.
9. Mention the value as price each and Aggregator as Sum.
10. This will give the sum of the prices of different products sold across different countries of the world.
11. Save your changes by clicking on  button on the top right corner above the map.
12. After making these changes in Maps, your map widget will be depicted as below:-




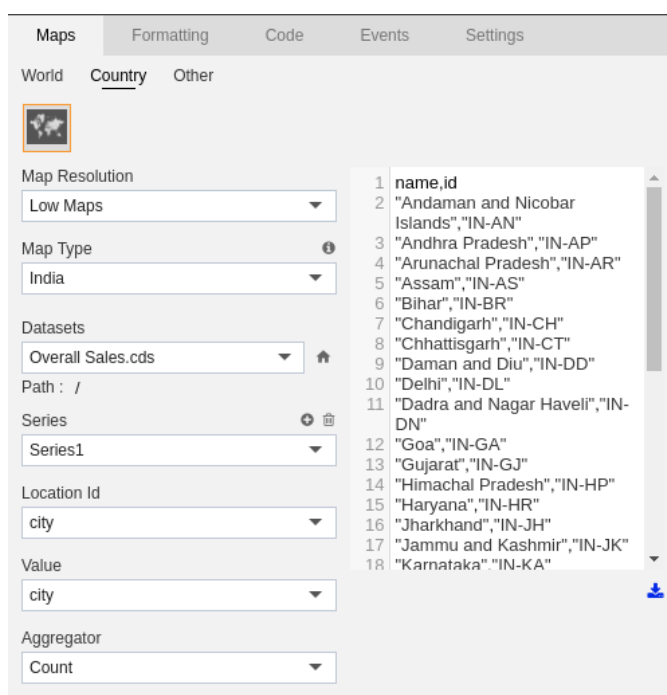
13. In a similar manner, you can also create charts for country and other regions.
14. You can move your widget anywhere on the screen by clicking on .
15. You can again go to edit mode by clicking on  to perform other changes in Map widget.

Country

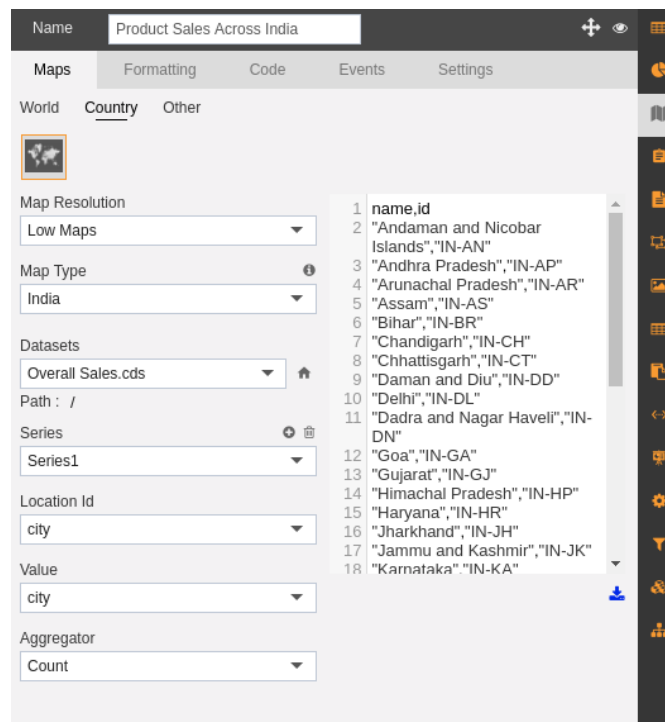
1. We will be working with the Country Map in this case as shown below:-




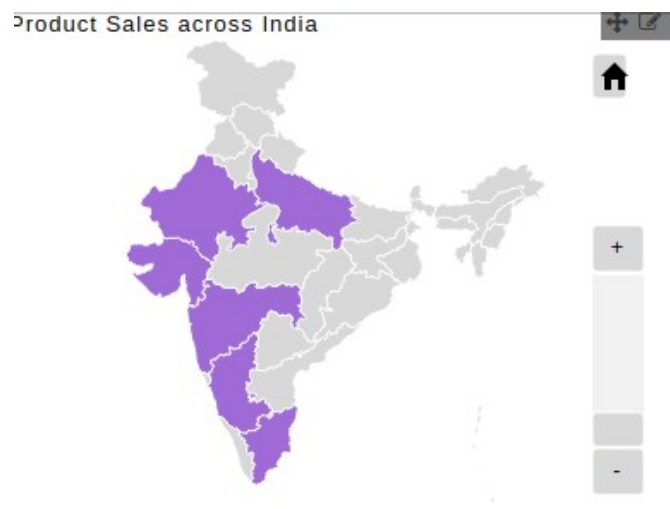
2. You can mention the resolution of your Map to be Low/High from the drop down in Map Resolution. (By default Low Maps is selected)
3. You can select Map Type from the drop-down to select the country of your choice.
4. You can also generate ID and name of different countries across the world that you want to include in your World Map by clicking on  which will generate all the ID's as follows:-





- You can also download this list by clicking on  as shown in the figure above.
- Select **Overall Sales.cds** from the Datasets dropdown as shown below to depict the details of the products from across India:-




- Similarly select Series as Series1, Location Id as the State ID, value as ExtendedPrice and Aggregator as sum as shown in the figure.
- Save your changes by clicking on  button on the top right corner above the map.
- After making these changes in Maps, your map widget will be depicted as below:-

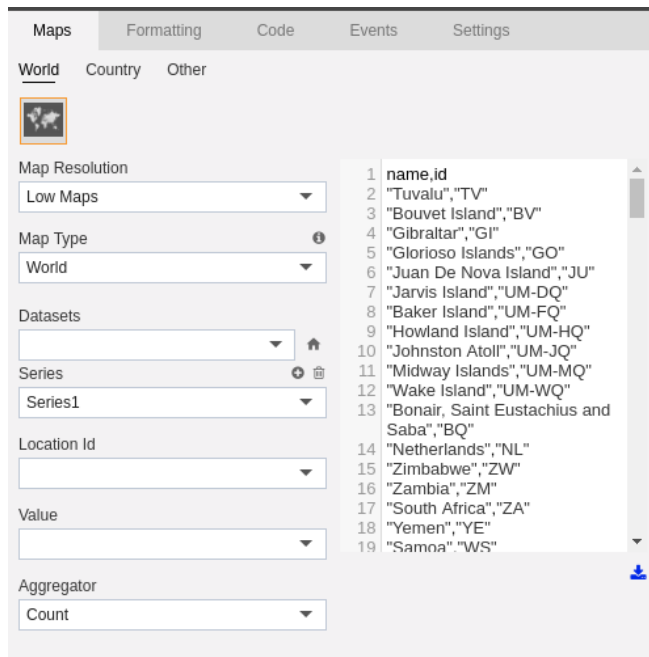


- In a similar manner, you can also create charts for the world and other regions.
- You can move your widget anywhere on the screen by clicking on  .
- You can again go to edit mode by clicking on  to perform other changes in Map widget.

Other


1. We will be working with the Other Map in this case.
2. You can mention the resolution of your Map to be Low/High from the drop-down in Map Resolution. (By default Low Maps is selected)
3. You can select Map Type from the dropdown as follows:-

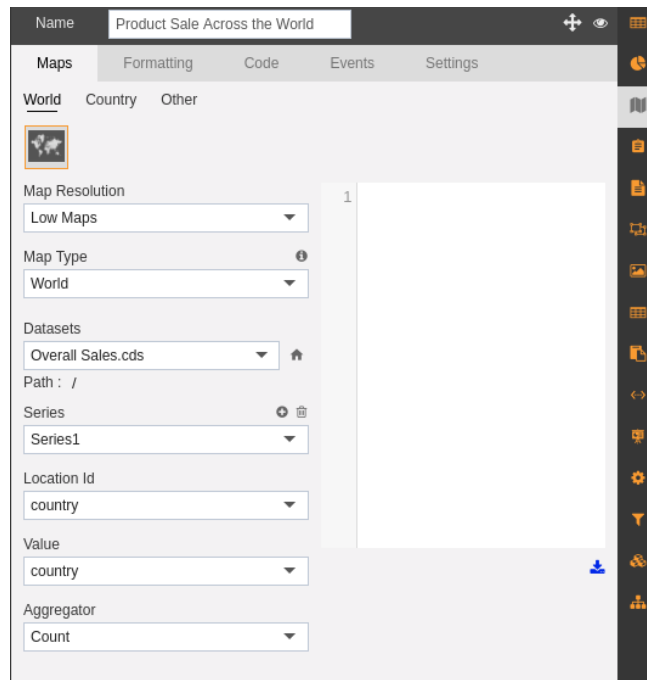
You can also generate ID and name of different countries across the world that you want to include in your World Map by clicking on  which will generate all the ID's as follows:-




The screenshot shows a software interface with a 'Maps' tab selected. Under 'World', there is a 'World' icon. The 'Map Resolution' is set to 'Low Maps'. The 'Map Type' is set to 'World'. The 'Datasets' dropdown is empty. The 'Series' dropdown is set to 'Series1'. The 'Location Id' dropdown is empty. The 'Value' dropdown is empty. The 'Aggregator' is set to 'Count'. On the right, a list of country names and IDs is displayed, numbered 1 to 19. A download icon is visible at the bottom right of the list.



| id | name,id |
|----|--|
| 1 | name,id |
| 2 | "Tuvalu","TV" |
| 3 | "Bouvet Island","BV" |
| 4 | "Gibraltar","GI" |
| 5 | "Glorioso Islands","GO" |
| 6 | "Juan De Nova Island","JU" |
| 7 | "Jarvis Island","UM-DQ" |
| 8 | "Baker Island","UM-FQ" |
| 9 | "Howland Island","UM-HQ" |
| 10 | "Johnston Atoll","UM-JQ" |
| 11 | "Midway Islands","UM-MQ" |
| 12 | "Wake Island","UM-WQ" |
| 13 | "Bonair, Saint Eustachius and Saba","BQ" |
| 14 | "Netherlands","NL" |
| 15 | "Zimbabwe","ZW" |
| 16 | "Zambia","ZM" |
| 17 | "South Africa","ZA" |
| 18 | "Yemen","YE" |
| 19 | "Samoa","WS" |

1. You can also download this list by clicking on  as shown in the figure above.
2. Select **Overall Sales.cds** from the Datasets drop-down as shown below to depict the details of the products from across the world:-




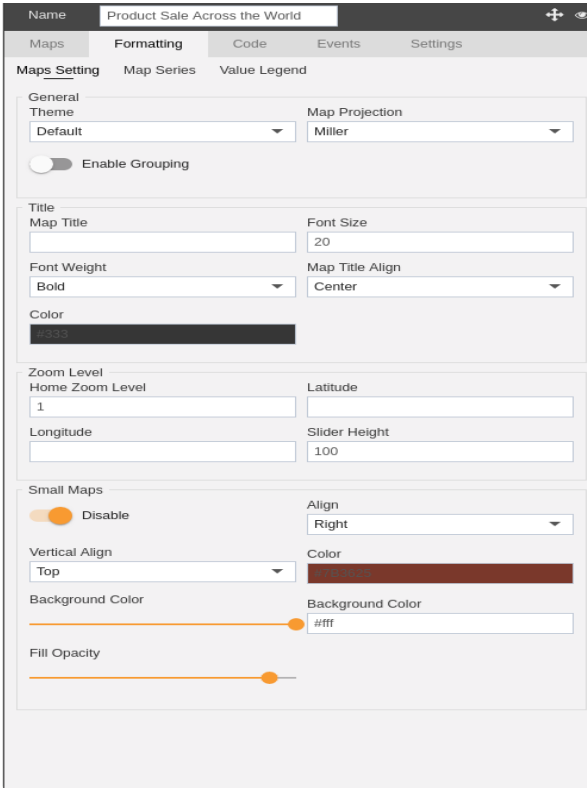
1. Similarly select Series as Series1, Location Id as the country id, value as country and Aggregator as Count as shown in the figure.
2. Save your changes by clicking on  button on the top right corner above the map.
3. After making these changes in the Maps, your map widget will be depicted as below:-



4. In a similar manner, you can also create charts for country and other regions.
5. You can move your widget anywhere on the screen by clicking on  .
6. You can again go to edit mode by clicking on  to perform other changes in Map widget.

Formatting

1. Click  on your current map widget in order to perform formatting.
2. Go to **Formatting** tab and the following screen will be displayed:-

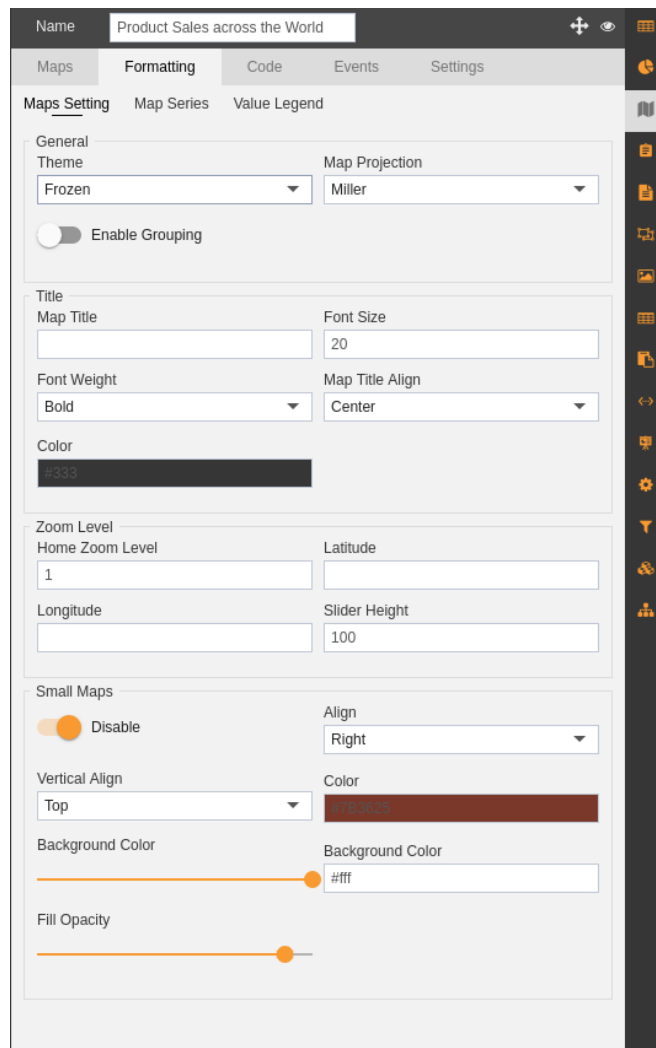


The screenshot shows the 'Formatting' tab for a map widget. The widget name is 'Product Sale Across the World'. The 'Formatting' tab is active, with sub-tabs for 'Maps Setting', 'Map Series', and 'Value Legend'. The 'General' section includes 'Theme' (Default), 'Map Projection' (Miller), and an 'Enable Grouping' toggle. The 'Title' section includes 'Map Title', 'Font Size' (20), 'Font Weight' (Bold), and 'Map Title Align' (Center). The 'Zoom Level' section includes 'Home Zoom Level' (1), 'Latitude', 'Longitude', and 'Slider Height' (100). The 'Small Maps' section includes a 'Disable' toggle, 'Align' (Right), 'Vertical Align' (Top), 'Color', 'Background Color' (hex #fff), and 'Fill Opacity'.

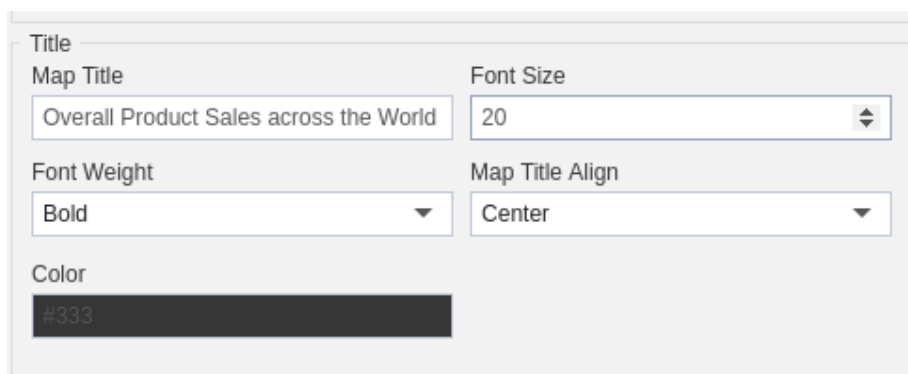
3. There are three sub-tabs under the formatting tab as follows:-
 - Map Settings
 - Map Series
 - Value Legend
4. Let us understand all these tabs in detail:-

Map Settings

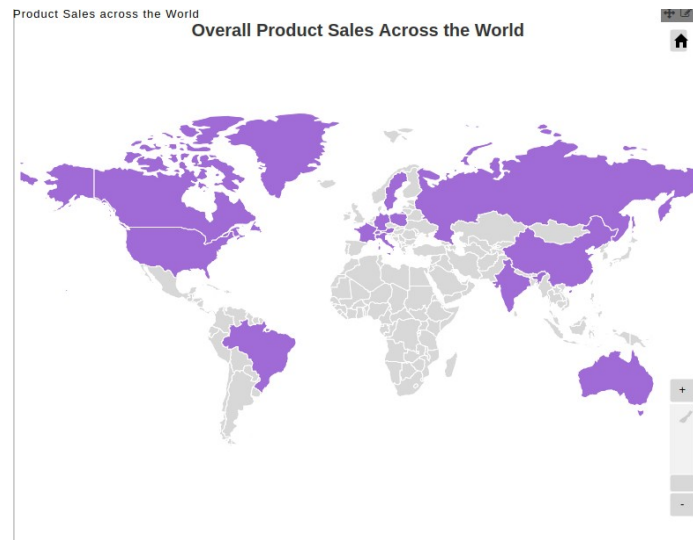
1. The Map Settings tab allows you to change the settings of your map as follows:-



2. In General Settings, select Theme as Frozen and Map Projection as Miller as shown in the figure above.
3. You can also select Enable Grouping if you desire to group your data.
4. Now in the Title Section, enter data in the text boxes as shown in the figure below:-



5. Your World Map will now look as below:-



6. You can change the zoom details as follows:-

The figure shows a configuration panel for the "Zoom Level". It contains four input fields: "Home Zoom Level" with the value "1", "Latitude" with the value "2", "Longitude" with the value "1" and a dropdown arrow, and "Slider Height" with the value "100".

7. Here you can change the zoom of the map from either latitude or longitude or both as depicted above. Perform the changes as shown in this figure to your Zoom level.
8. If you want to show a smaller scale of map besides your original map, enable "small map" functionality as follows:-

The figure shows a configuration panel for "Small Maps". It includes a "Disable" toggle switch (currently turned off), an "Align" dropdown menu set to "Right", a "Vertical Align" dropdown menu set to "Top", a "Color" field with a color swatch showing "#7B3625", a "Background Color" field with a color swatch showing "#fff", and a "Fill Opacity" slider.

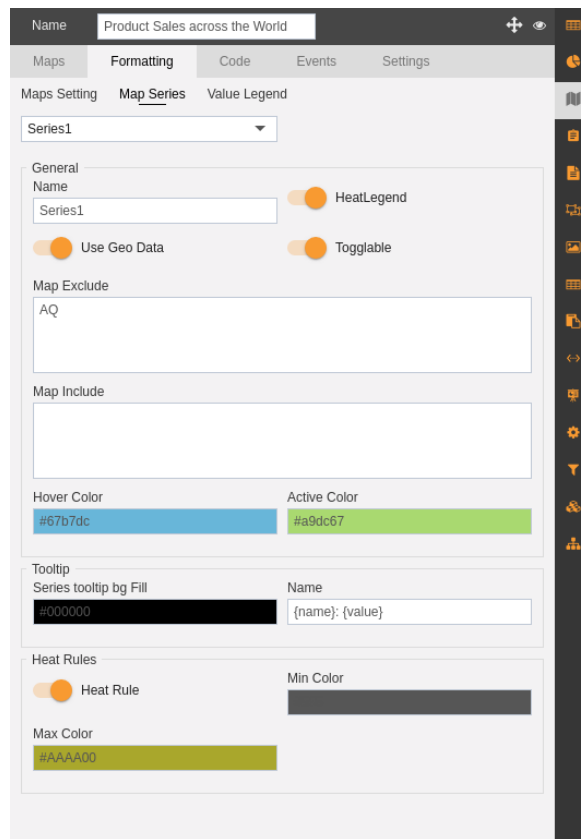
9. Keep the Align Right and Vertical Align Top and leave everything else as it is.
10. After this, your world map will look as follows:-


Overall Product Sales Across the World

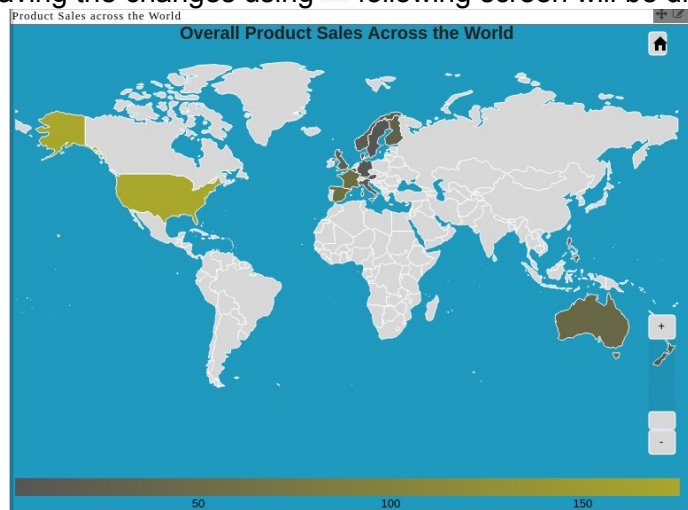


Map Series

1. You can change the settings for a series of the map using map series.



2. In General Settings, enter the name as shown above Series 1.
3. You can show heat legend, geodata and keep the data toggable as shown in the image above.
4. Map Exclude:- (When grouping is applied, you can exclude the part of a region)
5. Map Include:- (When grouping is applied, you can include a part of a region)
6. You can change the hover colour, active colour, heat rule, min colour, and max colour as shown in the figure above.
7. Finally, after saving the changes using  following screen will be displayed.



8. The line at the bottom of the map depicts the heat legend which depicts a range of colour from the maximum value to the minimum total price of products.


Value Legend

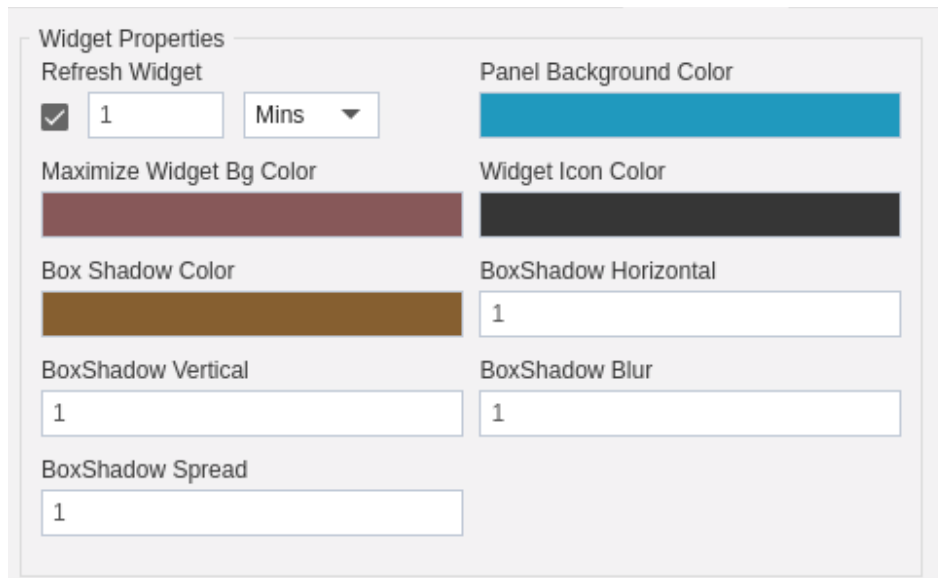
Code

1.

Events

Settings

1. Click on  on your current map widget in order to change settings of the map.
2. You can change the settings of your map widget as follows:-



Widget Properties

Refresh Widget 1 Mins

Panel Background Color

Maximize Widget Bg Color

Widget Icon Color

Box Shadow Color

BoxShadow Horizontal 1

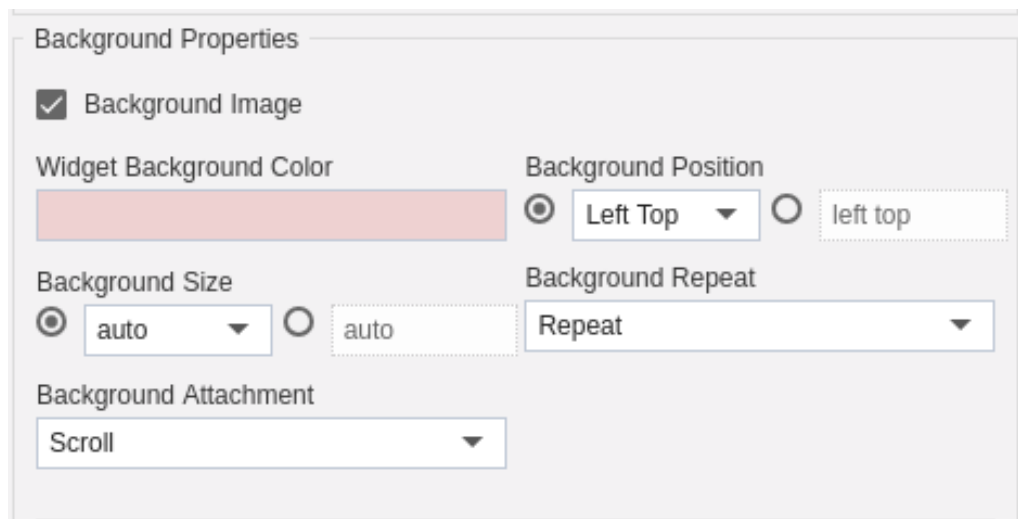
BoxShadow Vertical 1

BoxShadow Blur 1

BoxShadow Spread 1

3. Here in the above figure, widget properties have been set.
4. Widget will be refreshed after every single minute.
5. You can set the Panel Background Colour, Maximize widget bg colour, widget icon colour, box shadow colour and other similar properties related to widget as shown above.
6. You can also change the background image as shown below:-

7. You can set the Title



Background Properties

Background Image

Widget Background Color

Background Position Left Top left top

Background Size auto auto

Background Repeat Repeat

Background Attachment Scroll

properties as shown below:

8. Here you can set the position of title, title colour, font size, font style, font family and font weight.
9. You can set the Border to your map as follows:-

Border
 Border Type: Solid
 Border Width: 0.5
 Border Color: [Grey Swatch]
 Top Left Radius: 0.5
 Top Right Radius: 0.5
 Bottom Left Radius: 0.5
 Bottom Right Radius: 0.5

10. Here we have set Border Type as Solid, width 0.5, colour grey, top left radius 0.5, top right radius 0.5, bottom left radius 0.5 and bottom right radius 0.5.

Sub Title Properties
 SubTitle Hide
 SubTitle Text: Product Details
 SubTitle Font Style: normal
 SubTitle Font Size: 13
 SubTitle FontFamily: Arial
 SubTitle Font Weight: Normal
 Sub Title Move To: Left
 SubTitle Background Color: [White Swatch]
 SubTitle Color: [Black Swatch]
 Sub Title Border
 Show Filter Value
 Wait For Filter
 Hide in Desktop
 Hide in Tablet
 Hide in Mobile

11. In the similar manner you can set Sub Title properties as shown above.


12. You can also hide the data from certain devices, show filter value or wait for filter by checking the checkboxes shown above (Filter will be discussed in detail in later sections).









13. Now Click on  button in order to save the map.

14. Finally you map will be displayed as follows:-




Refresh

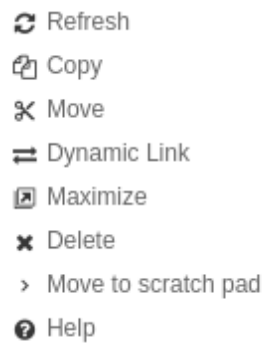
1. In order to refresh your map click on the side elapses  in your map widget.
2. This will open the following menu:-

-  Refresh
-  Copy
-  Move
-  Dynamic Link
-  Maximize
-  Delete
-  Move to scratch pad
-  Help

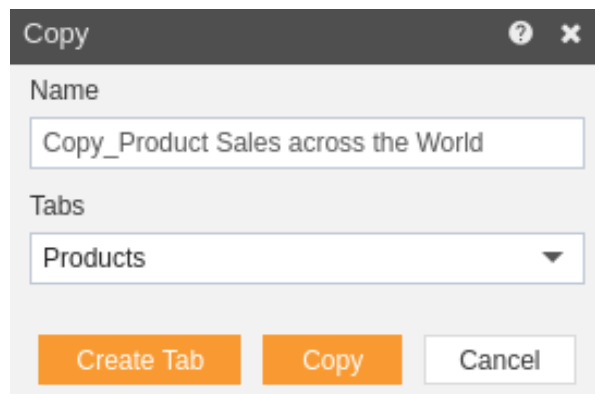
3. Click on Refresh and your map will be refreshed.

Copy

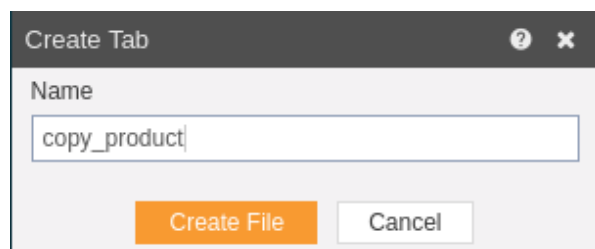
1. In order to copy your map click on the side elapses  in your map widget.
2. This will open the following menu:-



3. Click on copy which will open the following dialog box:-



4. Here you can specify the name you want to give while copying the map.
5. The default tab is products. You can create a new tab from here by clicking on **Create Tab**
6. This opens the following dialog box:-



7. Click on **Create File** in order to save the tab.
8. Now select copy_product from dropdown as follows:-

Copy

Name
Copy_Product Sales across the World


Tabs
copy_product

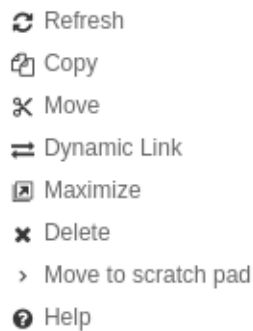
Create Tab Copy Cancel

9. Click on **Copy** to copy the map.
10. You can see a new tab “copy_product” has been created where our map is copied.

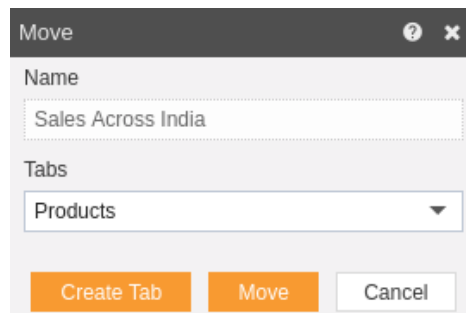


Move

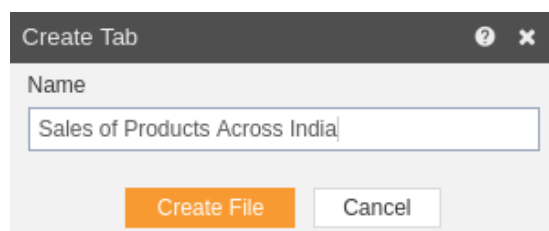
1. In order to move your map, click on the side elapses  in your map widget.
2. This will open the following menu:-



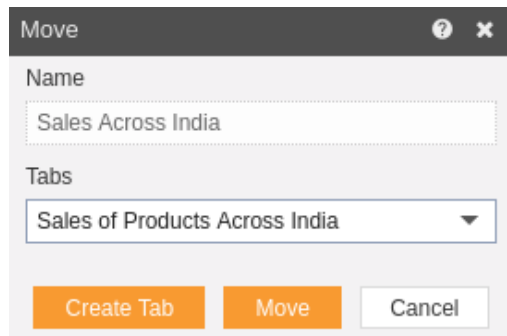
3. Click on copy which will open the following dialog box:-



4. Here you can specify the name you want to give while copying the map.
5. The default tab is products. You can create a new tab from here by clicking on **Create Tab**
6. This opens the following dialog box:-



7. Click on **Create File** in order to save the tab.
8. Now select "Sales of Products Across India" from dropdown as follows:-




9. Click on **Move** to copy the map.
10. A new tab "Sales of Products Across India" has been created where our map is moved.

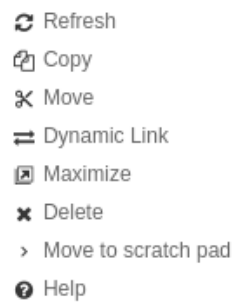


Dynamic Link

- 1.


Maximize

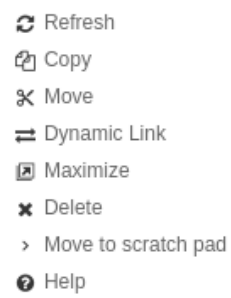
- In order to maximize your map click on the side elapses  in your map widget.
- This will open the following menu:-



- Click on Maximize and your map will be maximized.


Delete









- In order to delete your map click on the side elapses  in your map widget.
- This will open the following menu:-

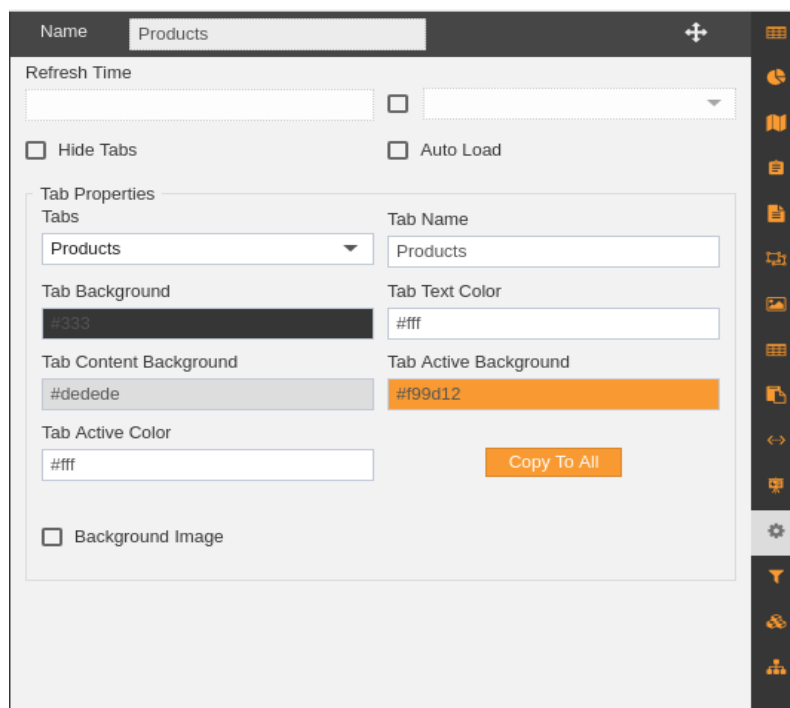


- Click on Delete and your map will be deleted.

Move to scratch pad

- In order to move your map to the scratch pad click on the side elapses  in your map widget.
- This will open the following menu:-


-  Refresh
-  Copy
-  Move
-  Dynamic Link
-  Maximize
-  Delete
-  > Move to scratch pad
-  Help

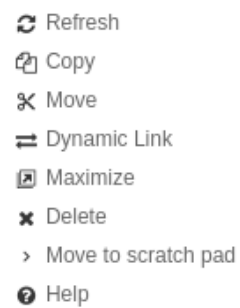


Click on Move to the scratch pad and your map will be moved to the scratch pad as follows:-

- The detailed description regarding the scratch pad will be provided in the scratch pad tutorial.

Help

- In order to access AIS help document related to map widget click on the side elapses  in your map widget.
- This will open the following menu:-



- Click on Help and you will be redirected to AIS help documents.

Reports as widget

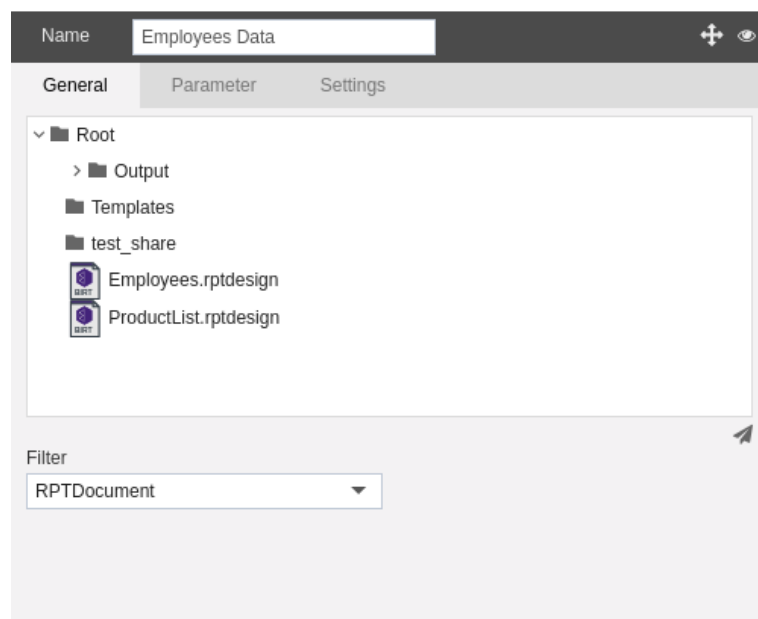
- Report widget enables the user to embed the reports created externally using BIRT, jasper or pentaho into the dashboard.
- Reports provides following functionalities:-
 1. Create Report
 2. Refresh
 3. Copy
 4. Move
 5. Dynamic Link
 6. Maximize
 7. Delete
 8. Move to scratch pad
 9. Help

Create Report

- To Add a **Report Widget** in dashboard, follow the steps below:
 1. Click on **Component** icon from the top right corner menu, a list of the available component will open up as follows:



2. Click on **Component** from the list of component into the dashboard, a configuration box would open as follows:




3. Following sub-tabs are included in create map as shown in the figure above:-

Scratch Pad


Pivot

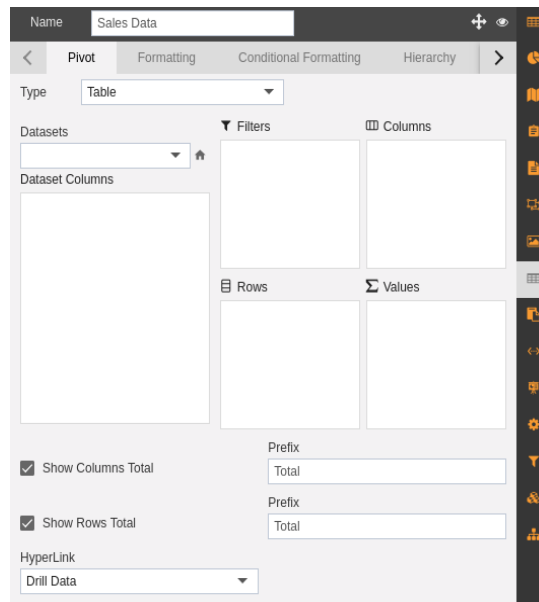
- **Pivot** provides create tables or heatmaps by selecting the appropriate datasets in the dashboard.
- Pivot includes the following functionalities:-
 - Create Pivot
 - Refresh
 - Copy
 - Move
 - Dynamic Link
 - Maximize
 - Delete
 - Move to scratchpad
 - Help

Create Pivot

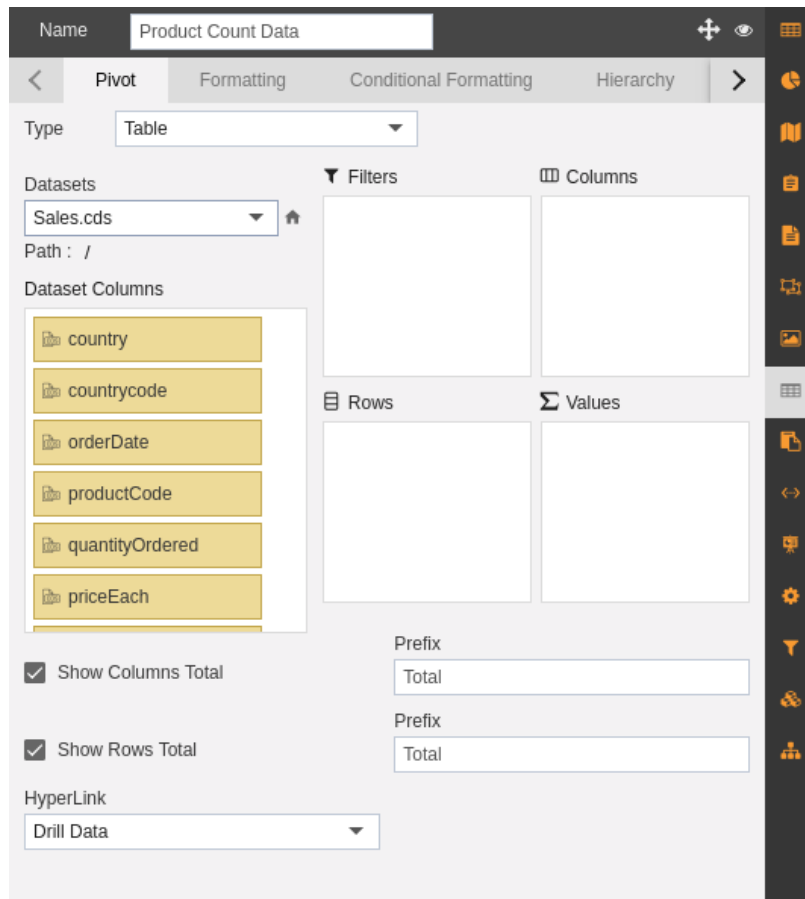
1. To add a **Pivot** in dashboard, follow the steps below:-
2. Click on  **Component** icon from the top right corner menu, a list of the available component will open up as follow.



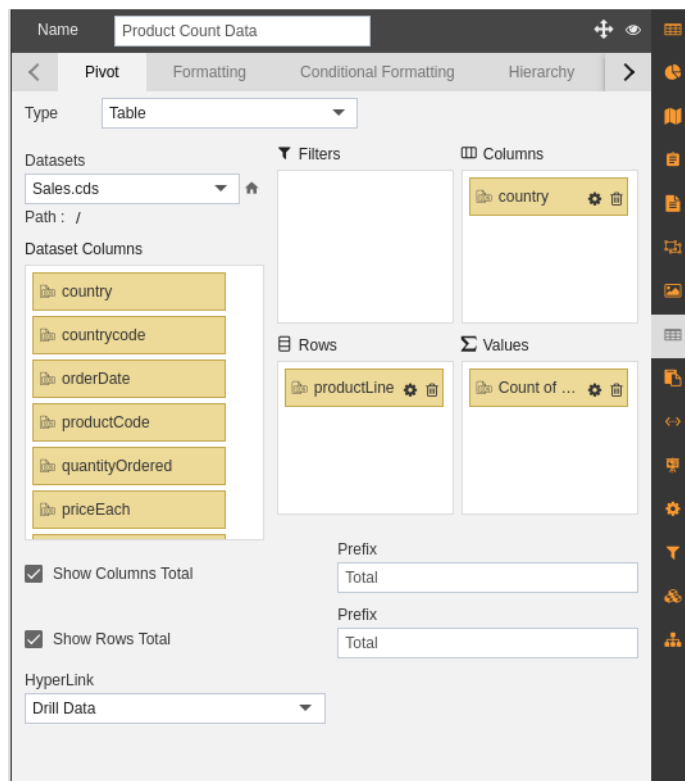
3. Click on  Component from the list of component into the dashboard, a configuration box would open as follows:



4. Following sub-tabs are included in create map as shown in the figure above:-
 - Pivot
 - Formatting
 - Conditional Formatting
 - Hierarchy
 - Settings
5. Let us understand each tab in detail in the following sections:-
 1. The main purpose of the Pivot tab is to enable the user to select the dataset and whether the pivot should be in form of table or heatmap.
 2. Provide a name to the Pivot as Product Count Data.
 6. Select the Type i.e. if you want to display the table or heatmap. For this example, we have considered Type as Table.
 7. Select the **Sales.cds** dataset from the dropdown menu as shown in below figure:-




6. Drag and drop country in Columns and productLine in Rows and following screen will be displayed:-

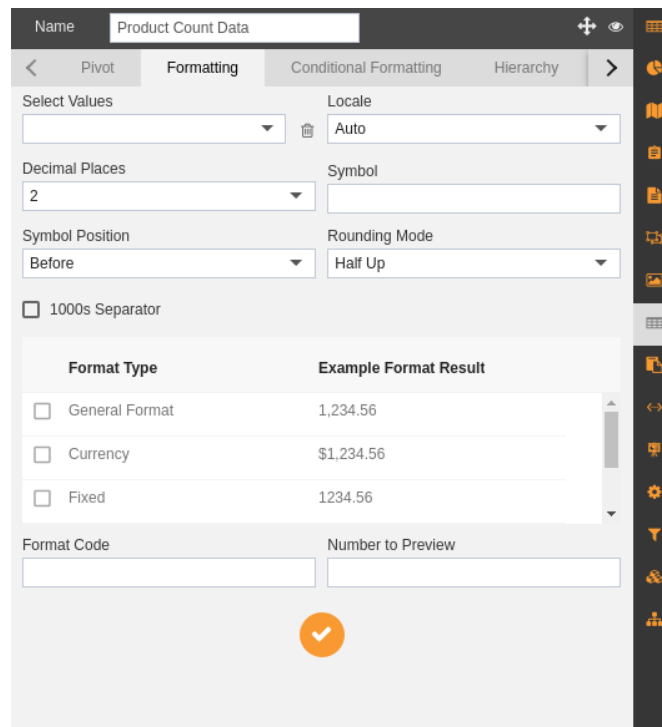


7. You can select to show rows and columns total as shown in the figure above.
8. The following pivot widget will be created due to these changes:-

| Product Count Data | | | | | | | | | |
|--------------------|---------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------------|
| | country | Denmark | Germany | Italy | Norway | Philippines | Spain | USA | Total Count of country |
| productLine | | Count of country | Count of country | Count of country | Count of country | Count of country | Count of country | Count of country | |
| Classic Cars | | 3 | | | 3 | 11 | 7 | 4 | 28 |
| Motorcycles | | | | | | 5 | | 8 | 13 |
| Planes | | | | 12 | | | | | 12 |
| Ships | | 7 | | 2 | | | | | 9 |
| Trains | | 1 | | | | | 2 | | 3 |
| Trucks and Buses | | | | | 7 | | 4 | | 11 |
| Vintage Cars | | 4 | 4 | 4 | 6 | | | 6 | 24 |
| Total | | 15 | 4 | 18 | 16 | 16 | 13 | 18 | 100 |

Formatting

1. Click on  on your current pivot widget in order to perform formatting.
2. Go to **Formatting** tab and the following screen will be displayed:-



Name: Product Count Data

Locale: Auto

Decimal Places: 2

Symbol Position: Before

Rounding Mode: Half Up

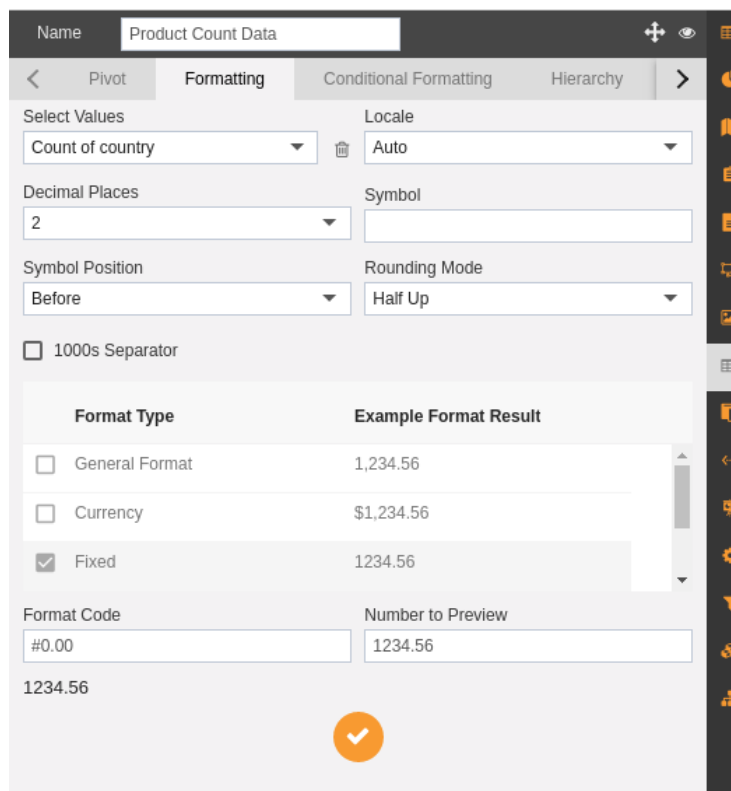
1000s Separator

| Format Type | Example Format Result |
|---|-----------------------|
| <input type="checkbox"/> General Format | 1,234.56 |
| <input type="checkbox"/> Currency | \$1,234.56 |
| <input type="checkbox"/> Fixed | 1234.56 |

Format Code:

Number to Preview:

3. Now perform following formatting changes:-



Name: Product Count Data

Locale: Auto

Select Values: Count of country

Decimal Places: 2

Symbol Position: Before

Rounding Mode: Half Up

1000s Separator

| Format Type | Example Format Result |
|---|-----------------------|
| <input type="checkbox"/> General Format | 1,234.56 |
| <input type="checkbox"/> Currency | \$1,234.56 |
| <input checked="" type="checkbox"/> Fixed | 1234.56 |

Format Code: #0.00


Number to Preview: 1234.56

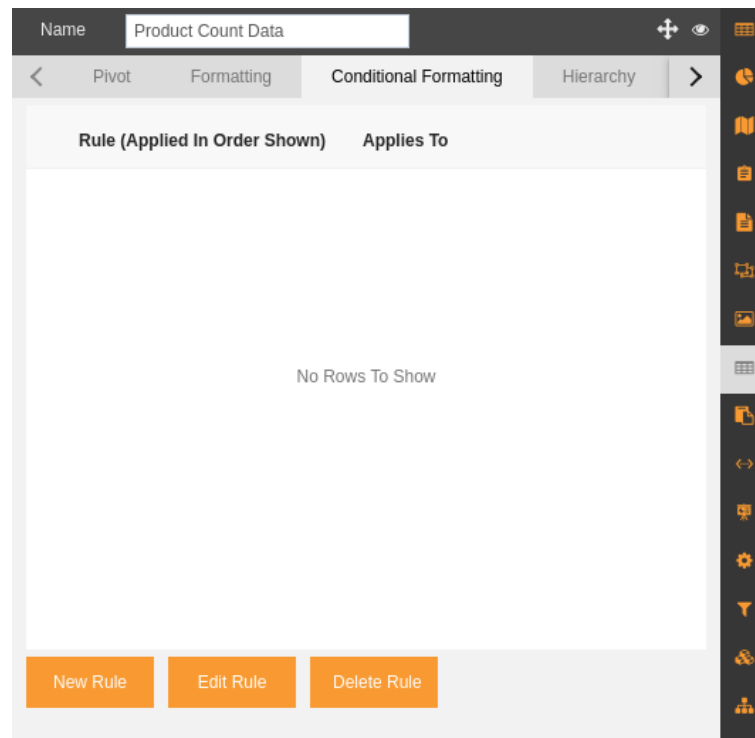
1234.56

4. Select Values as Count of the country from the dropdown.
5. Select Locale as Auto, decimal places 2, rounding mode half up.
6. Check the 1000s separator check box.
7. Keep the Format type as Fixed.
8. After formatting the pivot appears as follows:-


| Product Count Data | | | | | | | | | |
|--------------------|---------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------------|
| | country | Denmark | Germany | Italy | Norway | Philippines | Spain | USA | Total Count of country |
| productLine | | Count of country | Count of country | Count of country | Count of country | Count of country | Count of country | Count of country | |
| Classic Cars | | 3.00 | | | 3.00 | 11.00 | 7.00 | 4.00 | 28.00 |
| Motorcycles | | | | | | 5.00 | | 8.00 | 13.00 |
| Planes | | | | 12.00 | | | | | 12.00 |
| Ships | | 7.00 | | 2.00 | | | | | 9.00 |
| Trains | | 1.00 | | | | | 2.00 | | 3.00 |
| Trucks and Buses | | | | | 7.00 | | 4.00 | | 11.00 |
| Vintage Cars | | 4.00 | 4.00 | 4.00 | 6.00 | | | 6.00 | 24.00 |
| | Total | 15.00 | 4.00 | 18.00 | 16.00 | 16.00 | 13.00 | 18.00 | 100.00 |

Conditional Formatting

1. Click on  on your current pivot widget in order to perform the conditional formatting.
2. Go to **Conditional Formatting** tab and the following screen will be displayed:-



3. In order to add new rule to the pivot widget click on the **New Rule** button as shown in the figure above.
4. After that perform the formatting as shown in the figure:-


5. Drag and drop Count of country in Selected Column.
6. Select Rule Type as **“Format cells all based on their values”**.
7. Format Type 2-Color Scale, Minimum type Lowest Value and Maximum type Highest Value.
8. Finally click on the  button as shown in the figure.
9. Now your pivot widget looks as below:-

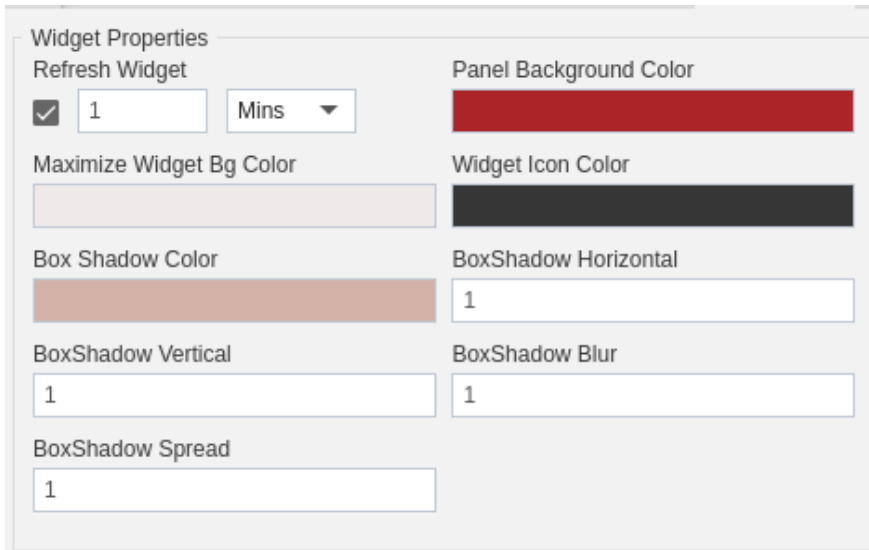
| Product Count Data | | | | | | | | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------------|
| | country | Denmark | Germany | Italy | Norway | Philippines | Spain | USA | Total Count of country |
| productLine | Count of country | Count of country | Count of country | Count of country | Count of country | Count of country | Count of country | Count of country | |
| Classic Cars | 3.00 | | | | 3.00 | 13.00 | 7.00 | 4.00 | 28.00 |
| Motorcycles | | | | | | 5.00 | | 9.00 | 13.00 |
| Planes | | | | 12.00 | | | | | 12.00 |
| Ships | 7.00 | | | 2.00 | | | | | 9.00 |
| Trains | 1.00 | | | | | | 2.00 | | 3.00 |
| Trucks and Buses | | | | | 7.00 | | 4.00 | | 11.00 |
| Vintage Cars | 4.00 | 4.00 | 4.00 | 4.00 | 6.00 | | | 6.00 | 24.00 |
| Total | 15.00 | 4.00 | | 18.00 | 16.00 | 16.00 | 13.00 | 18.00 | 100.00 |

10. You can edit your conditional formatting rule by selecting the rule and clicking on **Edit Rule** button.
11. Finally, in order to delete the rule you can select the rule and click on **Delete Rule** button.

Hierarchy


Settings

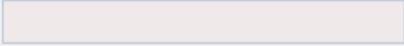
1. Click on  on your current pivot widget in order to change settings of the pivot.
2. You can change the settings of your pivot widget as follows:-





Widget Properties

Refresh Widget 1 Mins

Panel Background Color 

Maximize Widget Bg Color 

Widget Icon Color 

Box Shadow Color 

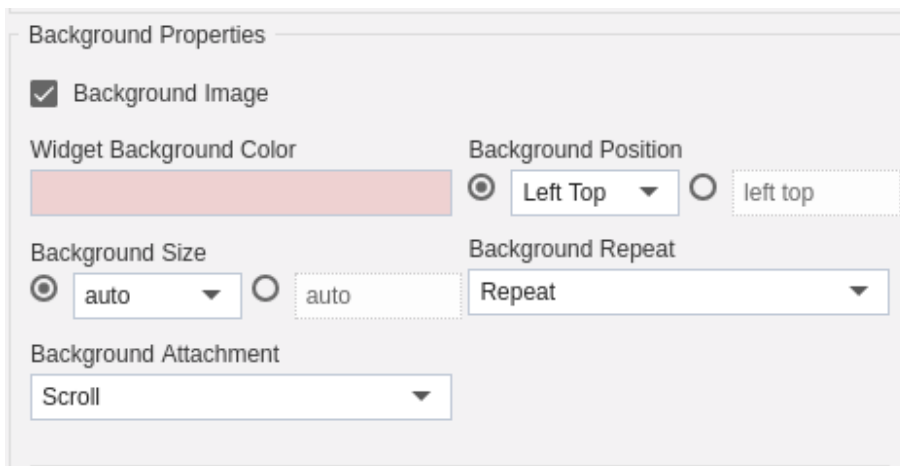
BoxShadow Horizontal 1

BoxShadow Vertical 1

BoxShadow Blur 1


BoxShadow Spread 1

3. Here in the above figure, widget properties have been set.
4. The widget will be refreshed after every single minute.
5. You can set the Panel Background Colour, Maximize widget bg colour, the widget icon colour, box shadow colour and other similar properties related to the widget as shown above.
6. You can also change the background image as shown below:-



Background Properties

Background Image

Widget Background Color 

Background Position Left Top left top

Background Size auto auto

Background Repeat Repeat

Background Attachment Scroll

7. You can set the Title properties as shown below:-

Title Properties

Title Hide

Title Move To:

Title Color:

Title Font Size:

Title Font Style:

Title FontFamily:

Title Font Weight:

Title Background Color:

8. Here you can set the position of title, title colour, font size, font style, font family and font weight.
9. You can set the Border to your map as follows:-

Border

Border Type:

Border Width:

Border Color:

Top Left Radius:

Top Right Radius:

Bottom Left Radius:

Bottom Right Radius:

10. Here we have set Border Type as Solid, width 0.5, colour grey, top left radius 0.5, top right radius 0.5, bottom left radius 0.5 and bottom right radius 0.5.

Sub Title Properties

SubTitle Hide

SubTitle Text:

SubTitle Font Style:

SubTitle Font Size:

SubTitle FontFamily:

SubTitle Font Weight:

Sub Title Move To:

SubTitle Background Color:

SubTitle Color:

Sub Title Border


Show Filter Value

Wait For Filter

Hide in Desktop

Hide in Tablet









Hide in Mobile

11. In a similar manner, you can set Sub Title properties as shown above.
12. You can also hide the data from certain devices, show filter value or wait for the filter by checking the checkboxes shown above (Filter will be discussed in detail in later sections).
13. Now Click on  button in order to save the map.
14. Finally, your map will be displayed as follows:-

| Product Count Data | | | | | | | | | |
|----------------------------------|---------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------------|
| Total Product Sales Country Wise | | | | | | | | | |
| | country | Denmark | Germany | Italy | Norway | Philippines | Spain | USA | Total Count of country |
| productLine | | Count of country | Count of country | Count of country | Count of country | Count of country | Count of country | Count of country | |
| Classic Cars | | 3.00 | | | 3.00 | 12.00 | 7.00 | 4.00 | 28.00 |
| Motorcycles | | | | | | 5.00 | | 8.00 | 13.00 |
| Planes | | | | 12.00 | | | | | 12.00 |
| Ships | | 7.00 | | 2.00 | | | | | 9.00 |
| Trains | | 1.00 | | | | | 2.00 | | 3.00 |
| Trucks and Buses | | | | | 7.00 | | 4.00 | | 11.00 |
| Vintage Cars | | 4.00 | 4.00 | 4.00 | 5.00 | | | 6.00 | 24.00 |
| Total | | 15.00 | 4.00 | 18.00 | 16.00 | 16.00 | 13.00 | 18.00 | 100.00 |


Refresh

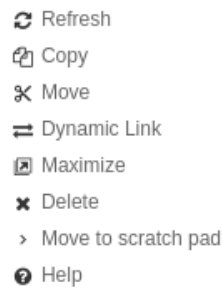
1. 1

-  Refresh
-  Copy
-  Move
-  Dynamic Link
-  Maximize
-  Delete
-  Move to scratch pad
-  Help

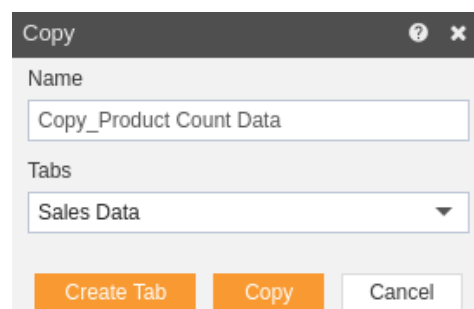
2. Click on Refresh and your pivot will be refreshed.

Copy

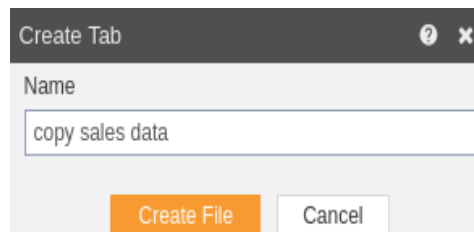
- In order to copy your pivot click on the side elapses  in your pivot widget.
- This will open the following menu:-



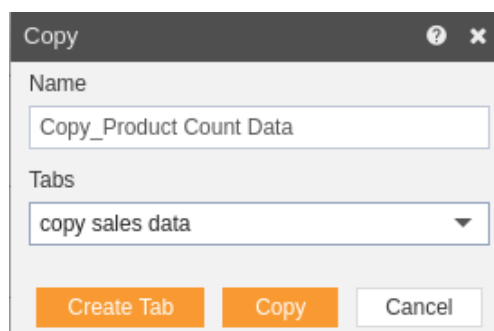
Click on copy which will open the following dialog box:-



- Here you can specify the name you want to give while copying the pivot.
- The default tab is Sales Data. You can create a new tab from here by clicking on **Create Tab**.
- This opens the following dialog box:-




- Click on **Create File** in order to save the tab.
- Now select copy_product from dropdown as follows:-

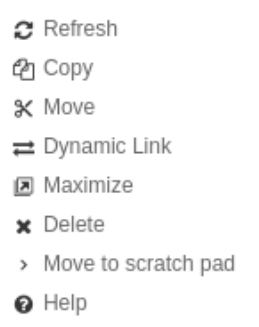


- Click on **Copy** to copy the pivot widget.
- You can see a new tab copy sales data has been created where our pivot is copied.

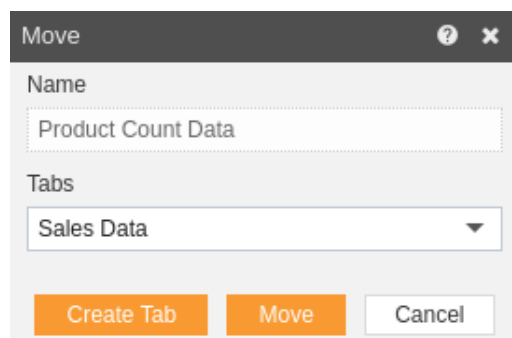
| | | Denmark | Germany | Italy | Norway | Philippines | Spain | USA | Total Count of country |
|------------------|---------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------------|
| productLine | country | Count of country | Count of country | Count of country | Count of country | Count of country | Count of country | Count of country | |
| Classic Cars | | 3.00 | | | 3.00 | 15.00 | 7.00 | 4.00 | 28.00 |
| Motorcycles | | | | | | 5.00 | | 8.00 | 13.00 |
| Planes | | | | 12.00 | | | | | 12.00 |
| Ships | | 7.00 | | 2.00 | | | | | 9.00 |
| Trains | | 1.00 | | | | | 2.00 | | 3.00 |
| Trucks and Buses | | | | | 7.00 | | 4.00 | | 11.00 |
| Vintage Cars | | 4.00 | 4.00 | 4.00 | 6.00 | | | 6.00 | 24.00 |
| Total | | 15.00 | 4.00 | 18.00 | 16.00 | 16.00 | 13.00 | 18.00 | 100.00 |

Move

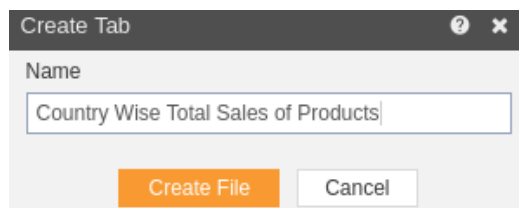
1. In order to move your pivot click on the side elapses  in your map widget.
2. This will open the following menu:-



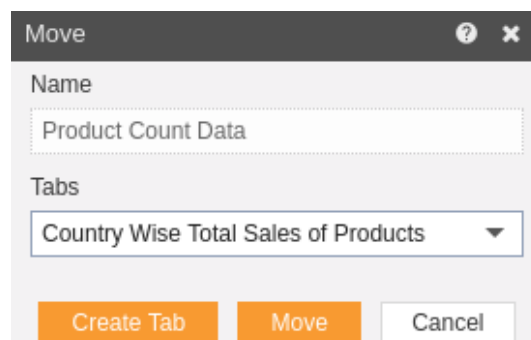
3. Click on copy which will open the following dialog box:-



4. Here you can specify the name you want to give while moving the pivot.
5. The default tab is Product Count Data. You can create a new tab from here by clicking on **Create Tab**.
6. This opens the following dialog box:-



7. Click on **Create File** in order to save the tab.
8. Now select Sales of Products Across India from dropdown as follows:-




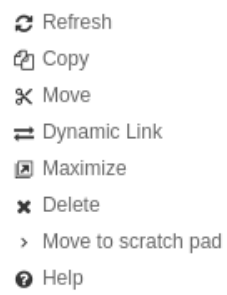
9. Click on **Move** to copy the widget.
10. You can see a new tab Country Wise Sales of Products has been created where our widget is moved.
11. As the pivot widget is removed from Sales Data it will appear blank to the user.

| Sales Data | | | | | | | | | |
|----------------------------------|---------|--------------------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------------|
| copy sales data | | Country Wise Total Sales of Products | | | | | | | |
| Product Count Data | | | | | | | | | |
| Total Product Sales Country Wise | | | | | | | | | |
| | country | Denmark | Germany | Italy | Norway | Philippines | Spain | USA | |
| productLine | | Count of country | Count of country | Count of country | Count of country | Count of country | Count of country | Count of country | Total Count of country |
| Classic Cars | | 3.00 | | | 3.00 | 11.00 | 7.00 | 4.00 | 28.00 |
| Motorcycles | | | | | | 5.00 | | 8.00 | 13.00 |
| Planes | | | | 12.00 | | | | | 12.00 |
| Ships | | 7.00 | | 2.00 | | | | | 9.00 |
| Trains | | 1.00 | | | | | 2.00 | | 3.00 |
| Trucks and Buses | | | | | 7.00 | | 4.00 | | 11.00 |
| Vintage Cars | | 4.00 | 4.00 | 4.00 | 5.00 | | | 5.00 | 24.00 |
| Total | | 15.00 | 4.00 | 18.00 | 16.00 | 16.00 | 13.00 | 18.00 | 100.00 |

Dynamic Link


Maximize

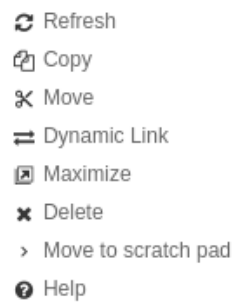
- In order to maximize your pivot click on the side elapses  in your pivot widget.
- This will open the following menu:-



- Click on Maximize and your pivot will be maximized.


Delete

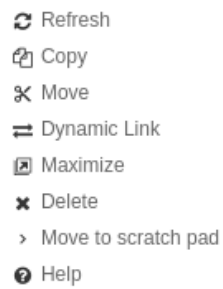
- In order to delete your pivot click on the side elapses  in your pivot widget.
- This will open the following menu:-



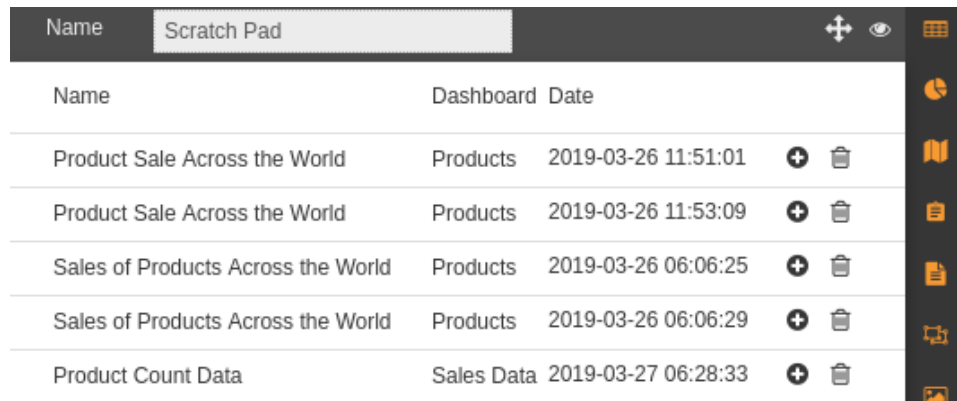
- Click on Delete and your pivot will be deleted.

Move to scratch pad

- In order to move your pivot to the scratch pad click on the side elapses  in your pivot widget.
- This will open the following menu:-



- Click on Move to scratch pad and your map will be moved to the scratch pad as follows:-




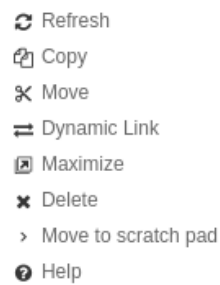
A screenshot of a dashboard table with a dark header and a dark sidebar on the right. The table has columns for Name, Dashboard, and Date. The sidebar contains several icons for different dashboard components.

| Name | Dashboard | Date | | |
|------------------------------------|------------|---------------------|---|----|
| Product Sale Across the World | Products | 2019-03-26 11:51:01 | + | 🗑️ |
| Product Sale Across the World | Products | 2019-03-26 11:53:09 | + | 🗑️ |
| Sales of Products Across the World | Products | 2019-03-26 06:06:25 | + | 🗑️ |
| Sales of Products Across the World | Products | 2019-03-26 06:06:29 | + | 🗑️ |
| Product Count Data | Sales Data | 2019-03-27 06:28:33 | + | 🗑️ |

- The detailed description regarding scratch pad will be provided in scratch pad tutorial.


Help

- In order to access AIS help document related to pivot widget click on the side elapses  in your pivot widget.
- This will open the following menu:-




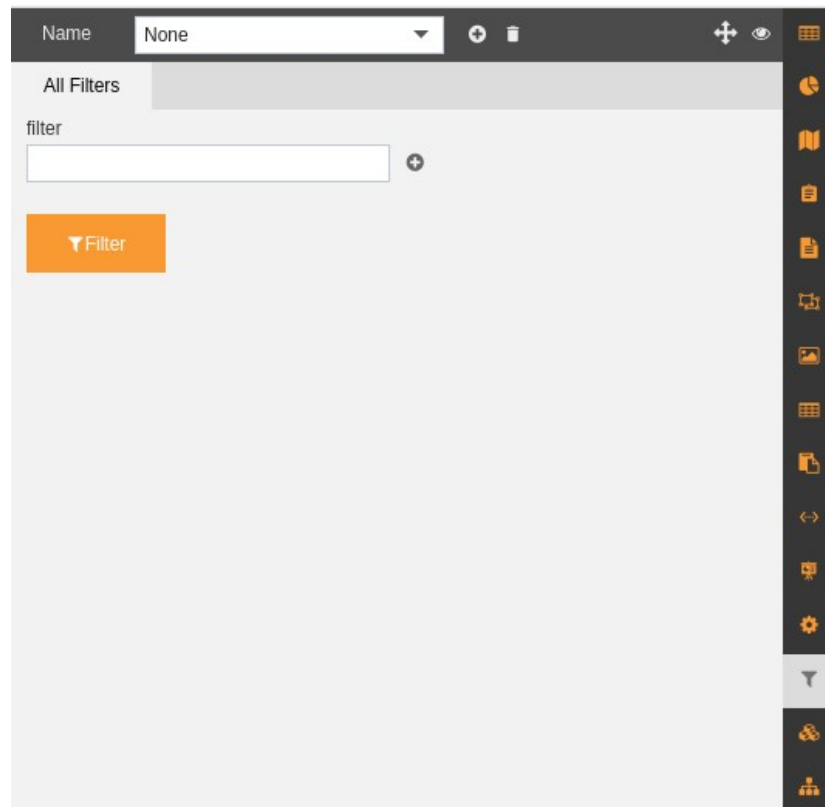
- Click on Help and you will be redirected to AIS help documents.


Filter

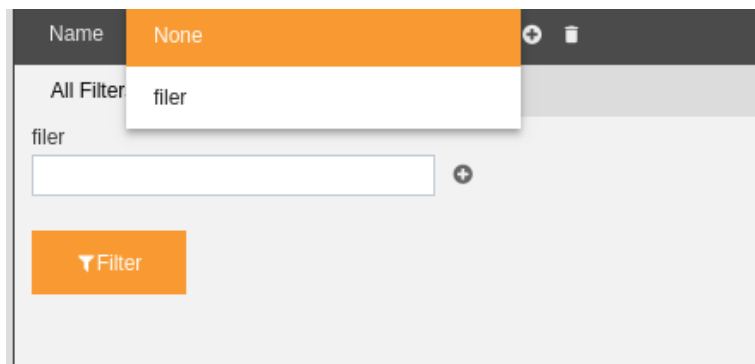
- Dashboard Filters enable users to create filters on the fly, which can then be used to filter all the widget in the dashboard using single click based on the value passed in the filter box. Dashboard Filters can be used to filter widgets available in the open dashboard which can be spread across to all the tabs.
- AIS enables users to create various types of filters such as:
 1. Text box filter
 2. List (Drop Down filter)
 3. Multi-select
 4. Date
 5. Radio Buttons
 6. Check box and much more
- **A Filter** enable users, to create the filter which can then be used to filter the existing dashboard, multiple tabs and multiple widgets.
- To Create New **Filter**, follow the steps below:
 1. Click on  **Component** icon from the top right corner menu, a list of the available component will open up as follows:



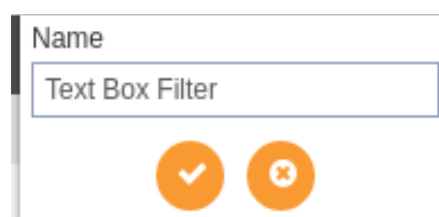
2. Click on  Component from the list of component into the dashboard, a configuration box would open as follows:



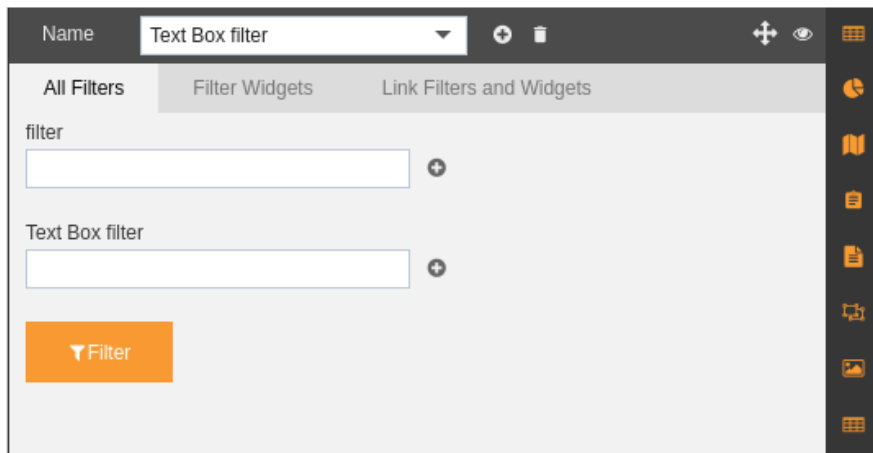
3. Click on  besides the Name drop down menu in order to add a new filter or you can select the existing filter from the drop down menu as follows:-



4. We will create a new filter for textbox as follows:-



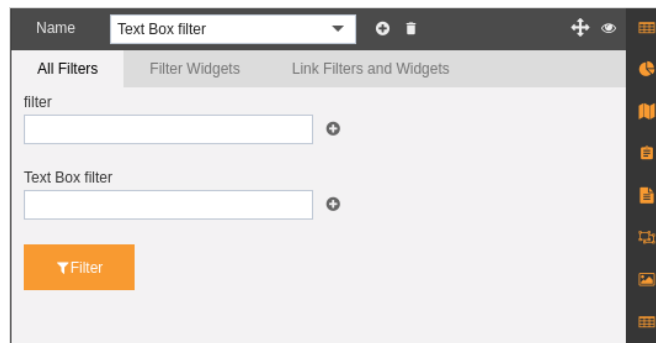
5. Click on  button in order to save a filter which will appear on your screen as follows:-




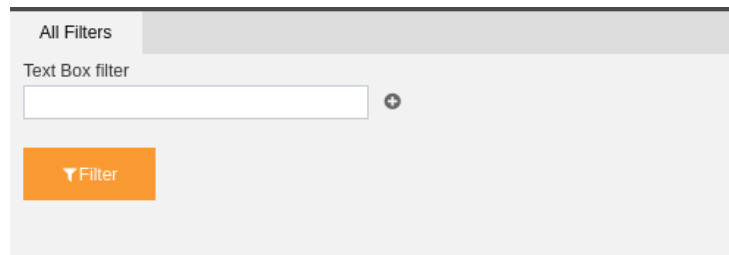
6. As you can see our filter is added to the filter list.
7. The filter widget has the following sub-tabs:-
 - All Filters
 - Filter Widgets
 - Link Filters and Widgets
8. Let us understand each one of them in detail in the following sections.


All Filters

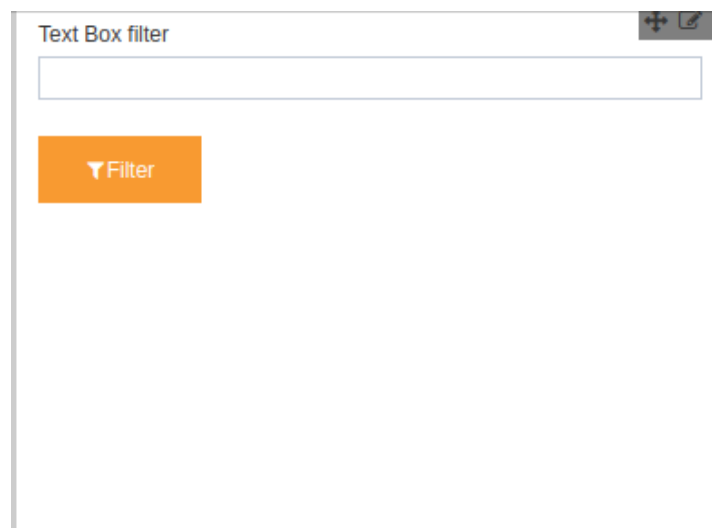
1. The All Filters Tab displays the list of all the existing filters in the AIS application as follows:-




2. Here we have two filters “filter” and “Text Box filter”.
3. As we have to use Text Box filter for understanding, delete the other filter.
4. For this select the filter “**filter**” from the drop-down menu and press on delete button  which will delete the filter and following screen will be displayed:-

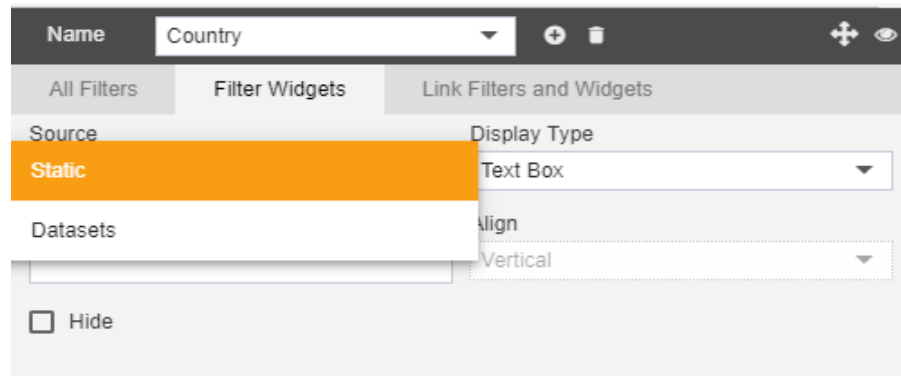
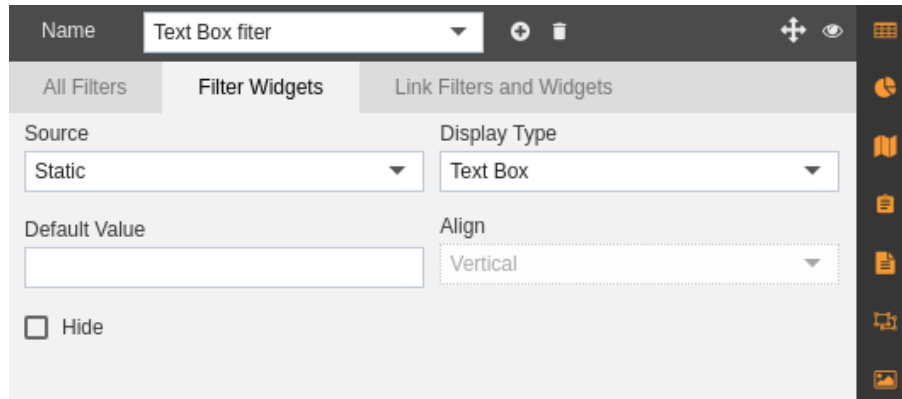


In order to add the filter to the dashboard click on  besides the Text Box filter and the filter will be added to the dashboard as follows:-



Filter Widgets

1. Click on  on your current filter widget in order to see the filter widgets.
2. Select Text Box filter from the Name drop-down if not already selected.
3. Go to **Filter Widgets** tab and the following screen will be displayed:-



- In **Filter Widgets** Tab, Provide the desired **Name** of the Filter. The **Height** and **Width** of the Filter are predefined and can be updated.
 - **Display Type** allows users to create the type of the filter using the drop-down menu box i.e. Text Box, List Box, Multi-select, Date, Radio, Checkbox, etc.
 - If selected **Display Type** is **Radio** or **Checkbox**, select **Align** from the drop-down menu to **Horizontal** or **Vertical** as desired.
 - Select one of the **Source** to create a widget from,
 - **Static**
 - **Datasets**
 - **Parameters**
1. Select dataset from the **Available datasets** box select single dataset and single column as a source for your filter, Selected Column will appear as follow: This column values will be used to filter the links widgets.

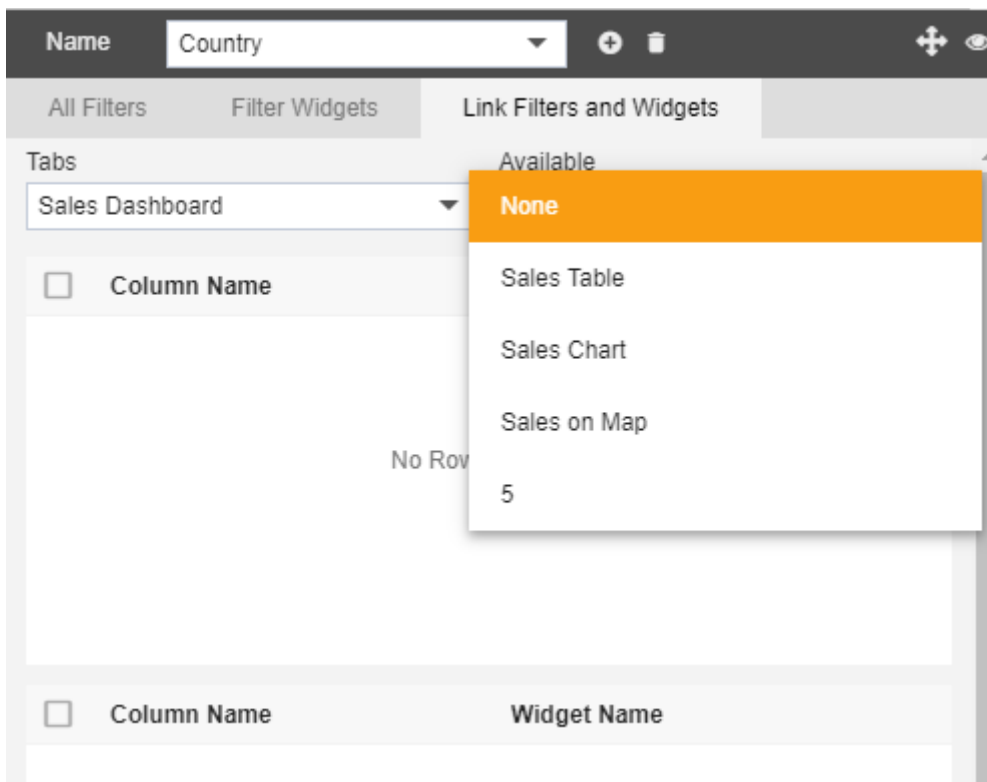
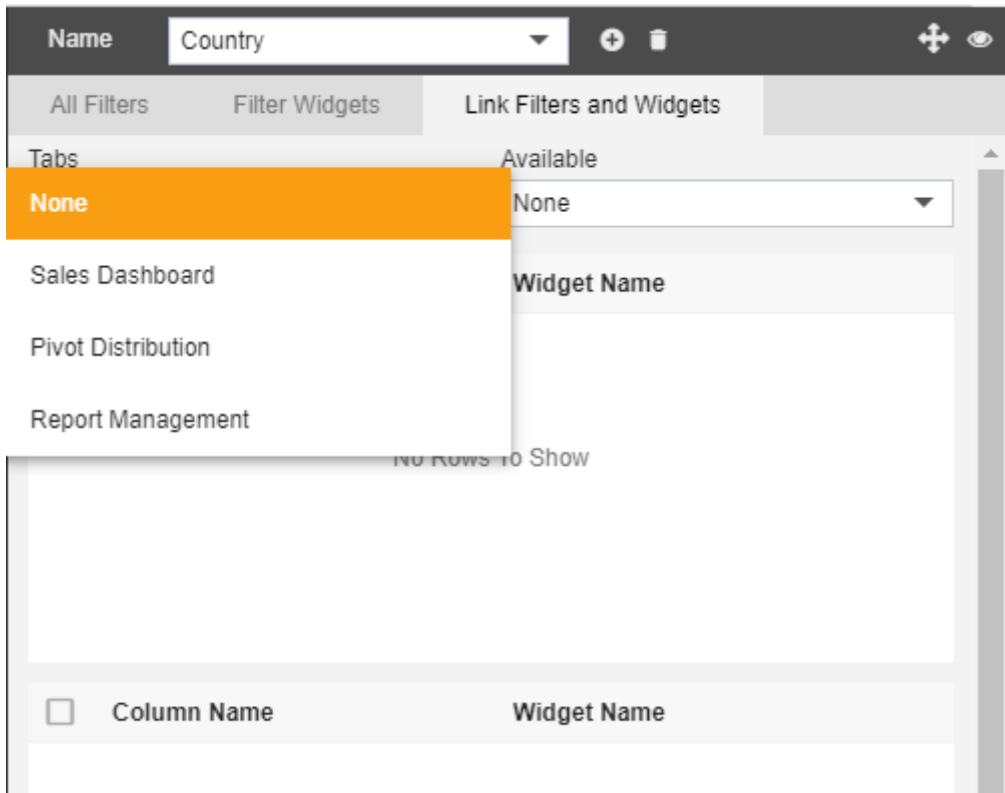
The screenshot shows the configuration interface for a filter widget named 'Country'. The interface includes several sections:

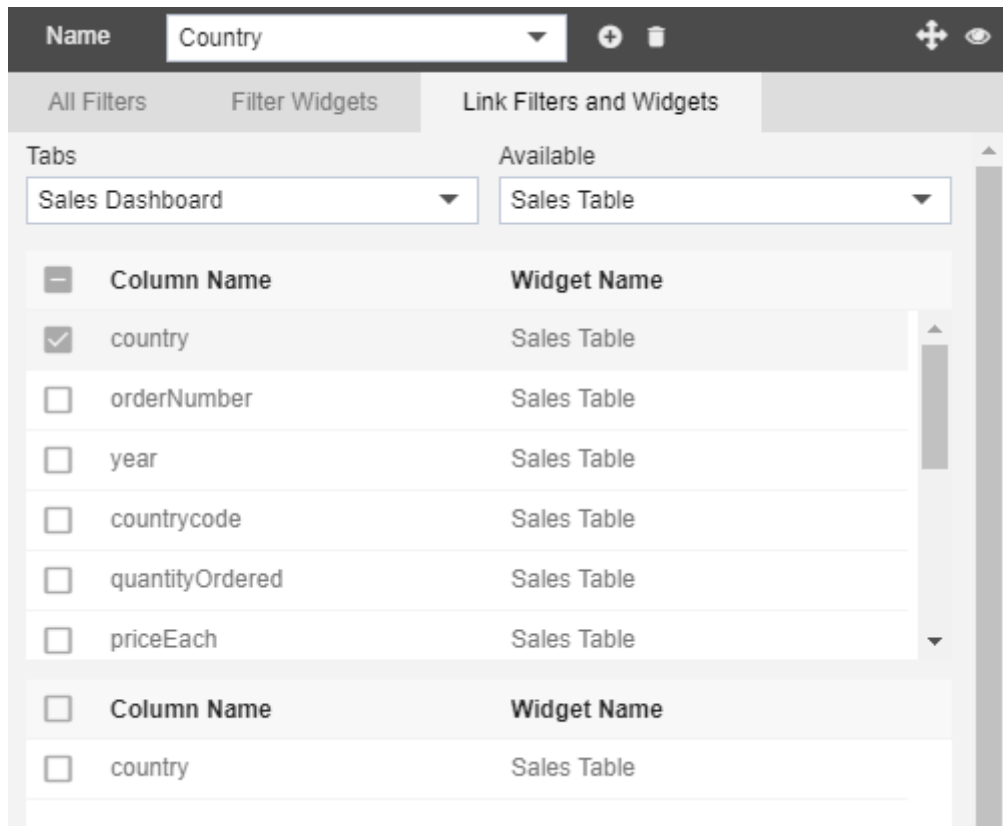
- Source:** A dropdown menu set to 'Datasets'.
- Display Type:** A dropdown menu set to 'Text Box'.
- Datasets:** A dropdown menu set to 'Sales.cds' with a home icon to its right.
- Path:** A text field containing '/test_dataset_brij/'.
- Default Value:** An empty text input field.
- Align:** A dropdown menu set to 'Vertical'.
- Column Name:** A dropdown menu set to 'country'.
- Column Value:** A dropdown menu set to 'country'.
- Hide:** A checkbox that is currently unchecked.

- You can provide a default value if you want.
 - To hide a filter you can select hide checkbox.
 - To show All-None option in select box.
2. Go to Link Filters and Widgets Tab to link other widgets, you will get list of the widgets in the **Available Columns**, you can link as many widgets you like.

The screenshot shows the 'Link Filters and Widgets' configuration panel for the 'Country' filter. The interface includes the following elements:

- Tabs:** A dropdown menu set to 'None'.
- Available:** A dropdown menu set to 'None'.
- Table:** A table with two columns: 'Column Name' and 'Widget Name'. The table is currently empty, displaying the message 'No Rows To Show'.





3. Select appropriate values as desired as shown above.




4. Click on  to create Filter.


Tips:

1. Multiple filters are possible in Active Intelligence Dashboard, each filter can then be linked with multiple widgets and can be used to filter with different values.
2. You can only select one source widgets from which the other widgets will get a filter.
3. Widgets in a different tab within the same dashboard can also be filtered.
4. Users can create Cascading parameters as well


Image & Text

- Image & Text provides creative visualization by adding your images and text using the HTML editor in dashboard.
- To Add an Image & Text Widget in a dashboard, follow the steps below:
 1. Click on  Component icon from the top right corner menu, a list of the available component will open up as follows:



2. Click on  Component from the list of component into the dashboard, a configuration box will open as follows:




3. If user wants to add new image then click on  button from the bottom.
4. Select Image which you want to add into the dashboard and click open.
5. Image will be added successfully to the dashboard.

Settings


- A user can edit the Image and text properties with the help of the settings tab.
- Settings tab includes widget properties, background properties, title properties, border properties, and subtitle properties.
- There are some additional features like show filter value, hide in desktop, hide in mobile, wait for filter and hide in a tablet.

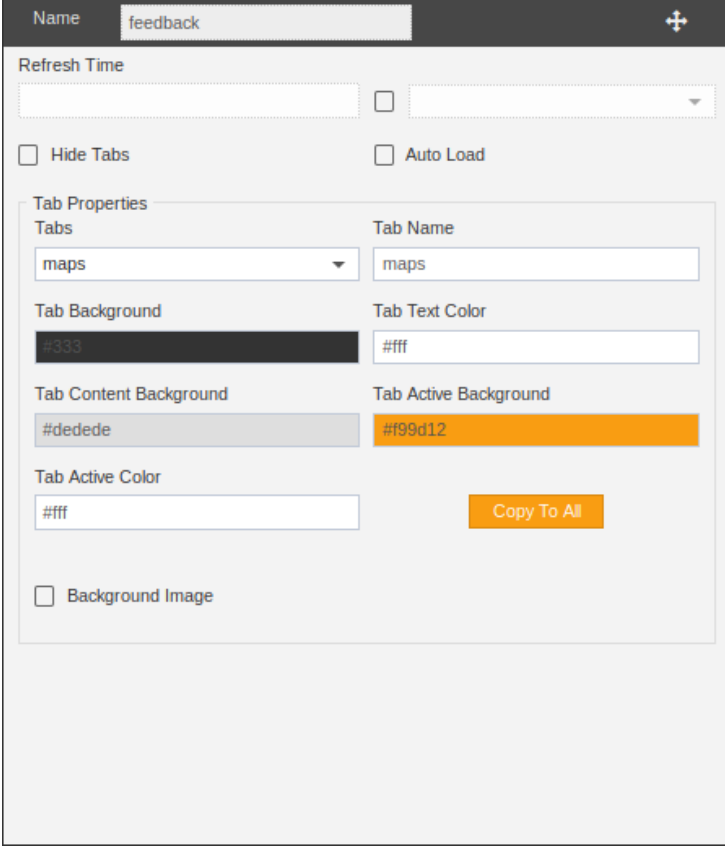
Custom Visualization

- Custom Visualization enable users to add custom codes i.e. html, JavaScript to write their own business logic to create custom widgets also users can use virtually add any charts or maps libraries i.e. High Charts, D3js, Google maps etc. to create custom widgets.
- NOTE: Please check the license condition, users must read and agree to the third party licenses before using them, AIS does not take any responsibility for any AIS customers for not following licensing terms for any third party tools and users are fully responsible for third party licenses and using third party library/tool by fully complying with the terms attached.
- To Add a Custom Visualization Widget in the dashboard, follow the steps below:
 1. Click on  Component icon from the top right corner menu, a list of the available component will open up as follows:



Dashboard Settings


- Dashboard Settings allows a user to change the settings of the Dashboard from the list of Dashboards.
- For Dashboard Settings, follow the steps below:
 1. In the Edit mode click on  icon at top left corner of the dashboard, below dialog box will appear.



The screenshot shows a settings dialog box for a dashboard named "feedback". The dialog box has a title bar with the name "feedback" and a close icon. Below the title bar, there are several sections of settings:

- Refresh Time:** A text input field and a dropdown menu.
- Hide Tabs:** A checkbox.
- Auto Load:** A checkbox.
- Tab Properties:** A section containing:
 - Tabs:** A dropdown menu with "maps" selected.
 - Tab Name:** A text input field with "maps" entered.
 - Tab Background:** A color picker showing "#333".
 - Tab Text Color:** A text input field with "#fff".
 - Tab Content Background:** A color picker showing "#dedede".
 - Tab Active Background:** A color picker showing "#f99d12".
 - Tab Active Color:** A text input field with "#fff".
- Background Image:** A checkbox.

There is a "Copy To All" button located below the Tab Active Color field.

2. There are different option to customize dashboard below are a few options.
 - In Name Option, dashboard name can be changed as desired.
 - In Refresh Option, dashboard would be refreshed every time at selected interval.
 - In the Background Color Option, the dashboard background color can be changed as desired.
 - In Hide Tabs Option, dashboard tabs can be hidden.
 - In Auto Load Option, dashboard can be loaded automatically.
 - In Background Image Option, background image can be added to dashboard.
3. Click on  button to see changes.

Documents


Documents tab contain the reports and common files, it works just like your window folders where you can create nested folders and upload the files and different reports at various levels.

Documents tab can be accessed from the main menu. Document and other sections under the document tab are only visible if the appropriate privileges have been assigned to the logged in user, please contact your administrator if you facing difficulties accessing the sections under the Documents tab.

Documents tab contain following sub sections:


- [Reports](#)
- [Merge Reports](#)
- [Adhoc](#)
- [Shared Resources](#)
- [Quick Run](#)
- [Mappings](#)
- [Dynamic Messages](#)

Report

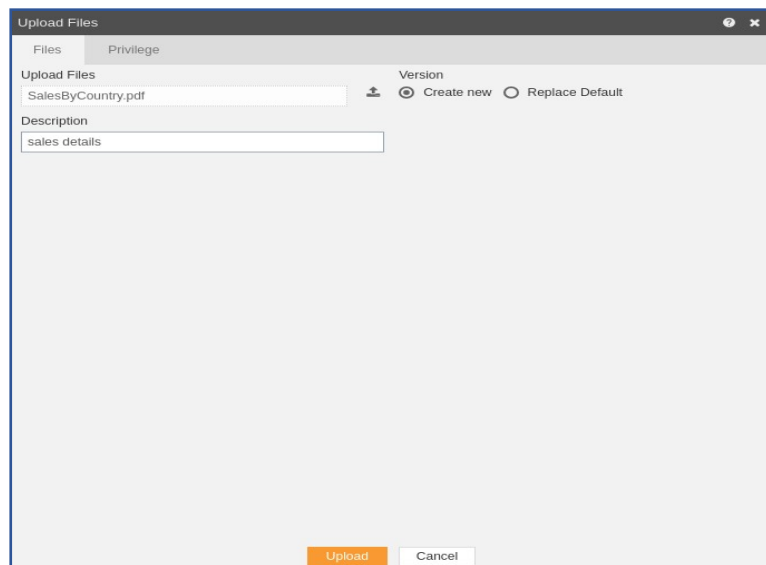
Reports are the sub-section under the Documents Section of the AIV application. The Reports section can be accessed by clicking on Reports to open in the same window or to open in a new window simply click on new window Icon  next to the Reports tab. The primary purpose of the Reports section to perform different functionalities related to reports such as:

1. [Upload](#)
2. [Create Folder](#)
3. [Copy](#)
4. [Move](#)
5. [Delete](#)
6. [Share](#)
7. [Schedule Reports](#)
8. [Unarchive](#)
9. [Unpurged](#)
10. [Audit](#)
11. [Version](#)
12. [Embed](#)
13. [Download](#)
14. [Property](#)

Upload Reports

The user can upload reports by clicking on the upload icon  on the toolbar located at the bottom of the reports page.

On clicking the icon, the following screen will be displayed






In the Files section as shown in the figure above, select the upload icon in order to upload your documents from your computer.

- If the report already exists on the AIV application, the user has an option to replace the default report or to create a new report using the version option as depicted above.
- Furthermore, the user can also provide an optional description for reference, in the description text area shown here.


- There is also an option to hide the visibility to certain users using the privileges tab as shown in the figure below:

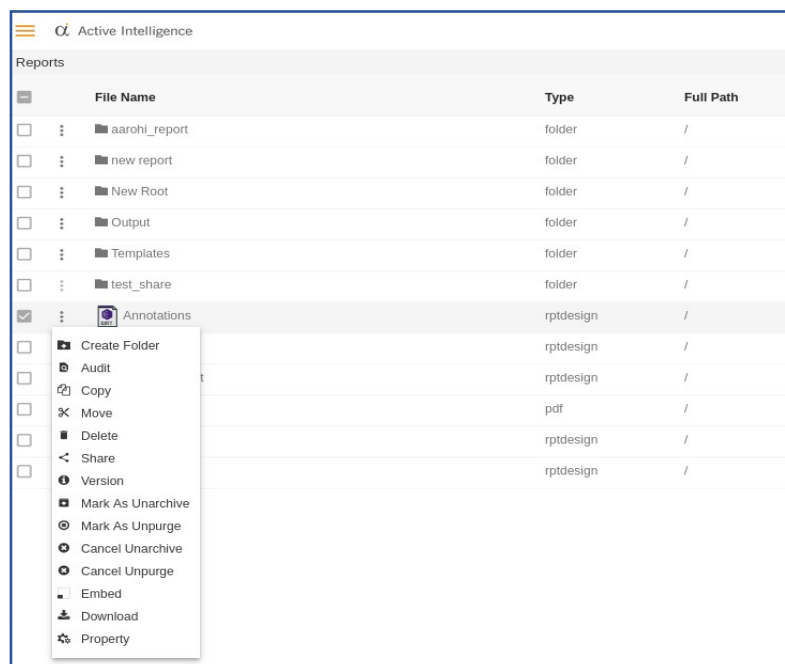
The image displays two screenshots of the 'Upload Files' application interface, specifically the 'Privilege' tab. Both screenshots show a checkbox for 'Assign default version share privilege' at the top. Below this, there are two columns: 'Available' and 'Selected'. In the top screenshot, the 'Available' list contains 'Administrator' (checked), 'Sales' (checked), 'office' (unchecked), and 'dhwani' (unchecked). The 'Selected' list is empty. In the bottom screenshot, the 'Available' list contains 'Admin' (unchecked), 'Demo' (unchecked), 'Vinay' (unchecked), and 'Aarohi' (checked). The 'Selected' list contains 'Aarohi' (unchecked). Both screenshots include a 'Search Role' or 'Search User' bar, radio buttons for 'Users' and 'Roles', and a 'Visibility' dropdown menu set to 'Private'. At the bottom of each window are 'Upload' and 'Cancel' buttons.

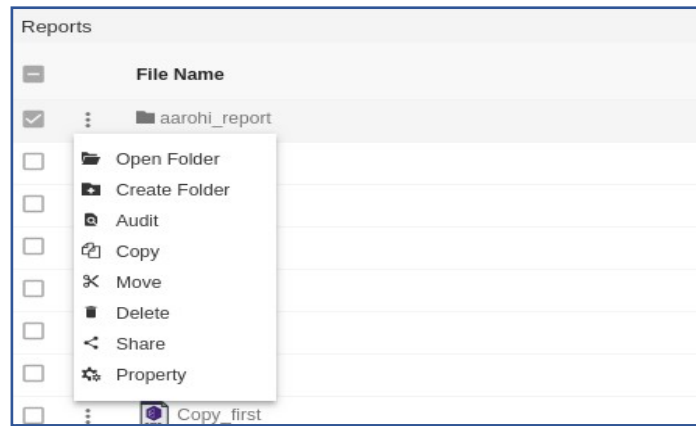
- In case of working with any new version of the report, you can assign the default version share privileges by checking the checkbox. For instance, if there are three versions of the same report and a new version is to be created of that report, then default share privileges can be applied to that report.
- The user can select other users who can share the report from the list of available users or search them in the search user bar.
- In a similar manner, the user can apply privileges to different user roles as follows:-
- Just as in case of users, the user can assign default share privileges to different user roles or can select the roles from the Available list of roles.
- The user can also search for roles in the Search Role bar.

- Visibility is used to mention who all can view the report and is of following three types:-
 1. **Private:-** It means only the current user / actual owner can view the file.
 2. **Internal:-** It means all the users within the organization can view the file.
 3. **Public:-** It means anyone can view the file.
- The user can select the visibility from the dropdown menu as shown above.
- In case of any further help, the user can click on the  icon to access the AIV help documents.
- Finally, in order to upload the report, click on the upload button.
- If the user is not satisfied and wants to cancel the upload request, he can do this by clicking on the cancel button next to upload or by clicking on  button next to the  icon.

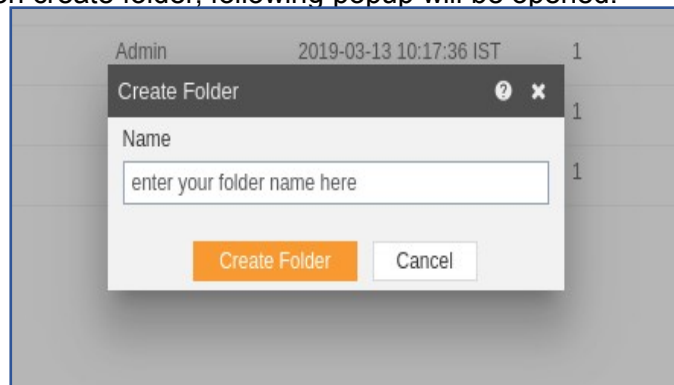
Create Folder

- There are two ways in which a user can create a new folder in the AIV application.
 1. By clicking on the create icon  next to the upload icon at the bottommost toolbar.
 2. By right clicking on any existing file or folder on the reports page as follows:-





3. On clicking on create folder, following popup will be opened:-



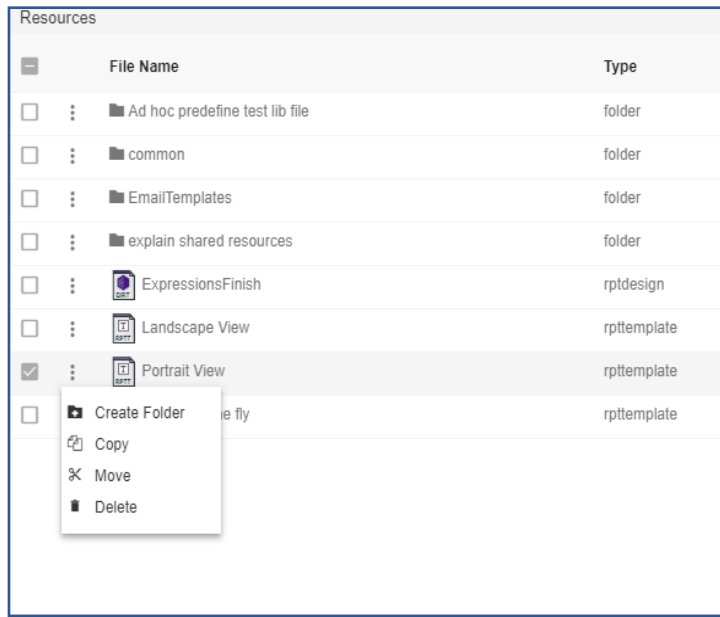
4. In case of any further help, the user can click on the icon to access the AIV help documents.
5. Enter the name you want to give to your folder in the text area and click on create folder.
6. If the user is not satisfied and wants to cancel the create request, he can do this by clicking on the cancel button next to upload or by clicking on button next to the icon.

Open Folder

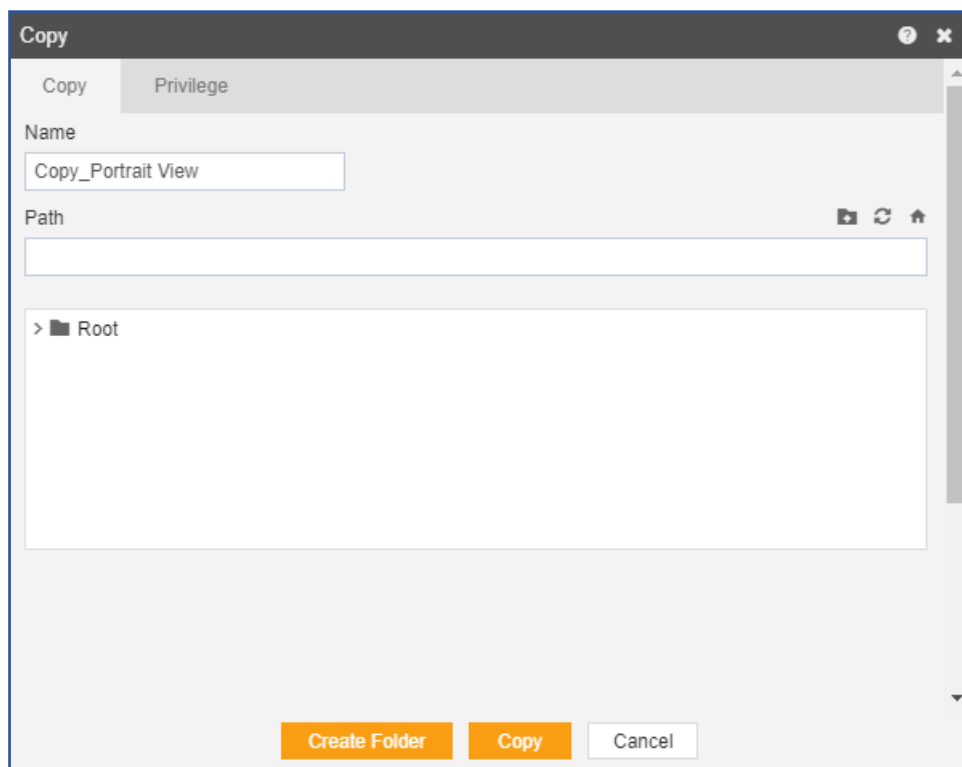
- There are two ways in which a user can open a folders in the AIV application:-
 1. On right clicking any of the existing folder, the following menu will be displayed. To open folder, click on Open Folder.
 2. By double-clicking the folder which you desire to open.

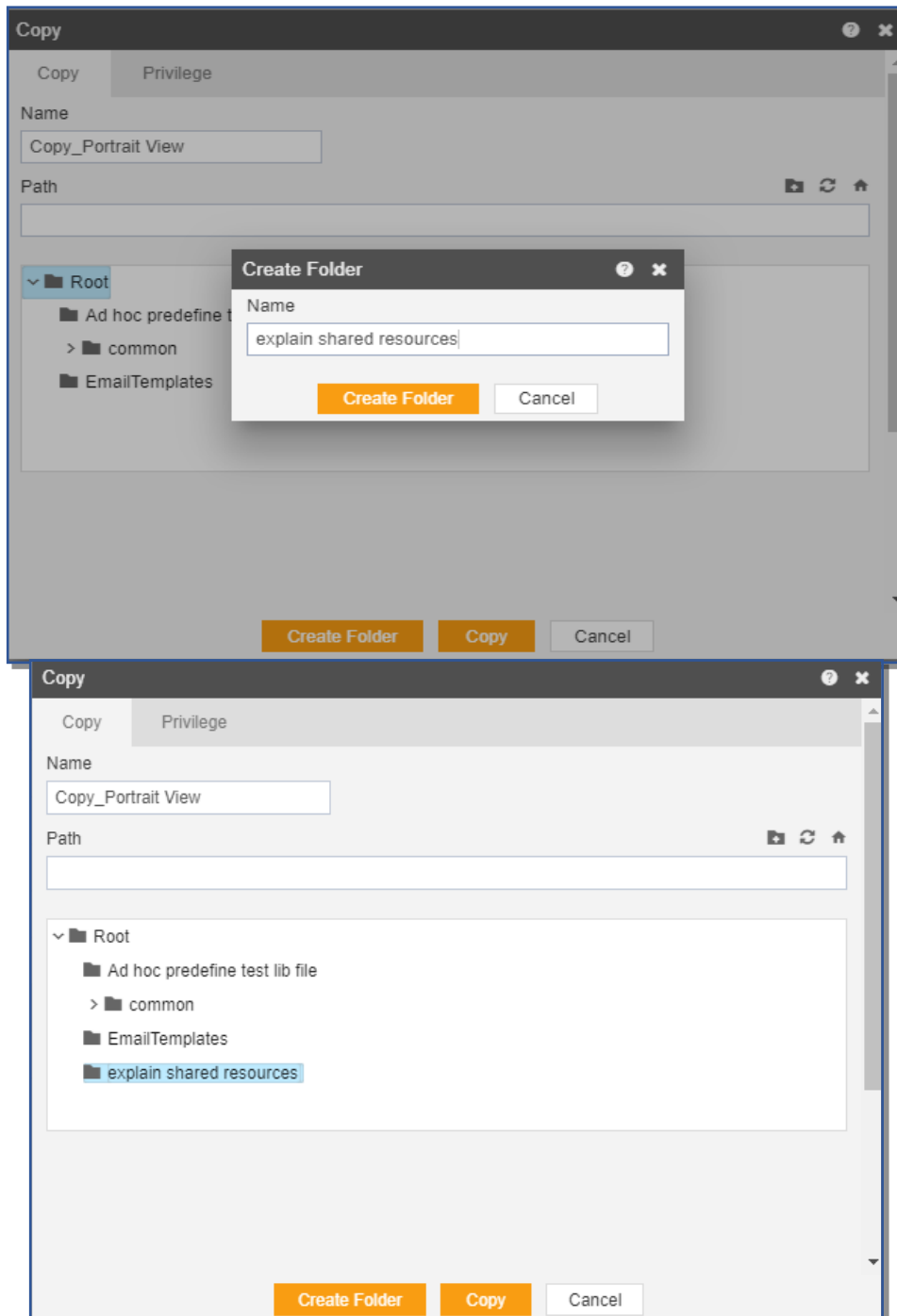
Copy

- There are two ways in which a user can copy a design in the AIV application:-
 1. By clicking on the copy icon located at the bottom most toolbar.
 2. By right clicking the report you want to copy. We will use the **Portrait View** design in this tutorial for the purpose of understanding.



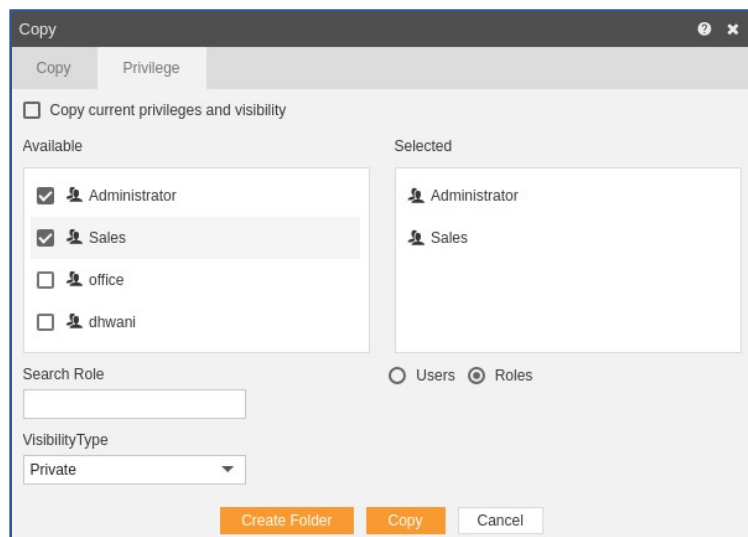
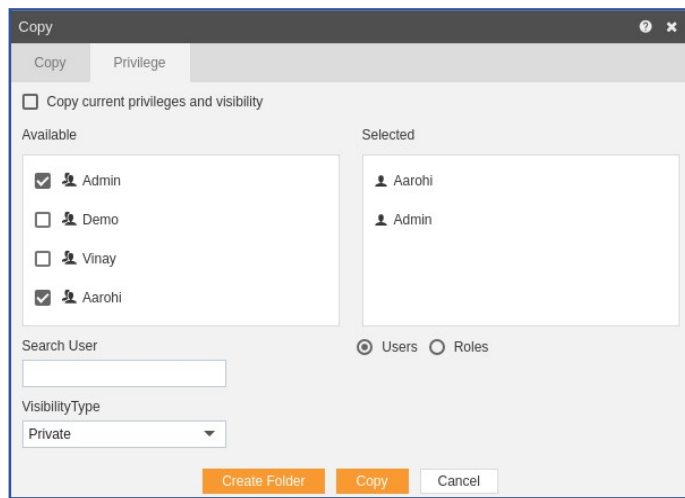
- Now perform the following steps in order to copy the design Portrait View:-
 1. Click on Copy using one of the methods mentioned above which will open the following popup.








2. The default name will be Copy_Portrait View. You can provide your own name while copying a design.
3. In order to provide copy destination, you can select any of the folders present in the popup or can create a new folder by selecting the folder where new folder must be created and clicking on Create Folder as follows:-
4. Here we have created a folder named explain shared resources within root where we will copy our Portrait View report.
5. Select explain shared resources from the list shown below:-
6. In order to assign privileges to the design, click on the privileges tab next to the copy tab. By default, Copy current privileges and visibility checkbox will be checked which will retain the same privileges and visibility of the original design in the copied version.


7. If you want to assign privileges, uncheck **Copy current privileges and visibility** checkbox.
8. The user can select other users with whom the copied design will be shared from the list of available users or search them in the search user bar.

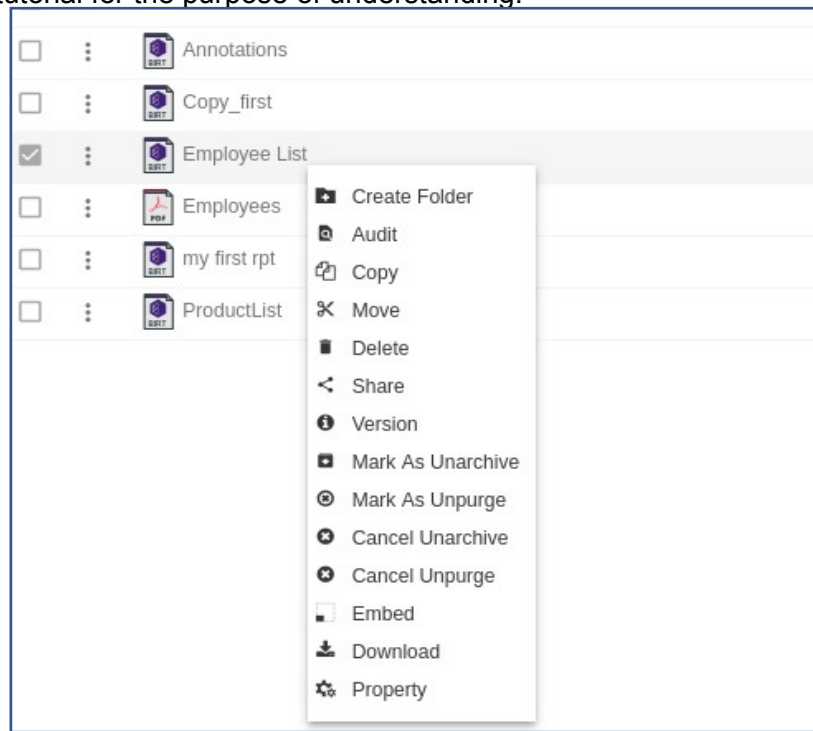


9. In a similar manner, the user can apply privileges to different user roles as follows:-
10. The user can also search for roles in the Search Role bar.
11. Visibility is used to mention who all can view the report and is of following three types:-
 - **Private:-** It means only the current user can view the file.
 - **Internal:-** It means all the users within the organization can view the file.
 - **Public:-** It means anyone can view the file.
12. The user can select the visibility from the dropdown menu as shown above.
13. In case of any further help, the user can click on the  icon to access the AIV help documents.
14. Finally, in order to copy the design, click on the Copy button.
15. If the user is not satisfied and wants to cancel the copy request, he can do this by clicking on cancel button next to copy or by clicking on  button next to the .
16. You can see the Copy_Potrait View appears in the explain folder by opening it.

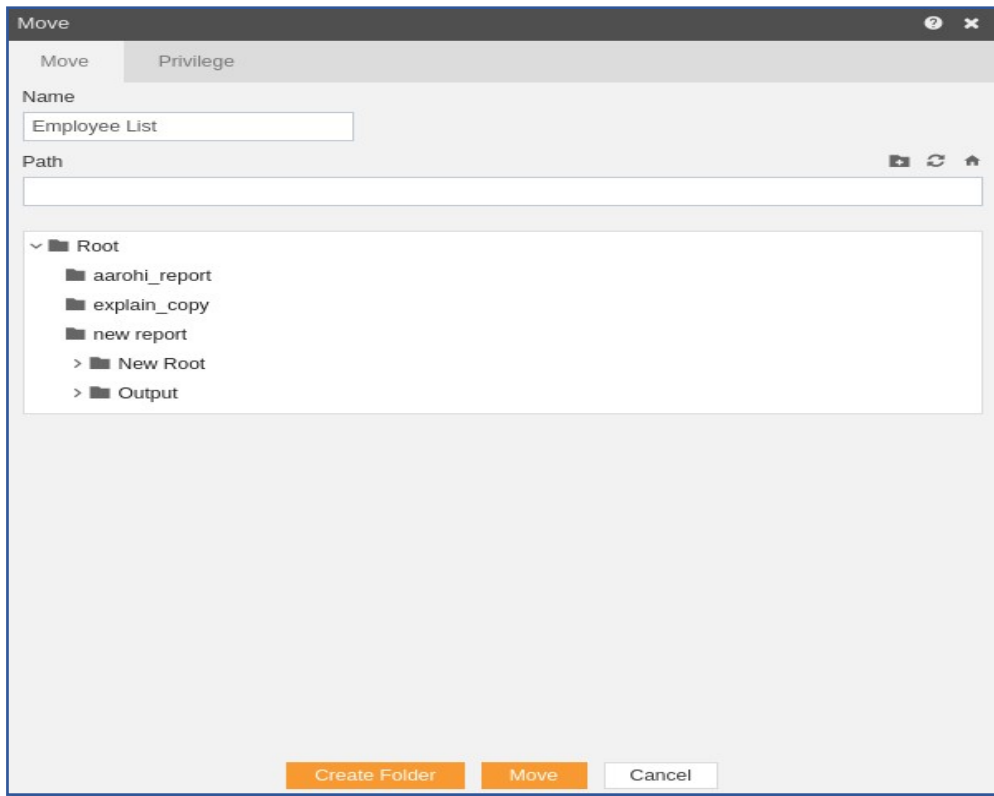
In a similar manner, you can also perform the copy operation on the folders selecting the folder you desire to copy and choosing the copy icon from the toolbar, or by right-clicking the folder and selecting the copy option from the elapses shown.

Move

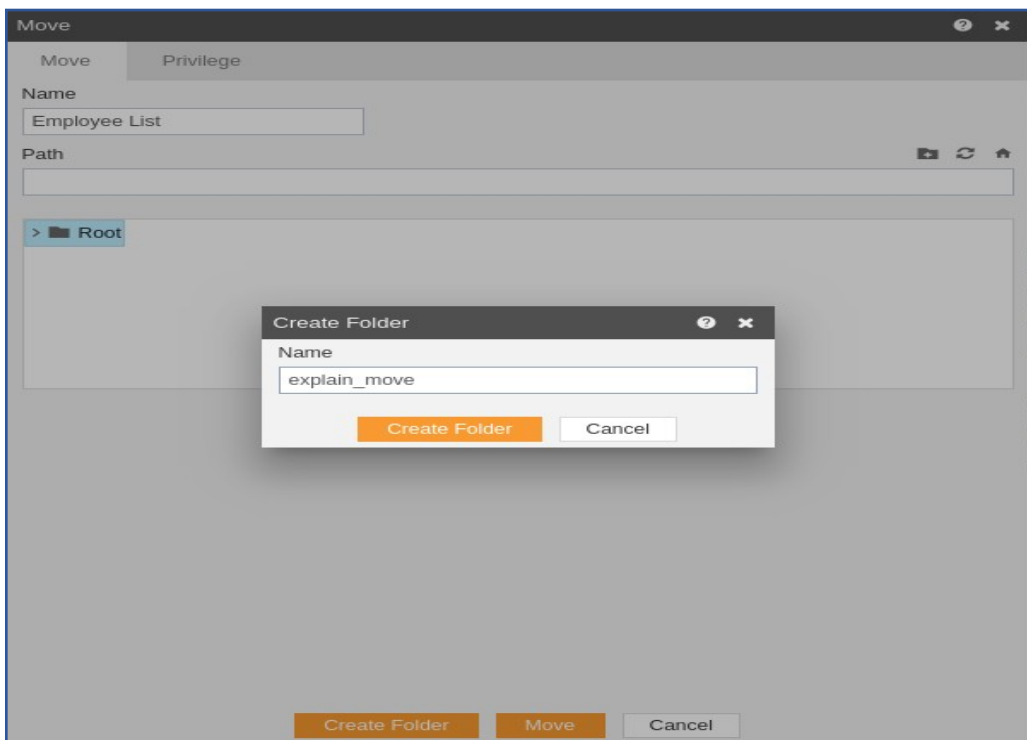
- There are two ways in which a user can move a report in the AIV application:-
 1. By clicking on the move icon  located at the bottom most toolbar.
 2. By right-clicking the report you want to move. We will use the **Employee List** report in this tutorial for the purpose of understanding.



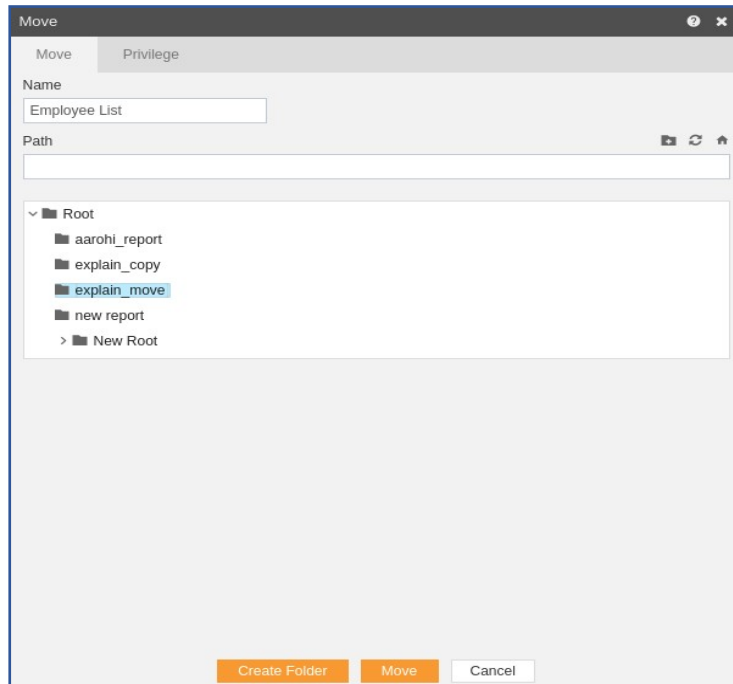
- Now perform the following steps in order to move the report Employee List:-
 1. Click on Move using one of the methods mentioned above which will open the following popup.



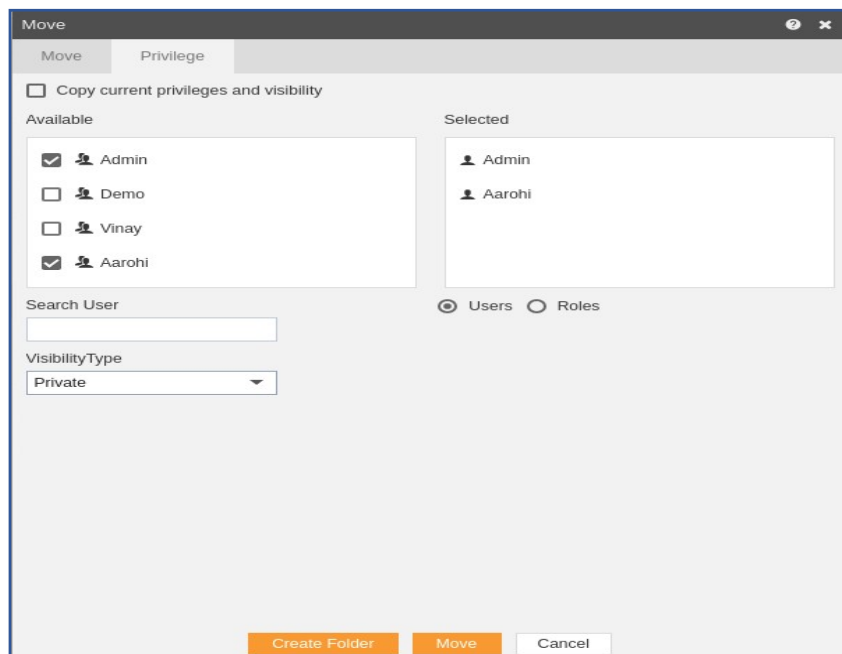
2. The default name will be Employee List. You can provide your own name while moving a report.
3. In order to provide move destination, you can select any of the folders present in the popup or can create a new folder by selecting the folder where new folder must be created and clicking on Create Folder as follows:-



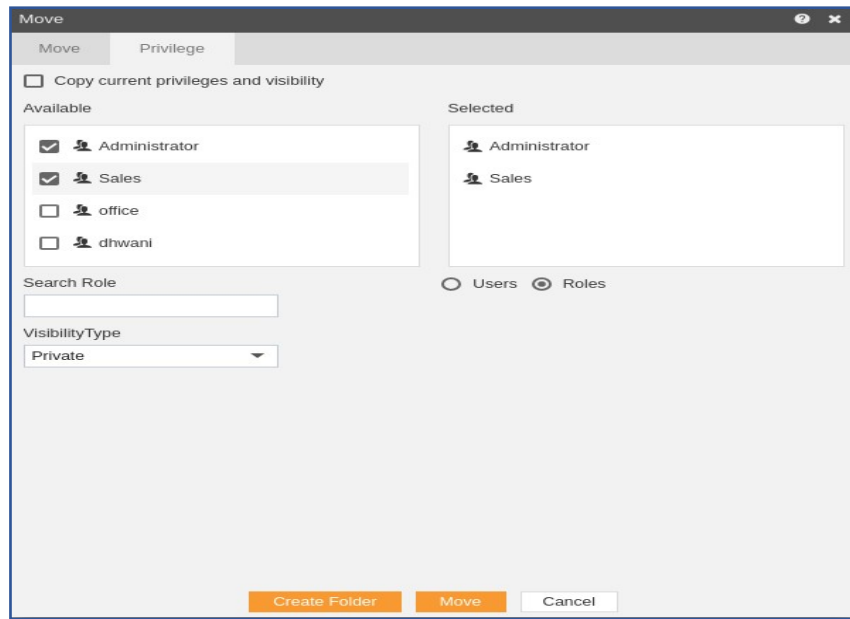
4. Here we have created a folder named explain_move within root where we will move our Employee List report.
5. Select explain_move from the list shown below:-






6. In order to assign privileges to the report, click on the privileges tab next to the move tab. By default, Copy current privileges and visibility checkbox will be checked which will retain the same privileges and visibility of the original report in the moved version.
7. If you want to assign privileges, uncheck Copy current privileges and visibility checkbox.
8. The user can select other users with whom the moved report will shared from the list of available users or search them in the search user bar.




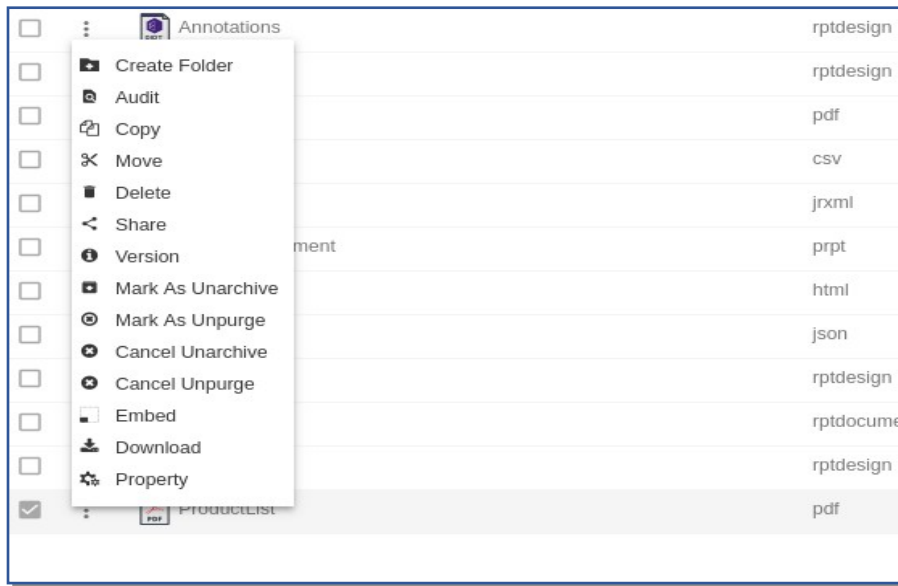
9. In the similar manner, user can apply privileges to different user roles as follows:-



10. The user can also search for roles in the Search Role bar.
11. Visibility is used to mention who all can view the report and is of following three types:-
 - **Private:-** It means only the current user can view the file.
 - **Internal:-** It means all the users within the organization can view the file.
 - **Public:-** It means anyone can view the file.
12. The user can select the visibility from the dropdown menu as shown above.
13. In case of any further help, the user can click on the  icon to access the AIV help documents.
14. Finally, in order to move the report, click on the Move button.
15. If the user is not satisfied and wants to cancel the move request, he can do this by clicking on the cancel button next to move or by clicking on  button next to the .
16. As the report is moved, it will be removed from the Reports page and will be added to the explain_moved folder
 - In a similar manner, you can also perform the move operation on the folders selecting the folder you desire to move and choosing the move icon from the toolbar, or by right-clicking the folder and selecting the move option from the elapses shown


Delete

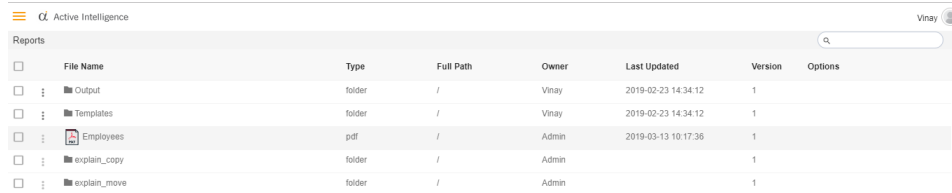
- There are two ways in which a user can delete a report in the AIV application:-
 1. By clicking on the delete icon  located at the bottom most toolbar.
 2. By right-clicking the report you want to delete. We will use **ProductList.pdf** report in this tutorial for the purpose of understanding.



- Finally, press on delete after selecting the report using any one of the above-mentioned methods.
- The report will be deleted and a message will be displayed report deleted successfully.
- In a similar manner, you can also perform the delete operation on the folders selecting the folder you desire to move and choosing the move icon from the toolbar, or by right-clicking the folder and selecting the move option from the elapses shown.

Share

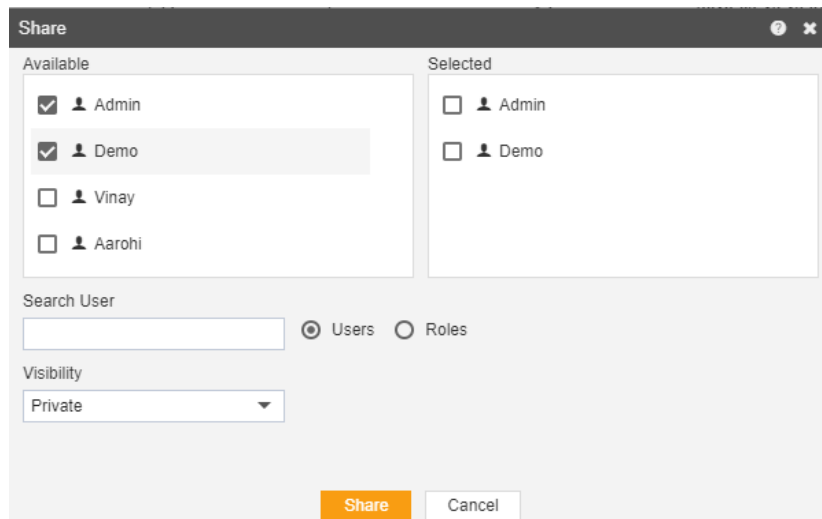
- There are two ways in which a user can share a report in the AIV application:-
 1. By clicking on the share icon  located at the bottom most toolbar.
 2. By right-clicking the report you want to share. We will use **Employees.pdf** report in this tutorial for the purpose of understanding.



| | File Name | Type | Full Path | Owner | Last Updated | Version | Options |
|--------------------------|--------------|--------|-----------|-------|---------------------|---------|---------|
| <input type="checkbox"/> | Output | folder | / | Vinay | 2019-02-23 14:34:12 | 1 | |
| <input type="checkbox"/> | Templates | folder | / | Vinay | 2019-02-23 14:34:12 | 1 | |
| <input type="checkbox"/> | Employees | pdf | / | Admin | 2019-03-13 10:17:36 | 1 | |
| <input type="checkbox"/> | explain_copy | folder | / | Admin | | 1 | |
| <input type="checkbox"/> | explain_move | folder | / | Admin | | 1 | |



- a. Now perform the following steps in order to share the report Employee List:
- b. Click on Share using one of the methods mentioned above which will open the following popup.



Share

Available

- Admin
- Demo
- Vinay
- Aarohi

Selected

- Admin
- Demo

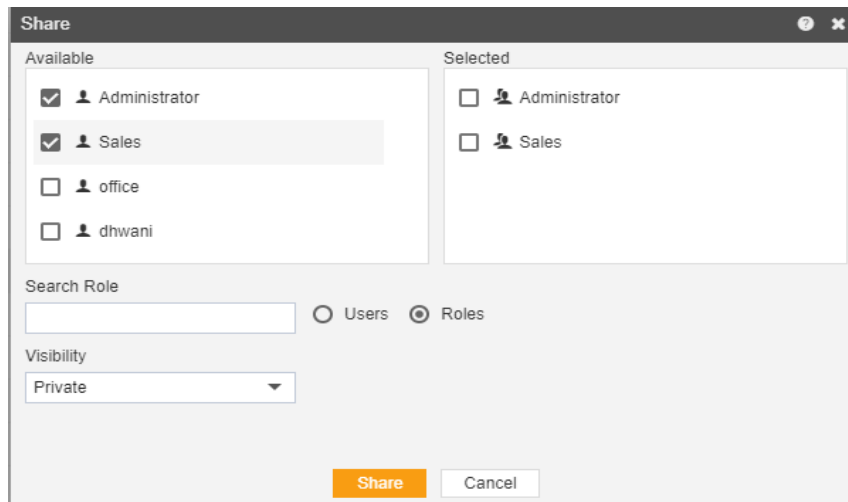
Search User




Users Roles

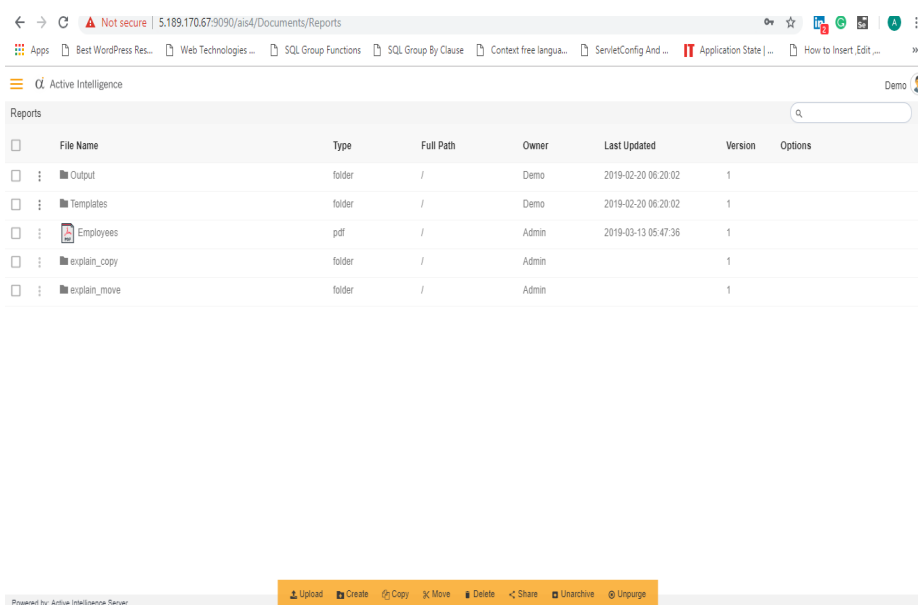
Visibility

Private

3. The user can select other users with whom the report will be shared from the list of available users or search them in the search user bar.
4. In a similar manner, user can select different user roles with whom the report will be shared as follows:-



5. The user can also search for the roles in the Search Role bar.
6. Visibility is used to mention who all can view the report and is of following three types:-
 - **Private**:- It means only the current user can view the file.
 - **Internal**:- It means all the users within the organization can view the file.
 - **Public**:- It means anyone can view the file.
7. The user can select the visibility from the dropdown menu as shown above. Select Internal visibility for our reference.
8. In case of any further help, the user can click on the  icon to access the AIV help documents.
9. Finally, in order to move the report, click on the Move button.
10. If the user is not satisfied and wants to cancel the share request, he can do this by clicking on cancel button next to share or by clicking on  button next to the  icon.
11. As the report is shared with user named Demo, the report will be visible in the Reports section when login is performed with the credentials of user Demo as follows:-



- In a similar manner, you can also perform the share operation on the folders selecting the folder you desire to share and choosing the share icon from the toolbar, or by right-clicking the folder and selecting the share option from the elapses shown.

Schedule Reports

The schedule Reports option is used to run your reports. (Mention the format of the report that can be scheduled). There are two methods to schedule the reports:-

Time schedule:- This includes three methods to schedule events.

Right now:- If you want to see the output of the report at the current moment.

Once:- The report will run once at the specific time on the day mentioned by the user.

Recurring:- If you want to run your report multiple times within an hour, day, week, month or year.

Event Schedule:- When the user wants to schedule their event, after some event is fired, then this type of scheduling comes into the picture.

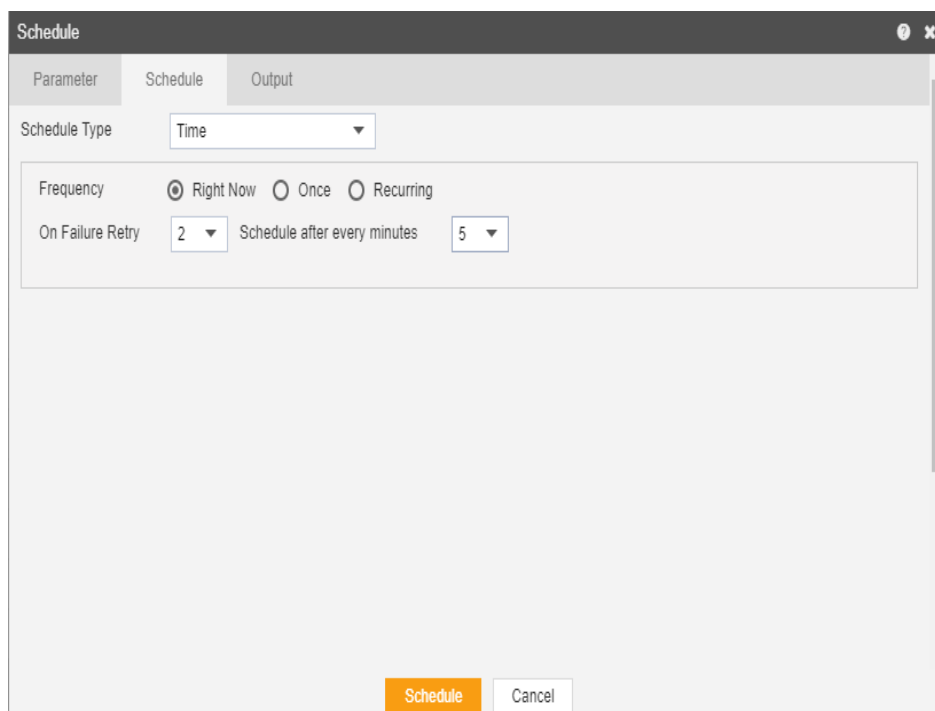
Let us understand each of them in detail now:-

Time Scheduling

- The reports can be scheduled at different moments of time based on the requirement of the user.

Right now

- In order to schedule the report at the present moment following steps should be followed:-
- We will be using **Employees.rptdesign** in the report section for the purpose of understanding.
- Double click on the report which will open the following dialog box:-



- Go to the schedule tab as shown in the figure above. By default, Schedule Type will be **Time** which can be changed to **Event** from the drop down menu.
- By default **Right Now** will be selected as the output frequency.
- You can also specify how many times the report should re-execute in case of failure and the interval from the drop down menu shown in the figure. For instance, in our case the report will be executed twice in case of failure within duration of 5 minutes.
- In order to specify the output, go to the output tab as follows:-

The screenshot shows the 'Schedule' dialog box with the 'Output' tab selected. The 'Name' field is 'Employees', 'Suffix' is 'None', 'Format' is 'pdf', and 'Path' is '/Output/Temp/'. The 'Delivery Path' checkbox is unchecked, 'Email' is unchecked, and 'Replace Default' is checked. 'Event on Success' and 'Event on Fail' are both set to 'None'. Buttons for 'Schedule' and 'Cancel' are at the bottom.

- Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.
- Select the format in which you want to generate the output from the dropdown menu. We have selected pdf for our example.
- You can also specify event on success/failure of the report which will trigger an event and execute all the waiting for event reports. We will discuss about this in detail in the event scheduling.
- You can also specify the delivery path on your computer where the reports will be downloaded as follows.

The screenshot shows the 'Schedule' dialog box with the 'Output' tab selected. The 'Name' field is 'Employees', 'Suffix' is 'None', 'Format' is 'rptdocument', and 'Path' is '/Output/Temp/'. The 'Delivery Path' checkbox is checked with the path '\C:\Users\Downloads', 'Email' is unchecked, and 'Replace Default' is checked. 'Event on Success' and 'Event on Fail' are both empty. Buttons for 'Schedule', 'Save as QuickRun', and 'Cancel' are at the bottom.

| Request | | Schedule | | | | | Waiting For Event | Running | Completed |
|-----------------|---------------------|---|-------------------------|-------------------------|-------------------------|---------------|-------------------|---------|-----------|
| 2019-03-19 | 2019-03-19 | Employees | | | | | | | |
| Report Name | Last Run | ID | Status | Start Date | End Date | Request Owner | Report Owner | | |
| Employees | 2019-03-19 04:19:04 | 753 | Failed | 2019-03-19 04:17:08 IST | 2019-03-19 04:17:11 IST | Admin | Admin | | |
| | | 754 | Completed | 2019-03-19 04:18:25 IST | 2019-03-19 04:18:25 IST | Admin | Admin | | |
| | | 755 | Completed | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:07 IST | Admin | Admin | | |
| | | <input type="button" value="Cancel"/> <input type="button" value="Retry"/> <input type="button" value="Clone"/> <input type="button" value="Delete"/> | | | | | | | |
| Task Type | Status | Task Details | Start Time | End Time | Option | | | | |
| REPORTEXECUTION | Completed | Report Executed | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:04 IST | | | | | |
| MAIL | Completed | Mail Sent | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:07 IST | i | | | | |

Once

- In order to schedule the report once during an hour, day, week, month or year following steps should be followed:-
- We will be using **Employees.rptdesign** in report section for the purpose of understanding.
- Double click on the report which will open the following dialog box:-

Schedule

Parameter | Schedule | Output

Schedule Type: Time

Frequency: Right Now Once Recurring

Start Time:

On Failure Retry: Schedule after every minutes

Report output owner: Admin Share

Available

- Admin
- Demo
- Vinay
- Aarohi

Selected

- Aarohi

Search User: Users Roles

Visibility: Internal

Approval Required

Send Reminder: After Days

Approved By: USER With Name: Admin

•

- Go to the schedule tab as shown in the figure above. By default Time will be selected, else select schedule type time from the drop down menu.
- Choose Once in the Frequency.
- You can also specify how many times the report should re-execute in case of failure and after how much duration from the drop down menu shown in the figure. For instance, in our case the report will be executed once in case of failure within duration of 5 minutes.
- Click on Share in case you want to share the report with other users.
 - Similarly, you can share the report with different user roles as follows:-

The screenshot shows the 'Schedule' configuration window with the following details:

- Tab:** Schedule
- Schedule Type:** Time
- Frequency:** Once (selected)
- Start Time:** 2019-03-20 11:22:25
- On Failure Retry:** 1
- Schedule after every minutes:** 5
- Report output owner:** Admin
- Share:**
- Available Roles:**
 - Administrator
 - Sales
 - office
 - dhwani
- Selected Roles:**
 - Aarohi
 - Administrator
 - Sales
- Search Role:** (Users/Roles selected)
- Visibility:** Internal
- Approval Required:**
- Send Reminder:** 1
- After Days:** 1
- Approved By:** USER
- With Name:** Admin
- Buttons:** Schedule, Save as QuickRun, Cancel

- Here the Visibility is kept Internal for this example.
- If you want you report to be approved before sending to other users, then check Approval Require.
- Send Reminder specifies how many reminder should be sent.
- After days specifies after how many days should the Reminder be sent again.
- Approved by specifies the user name, which is Admin in our case.
- In order to specify the output, go to the output tab as follows:-
 -

Schedule

Parameter Schedule Output

Name: Suffix:

Format:

Path:

Delivery Path Replace Default

Email

Event on Success: Event on Fail:

- Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.
- Select the format in which you want to generate the output from the dropdown menu. We have selected pdf for our example.
- You can also specify event on success/failure of the report which will trigger an event and execute all the waiting for event reports. We will discuss about this in detail in the event schedule.
- You can also specify the delivery path on your computer where the reports will be downloaded as follows.

Schedule

Parameter Schedule Output

Name: Suffix:

Format:





Path:

Delivery Path Replace Default

Email

Event on Success: Event on Fail:

-
- The user can also send the report as email to the other users using following steps:-

- Select the users and the roles from the drop down menu.
- Enter your email address/addresses to which you want to send the report via email.
- Select a template from the dropdown, we have selected the Default template for our example.
- Click on Schedule  icon in order to schedule the report.
- In case of any further help, the user can click on the  icon to access the AIV help documents.
- If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on  button next to the  icon.

The report is scheduled and output is displayed in pdf format in the new tab. The user can see the schedule request in the Request section of AIV application. This section displays all the reports that have completed, running, waiting for event or scheduled. In case of report failure, an error is also displayed on this page.

Request

Schedule Waiting For Event Running Completed

| Report Name | Last Run |
|-------------|---------------------|
| Employees | 2019-03-19 04:19:04 |

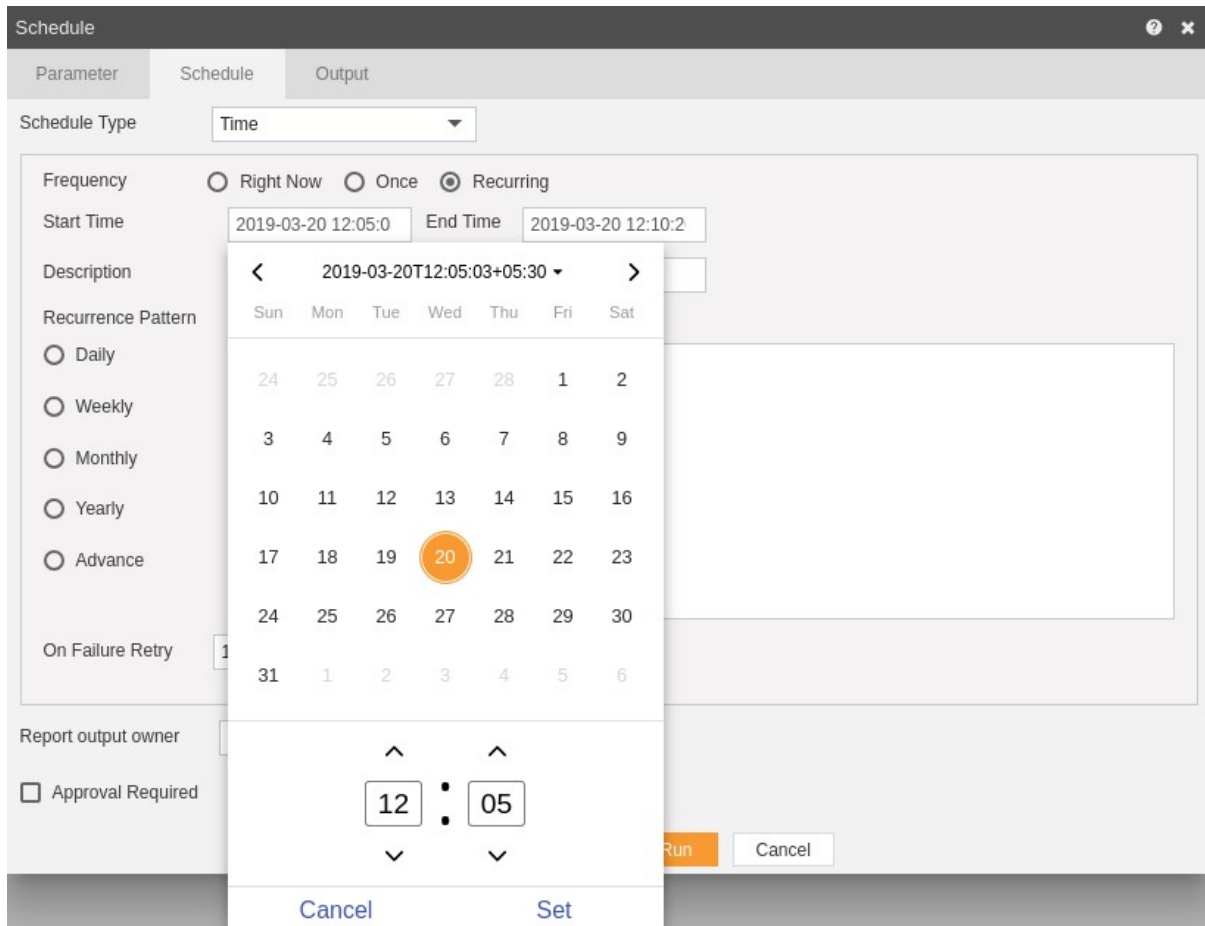
| ID | Status | Start Date | End Date | Request Owner | Report Owner |
|---|-----------|-------------------------|-------------------------|---------------|--------------|
| <input type="checkbox"/> 753 | Failed | 2019-03-19 04:17:08 IST | 2019-03-19 04:17:11 IST | Admin | Admin |
| <input type="checkbox"/> 754 | Completed | 2019-03-19 04:18:25 IST | 2019-03-19 04:18:25 IST | Admin | Admin |
| <input checked="" type="checkbox"/> 755 | Completed | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:07 IST | Admin | Admin |

Cancel Retry Clone Delete

| Task Type | Status | Task Details | Start Time | End Time | Option |
|--|-----------|-----------------|-------------------------|-------------------------|-------------------|
| <input type="checkbox"/> REPORTEXECUTION | Completed | Report Executed | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:04 IST | |
| <input type="checkbox"/> MAIL | Completed | Mail Sent | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:07 IST | i |

Recurring

- In order to schedule the report in a recurring pattern during a hour, day, week, month or year following steps should be followed:-
- We will be using **Employees.rptdesign** in the report section for the purpose of understanding.
- Double click on the report which will open the following dialog box:-



- Go to the schedule tab as shown in the figure above. By default, Time will be selected, else select schedule type time from the drop-down menu.
- Choose Recurring in the Frequency.
- Mention the Start time and End Time by setting the time as shown in the figure depicted above.
- You can provide an optional description for your reference.

The screenshot shows the 'Schedule' dialog box with the following configuration:

- Schedule Type:** Time
- Frequency:** Recurring (selected)
- Start Time:** 2019-03-20 12:05:0
- End Time:** 2019-03-20 12:10:2
- Description:** (empty)
- Recurrence Pattern:**
 - Daily:** (selected)
 - Every:** (selected) 1 Days
 - Every Weekday:** (unselected)
 - Schedule Time:** 12:08:40
 - Pattern:** 0 8 12 1/1 * ? *
 - Weekly (unselected)
 - Monthly (unselected)
 - Yearly (unselected)
 - Advance (unselected)
- On Failure Retry:** 1
- Schedule after every minutes:** 5
- Report output owner:** Admin
- Share:** (unselected)
- Approval Required:** (unselected)

Buttons at the bottom: Schedule, Save as QuickRun, Cancel.

- Now, you have to mention recurrence pattern which can be daily, weekly, monthly, yearly or advance.
- In Daily, you can mention the report to recur after specify number of days or to schedule every weekday at specified scheduled time.
- You can specify report to run weekly on specified day/days as follows:-

The screenshot shows the 'Schedule' dialog box with the following configuration:

- Schedule Type:** Time
- Frequency:** Recurring (selected)
- Start Time:** 2019-03-20 12:05:0
- End Time:** 2019-03-20 12:10:2
- Description:** (empty)
- Recurrence Pattern:**
 - Daily:** (unselected)
 - Weekly:** (selected)
 - Monday:** (unselected)
 - Thursday:** (checked)
 - Tuesday:** (unselected)
 - Friday:** (unselected)
 - Wednesday:** (unselected)
 - Saturday:** (checked)
 - Sunday:** (unselected)
 - Schedule Time:** 12:08:40
 - Pattern:** 0 8 12 ? * THU,SAT *
 - Monthly (unselected)
 - Yearly (unselected)
 - Advance (unselected)
- On Failure Retry:** 1
- Schedule after every minutes:** 5
- Report output owner:** Admin
- Share:** (unselected)
- Approval Required:** (unselected)

Buttons at the bottom: Schedule, Save as QuickRun, Cancel.

- Here we have mentioned that the report will run on every Thursday and Saturday at the scheduled time.

The screenshot shows the 'Schedule' dialog box with the following configuration:

- Schedule Type:** Time
- Frequency:** Recurring
- Start Time:** 2019-03-20 12:05:0
- End Time:** 2019-03-20 12:10:2
- Description:** Recurring report
- Recurrence Pattern:**
 - day 1 of every 1 month(s)
 - First Monday of every 1 month(s)
- Schedule Time:** 12:08:40
- On Failure Retry:** 1
- Schedule after every minutes:** 5
- Report output owner:** Admin
- Share:**
- Approval Required:**

- In the above figure, we have mentioned that the report will run every first day each month at a scheduled time till the end time, or you can mention like First Monday of every month as mentioned above.

The screenshot shows the 'Schedule' dialog box with the following configuration:

- Schedule Type:** Time
- Frequency:** Recurring
- Start Time:** 2019-03-20 12:05:0
- End Time:** 2019-03-20 12:15:2
- Description:** Recurring report
- Recurrence Pattern:**
 - every January 1
 - First Monday of every February
- Schedule Time:** 12:08:40
- On Failure Retry:** 1
- Schedule after every minutes:** 5
- Report output owner:** Admin
- Share:**
- Approval Required:**

- You can also specify report to run every year, as mentioned above, here the report will run every year on January 1 at the scheduled time or you can select like First Monday of every February at the scheduled time till the end time.

- In the above figure we have used a recurrence pattern which will schedule a report after each minute.
- To understand in detail about expressions of this type click on which will guide you in detail about how to use these expressions.
- You can also specify how many times the report should re-execute in case of failure and after how much duration from the drop down menu shown in the figure. For instance, in our case the report will be executed once in case of failure within duration of 5 minutes.
- Click on Share in case you want to share the report with other users.
- Similarly, you can share the report with different user roles as follows:-





- Here the Visibility is kept Internal for this example.
- If you want your report to be approved before sending to other users, then check Approval Require.
- Send Reminder specifies how many reminder should be sent.
- After days specifies after how many days should the Reminder be sent again.
- Approved by specifies the user name, which is Admin in our case.
- In order to specify the output, go to the output tab as follows:-

The screenshot shows the 'Schedule' dialog box with the 'Output' tab selected. The 'Name' field is 'Employees', 'Suffix' is 'None', 'Format' is 'pdf', and 'Path' is '/Output/Temp/'. The 'Delivery Path' checkbox is unchecked, and 'Replace Default' is checked. 'Event on Success' and 'Event on Fail' are both set to 'None'. There are 'Schedule' and 'Cancel' buttons at the bottom.

- Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.
- Select the format in which you want to generate the output from the dropdown menu. We have selected pdf for our example.
- You can also specify event on success/failure of report which will trigger an event and execute all the waiting for event reports. We will discuss this in detail in the event schedule.
- You can also specify the delivery path on your computer where the reports will be downloaded as follows.

The screenshot shows the 'Schedule' dialog box with the 'Output' tab selected. The 'Name' field is 'Employees', 'Suffix' is 'None', 'Format' is 'pdf', and 'Path' is '/Output/Temp/'. The 'Delivery Path' checkbox is checked, and the path is 'C:\Users\aaorohi\Downloads'. 'Replace Default' is checked. 'Event on Success' and 'Event on Fail' are both set to 'None'. There are 'Schedule' and 'Cancel' buttons at the bottom.

- The user can also send the report as email to the other users using following steps:-

- Select the users and the roles from the drop-down menu.
- Enter your email address/addresses to which you want to send the report via email.
- Select a template from the dropdown, we have selected the Default template for our example.
- Click on Schedule  icon in order to schedule the report.
- In case of any further help, the user can click on the  icon to access the AIV help documents.
- If the user is not satisfied and wants to cancel the move request, he can do this by clicking on the cancel button next to move or by clicking on  button next to the .

The report is scheduled and output is displayed in pdf format in the new tab. The user can see the schedule request in the Request section of the AIV application. This section displays all the reports that have completed, running, waiting for an event or scheduled. In the case of report failure, an error is also displayed on this page.

Active Intelligence Admin

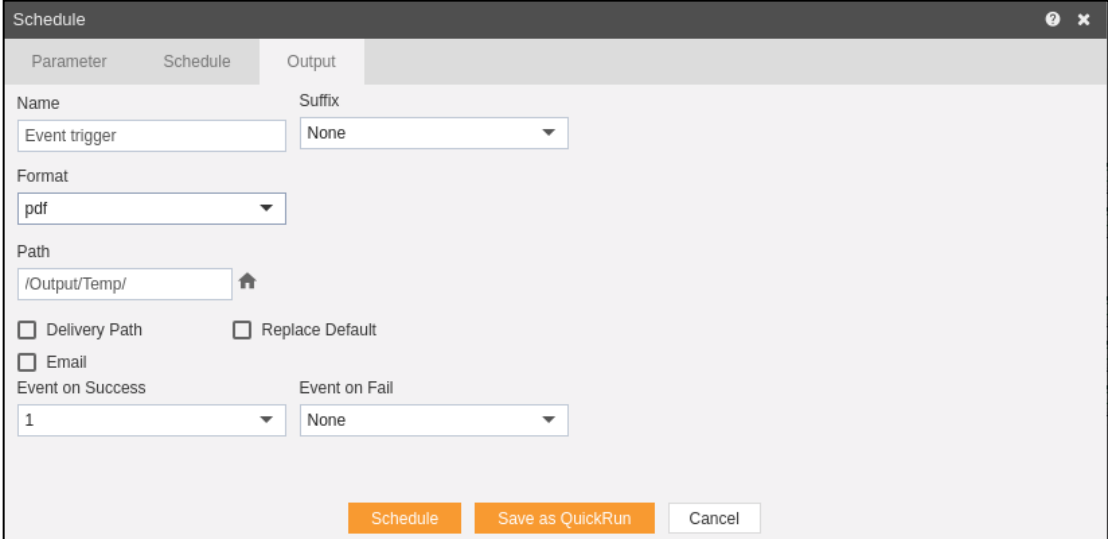
| Request | | Schedule | Waiting For Event | Running | Completed |
|-------------|---------------------|----------|-------------------|---------|-----------|
| 2019-03-19 | 2019-03-19 | | | | |
| Report Name | Last Run | | | | |
| Employees | 2019-03-19 04:19:04 | | | | |

| ID | Status | Start Date | End Date | Request Owner | Report Owner |
|-----|-----------|-------------------------|-------------------------|---------------|--------------|
| 753 | Failed | 2019-03-19 04:17:08 IST | 2019-03-19 04:17:11 IST | Admin | Admin |
| 754 | Completed | 2019-03-19 04:18:25 IST | 2019-03-19 04:18:25 IST | Admin | Admin |
| 755 | Completed | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:07 IST | Admin | Admin |

| Task Type | Status | Task Details | Start Time | End Time | Option |
|-----------------|-----------|-----------------|-------------------------|-------------------------|--------|
| REPORTEXECUTION | Completed | Report Executed | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:04 IST | |
| MAIL | Completed | Mail Sent | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:07 IST | |

Event Scheduling

- You can trigger an event with another report as follows:-



The screenshot shows a 'Schedule' dialog box with the following fields and options:

- Name:** Event trigger
- Suffix:** None
- Format:** pdf
- Path:** /Output/Temp/
- Delivery Path
- Replace Default
- Email
- Event on Success:** 1
- Event on Fail:** None

Buttons at the bottom: Schedule, Save as QuickRun, Cancel.

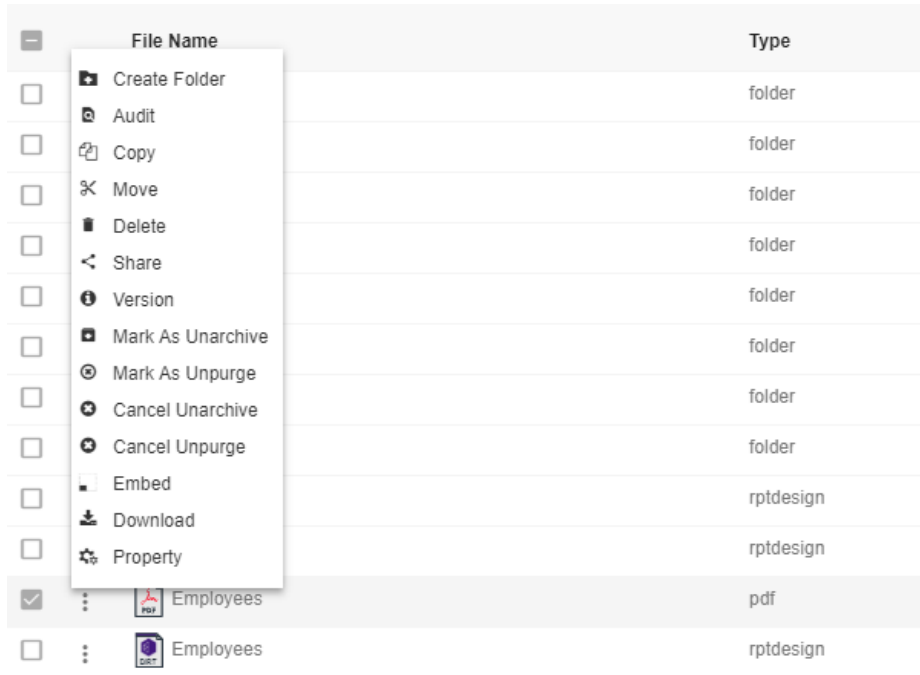
- Here we schedule a report named Event Trigger which will trigger event 1 when run successfully.
- After this event is triggered, our Employee report will be executed.

Unarchive


- The main purpose of unarchive in an AIV application is to enable the user to save some of his important files from being archived.
- Usually, each type of file is assigned to be archived after a certain number of days by the Administrator, after which the file goes to the Archive mode.
- Once a file is marked as unarchive, then it will not get deleted when the cycle for archive runs in the AIV application.
- In order to change the settings of the file to be archived/unarchived you need to contact the Administrator.

To Unarchive file and folders follow these steps:

- Select the file or folders you want to Mark as Unarchive. (Note: multiple file and folders or combination of file and folders can be selected).
- Right click and select the **Unarchive** button from the context menu or directly from the bottom menu as shown in the image below:

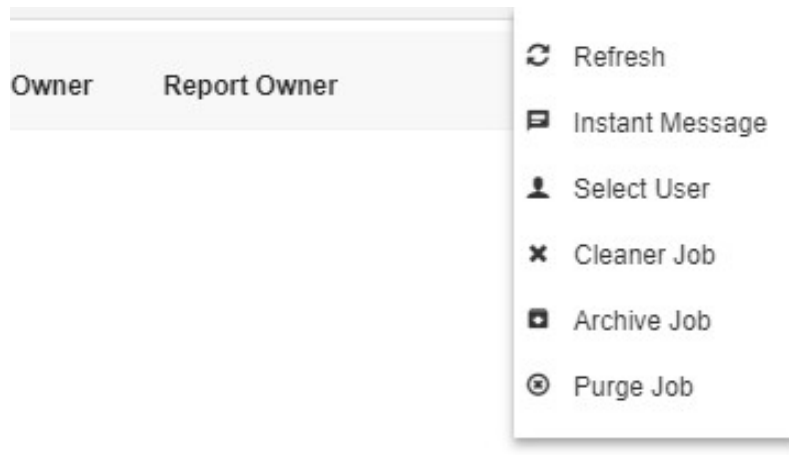


Here Employees.pdf is marked as unarchive and hence it will not get deleted when all other pdf files are archived.

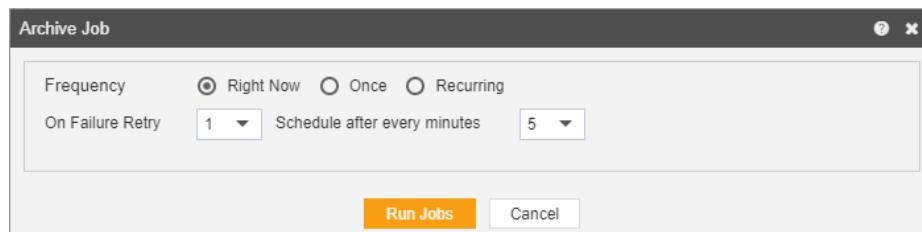
- You can check the archive status of the file by clicking on  Property as mentioned in the above figure.

| Properties | |
|---|---------------------|
| General | |
| Name | Description |
| Employees | employee data |
| Owner | VisibilityType |
| Admin | INT |
| Default Version | Created On |
| 1 | 2019-03-13 10:17:36 |
| LastUpdated By | LastUpdated On |
| Admin | 2019-03-13 10:17:36 |
| Is Archivable | Is Purgable |
| False | True |
| <input type="button" value="Submit"/> <input type="button" value="Cancel"/> | |

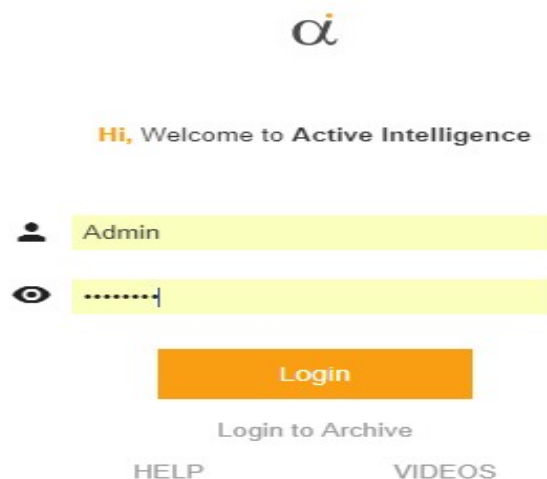
- Here “Is Archivable” property of Employees.pdf is False which means this file will not be archived when the cycle for Archive runs.
- In order to run archive jobs, go to the Requests of the Request section.



- Click on the Archive Job in order to perform the Archive which will open the following dialog box.



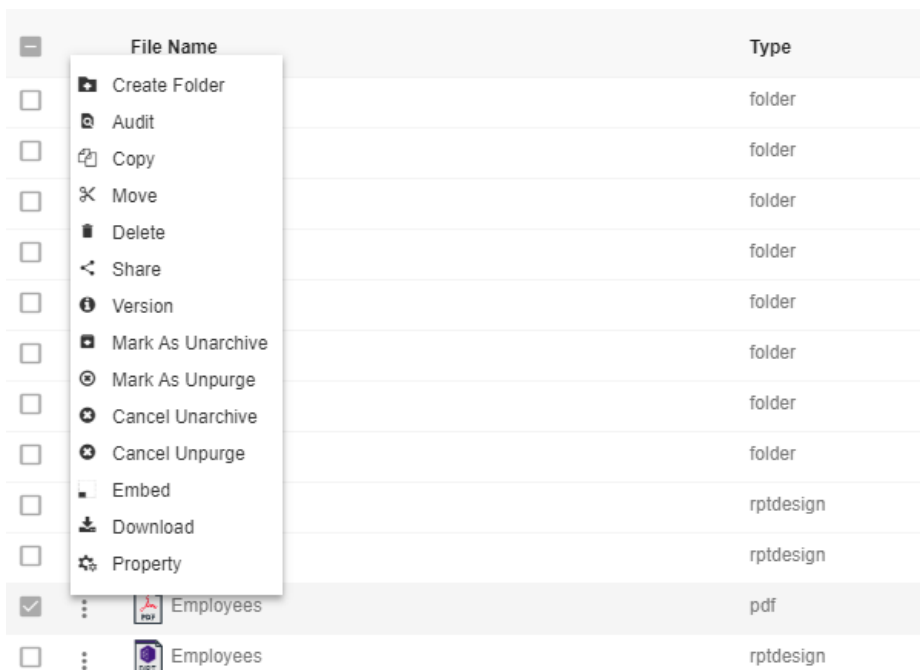
- Click on **Run Jobs** in order to run the Archive Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the archive jobs.
- The administrator user can Login to Archive mode to see the details of all the files that have been archived as follow:



- After logging in, following screen will be displayed which shows all the Reports which have been archived.

| File Name | Type | Full Path | Owner | Last Updated | Version | Options |
|---------------|--------|-----------|--------|-------------------------|---------|---------|
| aaorhi_report | folder | / | Admin | 2019-03-11 14:49:12 IST | 1 | |
| explain_copy | folder | / | Admin | 2019-03-18 16:42:08 IST | 1 | |
| explain_move | folder | / | Admin | 2019-03-18 17:49:41 IST | 1 | |
| new report | folder | / | Admin | 2019-03-12 17:12:03 IST | 1 | |
| New Root | folder | / | Admin | 2019-03-09 10:39:06 IST | 1 | |
| Output | folder | / | Admin | 2019-03-13 13:01:26 IST | 1 | |
| Templates | folder | / | Admin | 2019-02-26 18:28:56 IST | 1 | |
| last_report | folder | / | Admin | 2019-03-18 16:38:11 IST | 1 | |
| last_share | folder | / | Aarohi | 2019-03-11 19:01:31 IST | 1 | |
| ProductList | pdf | / | Admin | 2019-03-13 10:20:30 IST | 1 | |

- You can cancel the unarchive by right clicking the report and selecting cancel unarchive:



- Now check properties to see that "Is Archivable" is true:-

Properties

General

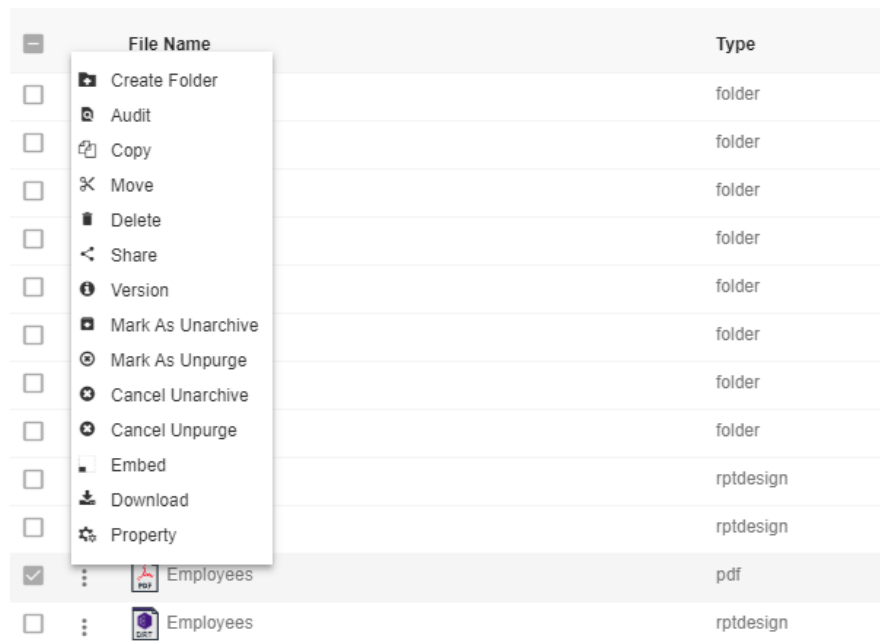
| | | | |
|-----------------|-----------|----------------|---------------------|
| Name | Employees | Description | employee data |
| Owner | Admin | VisibilityType | INT |
| Default Version | 1 | Created On | 2019-03-13 10:17:36 |
| LastUpdated By | Admin | LastUpdated On | 2019-03-13 10:17:36 |
| Is Archivable | True | Is Purgable | True |

Unpurged

- The main purpose of unpurged in an AIV application is to enable the user to save some of his important files from being deleted permanently.
- Usually, each type of file is assigned to be purged after certain number of days by the Administrator, after which the file gets deleted permanently.
- Once a file is marked as unpurged, then it will not get deleted when the cycle for purge runs in the AIV application.
- In order to change the settings of the file to be purged/unpurged you need to contact the Administrator.

To Unpurged file and folders follow these steps:

- Select the file or folders you want to Mark as Unpurged . (Note: multiple file and folders or combination of file and folders can be selected).
- Right click and select the **Unpurge** button from the context menu or directly from the bottom menu as shown in the image below:



- Here Employees.pdf is marked as unpurged and hence it will not get deleted when all other pdf files are purged.
- You can check the purge status of the file by clicking on **Property** as mentioned in the above figure.

- Here “Is Purgeable” property of Employees.pdf is False which means this file will not be archived when the cycle for Purge runs.
- In order to run purge jobs, go to the Requests in the Request section.

- Click on the Purge Job in order to perform the Purge which will open the following dialog box.

- Click on **Run Jobs** in order to run the Purge Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the purge jobs.
- The administrator user can Login to Archive mode to see the details of all the files that have been purged as follow:



Hi, Welcome to Active Intelligence



Admin



.....

Login

Login to Archive

HELP

VIDEOS

- After logging in, following screen will be displayed which shows all the Reports which have been purged.

| Reports | | | | | | | |
|--------------------------|---------------|--------|-----------|--------|-------------------------|---------|---------|
| <input type="checkbox"/> | File Name | Type | Full Path | Owner | Last Updated | Version | Options |
| <input type="checkbox"/> | aaorhi_report | folder | / | Admin | 2019-03-11 14:49:12 IST | 1 | |
| <input type="checkbox"/> | explain_copy | folder | / | Admin | 2019-03-18 16:42:08 IST | 1 | |
| <input type="checkbox"/> | explain_move | folder | / | Admin | 2019-03-18 17:49:41 IST | 1 | |
| <input type="checkbox"/> | new report | folder | / | Admin | 2019-03-12 17:12:03 IST | 1 | |
| <input type="checkbox"/> | New Root | folder | / | Admin | 2019-03-09 10:39:06 IST | 1 | |
| <input type="checkbox"/> | Output | folder | / | Admin | 2019-03-13 13:01:26 IST | 1 | |
| <input type="checkbox"/> | Templates | folder | / | Admin | 2019-02-26 18:28:56 IST | 1 | |
| <input type="checkbox"/> | test_report | folder | / | Admin | 2019-03-18 16:38:11 IST | 1 | |
| <input type="checkbox"/> | test_share | folder | / | Aarohi | 2019-03-11 19:01:31 IST | 1 | |
| <input type="checkbox"/> | ProductList | pdf | / | Admin | 2019-03-13 10:20:30 IST | 1 | |

- You can cancel the unpurged by right clicking the report and selecting cancel unpurge:

| <input type="checkbox"/> | File Name | Type |
|--------------------------|-----------|-----------|
| <input type="checkbox"/> | Employees | pdf |
| <input type="checkbox"/> | Employees | rptdesign |

- Create Folder
- Audit
- Copy
- Move
- Delete
- Share
- Version
- Mark As Unarchive
- Mark As Unpurge
- Cancel Unarchive
- Cancel Unpurge
- Embed
- Download
- Property

- Now check properties to see that “Is Purgeable” is true:-

The screenshot shows a 'Properties' dialog box with the 'General' tab selected. The following table represents the data visible in the dialog:

| | | | |
|-----------------|-----------|----------------|---------------------|
| Name | Employees | Description | employee data |
| Owner | Admin | VisibilityType | INT |
| Default Version | 1 | Created On | 2019-03-13 10:17:36 |
| LastUpdated By | Admin | LastUpdated On | 2019-03-13 10:17:36 |
| Is Archivable | True | Is Purgeable | True |

Buttons: Submit, Cancel

Audit

- Audit shows the actions like when the user created, uploaded or downloaded any particular file.
- Following image describes the audit option.

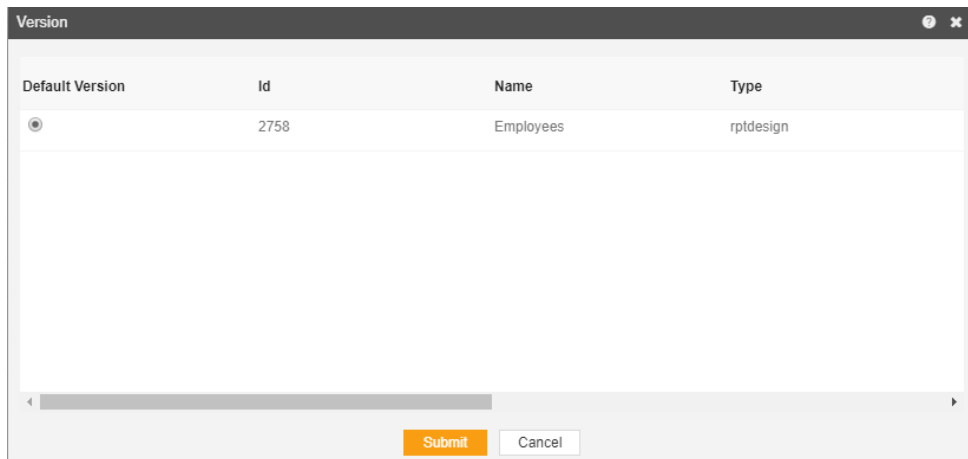
The screenshot shows an 'Audit' dialog box with a table of audit records. The table has the following columns: Resource Type, Action Type, Username, and Start Time. The records are filtered by the user 'Admin'.

| Resource Type | Action Type | Username | Start Time |
|---------------|-------------|----------|---------------------|
| FILE | SCHEDULE | Admin | 2019-03-19 04:17:08 |
| FILE | SCHEDULE | Admin | 2019-03-19 04:18:25 |
| FILE | SCHEDULE | Admin | 2019-03-19 04:19:04 |
| FILE | SCHEDULE | Admin | 2019-03-20 11:37:23 |
| FILE | SCHEDULE | Admin | 2019-03-20 11:40:22 |
| FILE | SCHEDULE | Admin | 2019-03-20 11:52:15 |

Buttons: Cancel

Version

- Version option shows the number of versions of the selected alert as well as the version which the user is using.
- Following is the image describing the number of versions of the selected report.

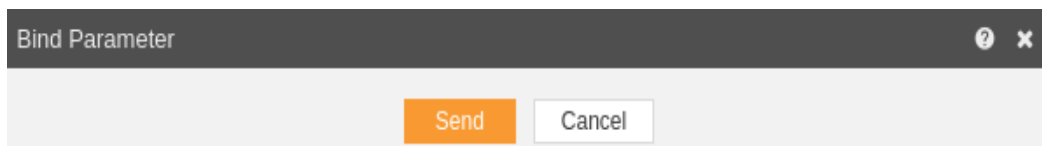


Embed

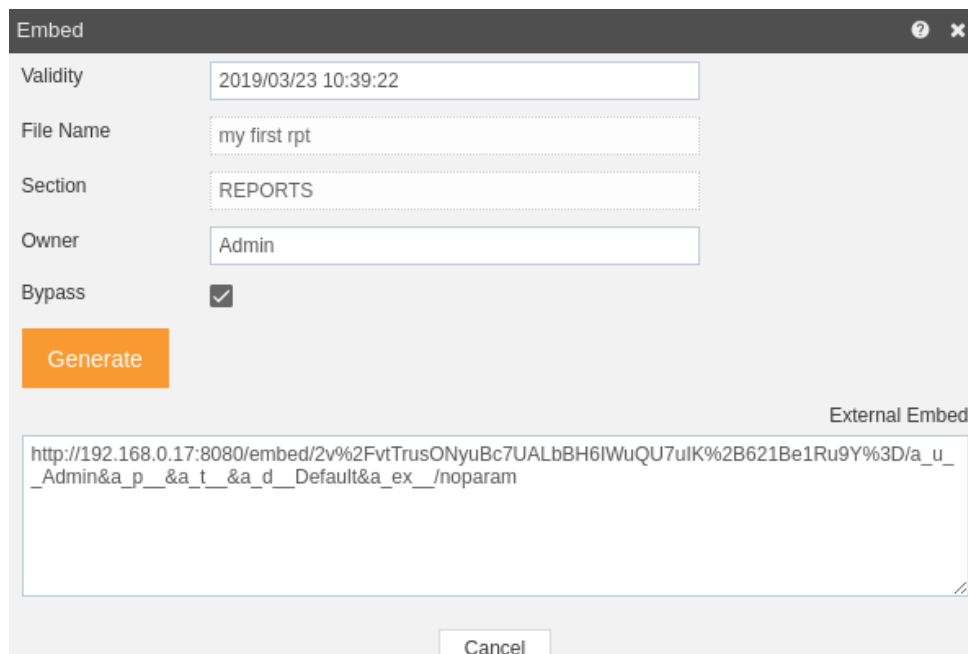
To Embed a Report, follow these steps: (Only users with Report privilege have access to this section)

1. To embed a report (select the desire Report and right click and select Embed from the context menu).

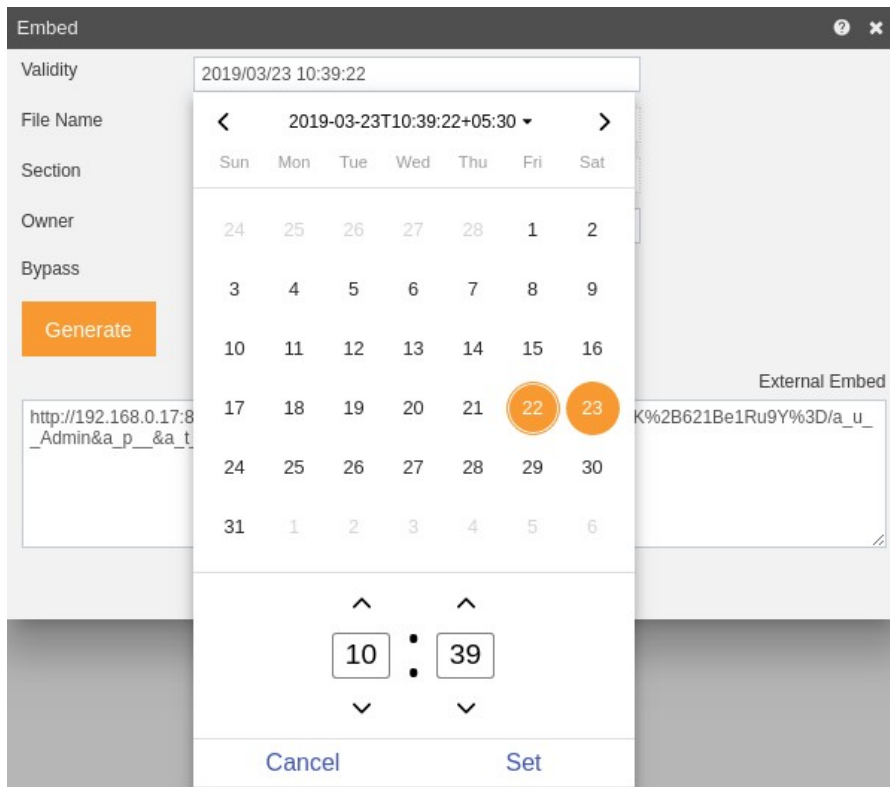
- Following dialog box will appear



- Click on Send button which will open the following dialog box.



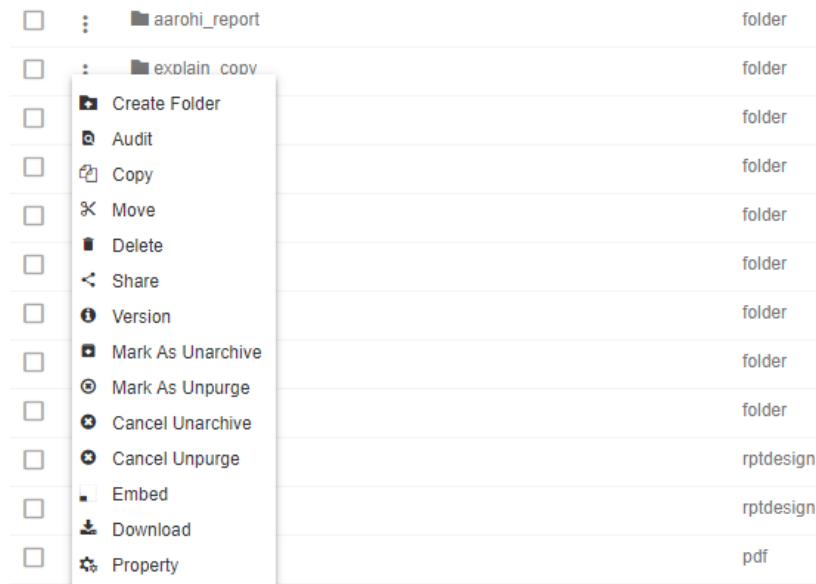
- Set the validity date as shown below:-



- Click on **Generate** to generate the embed key as shown above.
- Now copy the embed key and paste it on your browser to see the results.

Download

User can download the selected artefact by clicking download option from context menu.



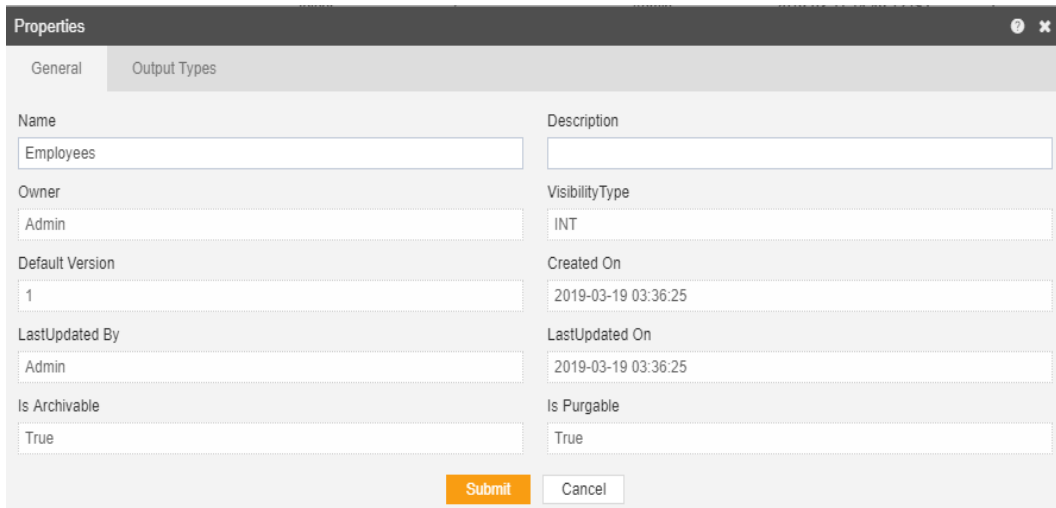
Property

- Use Properties option of the file and folders for the following:
 - To update the Name of the file and folders
 - To change the Output Types of the File (Note: only applicable to files)

- To view the file and folders Properties such as owner information, last updated by, the file created date, archive and purge options and file visibility i.e. (Private, Internal, Public) and much more.

To view the Property for the file or folder follow the steps below:


1. Select file or folder you wish to see properties for or update the information such as Name or Output Type by selecting  Properties from the context menu, following dialog box will appear as shown in the image below:



| Properties | |
|---|---------------------|
| General | |
| Name | Description |
| Employees | |
| Owner | Visibility Type |
| Admin | INT |
| Default Version | Created On |
| 1 | 2019-03-19 03:36:25 |
| LastUpdated By | LastUpdated On |
| Admin | 2019-03-19 03:36:25 |
| Is Archivable | Is Purgable |
| True | True |
| <input type="button" value="Submit"/> <input type="button" value="Cancel"/> | |


2. The Name can be updated (Note: The above image is taken from the Folder Properties, The File Properties will have additional tab for Output Type which will enable users to select/unselect the file Output visibility Type i.e. pdf, doc, HTML, etc.).
3. Finally click button to save the changes to the file Properties, if any.

Merge Reports

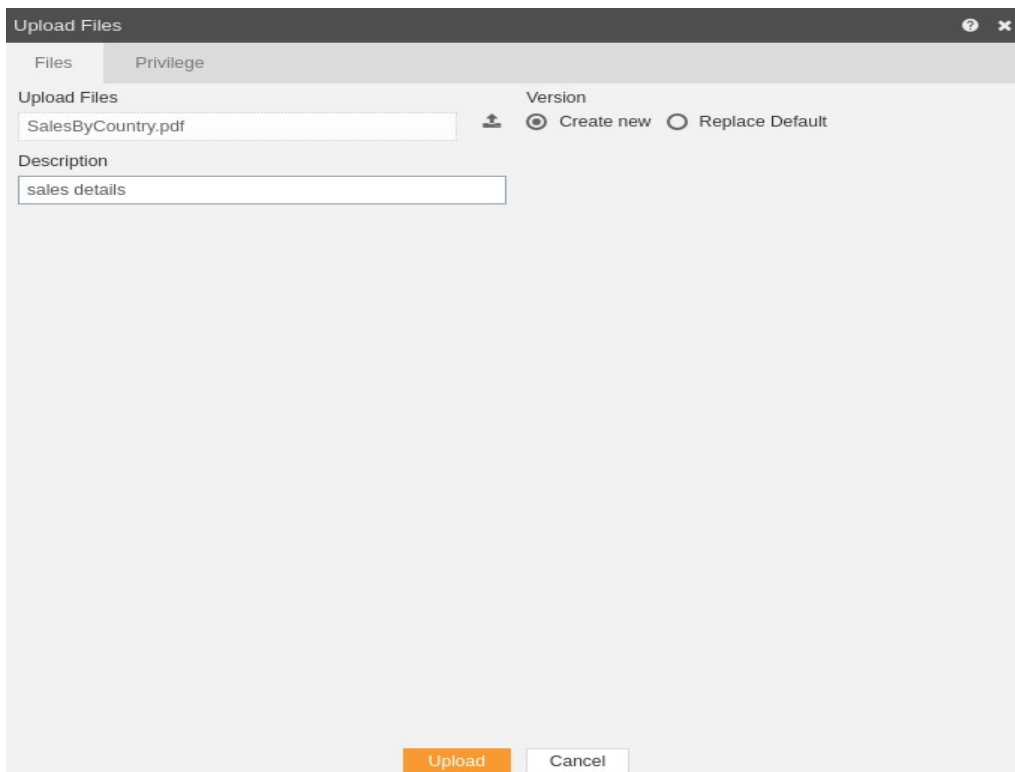
Merge Reports is the second sub-tab under the Documents tab of the AIV application. The Merge Reports section can be accessed by clicking on Merge Reports or by clicking on  next to the Merge Reports tab, which will open the Merge Reports in a new tab. The primary purpose of the Merge Reports section to perform different functionalities related to reports such as:

1. Upload Reports
2. Delete
3. Share
4. Create Merge Reports
5. Clone
6. Schedule Merge Reports
7. [Unarchive](#)
8. [Unpurged](#)
9. [Audit](#)
10. [Version](#)
11. [Embed](#)
12. [Download](#)
13. [Property](#)

Upload

The user can upload reports by clicking on the upload icon  on the toolbar located at the bottom of the reports page.

- On clicking the icon, following screen will be displayed.



Upload Files

Files Privilege

Upload Files

SalesByCountry.pdf

Version

Create new Replace Default

Description

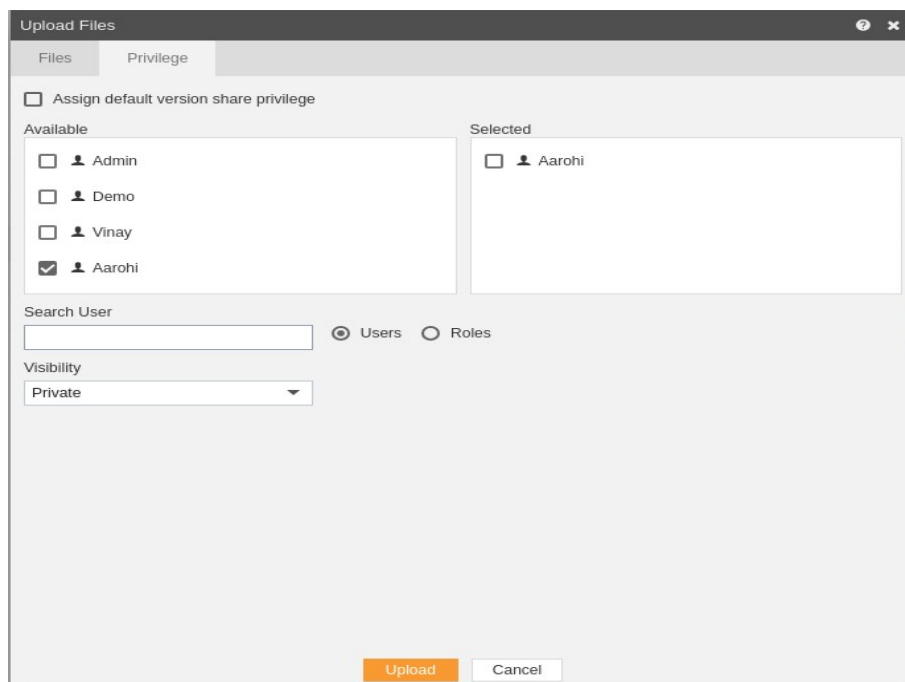
sales details

Upload Cancel

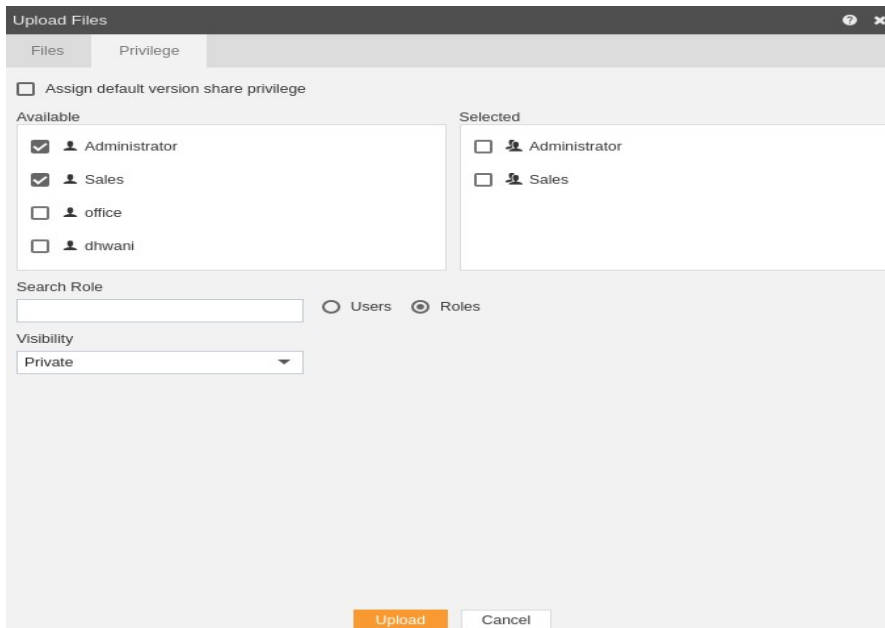
- In the Files section as shown in the figure above, select the upload icon in order to upload your documents from your computer.

If the report already exists on the AIV application, the user has an option to replace the default report or to create a new report using the version option as depicted above.




- Furthermore, the user can also provide an optional description for reference, in the description text area shown here.
- There is also an option to hide the visibility to certain users using the privileges tab as shown in the figure below:




- In case of working with any new version of the report, you can assign the default version share privileges by checking the checkbox. For instance, if there are three versions of the same report and a new version is to be created of that report, than default share privileges can be applied to that report.
- The user can select other users who can share the report from the list of available users or search them in the search user bar.
- In a similar manner, the user can apply privileges to different user roles as follows:-



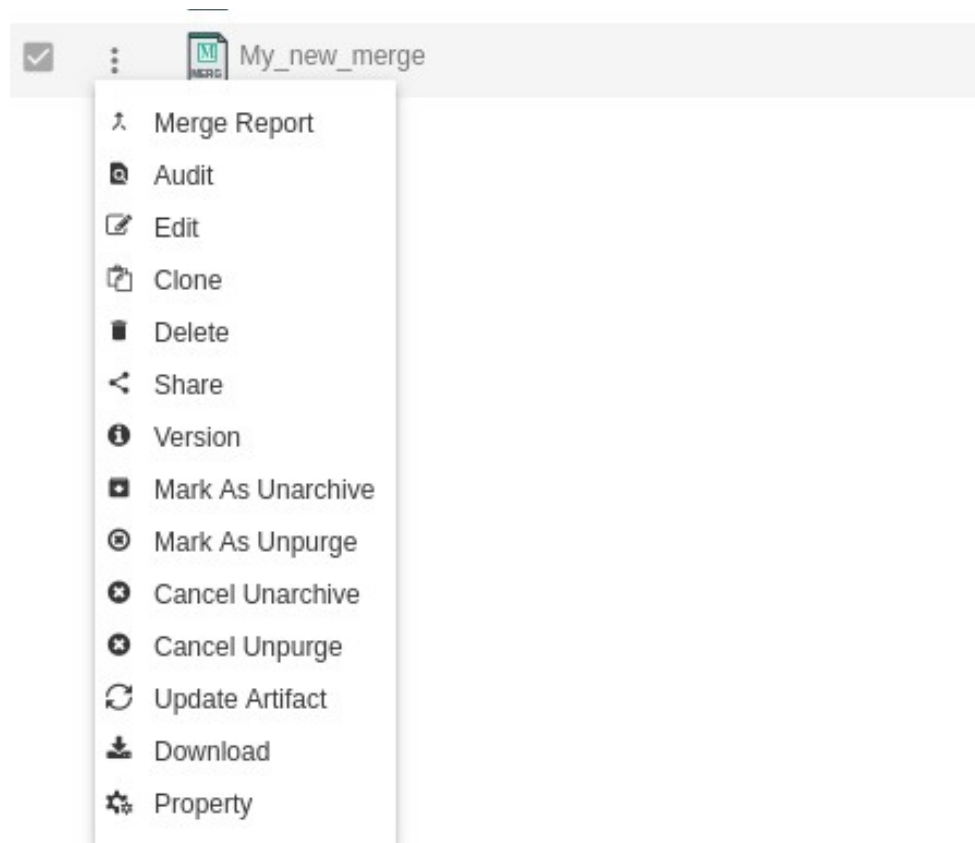
Just as in case of users, the user can assign default share privileges to different user roles or can select the roles from the Available list of roles.

- The user can also search for roles in the Search Role bar.
- Visibility is used to mention who all can view the report and is of following three types:-
 1. **Private:-** It means only the current user can view the file.
 2. **Internal:-** It means all the users within the organization can view the file.
 3. **Public:-** It means anyone can view the file.
- The user can select the visibility from the dropdown menu as shown above.
- In case of any further help, the user can click on the  icon to access the AIV help documents.
- Finally, in order to upload the report, click on the upload button.
- If the user is not satisfied and wants to cancel the upload request, he can do this by clicking on the cancel button next to upload or by clicking on  button next to the  icon.

Delete


- There are two ways in which a user can delete a merge report in the AIV application:-
 1. By clicking on the delete icon  located at the bottom most toolbar.

By right-clicking the report you want to delete. We will use **My_new_merge** report in this tutorial for the purpose of understanding.

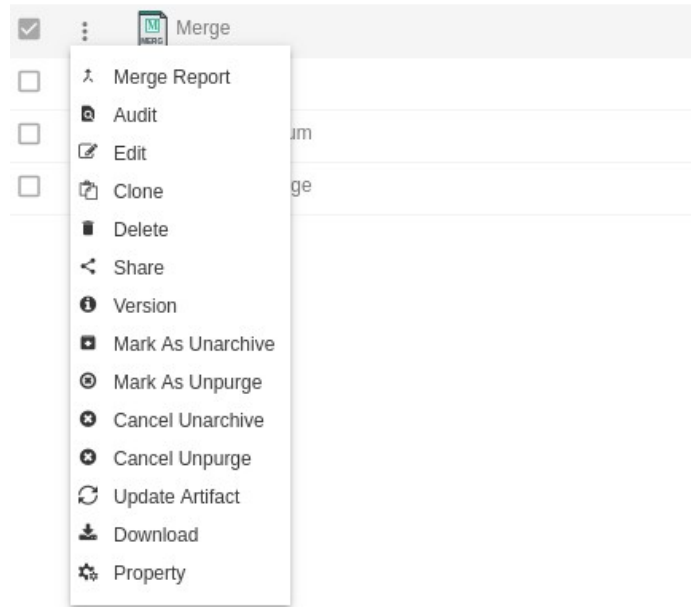


- Finally, press on delete after selecting the report using any one of the above-mentioned methods.
- The report will be deleted and a message will be displayed “report deleted successfully.”
- In a similar manner, you can also perform the delete operation on the folders selecting the folder you desire to move and choosing the move icon from the toolbar, or by right-clicking the folder and selecting the move option from the elapses shown.

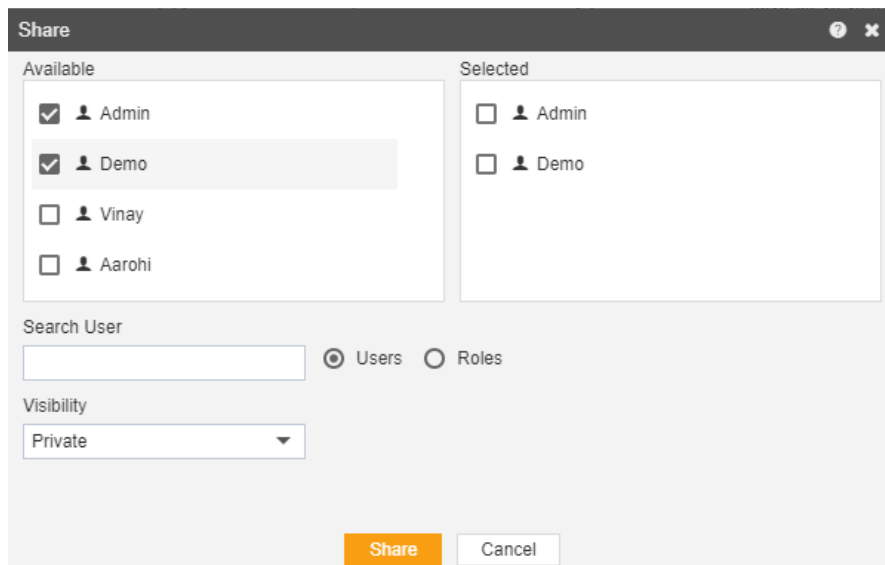
Share

- There are two ways in which a user can share a report in the AIV application:-
 1. By clicking on the share icon  located at the bottom most toolbar.

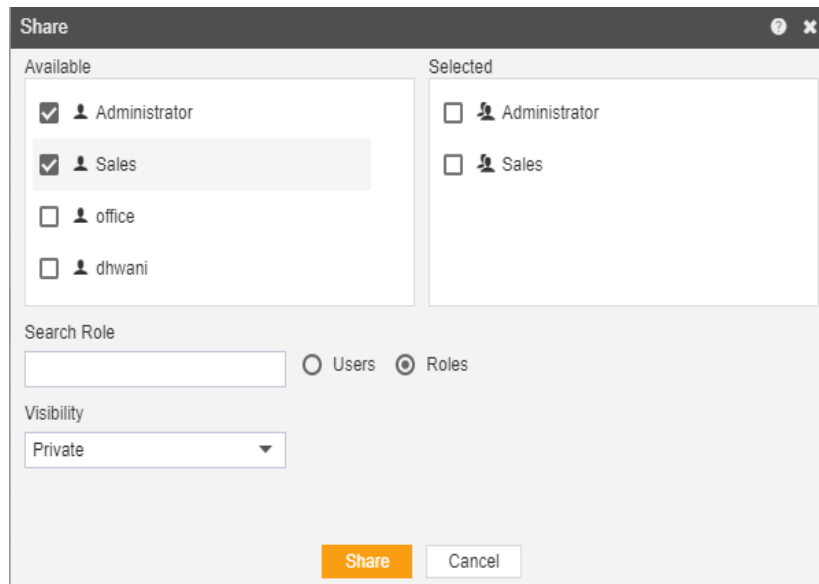
By right-clicking the report you want to share, We will use the **Merge** report in this tutorial for the purpose of understanding.






- Now perform the following steps in order to move the report Employee List:
1. Click on Share using one of the methods mentioned above which will open the following popup.



2. The user can select other users with whom the report will share from the list of available users or search them in the search user bar.
3. In a similar manner, the user can select different user roles with whom the report will be shared.



4. The user can also search for roles in the Search Role bar.
5. Visibility is used to mention who all can view the report and is of following three types:-
 - **Private:-** It means only the current user can view the file.
 - **Internal:-** It means all the users within the organization can view the file.
 - **Public:-** It means anyone can view the file.
6. The user can select the visibility from the dropdown menu as shown above. Select Internal visibility for our reference.
7. In case of any further help, the user can click on the  icon to access the AIV help documents.
8. Finally, in order to move the report, click on the Move button.
9. If the user is not satisfied and wants to cancel the share request, he can do this by clicking on cancel button next to share or by clicking on  button next to the  icon.
10. As the report is shared with a user named Demo, the report will be visible in the Reports section when login is performed with the credentials of user Demo as follows:-

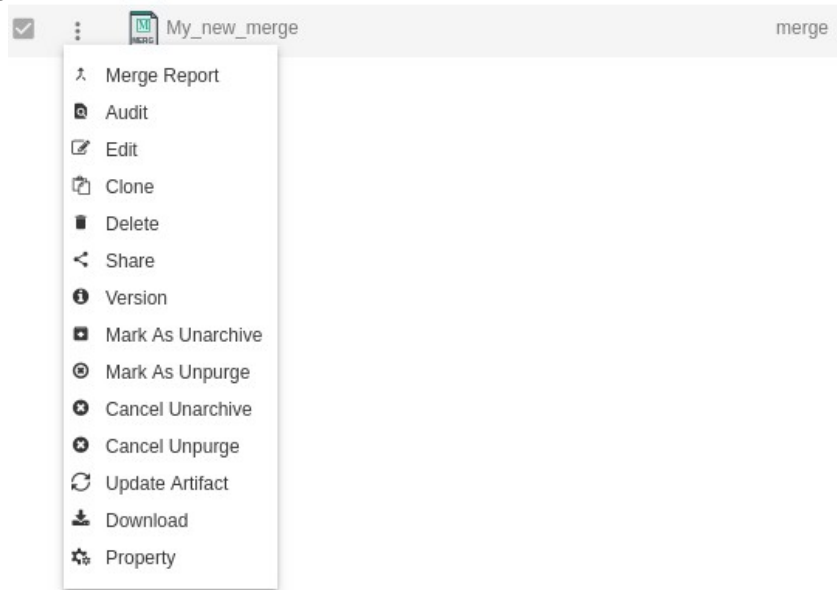


- In a similar manner, you can also perform the share operation on the folders selecting the folder you desire to share and choosing the share icon from the toolbar, or by right-clicking the folder and selecting the share option from the elapses shown.

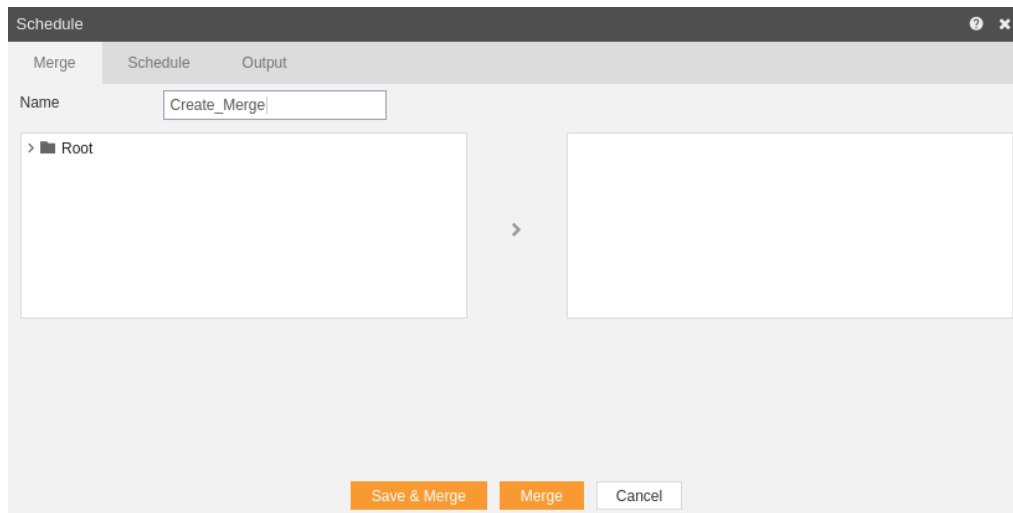
Create Merge Reports

There are two ways in which a user can create merge report in the AIV application:-

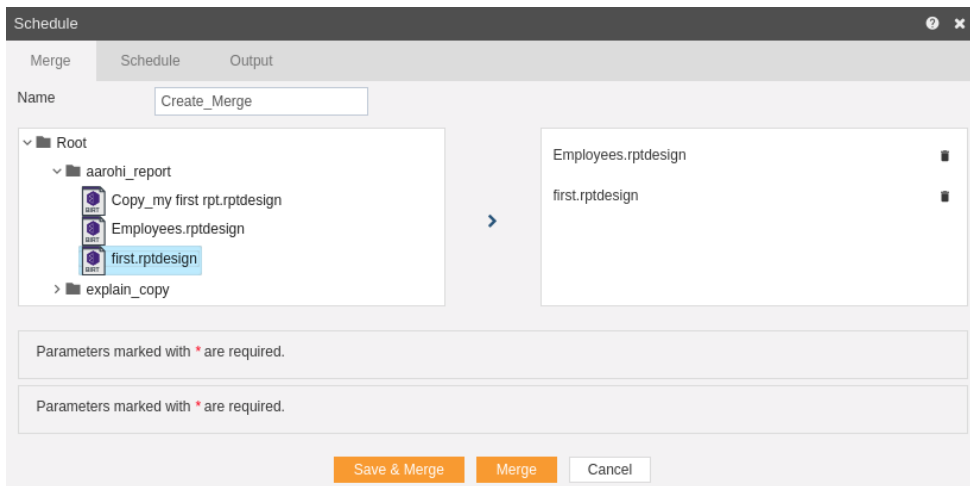
1. By clicking on the create icon  located at the bottom most toolbar.
2. By right clicking any existing merge report as follows:-



- The following dialog box will open as a result of the above actions performed by the user:-



- Expand Root to see the existing reports:-



- Give a name to merge report as desired.
- Expand the folder and select any reports you want to merge by selecting them and clicking on the “>” arrow as seen in the figure above.
- If you want to schedule the merge reports, you can do so by going to schedule section. The detailed explanation of the same has been provided in the **Schedule Merge Reports** section.
- Click on Save and Merge and a merged report will be generated as seen below:-


| File Name | Type | Full Path | Owner | Last Updated | Version | Options |
|----------------|-------|-----------|-------|-------------------------|---------|---------|
| aaroohi_merge | merge | / | Admin | 2019-03-12 17:34:29 IST | 5 | |
| Copy_Merge | merge | / | Admin | 2019-02-23 14:35:43 IST | 1 | |
| Create_Merge | merge | / | Admin | 2019-03-20 16:21:15 IST | 1 | |
| Latest_merge | merge | / | Admin | 2019-03-04 18:35:25 IST | 1 | |
| Merge | merge | / | Admin | 2019-03-13 12:45:01 IST | 9 | |
| Merge new | merge | / | Admin | 2019-03-05 17:49:56 IST | 1 | |
| Merge selerium | merge | / | Admin | 2019-03-05 18:27:17 IST | 1 | |
| My_new_merge | merge | / | Admin | 2019-03-04 18:26:49 IST | 1 | |

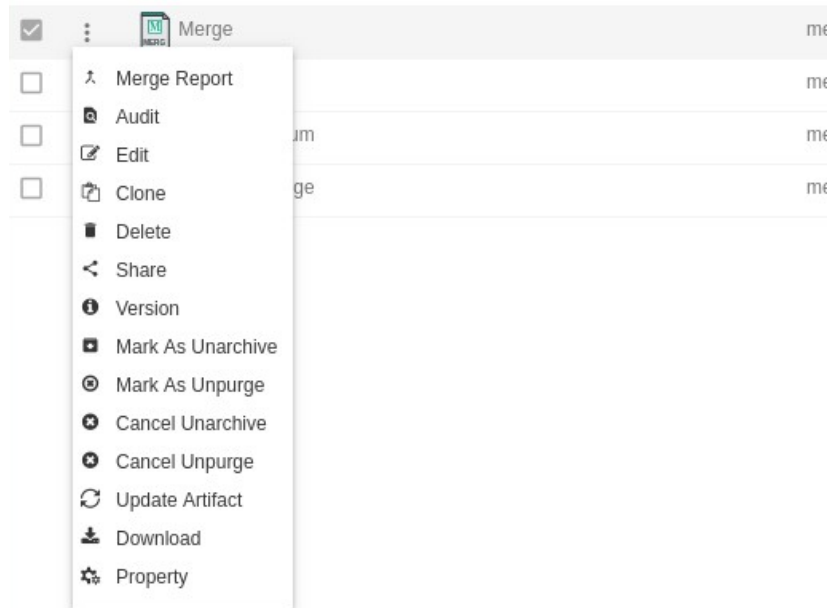
Clone


Clone enable the user to make a new instance/copy of the selected file.

To Clone Merge Report, follow these steps: (Only users with Merge Reports privilege have access to this section)

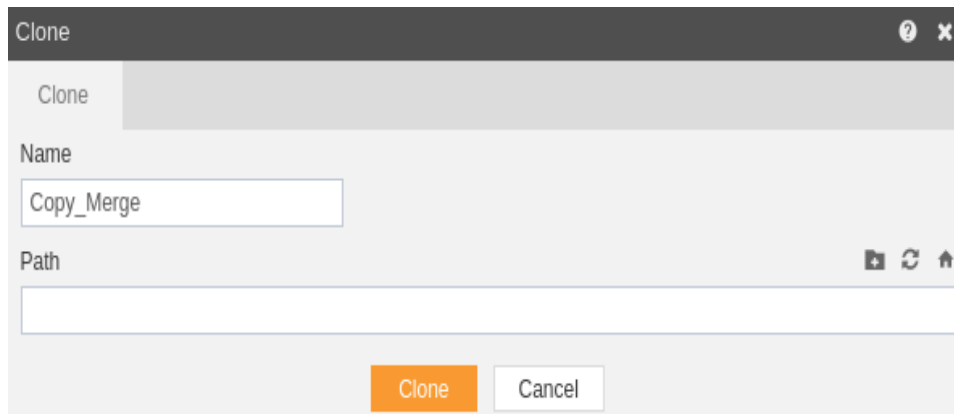
There are two ways in which the user can clone a report:-

Right-click and select  Clone from the context menu as shown in the figure below:-




select  from the footer menu bar.

Using any of the above mentioned methods when you clone the merge report following dialog box will appear:



User have option to update the File Name

You can also specify optional path where your cloned report will be saved.

Finally click on  button to finish creating a copy of selected Merge Report.

In this manner, you can Clone a merge report.

Schedule Merge Reports

The schedule Merge Reports option is used when you want to run your merge reports. (Mention the format of report that can be scheduled). You can schedule your merge reports at the time of creation of a new merge report.

There are two methods to schedule the merge reports:-

Time Scheduling

The events can be scheduled at different moments of time based on the requirement of the user. This includes three methods to schedule events

Right now

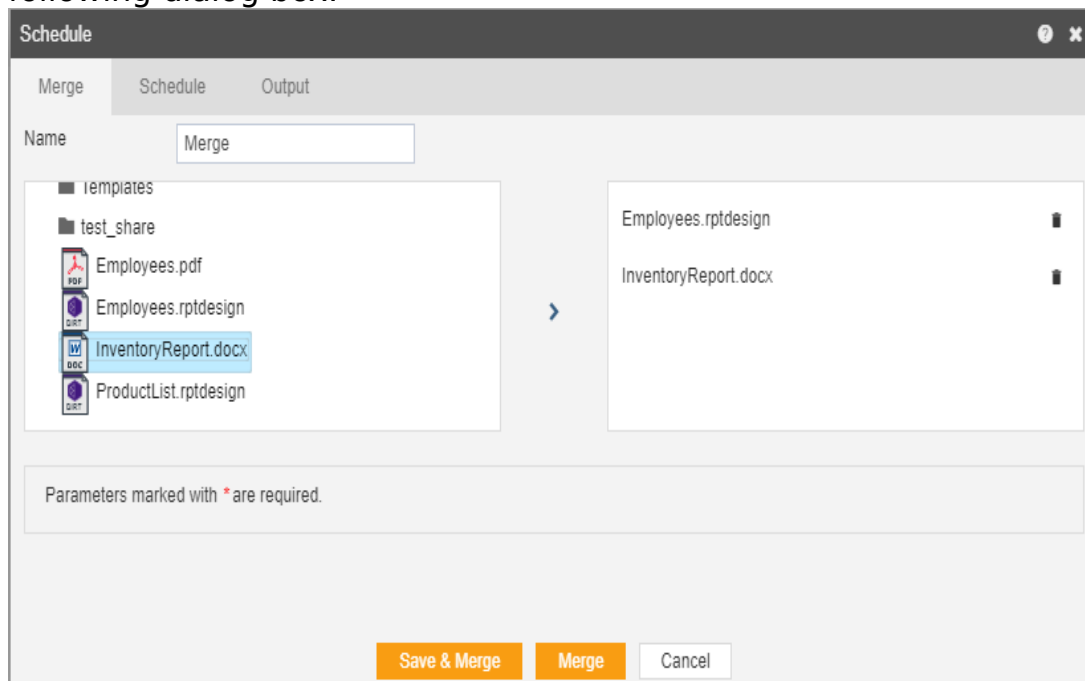
If you want to see the output of the report at the current moment.
Once:- The report will run once at the specific time on the day mentioned by the user.

Recurring:- If you want to run your report for multiple times within an hour, day, week, month or year.

In order to schedule the report at the present moment following steps should be followed:-

We will be using Merge.merge for the purpose of understanding.

Right click on the report and select `Merge Report` which will open the following dialog box:-



Select the reports that you want to merge and go to schedule as follows:-

Schedule

Merge Schedule Output

Schedule Type: Time

Frequency: Right Now Once Recurring

On Failure Retry: 1 Schedule after every minutes: 5

Save & Merge Merge Cancel

Go to the schedule tab as shown in the figure above. By default, Time will be selected else select schedule type time from the drop-down menu. By default Right Now will be selected as the output frequency. You can also specify how many times the report should re-execute in case of failure and after how much duration from the drop-down menu shown in the figure. For instance, in our case, the report will be executed twice in case of failure within duration of 5 minutes. In order to specify the output, go to the output tab as follows:-

Schedule

Merge Schedule Output

Name: Merge Suffix: None

Format: pdf

Path: /Output/Temp/

Delivery Path Replace Default

Email


Event on Success: Event on Fail:



Save & Merge Merge Cancel

Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.

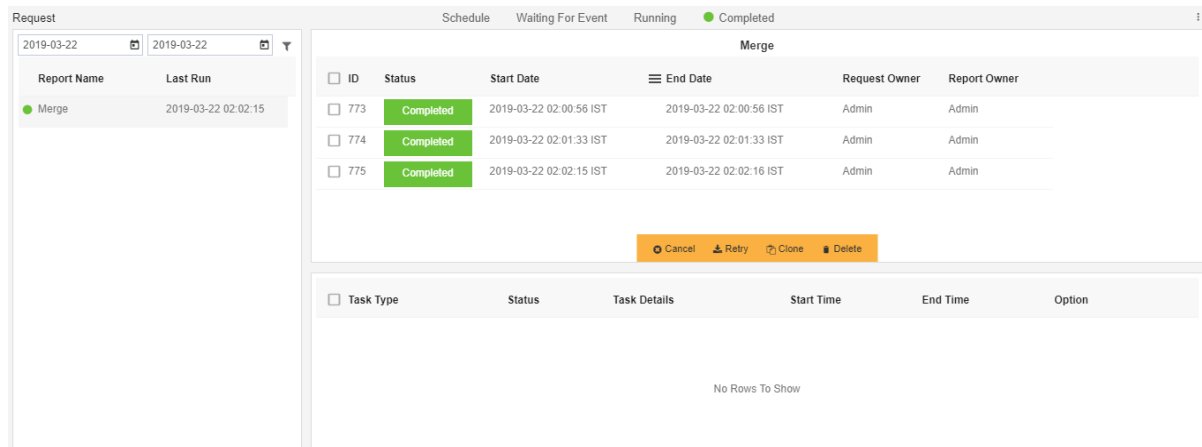
Select a template from the dropdown, we have selected the Default template for our example.

Click on **Save & Merge** or **Merge** icon in order to schedule the report.

In case of any further help, the user can click on the  icon to access the AIV help documents.

If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on  button next to the  icon.

The merge report is scheduled and output is displayed in pdf format in the new tab. The user can see the schedule request in the Request section of AIV application. This section displays all the reports that have completed, running, waiting for event or scheduled. In case of report failure, error is also displayed on this page.





The screenshot shows the 'Request' section of the AIV application. It features a navigation bar with tabs for 'Schedule', 'Waiting For Event', 'Running', and 'Completed'. The 'Completed' tab is active. On the left, there is a table with columns 'Report Name' and 'Last Run', showing a single entry for 'Merge' with a last run time of '2019-03-22 02:02:15'. The main area displays a table titled 'Merge' with columns: ID, Status, Start Date, End Date, Request Owner, and Report Owner. The table contains three rows, all with a status of 'Completed' and a request owner of 'Admin'. Below the table are buttons for 'Cancel', 'Retry', 'Clone', and 'Delete'. At the bottom, there is another table with columns: Task Type, Status, Task Details, Start Time, End Time, and Option, which currently shows 'No Rows To Show'.

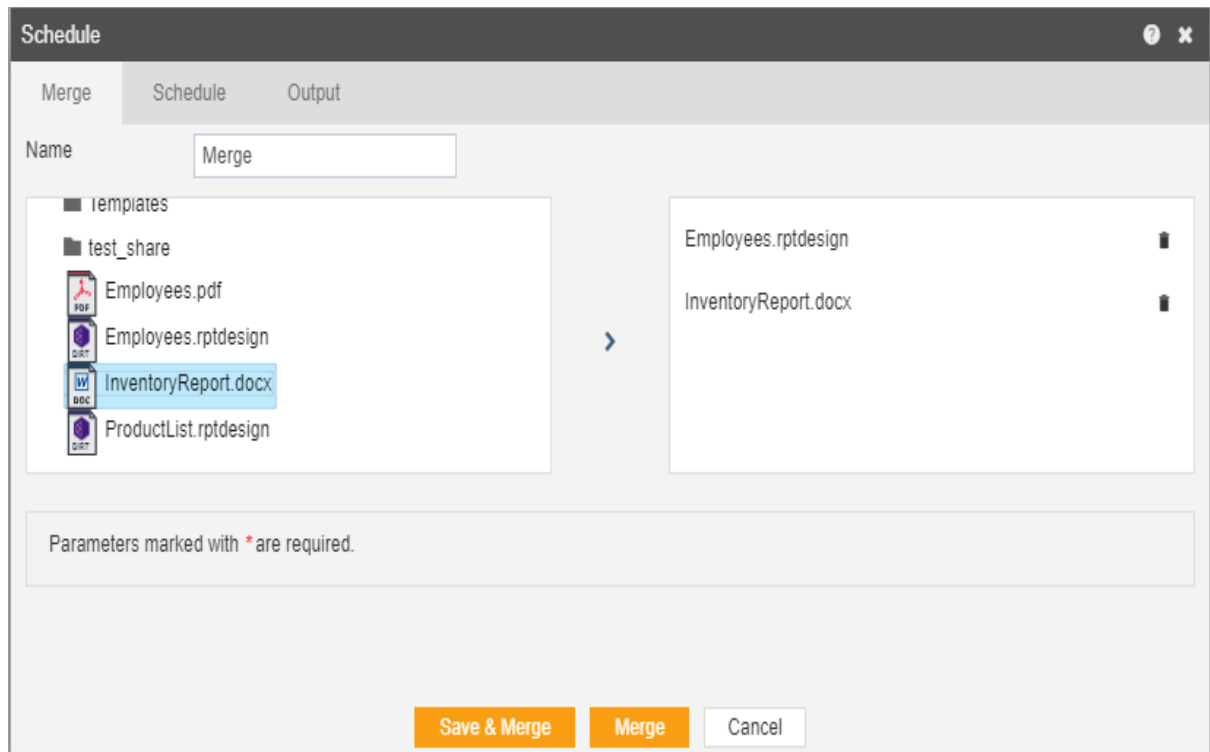
| ID | Status | Start Date | End Date | Request Owner | Report Owner |
|-----|-----------|-------------------------|-------------------------|---------------|--------------|
| 773 | Completed | 2019-03-22 02:00:56 IST | 2019-03-22 02:00:56 IST | Admin | Admin |
| 774 | Completed | 2019-03-22 02:01:33 IST | 2019-03-22 02:01:33 IST | Admin | Admin |
| 775 | Completed | 2019-03-22 02:02:15 IST | 2019-03-22 02:02:15 IST | Admin | Admin |

Once

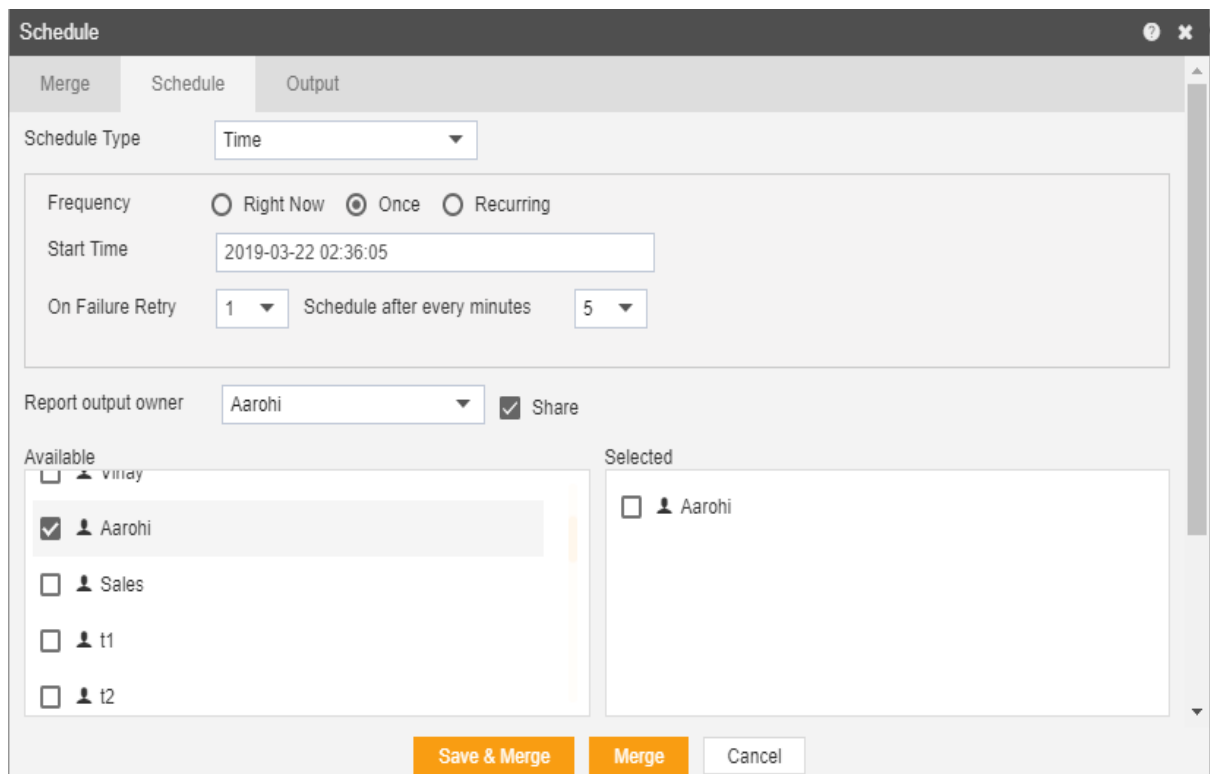
In order to schedule the report once during a hour, day, week, month or year following steps should be followed:-

We will be using Merge.merge for the purpose of understanding.

Right click on the report and select  Merge Report  which will open the following dialog box:-



Select the reports that you want to merge and go to schedule as follows:-



Go to the schedule tab as shown in the figure above. By default, Time will be selected, else select schedule type time from the drop down menu. Choose Once in the Frequency. You can also specify how many times the report should re-execute in case of failure and after how much duration from the drop-down menu shown in

the figure. For instance, in our case, the report will be executed once in case of failure within a duration of 5 minutes. Click on Share in case you want to share the report with other users. Similarly, you can share the report with different user roles as follows:-

The screenshot shows the 'Schedule' dialog box with the 'Available' tab selected. The 'Available' list contains four roles: Administrator (checked), Sales (checked), office (unchecked), and dhwani (unchecked). The 'Selected' list is empty. Below the lists, there is a 'Search Role' input field, radio buttons for 'Users' and 'Roles' (with 'Roles' selected), a 'Visibility' dropdown set to 'Internal', a checked 'Approval Required' checkbox, and fields for 'Send Reminder' (1), 'After Days' (1), 'Approved By' (USER), and 'With Name' (Admin). At the bottom, there are three buttons: 'Save & Merge' (orange), 'Merge' (orange), and 'Cancel' (white).

Here the Visibility is kept Internal for this example. If you want you're to report to be approved before sending to other users, then check Approval Require. Send Reminder specifies how many reminder should be sent. After days specifies after how many days should the Reminder be sent again. Approved by specifies the user name, which is Admin in our case. In order to specify the output, go to the output tab as follows:-


The screenshot shows the 'Schedule' dialog box with the 'Output' tab selected. The 'Name' field contains 'Merge' and the 'Suffix' dropdown is set to 'None'. The 'Format' dropdown is set to 'pdf'. The 'Path' field contains '/Output/Temp/' with a home icon. There are three checkboxes: 'Delivery Path' (unchecked), 'Replace Default' (unchecked), and 'Email' (unchecked). Below these are two dropdowns for 'Event on Success' and 'Event on Fail'. At the bottom, there are three buttons: 'Save & Merge' (orange), 'Merge' (orange), and 'Cancel' (white).



Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.

Enter your email address/addresses to which you want to send the report via email.

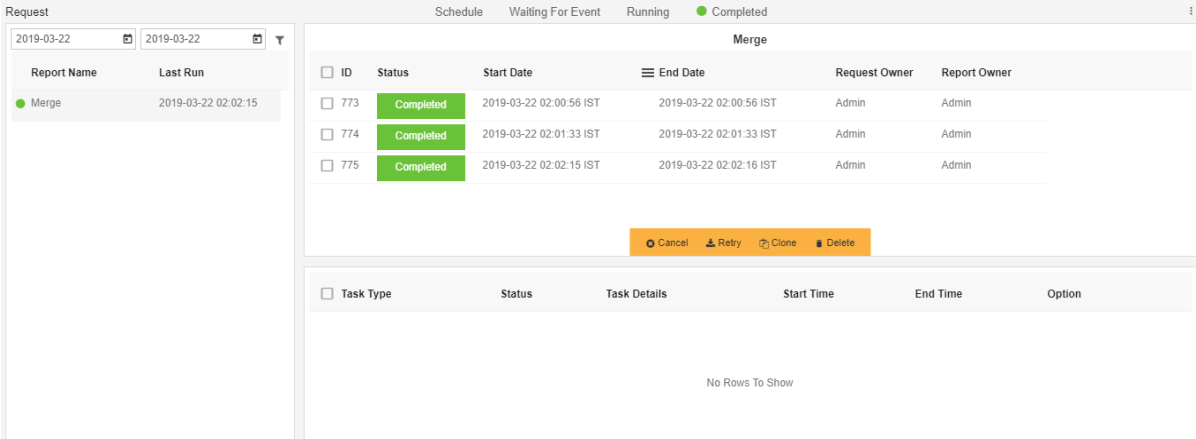
Select a template from the dropdown, we have selected the Default template for our example.

Click on **Save & Merge** or **Merge** icon in order to schedule the report.

In case of any further help, the user can click on the  icon to access the AIV help documents.

If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on  button next to the  icon.

The report is scheduled and output is displayed in pdf format in the new tab. The user can see the schedule request in the Request section of the AIV application. This section displays all the reports that have completed, running, waiting for an event or scheduled. In case of report failure, an error is also displayed on this page.



The screenshot shows the 'Request' section of the AIV application. It features a sidebar on the left with a table of report names and last run dates. The main area displays a table of completed reports with columns for ID, Status, Start Date, End Date, Request Owner, and Report Owner. Below the table are buttons for 'Cancel', 'Reby', 'Clone', and 'Delete'. At the bottom, there is a section for 'Task Type' with a 'No Rows To Show' message.

| Report Name | Last Run |
|-------------|---------------------|
| Merge | 2019-03-22 02:02:15 |

| ID | Status | Start Date | End Date | Request Owner | Report Owner |
|-----|-----------|-------------------------|-------------------------|---------------|--------------|
| 773 | Completed | 2019-03-22 02:00:56 IST | 2019-03-22 02:00:56 IST | Admin | Admin |
| 774 | Completed | 2019-03-22 02:01:33 IST | 2019-03-22 02:01:33 IST | Admin | Admin |
| 775 | Completed | 2019-03-22 02:02:15 IST | 2019-03-22 02:02:16 IST | Admin | Admin |


Buttons: Cancel, Reby, Clone, Delete

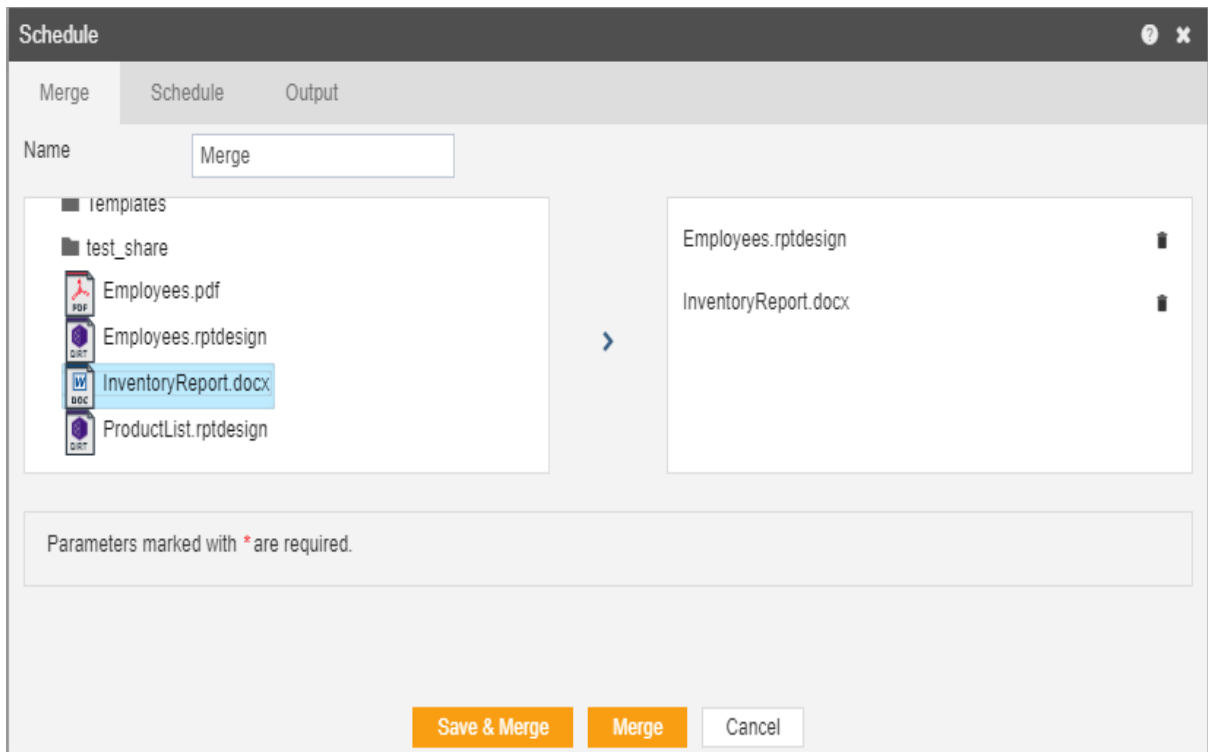
Task Type: No Rows To Show

Recurring

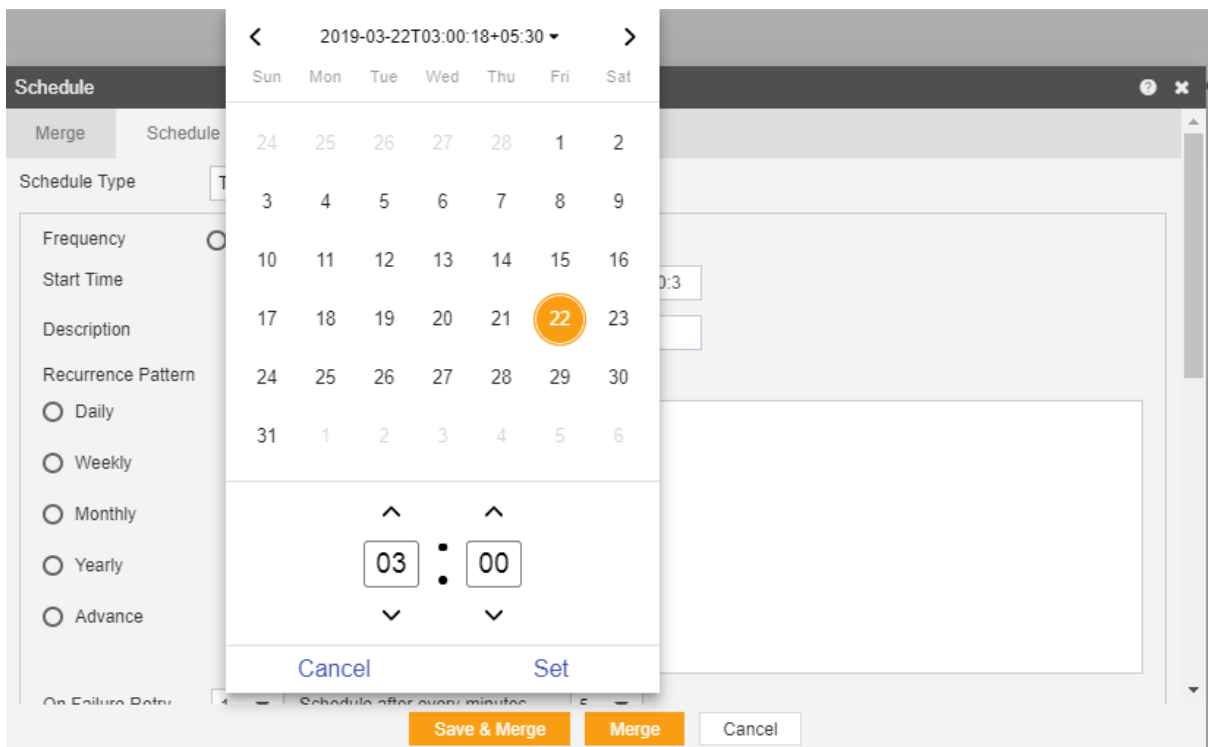
In order to schedule the report in a recurring pattern during a hour, day, week, month or year following steps should be followed:-

We will be using Merge.merge for the purpose of understanding.

Right click on the report and select  Merge Report which will open the following dialog box:-



Select the reports that you want to merge and go to schedule as follows:-



Go to the schedule tab as shown in the figure above. By default Time will be selected, else select schedule type time from the drop down menu. Choose Recurring in the Frequency. Mention the Start time and End Time by setting the time as shown in the figure depicted above. You can provide optional description for your reference.

The screenshot shows the 'Schedule' dialog box with the following settings:

- Schedule Type:** Time
- Frequency:** Recurring (selected)
- Start Time:** 2019-03-22 03:00:1
- End Time:** 2019-03-22 03:10:3
- Description:** recurring
- Recurrence Pattern:**
 - Daily:** (selected)
 - Every:** 1 Days
 - Every Weekday:** Schedule Time: 03:08:46, Pattern: 0 8 3 1/1 * ? *
 - Weekly
 - Monthly
 - Yearly
 - Advance
- On Failure Retry:** 1
- Schedule after every minutes:** 5
- Buttons:** Save & Merge, Merge, Cancel

Now, you have to mention recurrence pattern which can be daily, weekly, monthly, yearly or advance.

In Daily, you can mention the report to recur after specify number of days or to schedule every weekday at specified scheduled time.

You can specify report to run weekly on specified day/days as follows:-

The screenshot shows the 'Schedule' dialog box with the following settings:

- Schedule Type:** Time
- Frequency:** Recurring (selected)
- Start Time:** 2019-03-22 03:00:1
- End Time:** 2019-03-22 03:10:3
- Description:** recurring
- Recurrence Pattern:**
 - Weekly:** (selected)
 - Monday:**
 - Tuesday:**
 - Wednesday:**
 - Thursday:**
 - Friday:**
 - Saturday:**
 - Sunday:**
 - Schedule Time:** 03:08:46, Pattern: 0 8 3 ? * THU,SAT *
 - Daily
 - Monthly
 - Yearly
 - Advance
- On Failure Retry:** 1
- Schedule after every minutes:** 5
- Buttons:** Save & Merge, Merge, Cancel

Here we have mentioned that the report will run on every Thursday and Saturday at the scheduled time.

Schedule

Schedule Type: Time

Frequency: Right Now Once Recurring

Start Time: 2019-03-22 03:00:1 End Time: 2019-03-22 03:10:3

Description: recurring

Recurrence Pattern:

Daily

day 1 of every 1 month(s)

Weekly

First Monday of every 1 month(s)

Monthly

Yearly

Advance

Schedule Time: 03:08:46

On Failure Retry: 1 Schedule after every minutes: 5

Save & Merge Merge Cancel

In the above figure, we have mentioned that report will run every first day each month at scheduled time till the end time, or you can mention like First Monday of every month as mentioned above.

Schedule

Schedule Type: Time

Frequency: Right Now Once Recurring

Start Time: 2019-03-22 03:00:1 End Time: 2019-03-22 03:10:3

Description: recurring

Recurrence Pattern:

Daily

every January

Weekly

First Monday of every February

Monthly

Yearly

Advance

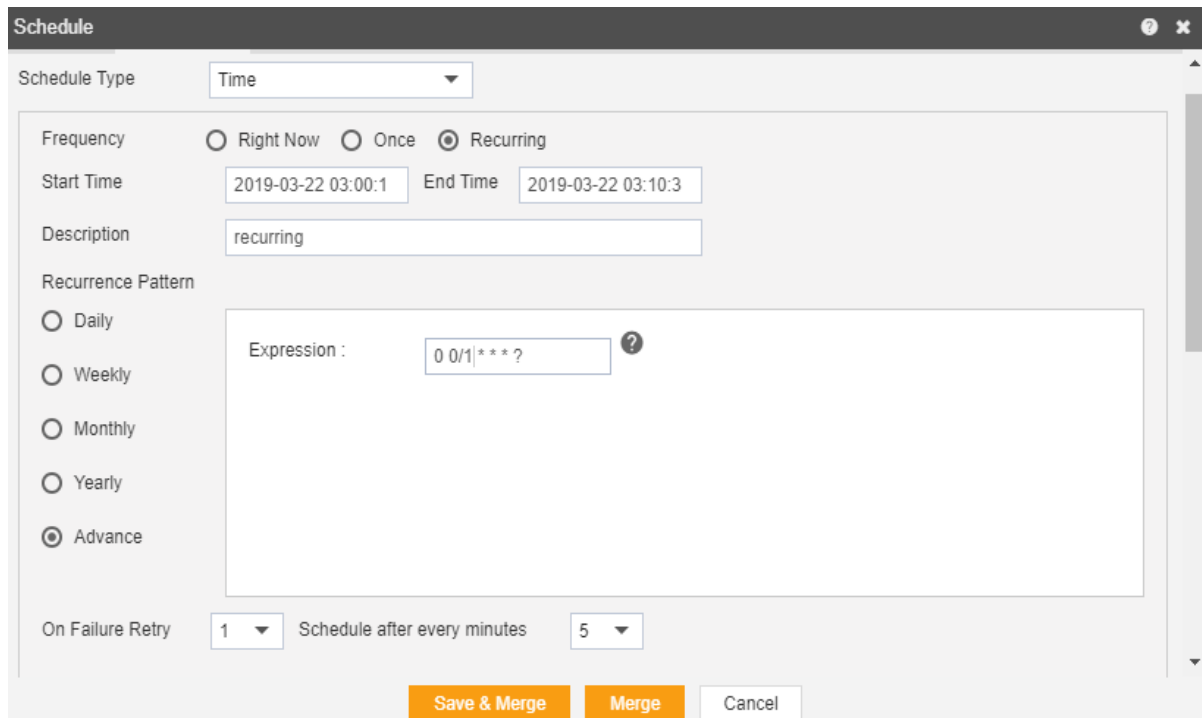
Schedule Time: 03:08:46 0 8 3 undefined 1 ? *

On Failure Retry: 1 Schedule after every minutes: 5

Save & Merge Merge Cancel

You can also specify report to run every year, as mentioned above, here the report will run every year on January 1 at scheduled time or you can select like First Monday of every February at scheduled time till the end time.


In the below figure we have used recurrence pattern which will schedule report after each minute.



The screenshot shows a 'Schedule' dialog box with the following configuration:

- Schedule Type:** Time
- Frequency:** Right Now, Once, Recurring
- Start Time:** 2019-03-22 03:00:1
- End Time:** 2019-03-22 03:10:3
- Description:** recurring
- Recurrence Pattern:**
 - Daily
 - Weekly
 - Monthly
 - Yearly
 - Advance
- Expression:** 0 0/1|***? (with a help icon ?)
- On Failure Retry:** 1
- Schedule after every minutes:** 5

Buttons at the bottom: Save & Merge, Merge, Cancel.

To understand in detail about expressions of this type click on  which will guide you in detail about how to use these expressions.

You can also specify how many times the report should re-execute in case of failure and after how much duration from the drop-down menu shown in the figure. For instance, in our case the report will be executed once in case of failure within a duration of 5 minutes.

Click on Share in case you want to share the report with other users.

Similarly, you can share the report with different user roles as follows:-

The screenshot shows the 'Schedule' window with the following configuration:

- Available:** Admin, Demo, Vinay, Aarohi (checked).
- Selected:** Administrator, Sales, Aarohi.
- Search User:** Empty text box, with radio buttons for 'Users' (selected) and 'Roles'.
- Visibility:** Internal (dropdown).
- Approval Required:** Checked.
- Send Reminder:** 1 (dropdown), **After Days:** 1 (dropdown).
- Approved By:** USER (dropdown), **With Name:** Admin (dropdown).
- Buttons:** Save & Merge, Merge, Cancel.

Here the Visibility is kept Internal for this example. If you want your report to be approved before sending to other users, then check Approval Require. Send Reminder specifies how many reminder should be sent. After days specifies after how many days should the Reminder be sent again. Approved by specifies the user name, which is Admin in our case. In order to specify the output, go to the output tab as follows:-


The screenshot shows the 'Schedule' window with the 'Output' tab selected, with the following configuration:



- Name:** Merge
- Suffix:** None (dropdown)
- Format:** pdf (dropdown)
- Path:** /Output/Temp/ (with home icon)
- Delivery Path:** Unchecked
- Replace Default:** Unchecked
- Email:** Unchecked
- Event on Success:** Empty dropdown
- Event on Fail:** Empty dropdown
- Buttons:** Save & Merge, Merge, Cancel.

Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required. Select the format in which you want to generate the output from the dropdown menu. We have selected pdf for our example.

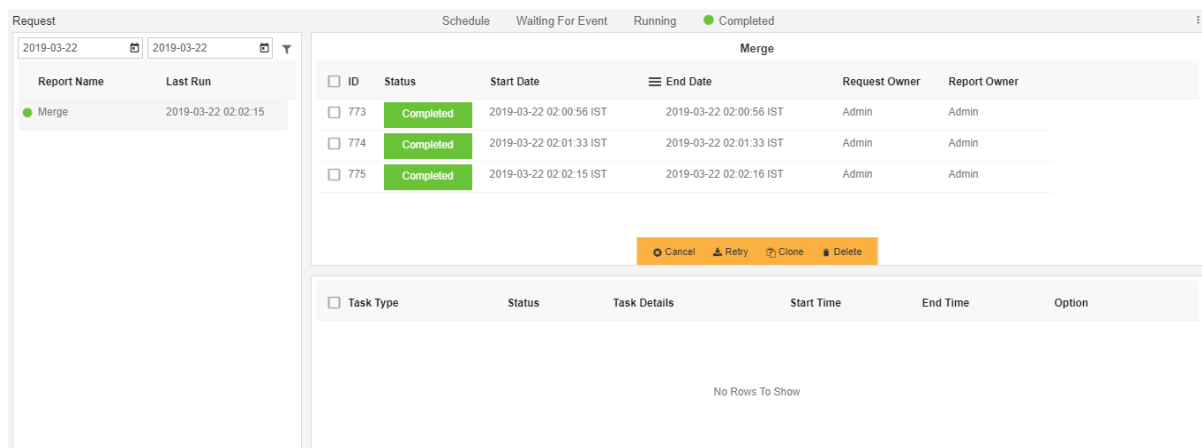
Select a template from the dropdown, we have selected Default template for our example.

Click on **Save & Merge** or **Merge** icon in order to schedule the report.

In case of any further help, the user can click on the  icon to access the AIV help documents.

If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on  button next to the  icon.

The merge report is scheduled and output is displayed in pdf format in the new tab. The user can see the schedule request in the Request section of AIV application. This section displays all the reports that have completed, running, waiting for event or scheduled. In case of report failure, error is also displayed on this page.



The screenshot shows the 'Request' section of the AIV application. The top navigation bar includes 'Schedule', 'Waiting For Event', 'Running', and 'Completed'. The main content area is titled 'Merge' and contains a table with the following data:


| ID | Status | Start Date | End Date | Request Owner | Report Owner |
|-----|-----------|-------------------------|-------------------------|---------------|--------------|
| 773 | Completed | 2019-03-22 02:00:56 IST | 2019-03-22 02:00:56 IST | Admin | Admin |
| 774 | Completed | 2019-03-22 02:01:33 IST | 2019-03-22 02:01:33 IST | Admin | Admin |
| 775 | Completed | 2019-03-22 02:02:15 IST | 2019-03-22 02:02:16 IST | Admin | Admin |

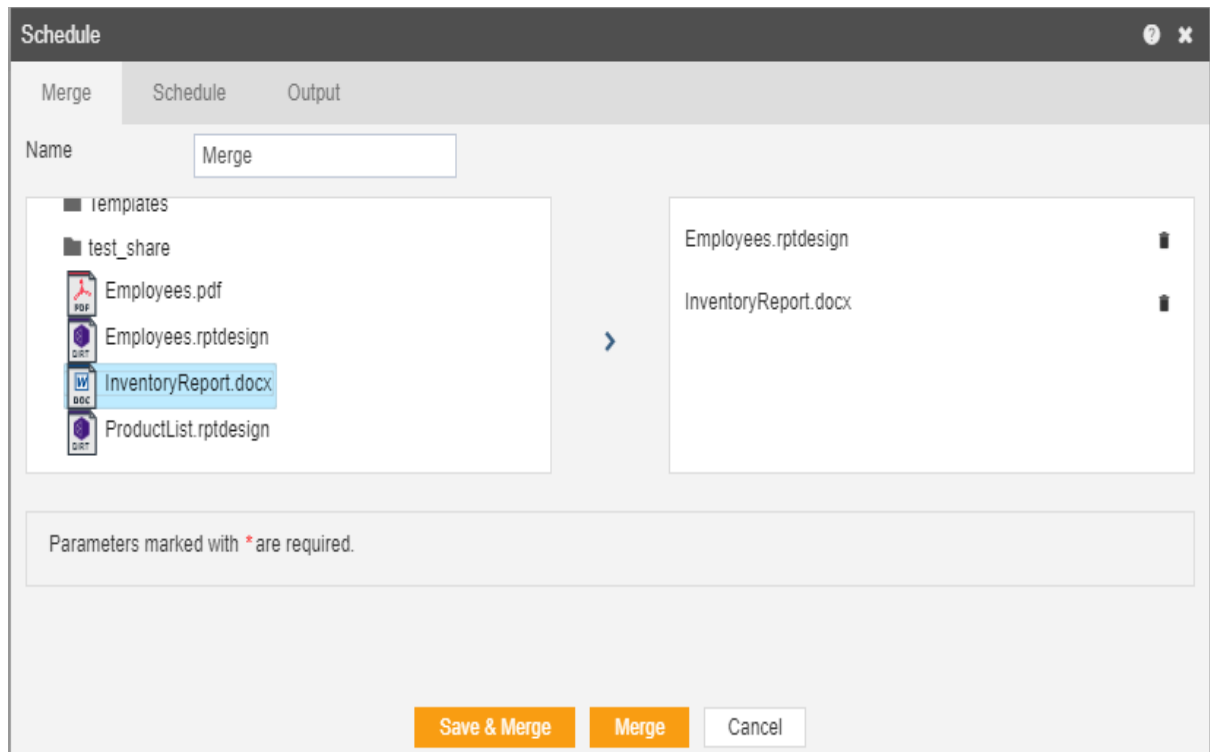
Below the table, there are buttons for 'Cancel', 'Retry', 'Clone', and 'Delete'. At the bottom of the page, there is a section for 'Task Type' with columns for 'Status', 'Task Details', 'Start Time', 'End Time', and 'Option', which currently shows 'No Rows To Show'.

Event Scheduling

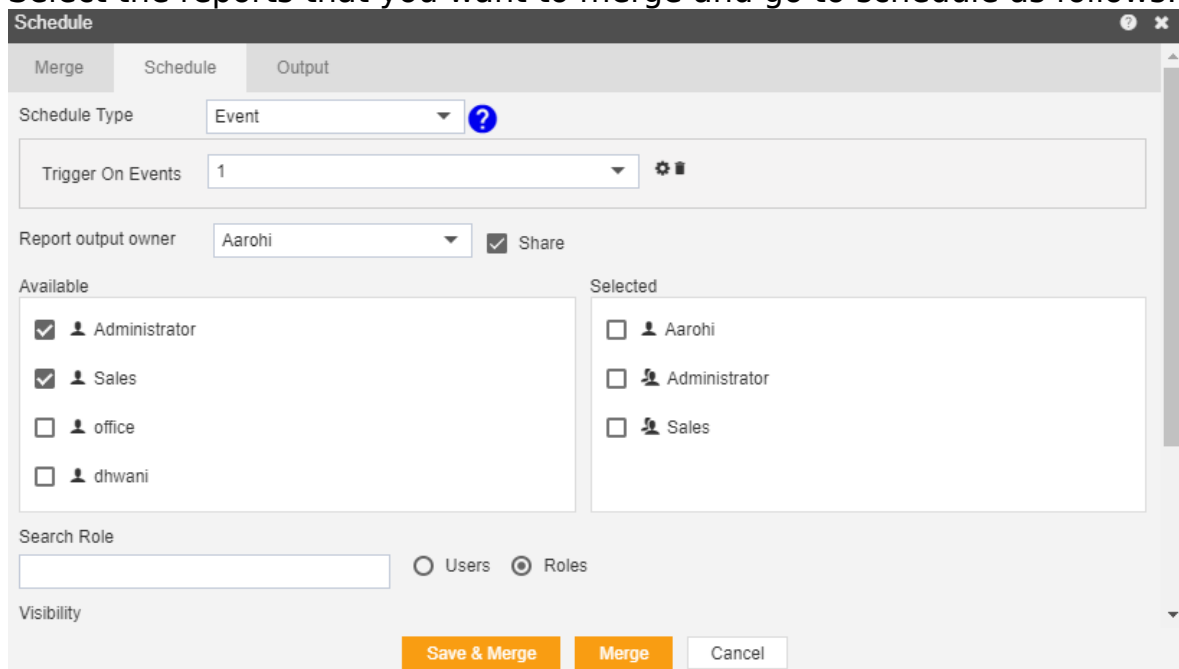
In order to schedule the report based on event following steps should be followed:-

We will be using Merge.report for the purpose of understanding.


Right click on the report and select  Merge Report which will open the following:-



Select the reports that you want to merge and go to schedule as follows:-



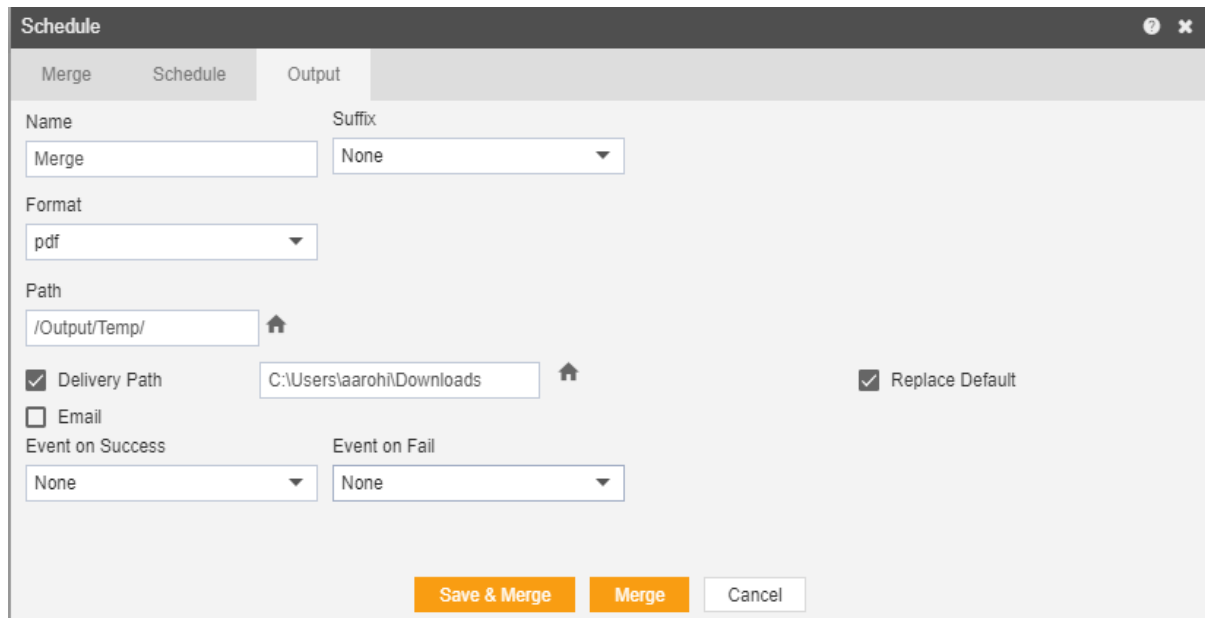
Go to the schedule tab as shown in the figure above. By default, Time will be selected hence select schedule type Event from the drop-down menu. The Trigger on Events define events on the trigger of which report will be scheduled.

Currently event 1 has been created for this example, you can create an event of your own by clicking on  which will open the following dialog box.

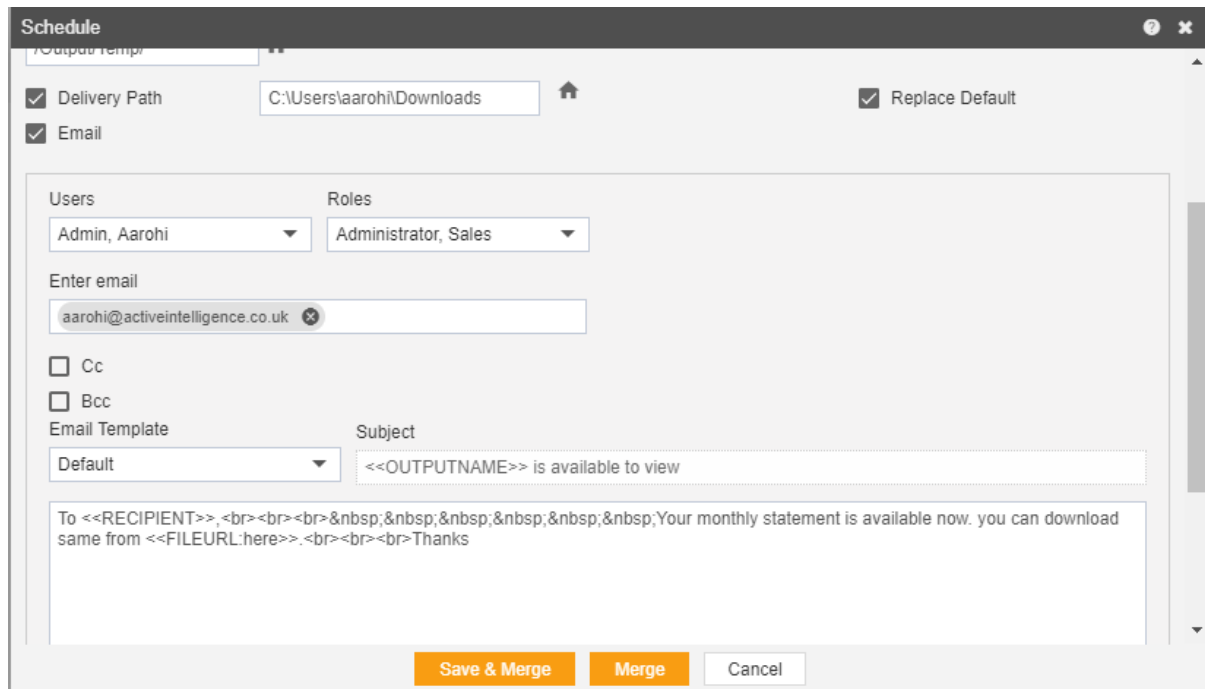
We will use predefined event 1 for our example so select event 1. Click on Share in case you want to share the report with other users or user roles Here the Visibility is kept Internal for this example. If you want you report to be approved before sending to other users, then check Approval Require. Send Reminder specifies how many reminder should be sent. After days specifies after how many days should the Reminder be sent again. Approved by specifies the user name, which is Admin in our case. In order to specify the output, go to the output tab as follows:-

Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.

Select the format in which you want to generate the output from the dropdown menu. We have selected pdf for our example. You can also specify event on success/failure of the report which will trigger an event and execute all the waiting for event reports. You can also specify the delivery path on your computer where the reports will be downloaded as follows.



The user can also send the report as email to the other users using following steps:-






Select the users and the roles from the drop-down menu.

Enter your email address/addresses to which you want to send the report via email.

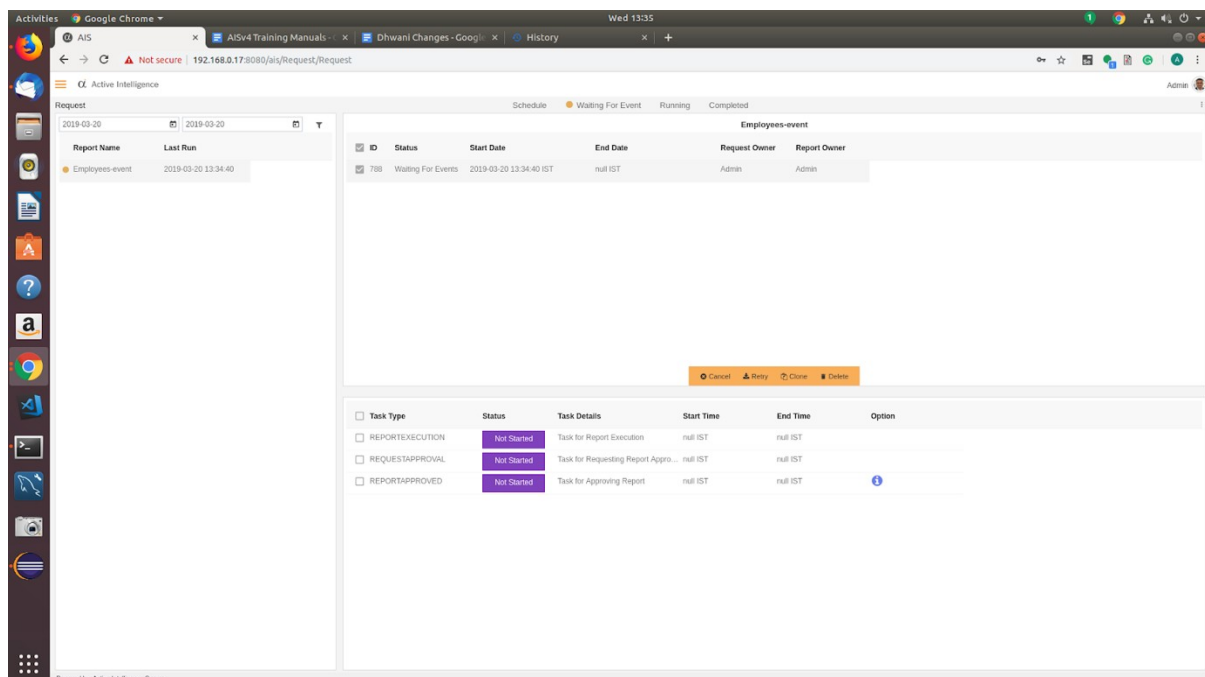
Select a template from the dropdown, we have selected the Default template for our example.

Click on **Save & Merge** or **Merge** icon in order to schedule the report.

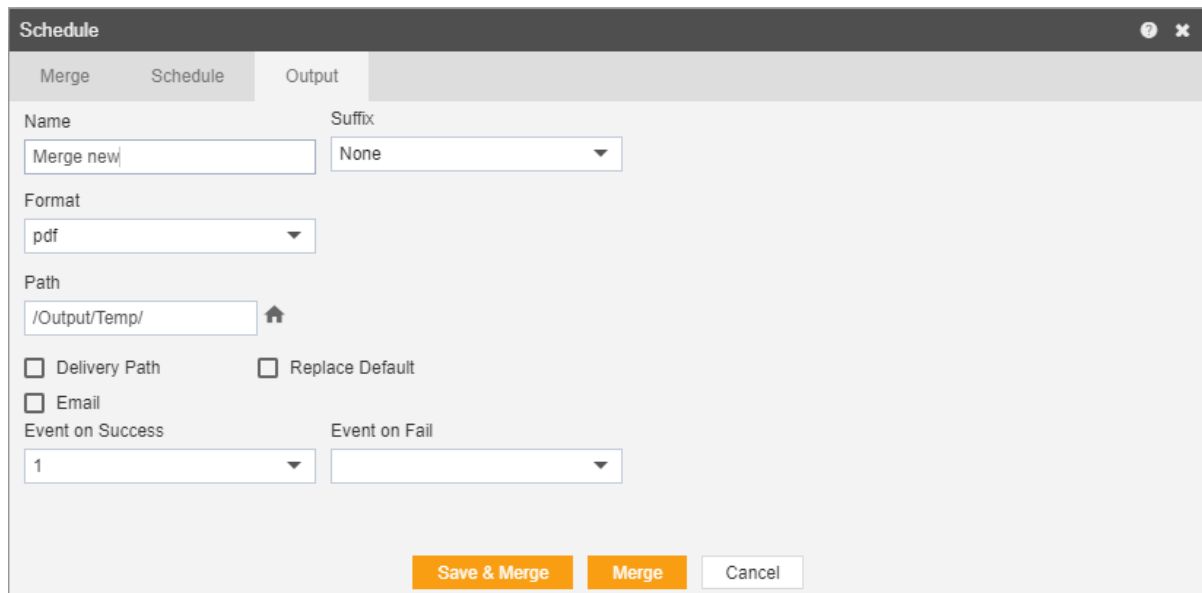
In case of any further help, the user can click on the  icon to access the AIV help documents.

If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on  button next to the .

The report is scheduled and you can check that in Requests section Requests tab, go to Waiting for event which shows following screen where the report is waiting for the event to trigger.



You can trigger an event with another report as follows:-




Here we schedule a report named Event Trigger which will trigger event 1 when running successfully. After this event is triggered, our Employee report will be executed.


Unarchive

- The main purpose of unarchive in an AIV application is to enable the user to save some of his important files from being archived.
- Usually, each type of file is assigned to be archived after a certain number of days by the Administrator, after which the file goes to the Archive mode.
- Once a file is marked as unarchive, then it will not get deleted when the cycle for archive runs in the AIV application.
- In order to change the settings of the file to be archived/unarchived you need to contact the Administrator.

To Unarchive file and folders follow these steps:

1. Select the file or folders you want to Mark as Unarchive. (Note: multiple file and folders or combination of file and folders can be selected).
2. Right click and select the  Unarchive button from the context menu or directly from the bottom menu as shown in the image below:

| | File Name | Type |
|-------------------------------------|-------------------|-----------|
| <input type="checkbox"/> | Create Folder | folder |
| <input type="checkbox"/> | Audit | folder |
| <input type="checkbox"/> | Copy | folder |
| <input type="checkbox"/> | Move | folder |
| <input type="checkbox"/> | Delete | folder |
| <input type="checkbox"/> | Share | folder |
| <input type="checkbox"/> | Version | folder |
| <input type="checkbox"/> | Mark As Unarchive | folder |
| <input type="checkbox"/> | Mark As Unpurge | folder |
| <input type="checkbox"/> | Cancel Unarchive | folder |
| <input type="checkbox"/> | Cancel Unpurge | folder |
| <input type="checkbox"/> | Embed | rptdesign |
| <input type="checkbox"/> | Download | rptdesign |
| <input type="checkbox"/> | Property | rptdesign |
| <input checked="" type="checkbox"/> | Employees | pdf |
| <input type="checkbox"/> | Employees | rptdesign |

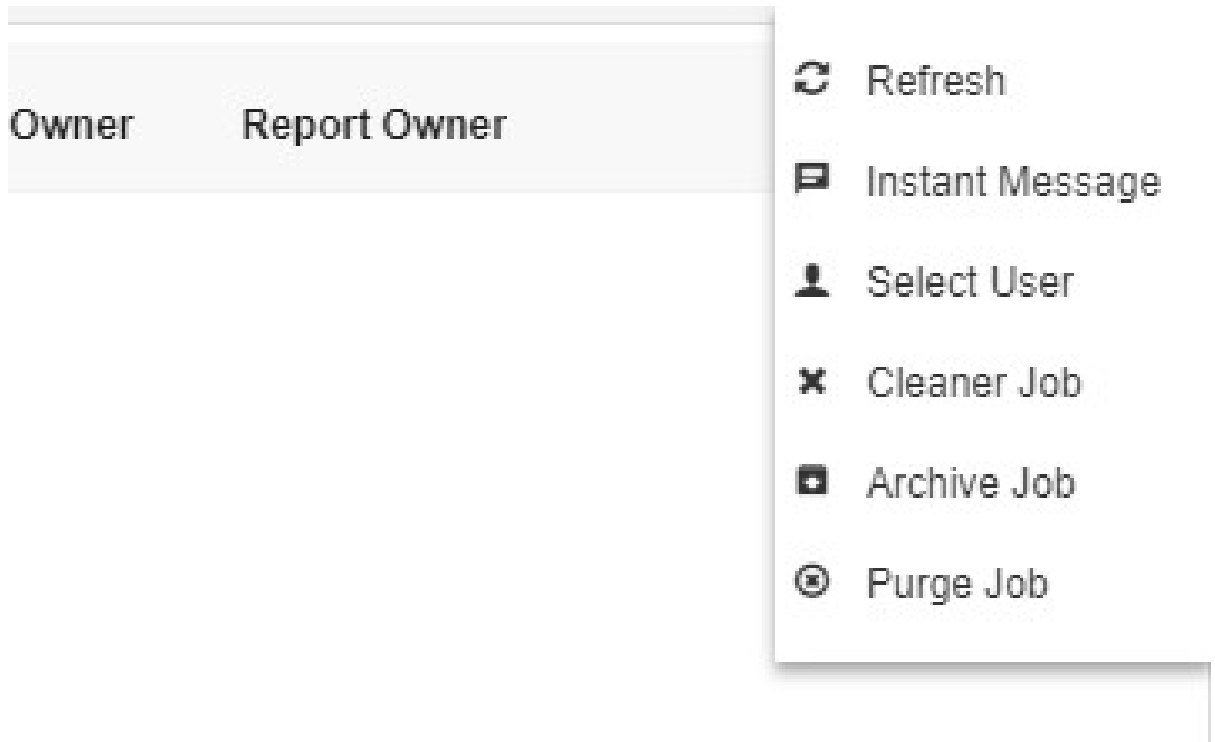
- Here Employees.pdf is marked as unarchive and hence it will not get deleted when all other pdf files are archived.
- You can check the archive status of the file by clicking on  Property as mentioned in the above figure.

Properties ? x

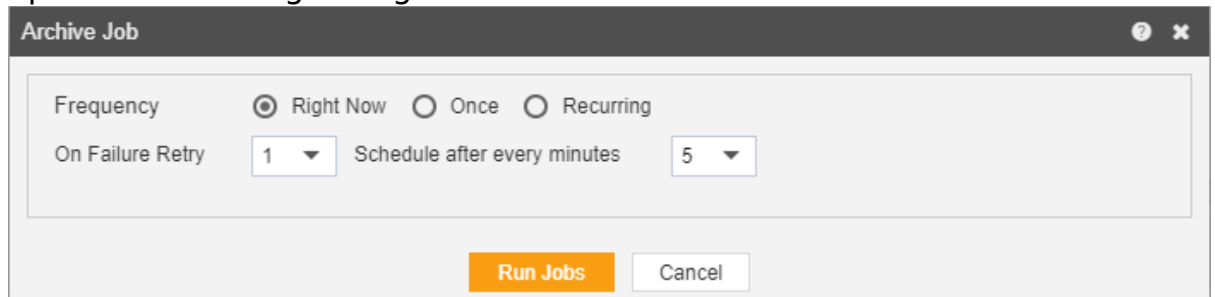
General

| | |
|--|--|
| Name <input type="text" value="Employees"/> | Description <input type="text" value="employee data"/> |
| Owner <input type="text" value="Admin"/> | VisibilityType <input type="text" value="INT"/> |
| Default Version <input type="text" value="1"/> | Created On <input type="text" value="2019-03-13 10:17:36"/> |
| LastUpdated By <input type="text" value="Admin"/> | LastUpdated On <input type="text" value="2019-03-13 10:17:36"/> |
| Is Archivable <input type="text" value="False"/> | Is Purgable <input type="text" value="True"/> |

- The Is Archivable property of Employees.pdf is False which means this file will not be archived when the cycle for Archive runs.
- In order to run archive jobs, go to the Requests of the Request section.

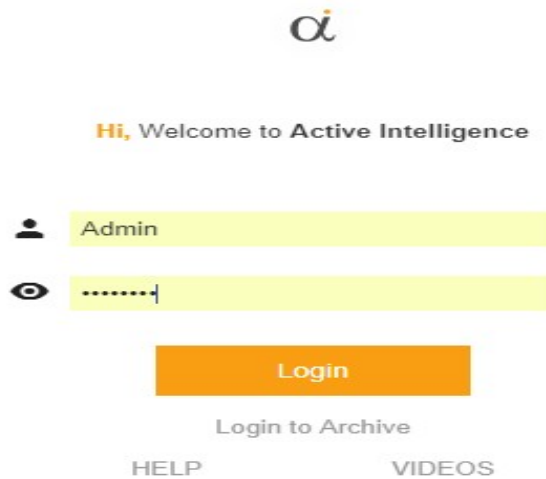


- Click on the Archive Job in order to perform the Archive which will open the following dialog box.



- Click on **Run Jobs** in order to run the Archive Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the archive jobs.

- The administrator user can Login to Archive mode to see the details of all the files that have been archived as follow



- After logging in, following screen will be displayed which shows all the Reports which have been archived.

| Reports | | | | | | | | Q | : |
|--------------------------|----------------|--------|-----------|--------|-------------------------|---------|---------|---|---|
| <input type="checkbox"/> | File Name | Type | Full Path | Owner | Last Updated | Version | Options | | |
| <input type="checkbox"/> | aa rohi_report | folder | / | Admin | 2019-03-11 14:49:12 IST | 1 | | | |
| <input type="checkbox"/> | explain_copy | folder | / | Admin | 2019-03-18 16:42:08 IST | 1 | | | |
| <input type="checkbox"/> | explain_move | folder | / | Admin | 2019-03-18 17:49:41 IST | 1 | | | |
| <input type="checkbox"/> | new report | folder | / | Admin | 2019-03-12 17:12:03 IST | 1 | | | |
| <input type="checkbox"/> | New Root | folder | / | Admin | 2019-03-09 10:39:06 IST | 1 | | | |
| <input type="checkbox"/> | Output | folder | / | Admin | 2019-03-13 13:01:26 IST | 1 | | | |
| <input type="checkbox"/> | Templates | folder | / | Admin | 2019-02-26 18:28:56 IST | 1 | | | |
| <input type="checkbox"/> | test_report | folder | / | Admin | 2019-03-18 16:38:11 IST | 1 | | | |
| <input type="checkbox"/> | test_share | folder | / | Aarohi | 2019-03-11 19:01:31 IST | 1 | | | |
| <input type="checkbox"/> | ProductList | pdf | / | Admin | 2019-03-13 10:20:30 IST | 1 | | | |

- You can cancel the unarchive by right clicking the report and selecting cancel unarchive:

| | File Name | Type |
|-------------------------------------|-------------------|-----------|
| <input type="checkbox"/> | Create Folder | folder |
| <input type="checkbox"/> | Audit | folder |
| <input type="checkbox"/> | Copy | folder |
| <input type="checkbox"/> | Move | folder |
| <input type="checkbox"/> | Delete | folder |
| <input type="checkbox"/> | Share | folder |
| <input type="checkbox"/> | Version | folder |
| <input type="checkbox"/> | Mark As Unarchive | folder |
| <input type="checkbox"/> | Mark As Unpurge | folder |
| <input type="checkbox"/> | Cancel Unarchive | folder |
| <input type="checkbox"/> | Cancel Unpurge | folder |
| <input type="checkbox"/> | Embed | rptdesign |
| <input type="checkbox"/> | Download | rptdesign |
| <input type="checkbox"/> | Property | rptdesign |
| <input checked="" type="checkbox"/> | Employees | pdf |
| <input type="checkbox"/> | Employees | rptdesign |

- Now check properties to see that Is Archivable is true:-

Properties

General


| | |
|--------------------------|--|
| Name Employees | Description employee data |
| Owner Admin | Visibility Type INT |
| Default Version 1 | Created On 2019-03-13 10:17:36 |
| Last Updated By Admin | Last Updated On 2019-03-13 10:17:36 |
| Is Archivable True | Is Purgable True |

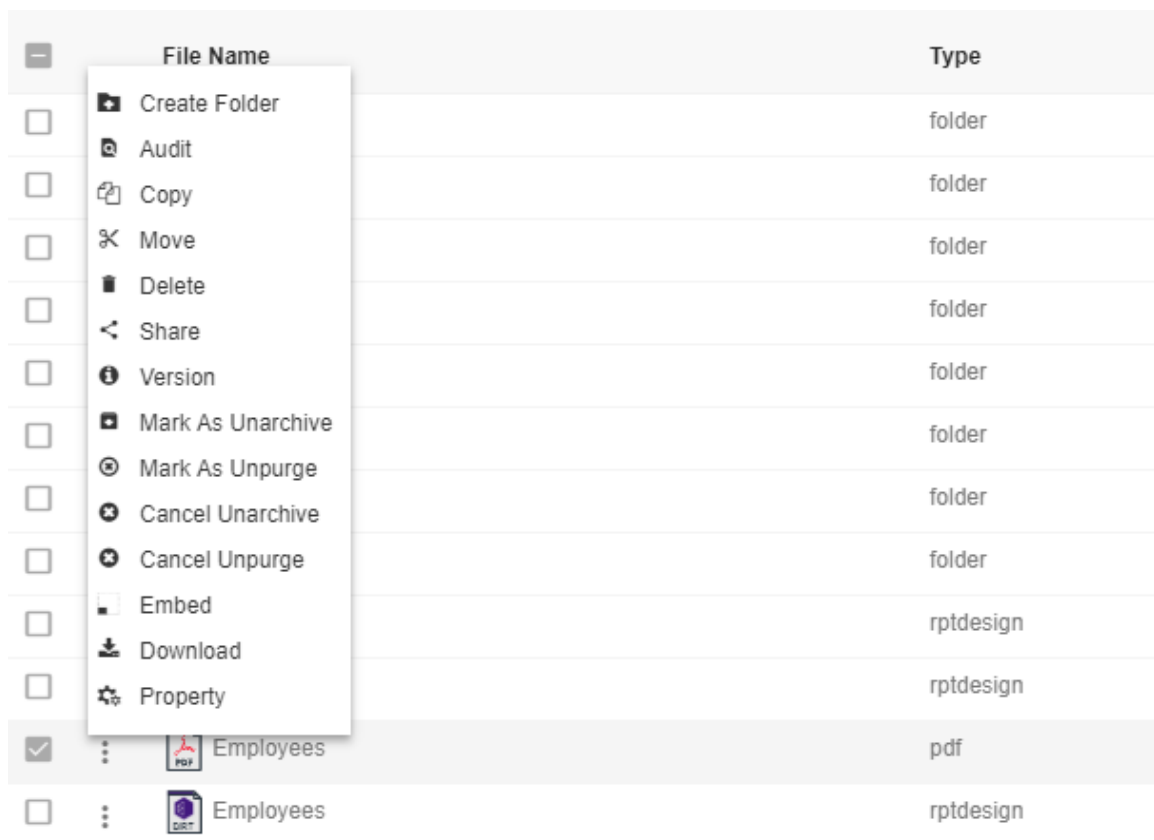
Unpurged


- The main purpose of unpurge in an AIV application is to enable the user to save some of his important files from being deleted permanently.
- Usually, each type of file is assigned to be purged after a certain number of days by the Administrator, after which the file gets deleted permanently.

- Once a file is marked as unpurge, then it will not get deleted when the cycle for purge runs in the AIV application.
- In order to change the settings of the file to be purged/unpurged you need to contact the Administrator.

To Unpurge file and folders follow these steps:

1. Select the file or folders you want to Mark as Unpurge. (Note: multiple file and folders or combination of file and folders can be selected).
2. Right click and select the  button from the context menu or directly from the bottom menu as shown in the image below:



- Here Employees.pdf is marked as unpurge and hence it will not get deleted when all other pdf files are purged.
- You can check the purge status of the file by clicking on  Property as mentioned in the above figure.

The 'Properties' dialog box shows the following details for 'Employees.pdf':

| | | | |
|-----------------|-----------|----------------|---------------------|
| Name | Employees | Description | employee data |
| Owner | Admin | VisibilityType | INT |
| Default Version | 1 | Created On | 2019-03-13 10:17:36 |
| LastUpdated By | Admin | LastUpdated On | 2019-03-13 10:17:36 |
| Is Archivable | True | Is Purgable | False |

Buttons: Submit, Cancel

- The “Is Purgable” property of Employees.pdf is False which means this file will not be archived when the cycle for Purge runs.
- In order to run purge jobs, go to the Requests of the Request section.

The context menu is open over a table with the following items:

| Owner | Report Owner |
|-------|--------------|
| | |

- Refresh
- Instant Message
- Select User
- Cleaner Job
- Archive Job
- Purge Job**

- Click on the Purge Job in order to perform the Archive which will open the following dialog box.

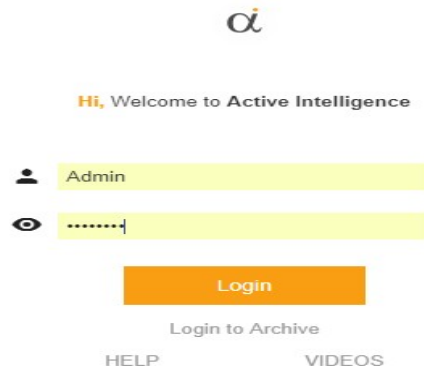
The 'Purge Job' dialog box contains the following settings:

Frequency: Right Now Once Recurring

On Failure Retry: 1 Schedule after every minutes: 5

Buttons: Run Jobs, Cancel

- Click on **Run Jobs** in order to run the Purge Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the archive jobs.
- The administrator user can login to Archive mode to see the details of all the files that have been purged as



- After logging in, following screen will be displayed which shows all the Reports which have been purged.

| Reports | | | | | | | | Q | ! |
|--------------------------|----------------|--------|-----------|--------|-------------------------|---------|---------|---|---|
| <input type="checkbox"/> | File Name | Type | Full Path | Owner | Last Updated | Version | Options | | |
| <input type="checkbox"/> | aaurohi_report | folder | / | Admin | 2019-03-11 14:49:12 IST | 1 | | | |
| <input type="checkbox"/> | explain_copy | folder | / | Admin | 2019-03-18 16:42:08 IST | 1 | | | |
| <input type="checkbox"/> | explain_move | folder | / | Admin | 2019-03-18 17:49:41 IST | 1 | | | |
| <input type="checkbox"/> | new report | folder | / | Admin | 2019-03-12 17:12:03 IST | 1 | | | |
| <input type="checkbox"/> | New Root | folder | / | Admin | 2019-03-09 10:39:06 IST | 1 | | | |
| <input type="checkbox"/> | Output | folder | / | Admin | 2019-03-13 13:01:26 IST | 1 | | | |
| <input type="checkbox"/> | Templates | folder | / | Admin | 2019-02-26 18:28:56 IST | 1 | | | |
| <input type="checkbox"/> | test_report | folder | / | Admin | 2019-03-18 16:38:11 IST | 1 | | | |
| <input type="checkbox"/> | test_share | folder | / | Aarohi | 2019-03-11 19:01:31 IST | 1 | | | |
| <input type="checkbox"/> | ProductList | pdf | / | Admin | 2019-03-13 10:20:30 IST | 1 | | | |

- You can cancel the “unpurge” by right clicking the report and selecting cancel unarchive:

| | File Name | Type |
|-------------------------------------|-------------------|-----------|
| <input type="checkbox"/> | Create Folder | folder |
| <input type="checkbox"/> | Audit | folder |
| <input type="checkbox"/> | Copy | folder |
| <input type="checkbox"/> | Move | folder |
| <input type="checkbox"/> | Delete | folder |
| <input type="checkbox"/> | Share | folder |
| <input type="checkbox"/> | Version | folder |
| <input type="checkbox"/> | Mark As Unarchive | folder |
| <input type="checkbox"/> | Mark As Unpurge | folder |
| <input type="checkbox"/> | Cancel Unarchive | folder |
| <input type="checkbox"/> | Cancel Unpurge | folder |
| <input type="checkbox"/> | Embed | rptdesign |
| <input type="checkbox"/> | Download | rptdesign |
| <input type="checkbox"/> | Property | rptdesign |
| <input checked="" type="checkbox"/> | Employees | pdf |
| <input type="checkbox"/> | Employees | rptdesign |

- Now check properties to see that “Is Purgeable” is true:-

Properties

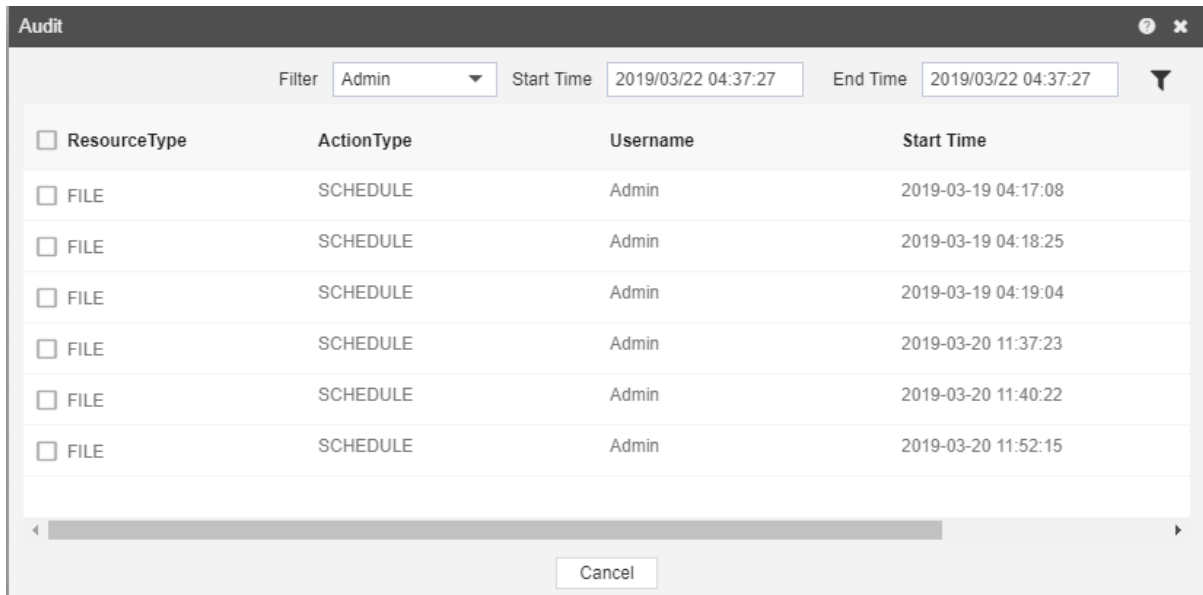
General

| | |
|--------------------------|--|
| Name Employees | Description employee data |
| Owner Admin | Visibility Type INT |
| Default Version 1 | Created On 2019-03-13 10:17:36 |
| Last Updated By Admin | Last Updated On 2019-03-13 10:17:36 |
| Is Archivable True | Is Purgeable True |

Audit

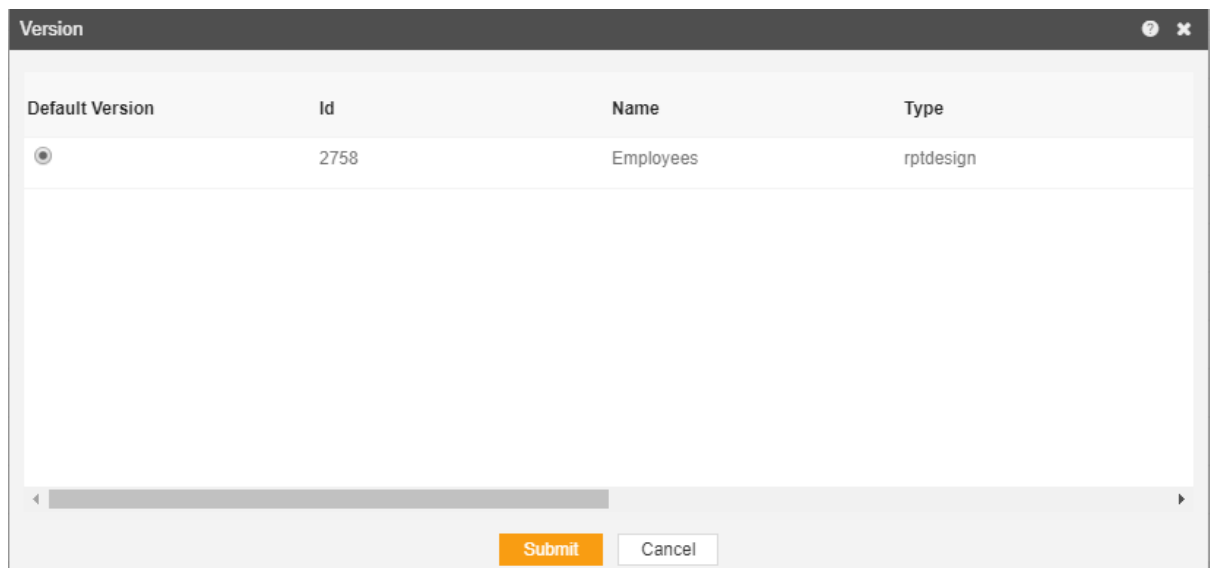
Audit shows the actions like when the user created, uploaded or downloaded any particular file.

- Following image describes the audit option.




Version

- Version option shows the number of versions of the selected alert as well as the version which the user is using.
- Following is the image describing a number of versions of the selected report.

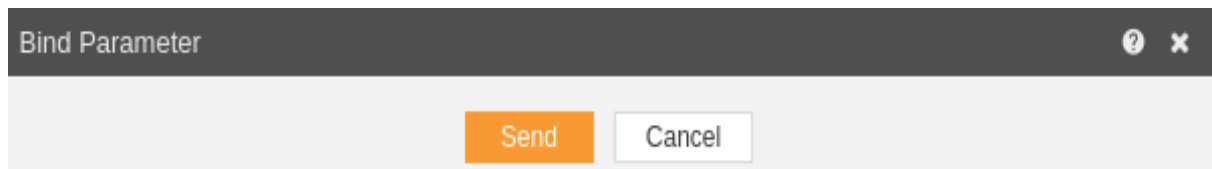


Embed

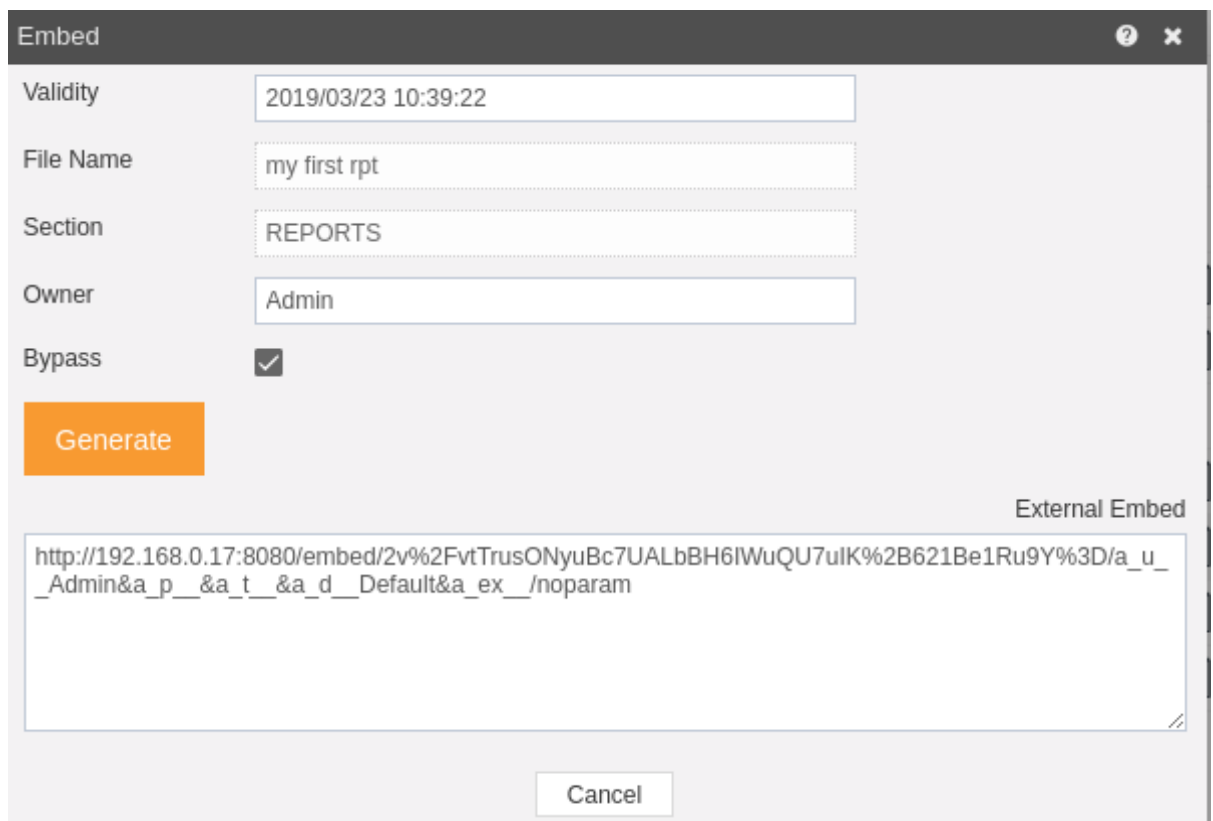
To Embed a Report, follow these steps: (Only users with Report privilege have access to this section)

- 1 To embed a report (select the desire Report and right click and select  Embed from the context menu).

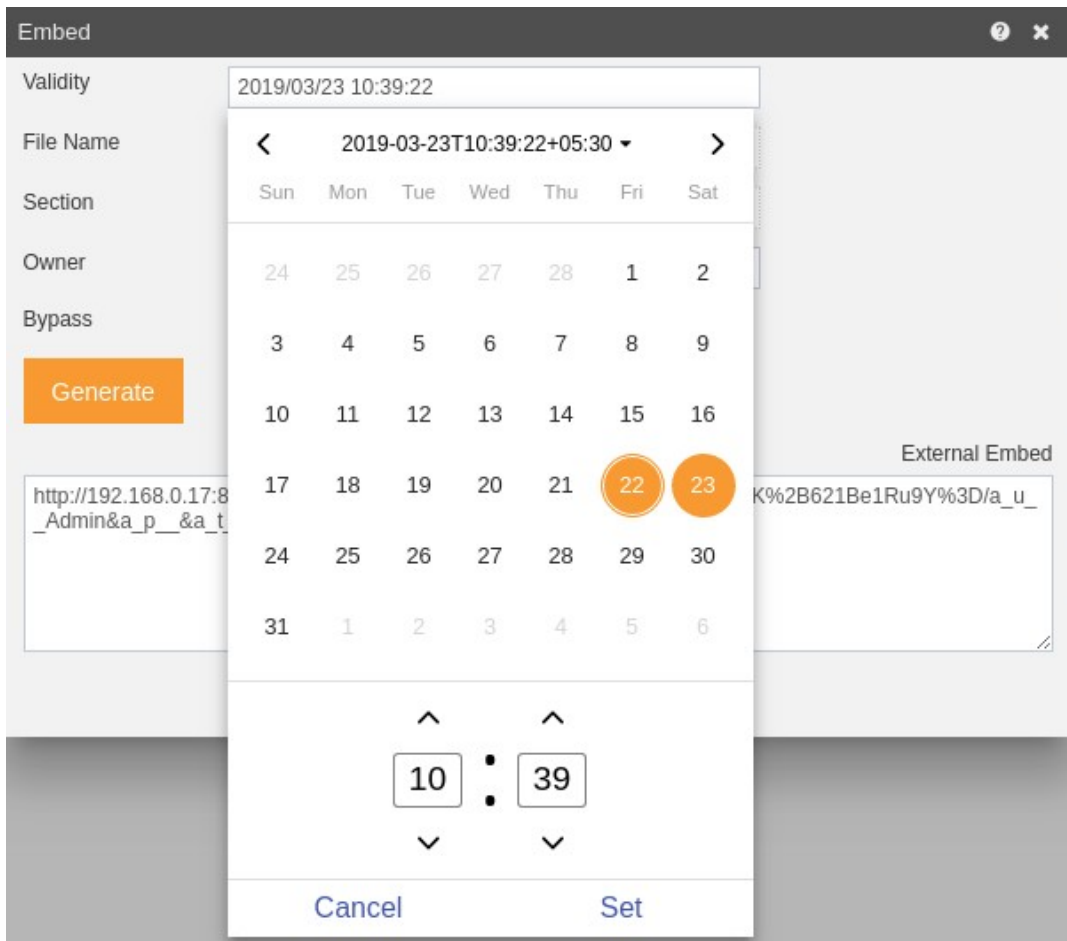
- Following dialog box will appear



- Click on Send button which will open the following dialog box.



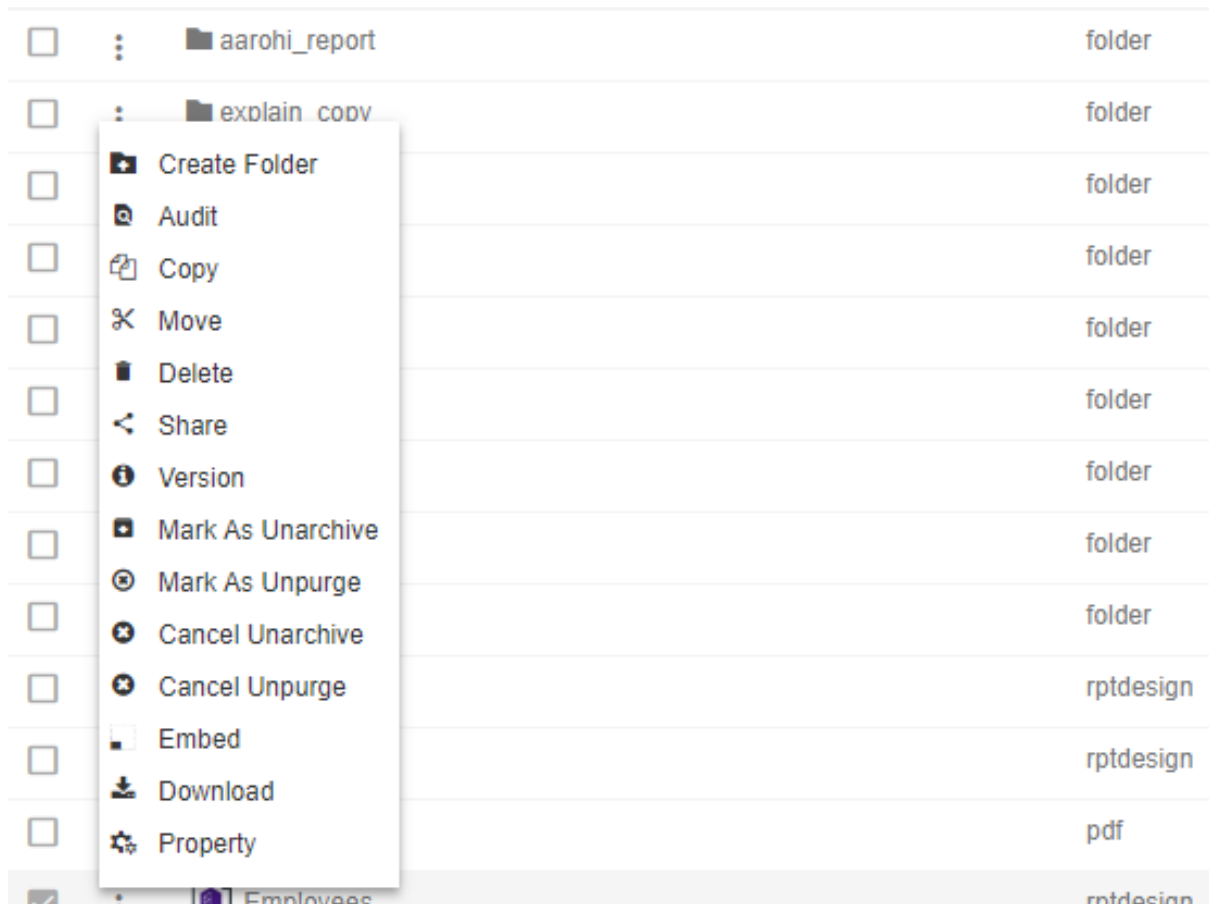
- Set the validity date as shown below:-



- Click on **Generate** to generate the embed key as shown above.
- Now copy the embed key and paste it on your browser to see the results.

Download


User can download the selected alert by clicking download option from context menu.



Property

- Use Properties option of the file and folders for the following:
- To update the Name of the file and folders
- To change the Output Types of the File (Note: only applicable to files)
- To view file and folders Properties such as owner information, last updated by, the file created date, archive and purge options and file visibility i.e. (Private, Internal, Public) and much more.

To view the Property for the file or folder follow the steps below:

1. Select file or folder you wish to see properties for or update the information such as Name or Output Type by selecting  Properties from the context menu, following dialog box will appear as shown in the image below:


The screenshot shows a 'Properties' dialog box with two tabs: 'General' and 'Output Types'. The 'Output Types' tab is active. The dialog contains the following fields:

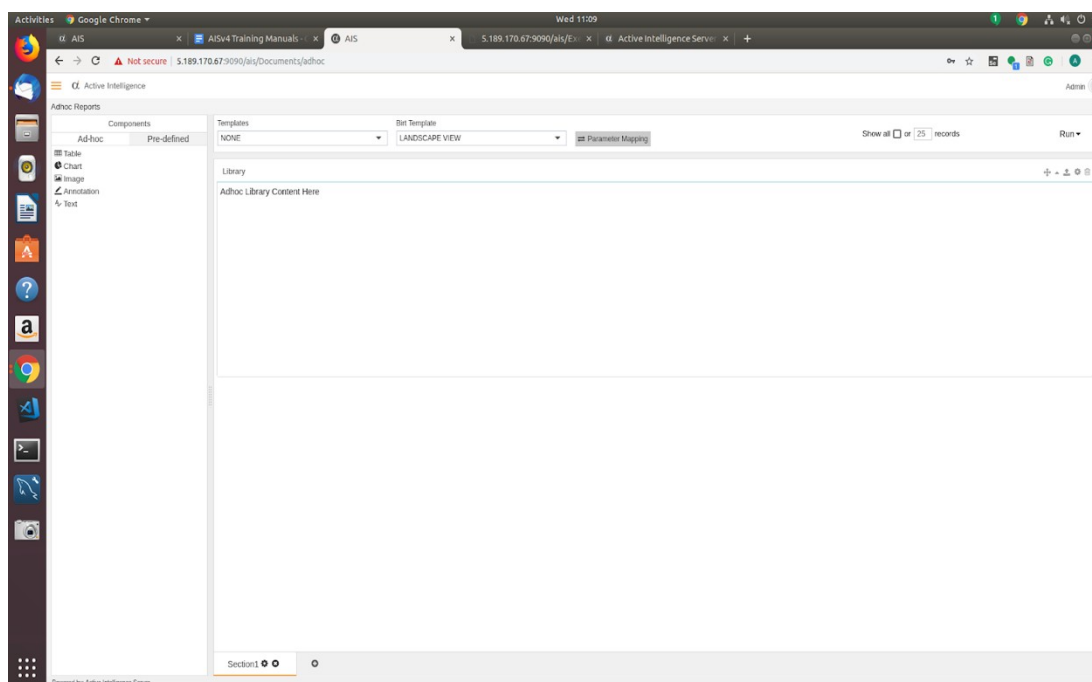
| Field | Value |
|-----------------|---------------------|
| Name | Employees |
| Description | |
| Owner | Admin |
| Visibility Type | INT |
| Default Version | 1 |
| Created On | 2019-03-19 03:36:25 |
| Last Updated By | Admin |
| Last Updated On | 2019-03-19 03:36:25 |
| Is Archivable | True |
| Is Purgable | True |

At the bottom of the dialog, there are two buttons: 'Submit' (highlighted in orange) and 'Cancel'.


2. The Name can be updated (Note: The above image is taken from the Folder Properties, File Properties will have additional tab for Output Type which will enable users to select/unselect the file Output visibility Type i.e pdf, doc, HTML, etc.).
3. Finally click **Submit** button to save the changes to the file Properties, if any.

Ad-hoc Tab

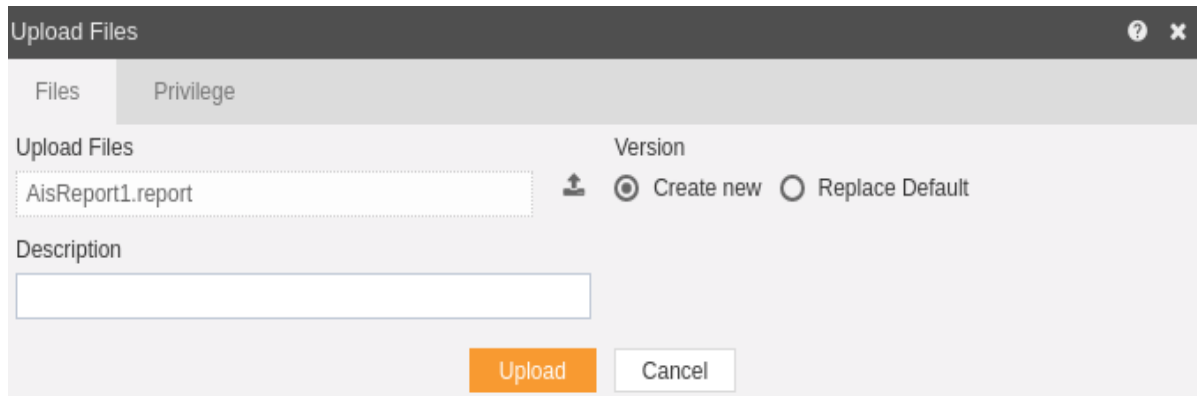
- Ad-hoc enables a naive user to create Reports with great ease using drag and drop mechanism to insert graphical elements like the chart on the page.
- The Ad-hoc section can be accessed by clicking on Ad-hoc or by clicking on  next to the Reports tab, which will open the Reports in a new tab.
- Ad-hoc helps us to insert following graphical elements as follows:-
 1. Table
 2. Chart
 3. Image
 4. Annotations
 5. Text
- Apart from this, a user can also create the following Predefined components from the component library:-
 1. Cover Page
 2. Performance Report
- Ad-hoc also performs following functionalities:-
 1. Upload
 2. Create
 3. Clone
 4. Delete
 5. Share
 6. Unarchive
 7. Unpurge
 8. Audit
 9. Version
 10. Download
 11. Property



Upload

The user can upload reports by clicking on the upload icon  on the toolbar located at the bottom of the Ad-hoc page.

- On clicking the icon, following screen will be displayed...



Upload Files

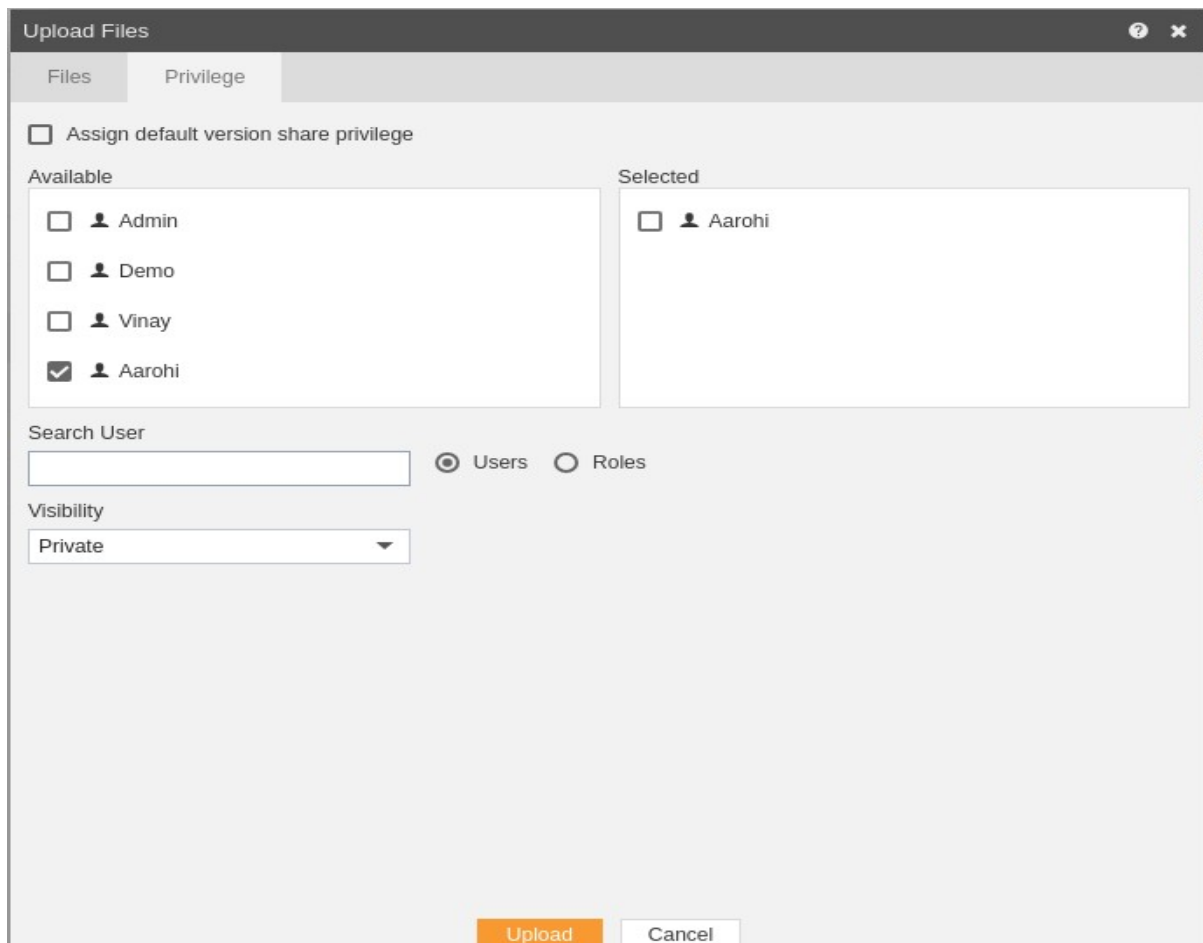
Files | Privilege

Upload Files: AisReport1.report

Version: Create new Replace Default

Description:

- In the Files section as shown in the figure above, select the upload icon in order to upload your documents from your computer.
- If the report already exists on the AIV application, the user has an option to replace the default report or to create a new report using the version option as depicted above.
- Furthermore, the user can also provide an optional description for reference, in the description text area shown here.
- There is also an option to hide the visibility to certain users using the privileges tab as shown in the figure below:



Upload Files

Files | Privilege

Assign default version share privilege

Available:

- Admin
- Demo
- Vinay
- Aarohi

Selected:

- Aarohi

Search User:

Users Roles

Visibility: Private

- In case of working with any new version of the report, you can assign the default version share privileges by checking the checkbox. For instance, if there are three versions of their same report and a new version is to be created of that report, then default share privileges can be applied to that report.
- The user can select other users who can share the report from the list of available users or search them in the search user bar.

- In a similar manner, the user can apply privileges to different user roles as follows:-

The screenshot shows a window titled "Upload Files" with a "Privilege" tab selected. At the top, there is a checkbox labeled "Assign default version share privilege". Below this, there are two columns: "Available" and "Selected".

Available:




- Administrator
- Sales
- office
- dhwani

Selected:


- Administrator
- Sales

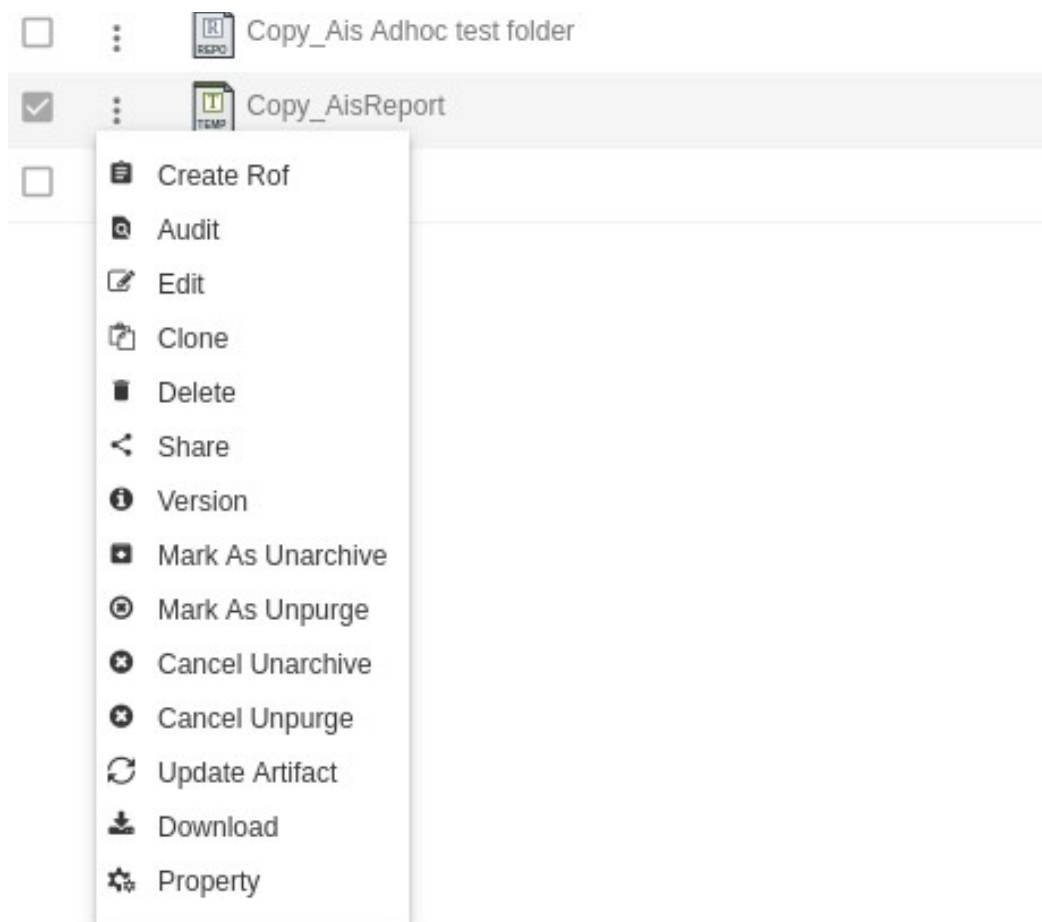
Below the lists is a "Search Role" input field. To its right are radio buttons for "Users" (unselected) and "Roles" (selected). Below that is a "Visibility" dropdown menu currently set to "Private". At the bottom of the dialog are two buttons: "Upload" (orange) and "Cancel" (white).

- Just as in case of users, the user can assign default share privileges to different user roles or can select the roles from the Available list of roles.
- The user can also search for roles in the Search Role bar.

- Visibility is used to mention who all can view the report and is of following three types:-
 1. **Private:-** It means only the current user can view the file.
 2. **Internal:-** It means all the users within the organization can view the file.
 3. **Public:-** It means anyone can view the file.
- The user can select the visibility from the dropdown menu as shown above.
- In case of any further help, the user can click on the  icon to access the AIV help documents.
- Finally, in order to upload the report, click on the upload button.
- If the user is not satisfied and wants to cancel the upload request, he can do this by clicking on cancel button next to upload or by clicking on  button next to the  icon.

Create Ad-hoc

- There are three ways in which a user can share a ad-hoc report in the AIV application:-
 1. By clicking on the create icon  located at the bottom most toolbar.
 2. By right clicking any existing ad-hoc report/template as follows:-

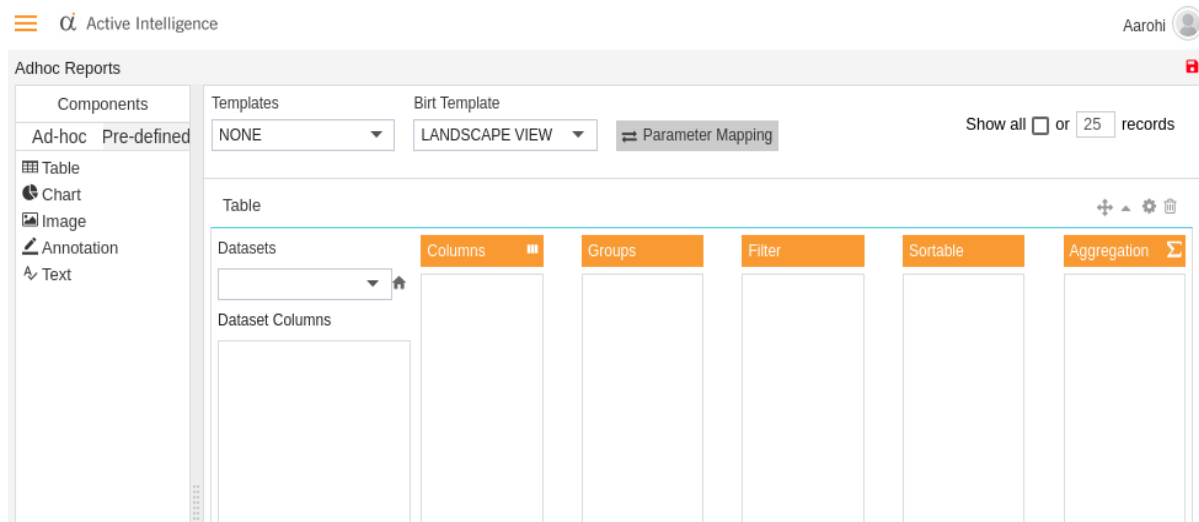


1. By clicking on  on the Ad-hoc tab in the Documents section.

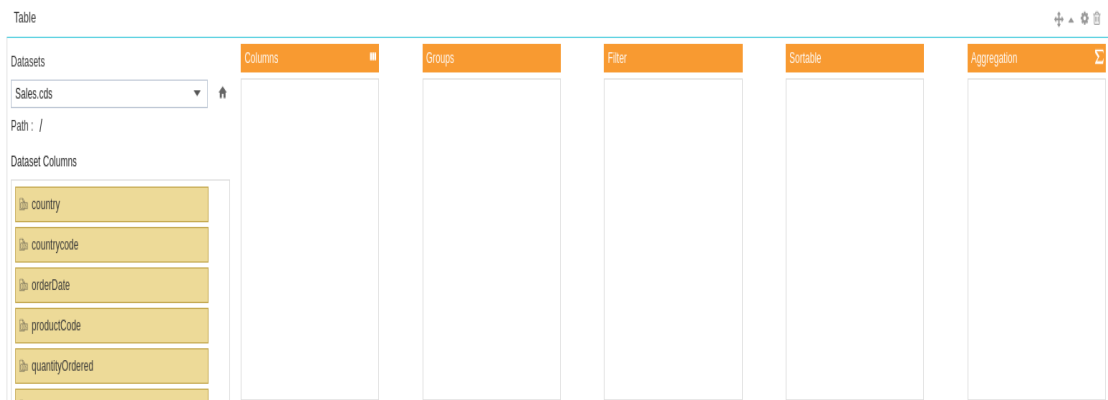
- Creating a report using any of the above mentioned methods will open the ad-hoc report create page.
- There are following different components on Ad-hoc Page:-
 1. Table
 2. Chart
 3. Image
 4. Annotations
 5. Text
 6. Cover Page
 7. Performance Report


Table:-

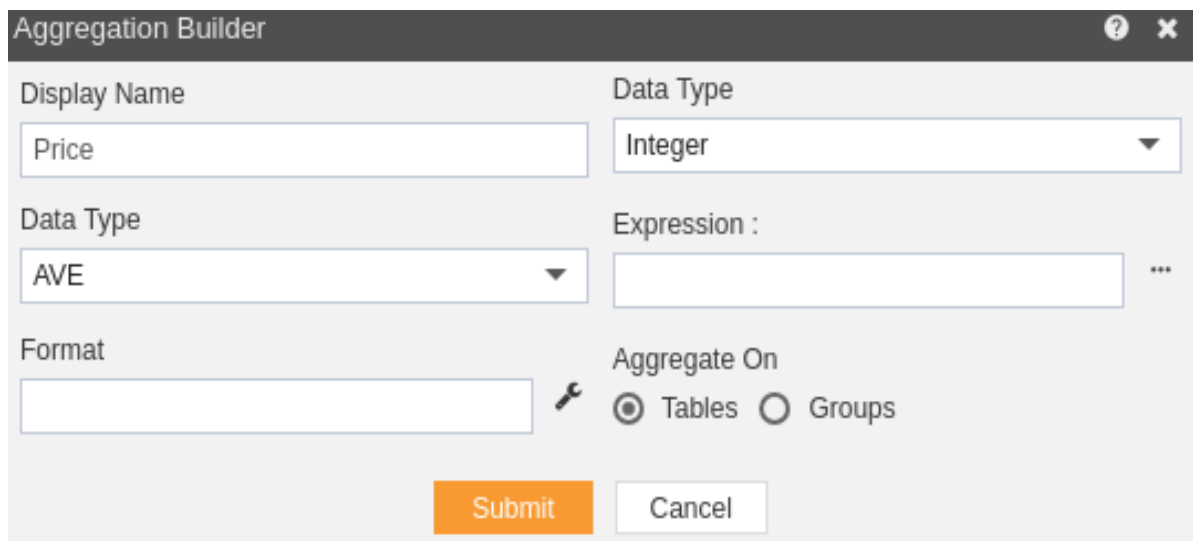
- In order to create a table follow the following steps:-
 1. Drag and drop the table to empty area as shown below:-




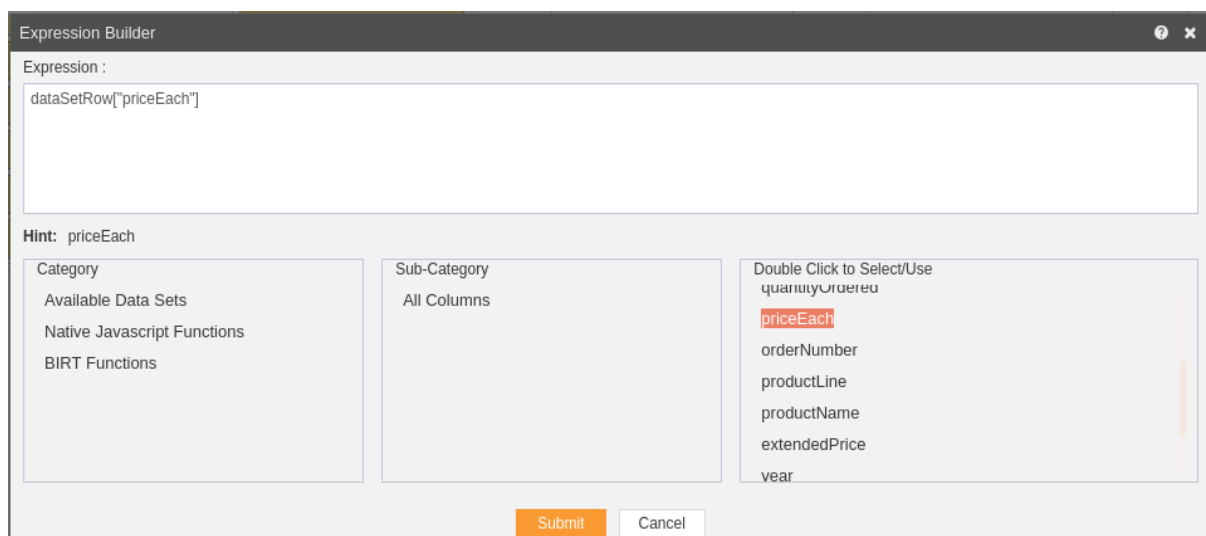
1. Now from the drop down list of Datasets select the Sales.cds as follows:-




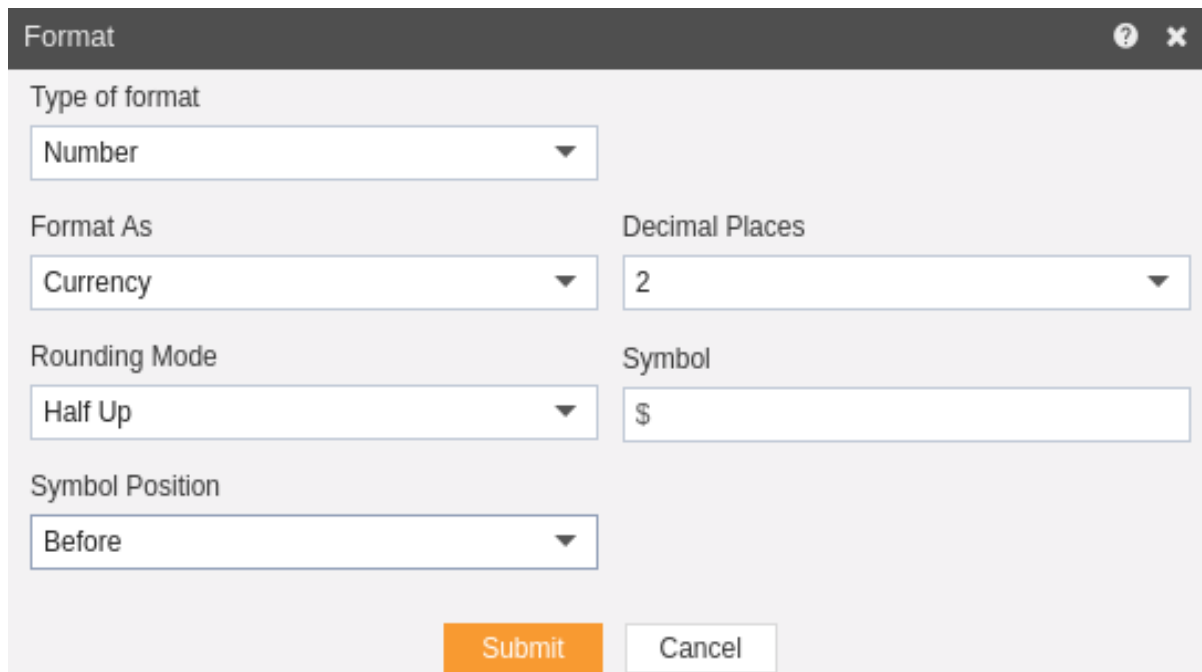
1. You will see all the columns of the Dataset under Dataset Columns.
2. Add productCode, productName, productLine, and priceEach in first Column by dragging the field and dropping it to Column 1.
3. In a similar fashion, add orderNumber to Groups, order Date to sortable and priceEach to Aggregation.
4. The report will group the products with the same order number, filter them based on country name, sort the data in ascending order based on the date on which the product was ordered.
5. In aggregate we have mentioned priceEach, In order to perform an Aggregation function click on  .
6. This will open the following dialog box:-



7. Enter the display name as Price and Data Type as Integer.
7. In order to specify the Expression, click on Expression builder  as follows:-



9. In the Category select Available Data sets.
9. Select All Columns in sub category and double click pricerEach to use the expression. Click the submit button.
9. You can specify the format by clicking on the  button which opens the following dialog box.

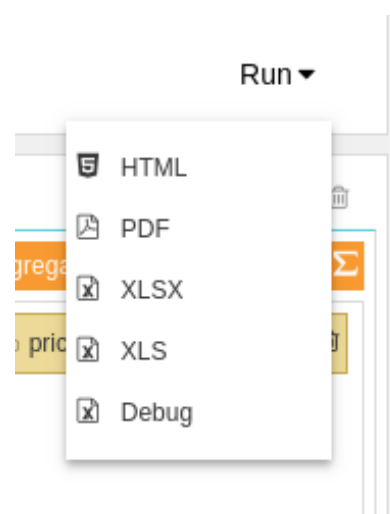


The image shows a 'Format' dialog box with the following settings:

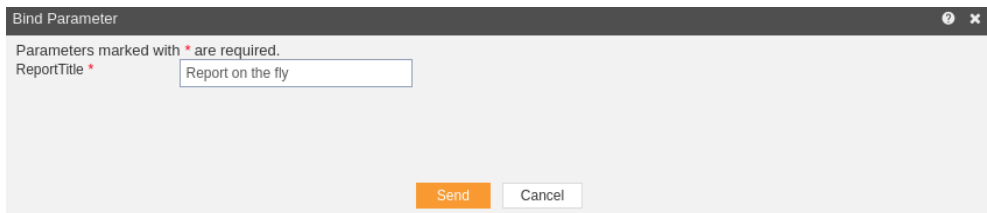
- Type of format: Number
- Format As: Currency
- Decimal Places: 2
- Rounding Mode: Half Up
- Symbol: \$
- Symbol Position: Before

Buttons: Submit (orange), Cancel (white)

12. Select format type as Number and Format As Currency from dropdown.
12. Round up to 2 decimal places, with Rounding mode Half Up and Symbol \$ with position of symbol Before the number.
12. Hit the Submit button to save the format and again hit submit to save Aggregation.
12. In order to run the table widget click on Run in the topmost right corner as follows:-



16. For this example, we select Run as HTML.
16. Click on HTML which will open the following dialog box:-

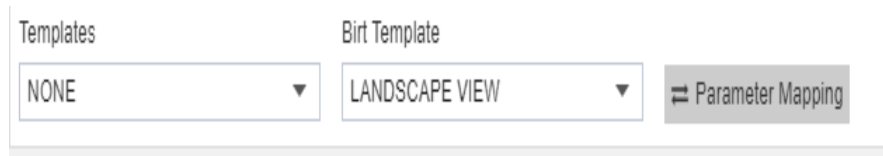


18. As the table has no parameters, just click on Send.

19. The following report will be generated in HTML.

| productCode | productName | productLine | priceEach |
|----------------|---|------------------|-----------|
| • 10100 | | | |
| S18_1749 | 1917 Grand Touring Sedan | Vintage Cars | 171.7 |
| S18_2248 | 1911 Ford Town Car | Vintage Cars | 67.8 |
| S18_4409 | 1932 Alfa Romeo 8C2300 Spider Sport | Vintage Cars | 86.51 |
| S24_3969 | 1936 Mercedes Benz 500k Roadster | Vintage Cars | 34.47 |
| • 10101 | | | |
| S18_2325 | 1932 Model A Ford J-Coupe | Vintage Cars | 151.28 |
| S18_2795 | 1928 Mercedes-Benz SSK | Vintage Cars | 145.13 |
| S24_1937 | 1939 Chevrolet Deluxe Coupe | Vintage Cars | 31.2 |
| S24_2022 | 1938 Cadillac V-16 Presidential Limousine | Vintage Cars | 53.76 |
| • 10102 | | | |
| S18_1342 | 1937 Lincoln Berline | Vintage Cars | 123.29 |
| S18_1367 | 1936 Mercedes-Benz 500K Special Roadster | Vintage Cars | 50.14 |
| • 10103 | | | |
| S10_1949 | 1952 Alpine Renault 1300 | Classic Cars | 207.87 |
| S10_4962 | 1962 LanciaA Delta 16V | Classic Cars | 128.53 |
| S12_1666 | 1958 Setra Bus | Trucks and Buses | 125.74 |
| S18_1097 | 1940 Ford Pickup Truck | Trucks and Buses | 112.0 |
| S18_2432 | 1926 Ford Fire Engine | Trucks and Buses | 54.09 |

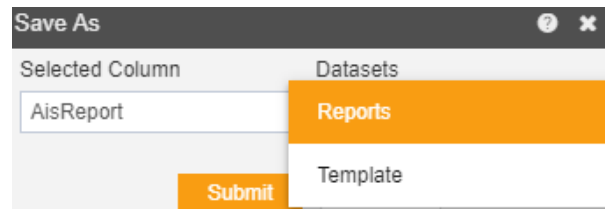
20. You can change the template format from the BIRT Templates as follows:-




21. You can also specify the number of records you want to show on a page from the following widget near the template selector widget:-

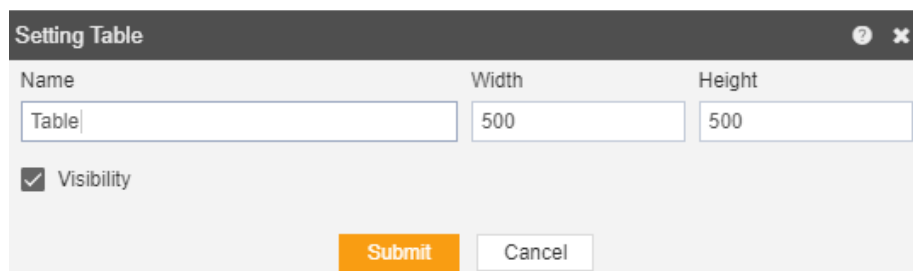
Show all or records


22. If you want to save your chart you can click on the save button at the topmost right corner below admin which will open the following dialog box:-



23. You can give your own name in selected column, and select format as Report/Template and press submit button to perform save operation.

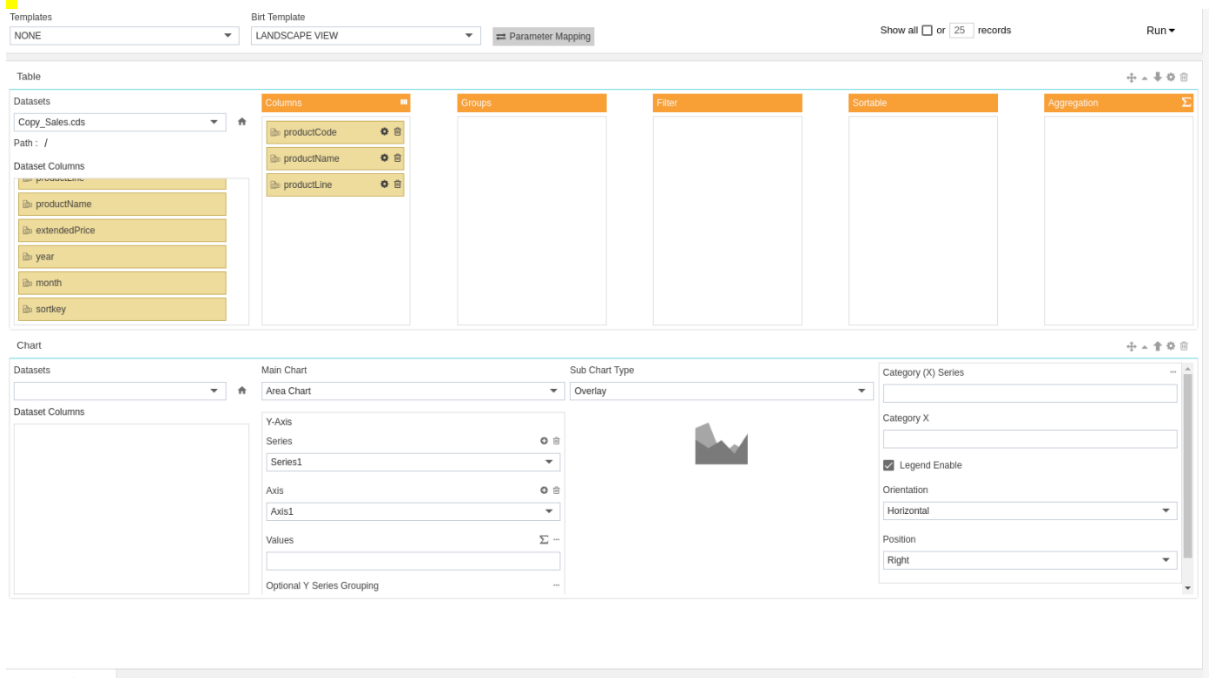
24. If you want to change the settings of a widget click on  below Run which will open the following dialog box:-



25. Here you can change name, width, height and visibility of your chart.
26. Similarly press  in order to delete the chart widget.
- 27.

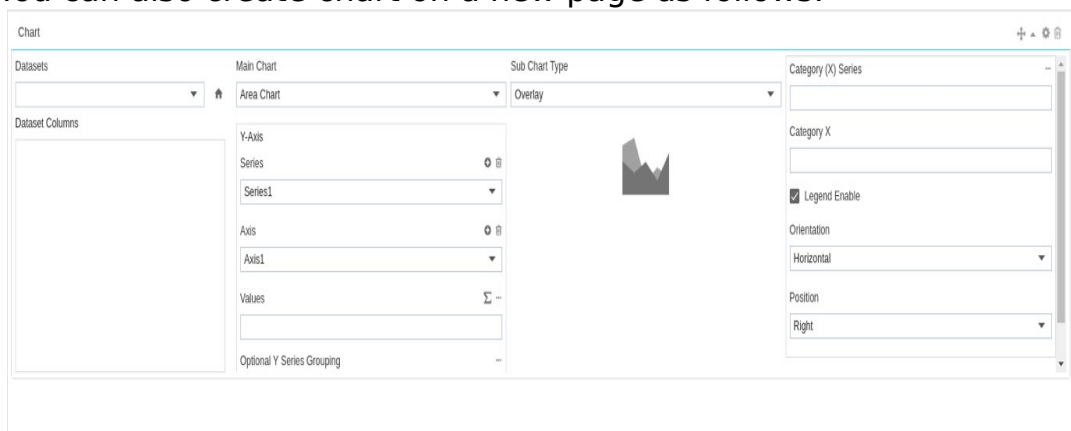
Chart

- In order to create a chart follow the following steps:-
- You can insert a chart below another widget like table as follows:-
-



The screenshot shows a BI tool interface with two widgets. The top widget is a 'Table' widget. It has a 'Datsets' dropdown set to 'Copy_Sales.cds'. The 'Columns' panel contains 'productCode', 'productName', and 'productLine'. The 'Groups', 'Filter', 'Sortable', and 'Aggregation' panels are empty. The bottom widget is a 'Chart' widget. It has a 'Main Chart' dropdown set to 'Area Chart' and a 'Sub Chart Type' dropdown set to 'Overlay'. The 'Y-Axis' panel shows 'Series1' selected. The 'X-Axis' panel shows 'Axis1' selected. The 'Values' panel shows a summation symbol. The 'Optional Y Series Grouping' panel is empty. The 'Category (X) Series' panel shows 'Category X' selected, with 'Legend Enable' checked, 'Orientation' set to 'Horizontal', and 'Position' set to 'Right'. A small area chart is visible in the center of the chart widget.

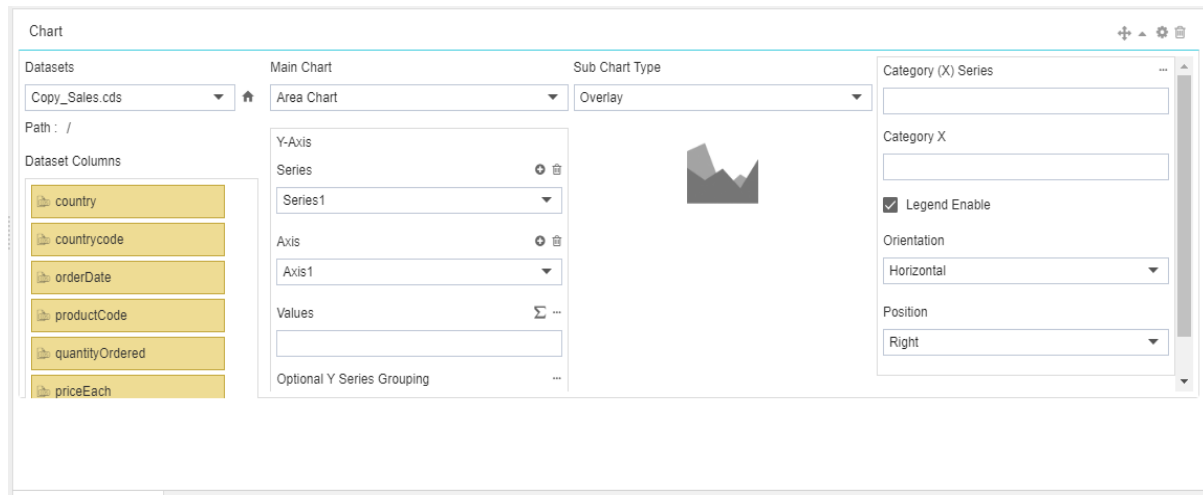
- You can also create chart on a new page as follows:-



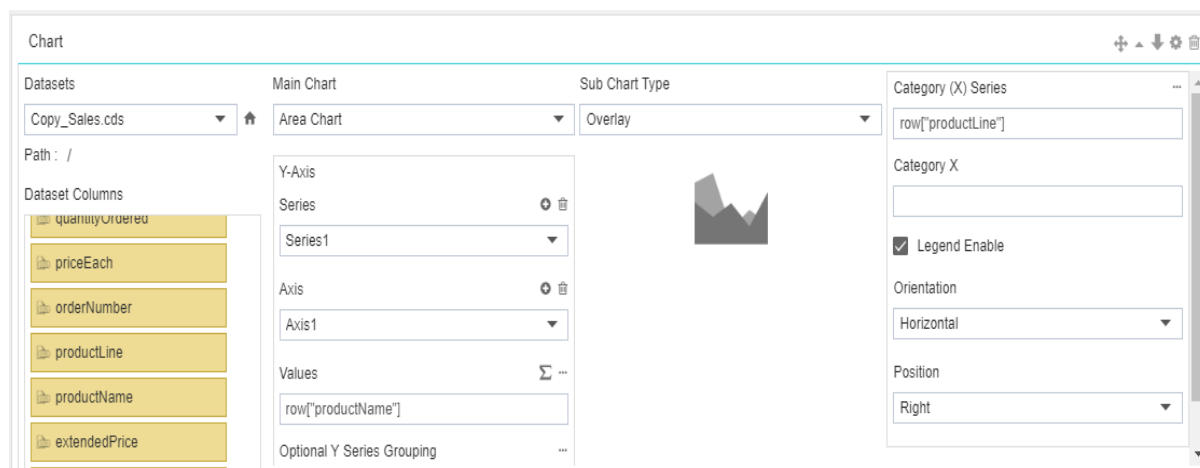
The screenshot shows a BI tool interface with a 'Chart' widget. It has a 'Main Chart' dropdown set to 'Area Chart' and a 'Sub Chart Type' dropdown set to 'Overlay'. The 'Y-Axis' panel shows 'Series1' selected. The 'X-Axis' panel shows 'Axis1' selected. The 'Values' panel shows a summation symbol. The 'Optional Y Series Grouping' panel is empty. The 'Category (X) Series' panel shows 'Category X' selected, with 'Legend Enable' checked, 'Orientation' set to 'Horizontal', and 'Position' set to 'Right'. A small area chart is visible in the center of the chart widget.

- Now follow the following steps:-

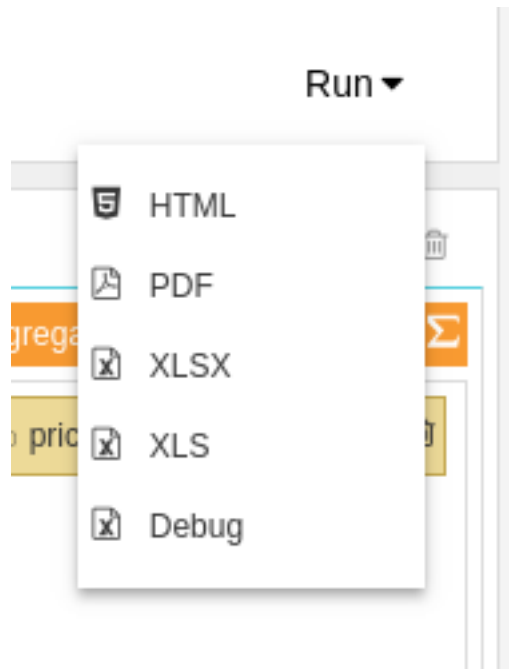
- 1 Drag and drop the chart to empty area as shown above:
- 2 Now from the drop down list of Datasets select the Sales.cds as follows:-



3. You will see all the columns of the Dataset under Dataset Columns.
3. Select Area chart in the Main Chart from the dropdown.
3. In the sub-chart type select Overlay.
3. Now drag and drop productName to Values in Y axis and country to optional Y series grouping.
3. In the similar fashion, add productLine to Category X.

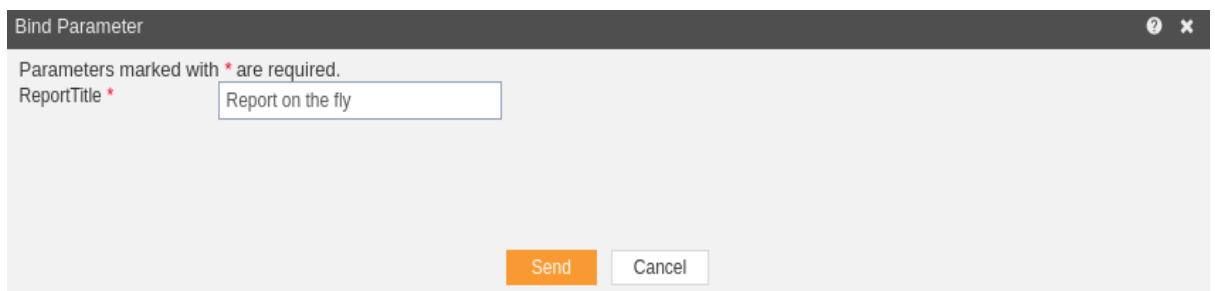


8. Leave everything else as it is in the chart and run the chart as HTML in order to see the how chart is displayed.
8. In order to run the table widget click on Run in the topmost right corner as follows:-



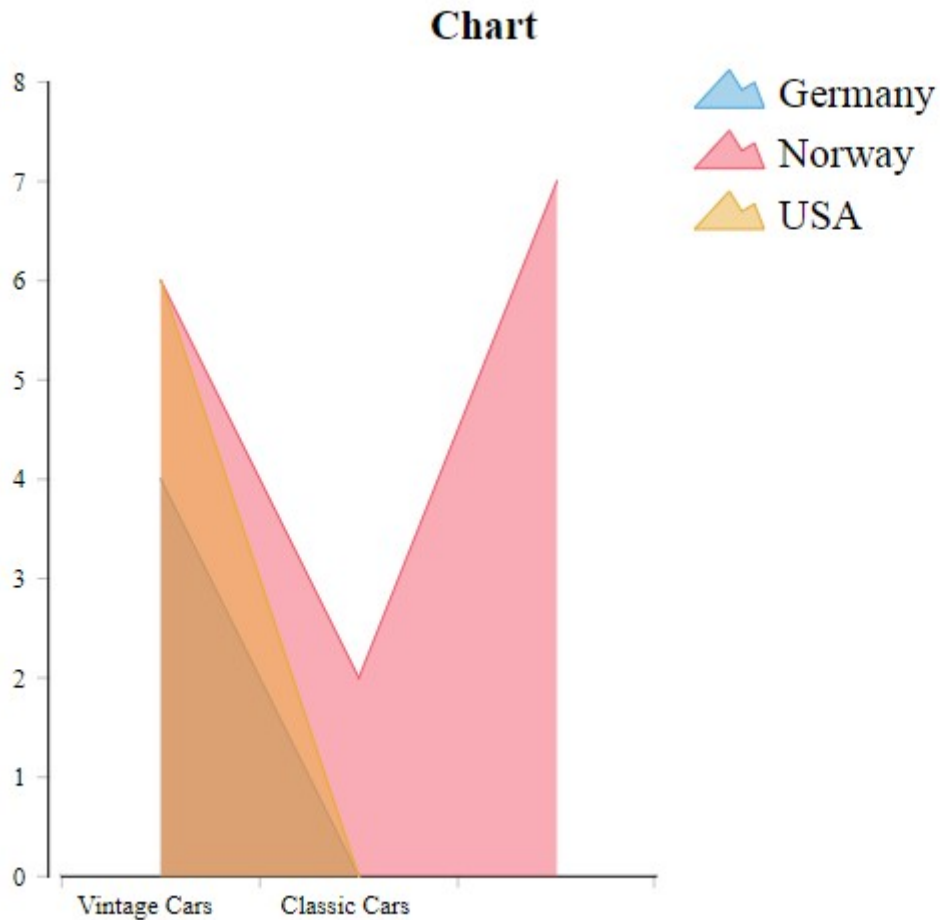
9. For this example, we select Run as HTML.

10. Click on HTML which will open the following dialog box:-



11. As the chart has no parameters, just click on Send.

12. The following chart will be generated in HTML.




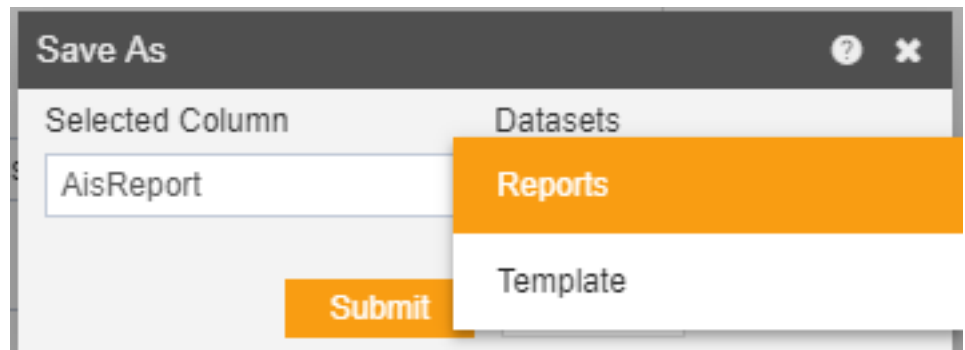
13. You can change the template format from the Birt Templates as follows:-



14. You can also specify the number of records you want to show on a page from the following widget near the template selector widget:-


Show all or records

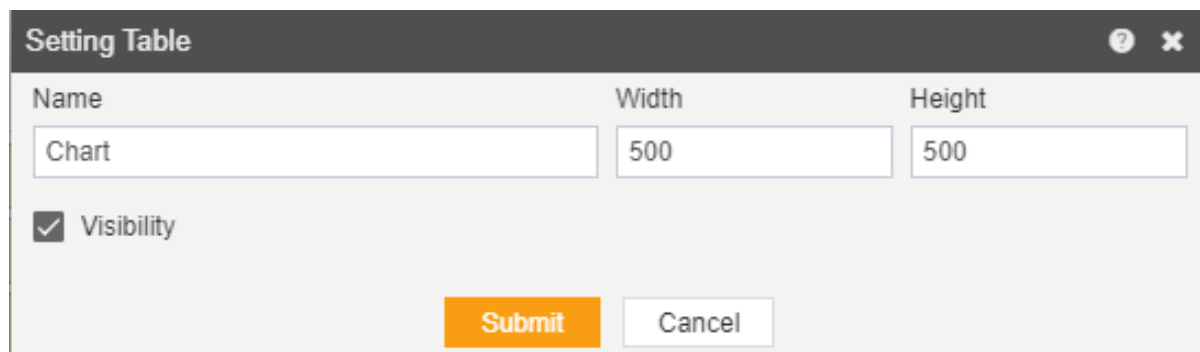
15. If you want to save your chart you can click on the save button  at the topmost right corner below admin which will open the following dialog box:-



16. You can give your own name in selected column, and select format as Report/Template and press submit button to perform save operation.

17.

18. If you want to change the settings of a widget click on  below Run which will open the following dialog box:-



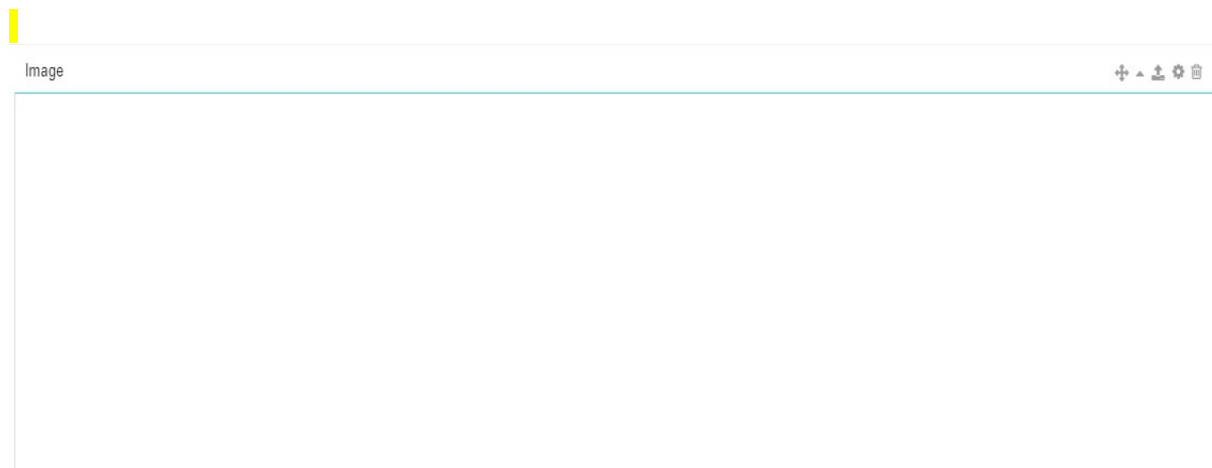
19. Here you can change name, width, height and visibility of your chart.

20. Similarly press  in order to delete the chart widget.


21.

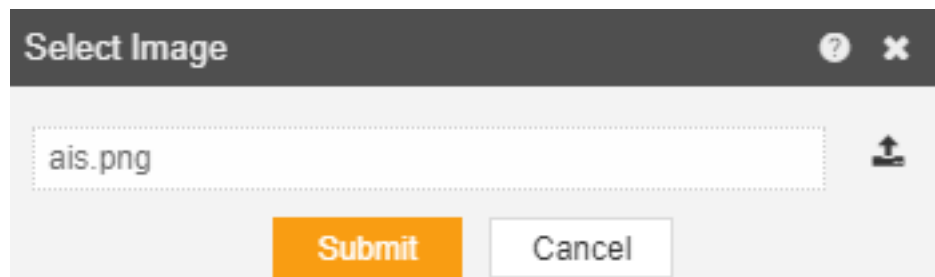
Image


- In order to insert an image in your adhoc report follow the following steps:-
- You can insert a image below another widget like table.
- You can also create image on a new page as follows:-



- Now follow the following steps:-

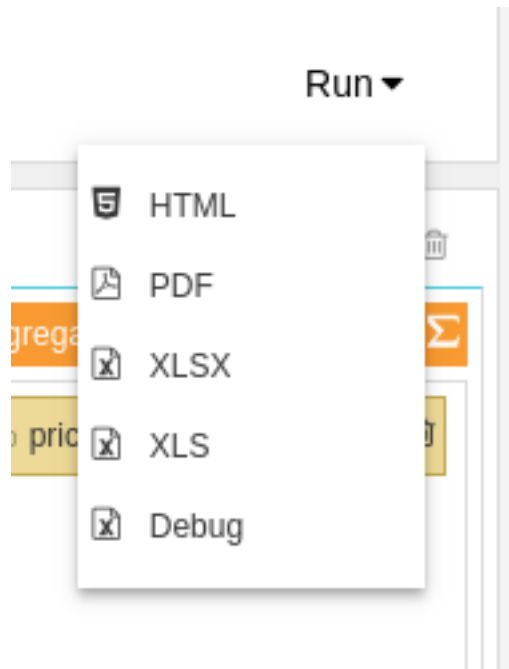
1. Drag and drop the image to empty area as shown above.
2. Now click on  to upload an image to your adhoc report.
3. This will open the following dialog box:-



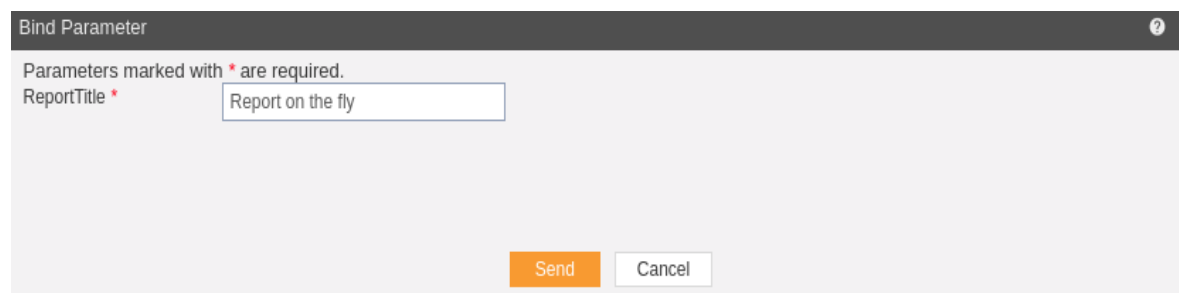
4. To select an image from your computer select  and select an image and press submit to save it.
5. You have now successfully inserted an image as follows:-



6. In order to run the image widget click on Run in the topmost right corner as follows:-



7. For this example, we select Run as HTML.
8. Click on HTML which will open the following dialog box:-




9. As the chart has no parameters, just click on Send.
10. The following image will be generated in HTML.




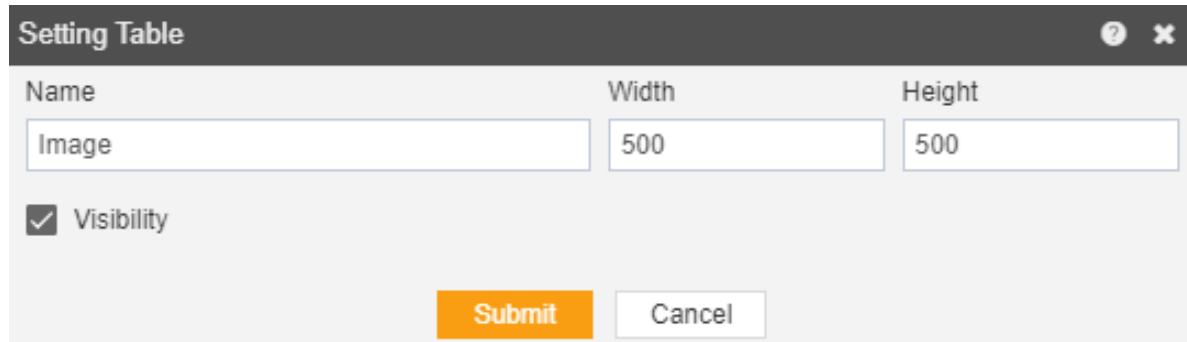
11. You can change the template format from the Birt Templates as follows:-

Templates: NONE
Birt Template: LANDSCAPE VIEW
Parameter Mapping

12. If you want to save your image you can click on the save button  at the topmost right corner below admin which will open the following dialog box:-

Save As
Selected Column: AisReport
Datasets: Reports
Submit

13. You can give your own name in selected column, and select format as Report/Template and press submit button to perform save operation.
14. If you want to change the settings of a widget click on  below Run which will open the following dialog box:-




Setting Table

| Name | Width | Height |
|-------|-------|--------|
| Image | 500 | 500 |

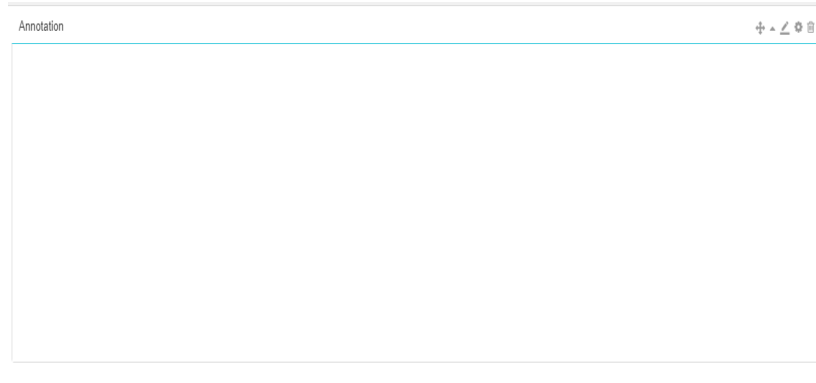
Visibility


Submit Cancel

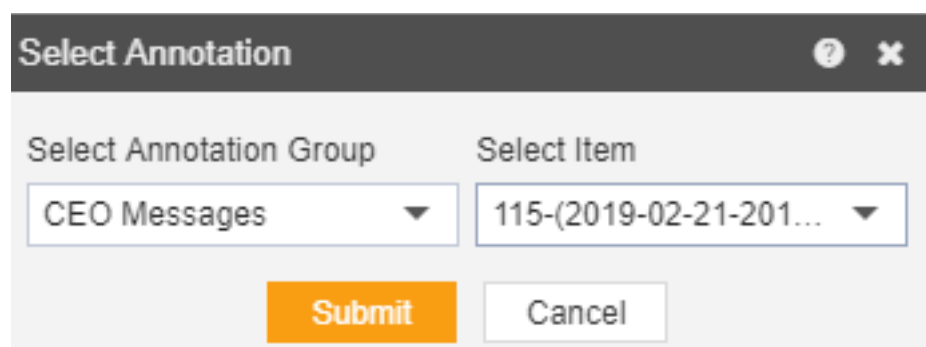
15. Here you can change name, width, height and visibility of your image.
16. Similarly press  in order to delete the image widget.

Annotation

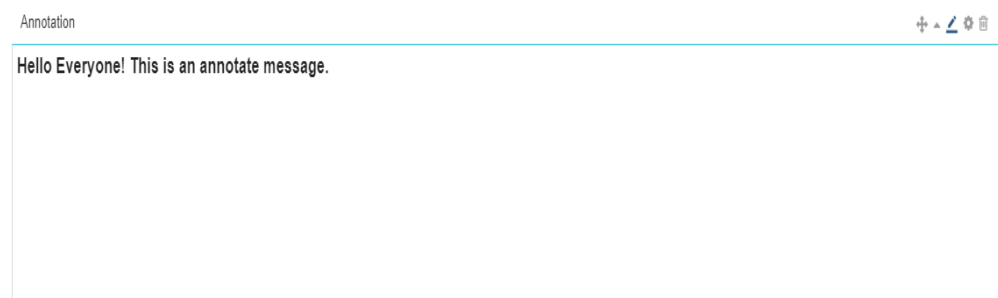
- Annotations are critical or explanatory notes added to a text, image or other data. They are references that point to the specific part of data.
- Annotations enables users to add shapes and text to make information more meaningful for the business.
- The detailed explanation regarding Annotations will be given in the Annotations section of Master Data.
- In this tutorial, we will learn how to add Annotations to the Adhoc report in an AIV application.
- In order to add Annotations to the Adhoc report perform following steps:-
 1. Drag and drop the Annotation to empty area as shown below:-



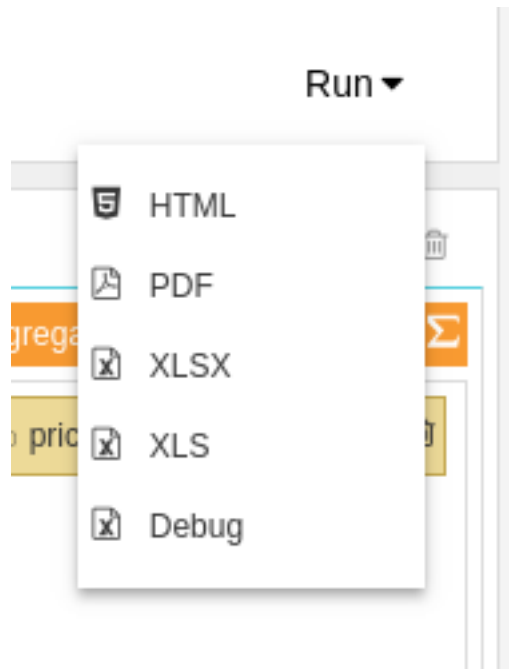
2. Now click on  to write an annotation message.
3. This will open the following dialog box:-



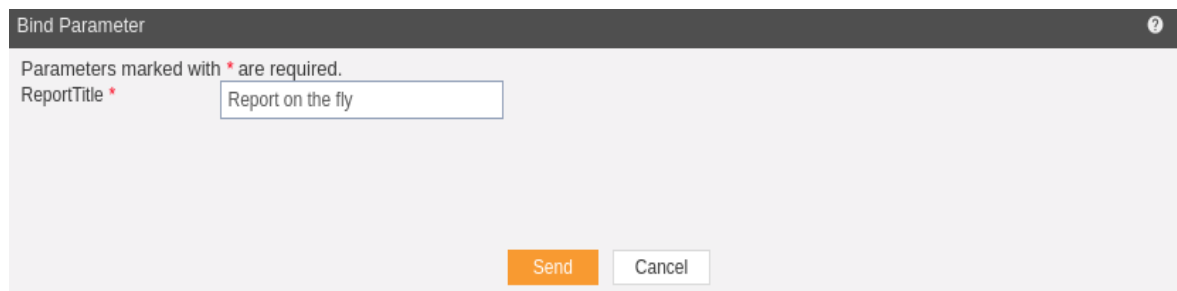
4. Select Annotation group as CEO message and Annotation Item number 115 from the dropdown as shown above and hit the submit button.
5. You have now successfully inserted an annotation as follows:-



6. In order to run the annotation widget click on Run in the topmost right corner as follows:-



7. For this example, we select Run as HTML.
8. Click on HTML which will open the following dialog box:-




9. As the chart has no parameters, just click on Send.
10. The following image will be generated in HTML.

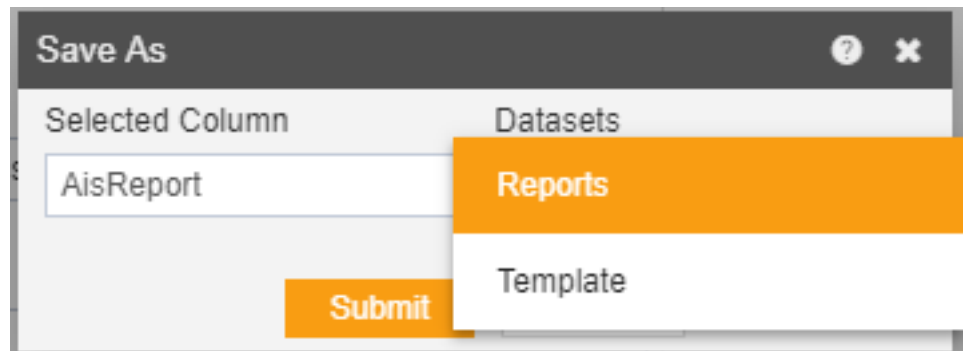
Report on the fly

Hello Everyone! This is an annotate message.


11. You can change the template format from the Birt Templates as follows:-

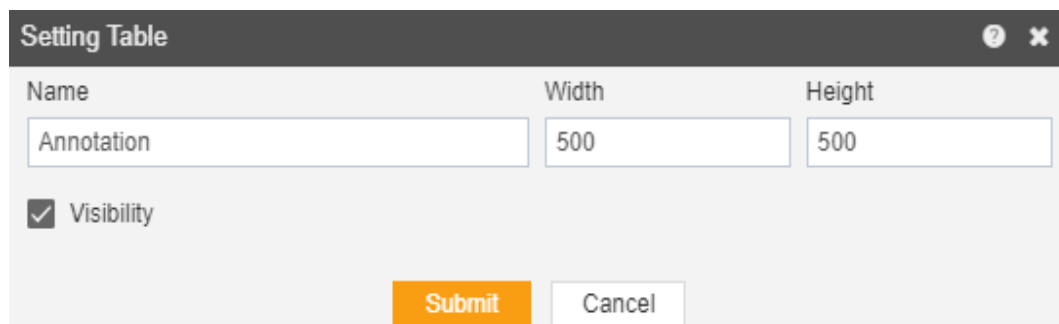
Templates: NONE Birt Template: LANDSCAPE VIEW Parameter Mapping

12. If you want to save your image you can click on the save button  at the topmost right corner below admin which will open the following dialog box:-




The 'Save As' dialog box has a title bar with a question mark and a close button. It contains two main sections: 'Selected Column' and 'Datasets'. The 'Selected Column' section has a text input field containing 'AisReport'. The 'Datasets' section is a dropdown menu with 'Reports' selected and highlighted in orange, and 'Template' as an option below it. At the bottom right, there is an orange 'Submit' button.

13. You can give your own name in selected column, and select format as Report/Template and press submit button to perform save operation.
14. If you want to change the settings of a widget click on  below Run which will open the following dialog box:-

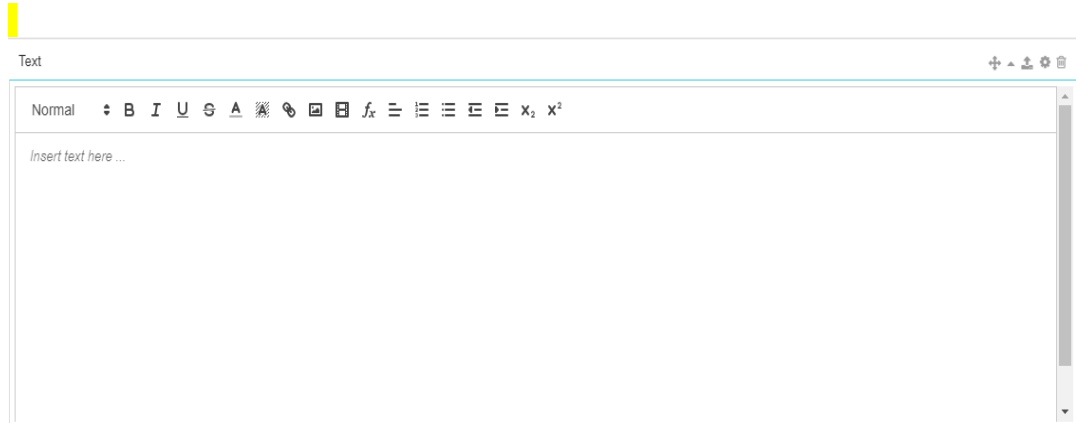


The 'Setting Table' dialog box has a title bar with a question mark and a close button. It contains a table with three columns: 'Name', 'Width', and 'Height'. The 'Name' column has a text input field containing 'Annotation'. The 'Width' column has a text input field containing '500'. The 'Height' column has a text input field containing '500'. Below the table, there is a checkbox labeled 'Visibility' which is checked. At the bottom, there are two buttons: an orange 'Submit' button and a white 'Cancel' button.

15. Here you can change name, width, height and visibility of your annotation.
16. Similarly press  in order to delete the annotation widget.


Text

- In order to insert text in your adhoc report follow the following steps:-
- You can insert a text below another widget like table.
- You can also create text on a new page as follows:-






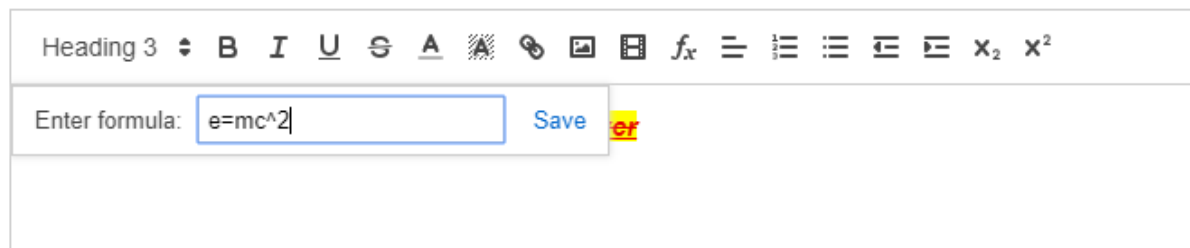
- Now follow the following steps:-
 1. Drag and drop the text to empty area as shown above.
 2. Now you can insert text in the empty area and perform formatting as follows:-



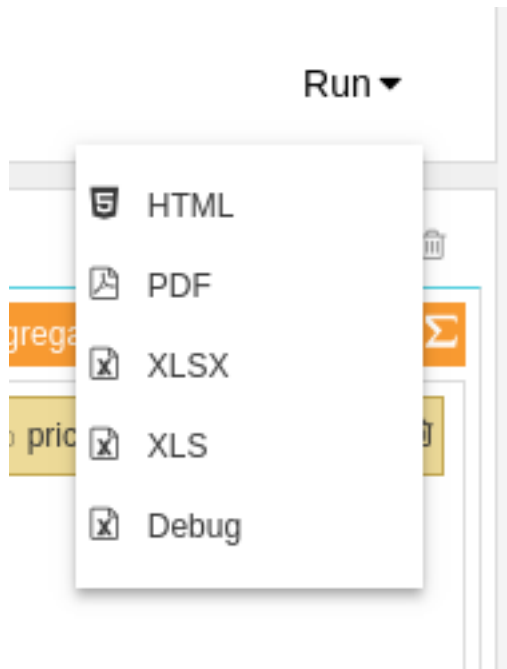
3. You can link your text to a specific URL by selecting the text and clicking  as follows:-



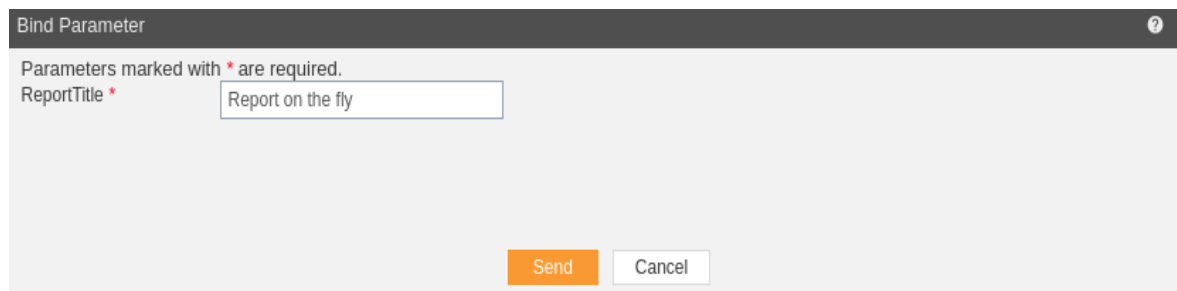
4. You can also insert an image or video by clicking on  or  respectively.
5. You can insert a formula in your report by clicking on  as follows:-



6. Similarly, you can perform alignment, indentation, superscript and subscript using text.
7. In order to run the text widget click on Run in the topmost right corner as follows:-



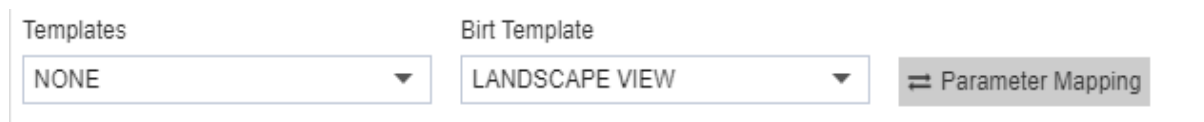
1. For this example, we select Run as HTML.
2. Click on HTML which will open the following dialog box:-




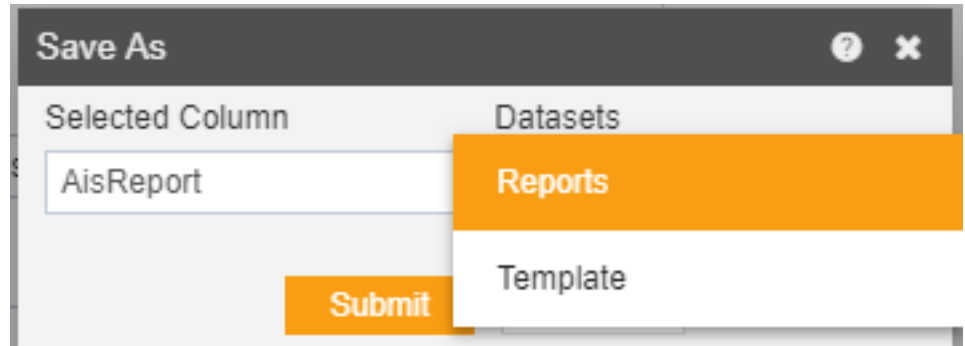
3. As the text has no parameters, just click on Send.
4. The following text will be generated in HTML.




21 You can change the template format from the Birt Templates as follows:-

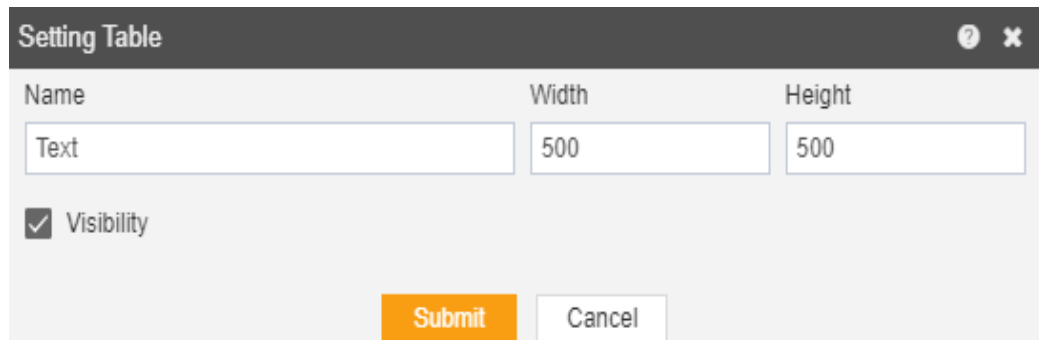


22 If you want to save your image you can click on the save button  at the topmost right corner below admin which will open the following dialog box:-



23 You can give your own name in selected column, and select format as Report/Template and press submit button to perform save operation.

24 If you want to change the settings of a widget click on  below Run which will open the following dialog box:-



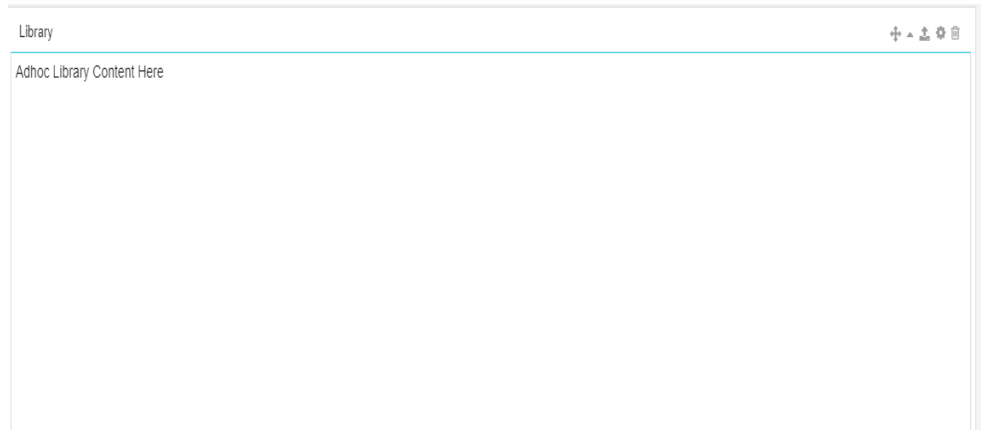
25 Here you can change name, width, height and visibility of your text.

26 Similarly press  in order to delete the text widget.

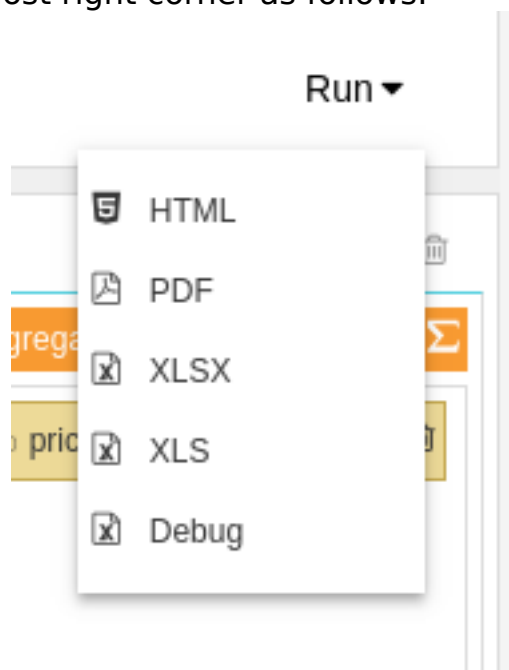
Pre-defined

- There are also some predefined components provided by the AIV application inside the component library of the Pre-defined tab on create adhoc page.
- These components are as follows:-
 - Cover Page
 - Performance Report
- In order to add predefined components to your adhoc report perform the following steps:-

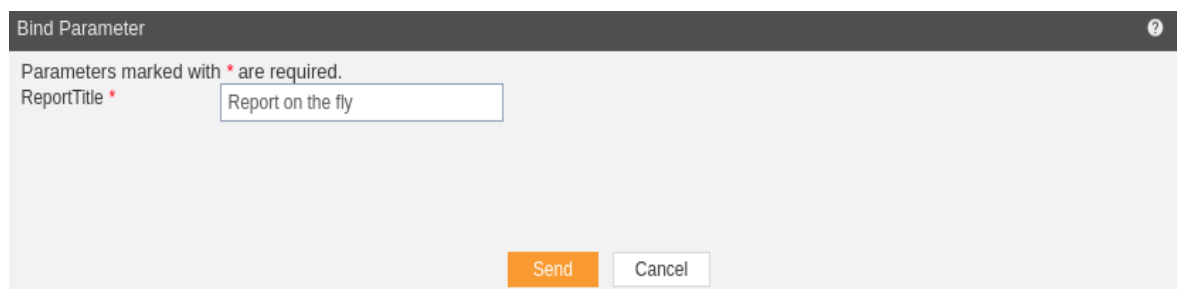
- Drag and drop the performance report to empty area as shown below:-



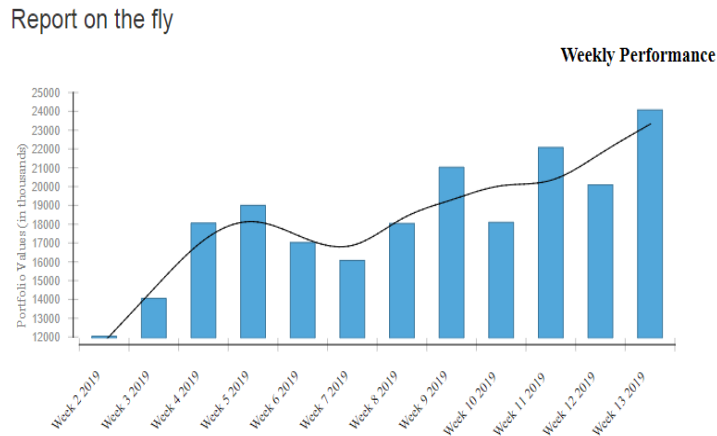
- 2 You have now successfully inserted a performance report in your adhoc report.
- 3 In order to run the performance report click on Run in the topmost right corner as follows:-



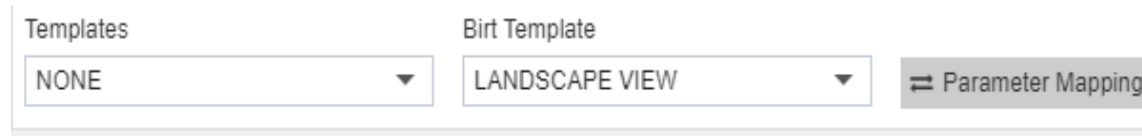
5. For this example, we select Run as HTML.
6. Click on HTML which will open the following dialog box:-




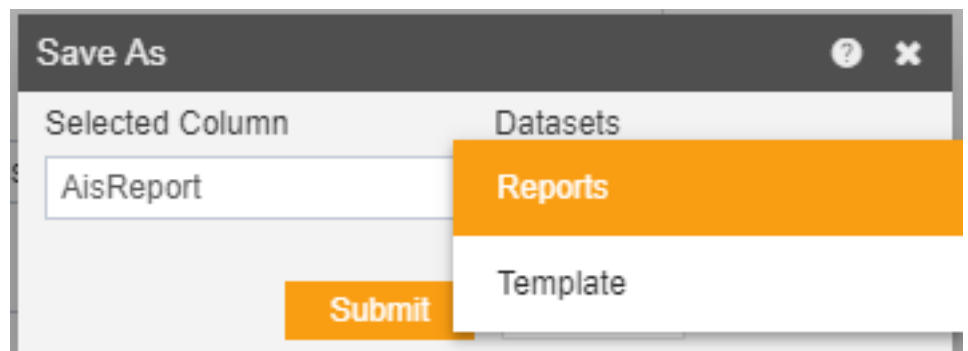
7. As the chart has no parameters, just click on Send.
8. The following performance report will be generated in HTML.




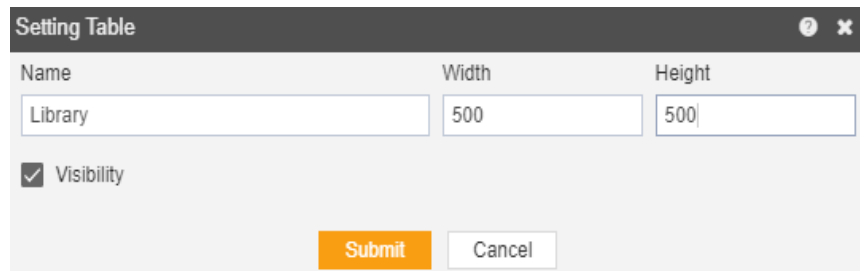
9. You can change the template format from the Birt Templates as follows:-




10. If you want to save your image you can click on the save button  at the topmost right corner below admin which will open the following dialog box:-




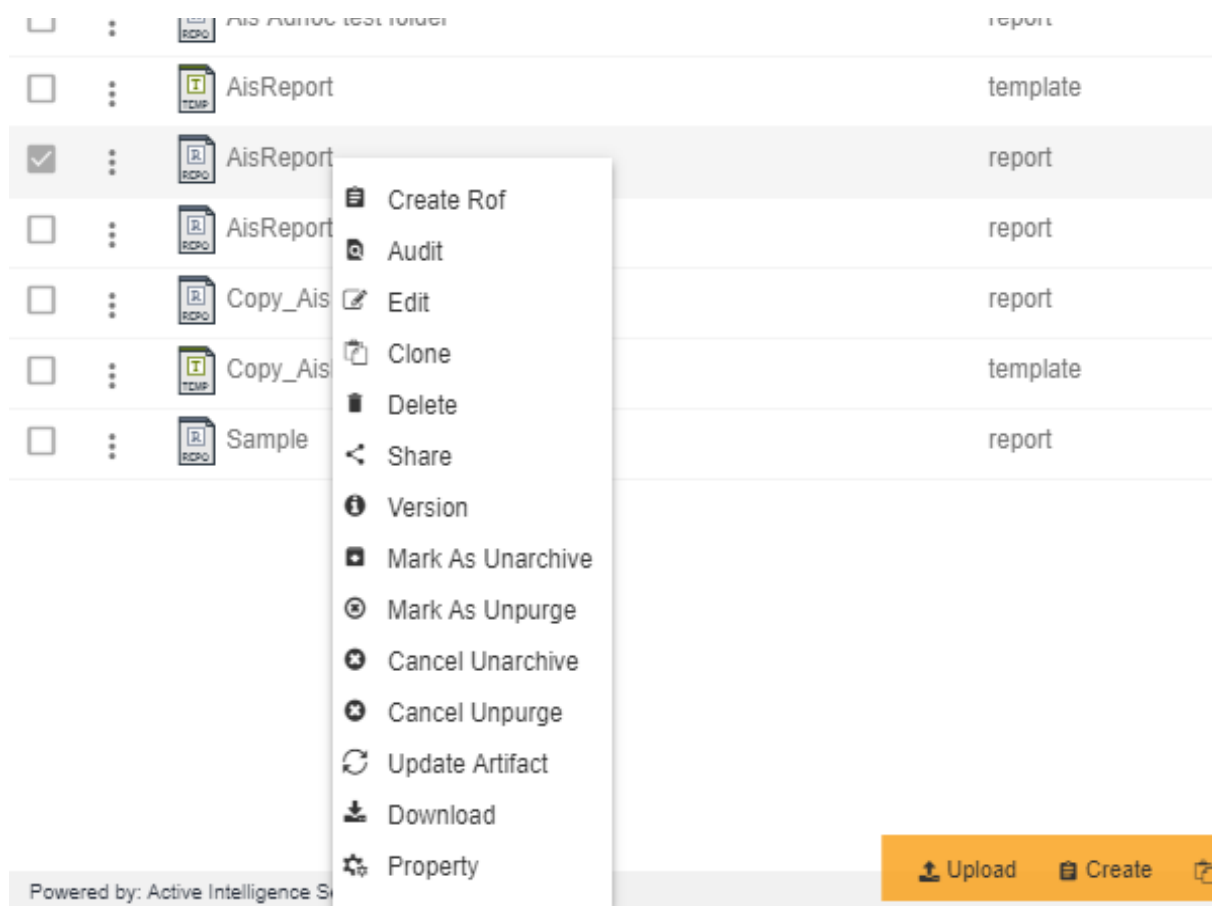
11. You can give your own name in selected column, and select format as Report/Template and press submit button to perform save operation.
12. If you want to change the settings of a widget click on  below Run which will open the following dialog box:-

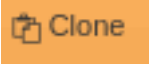
A dialog box titled "Setting Table" with a dark header bar containing a help icon and a close button. The dialog has three input fields: "Name" with the text "Library", "Width" with the value "500", and "Height" with the value "500". Below these fields is a checked checkbox labeled "Visibility". At the bottom right, there are two buttons: "Submit" (orange) and "Cancel" (white).

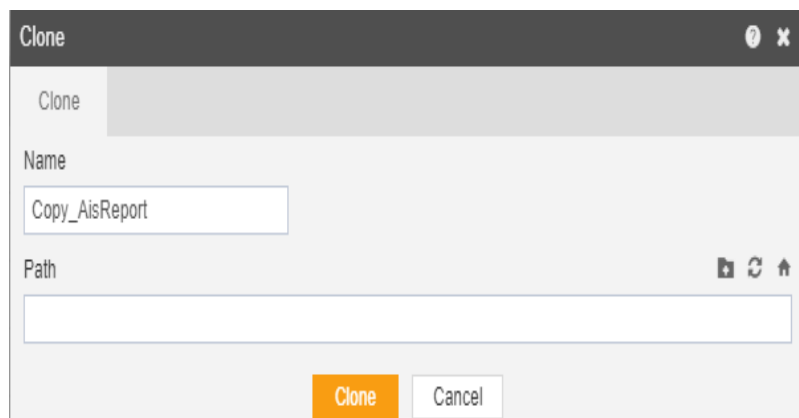
13. Here you can change name, width, height and visibility of your library.
14. Similarly press  in order to delete the performance report.

Clone

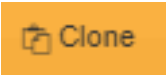
- Clone enable user to make a new instance/copy of the selected file.
- To Clone Adhoc Report, follow these steps: (Only users with Adhoc privilege have access to this section)
- There are two ways in which user can clone a report:-
 - Right click and select  Clone from the context menu as shown in the figure below:



1. select  from the footer menu bar.
 - a. Using any of the above mentioned methods when you clone the merge report following dialog box will appear:

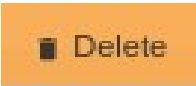


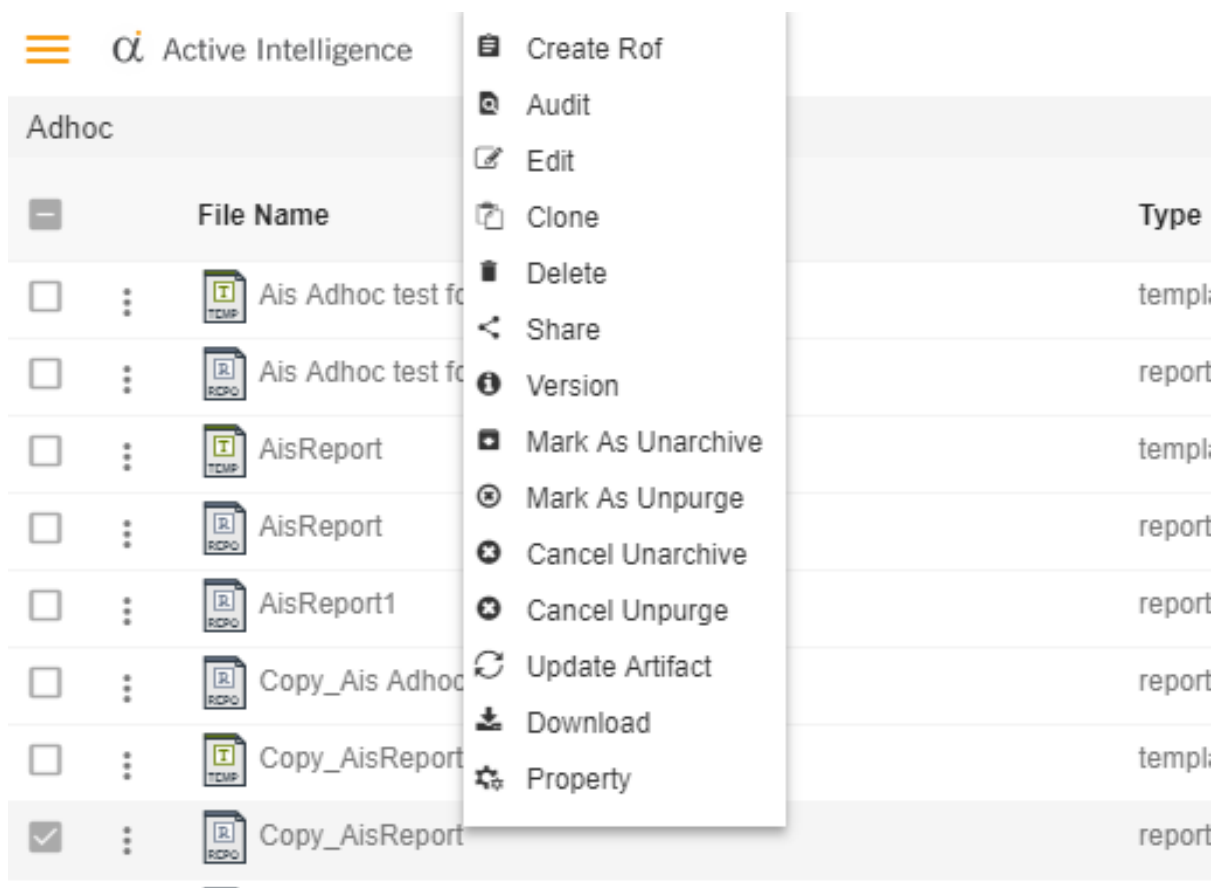
- User have option to update the File Name
- You can also specify optional path where your cloned report will be saved.

- Finally click on  button to finish creating a copy of selected Adhoc Report.
- In this manner, you can Clone an Adhoc report.

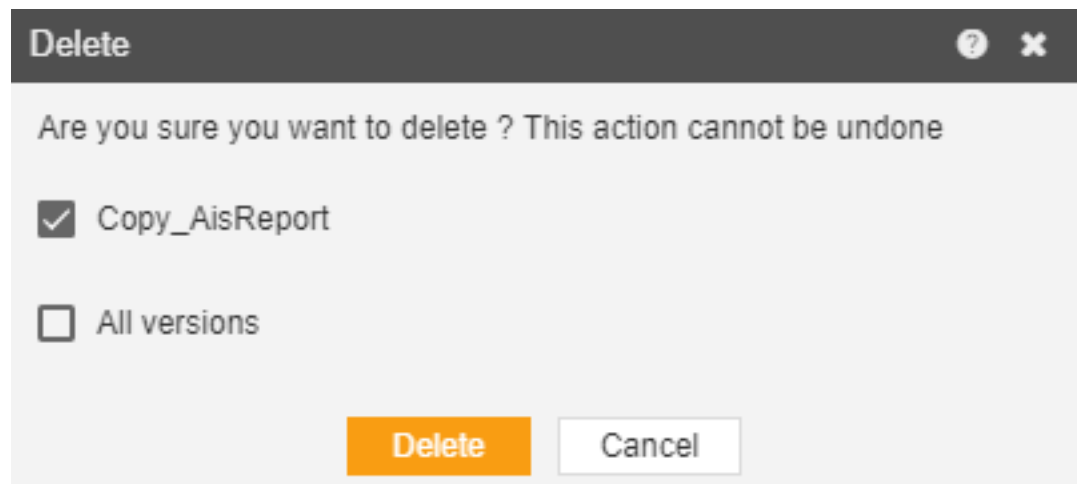
Delete

- There are two ways in which a user can delete an adhoc report in the AIV application:-

2. By clicking on the delete icon  located at the bottom most toolbar.
3. By right clicking the report you want to delete. We will use Copy_AIVreport.pdf report in this tutorial for the purpose of understanding.



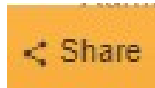
- Finally press on delete after selecting the report using any one of the above mentioned methods which will open the dialog box as shown below:-



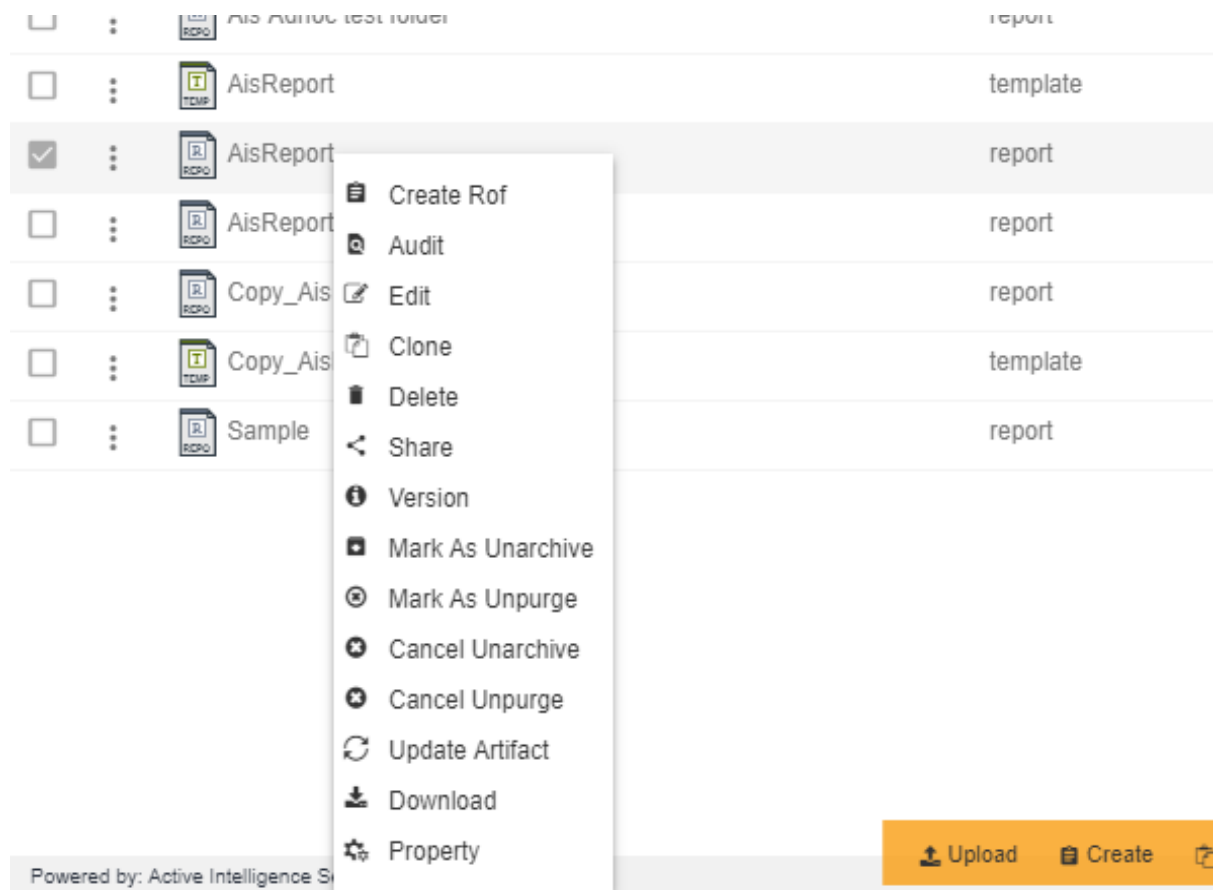
- For a report which has multiple versions, you can select whether you want to delete current version or all versions of that report.
- The report will be deleted and a message will be displayed report deleted successfully.
- In a similar manner, you can also perform the delete operation on the folders selecting the folder you desire to move and choosing the move icon from the
- toolbar, or by right-clicking the folder and selecting the move option from the elapses shown.

Share

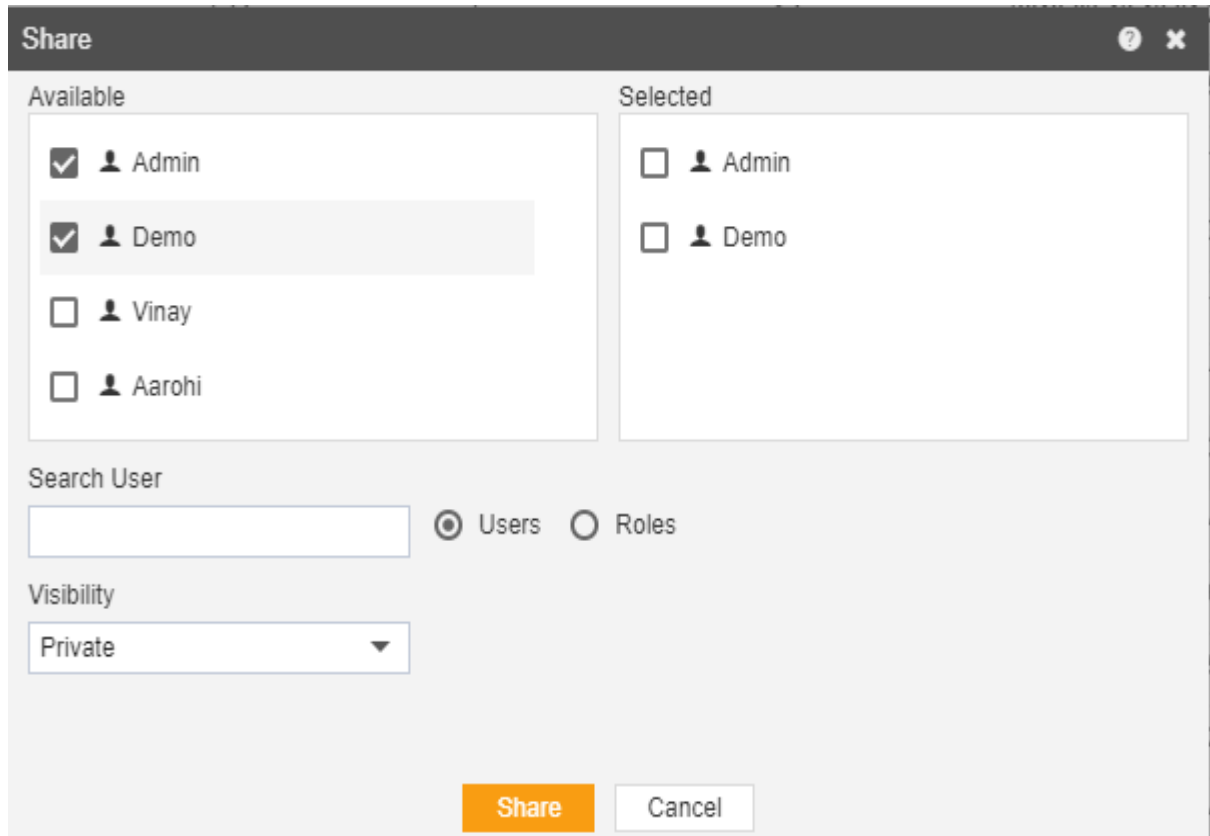
- There are two ways in which a user can share an adhoc report in the AIV application:-



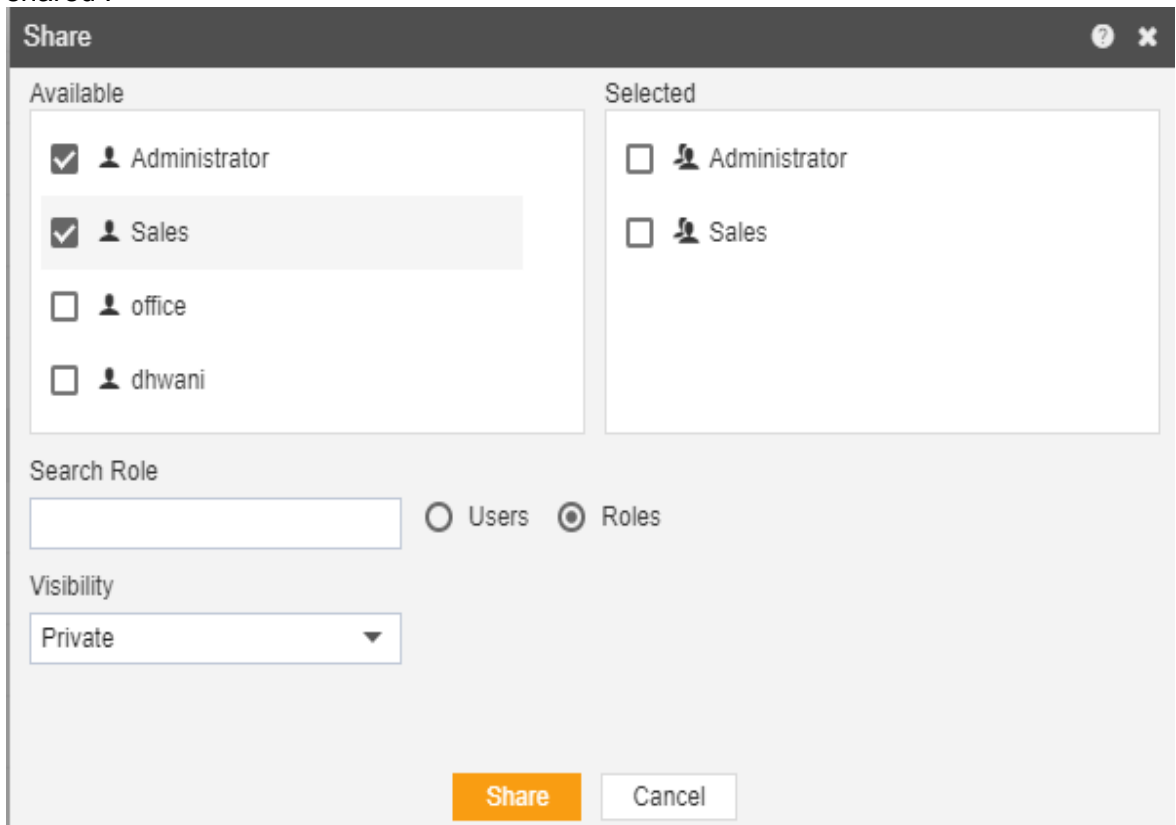
1. By clicking on the share icon located at the bottom most toolbar.
2. By right clicking the adhoc report you want to share. We will use **Aisreport.report** report in this tutorial for the purpose of understanding.






- Now perform the following steps in order to share the report Merge:
 1. Click on Share using one of the methods mentioned above which will open the following popup..



2. The user can select other users with whom the report will be shared from the list of available users or search them in the search user bar.
2. In a similar manner, user can select different user roles with whom the report will be shared.



4. The user can also search for roles in the Search Role bar.
4. Visibility is used to mention who all can view the report and is of following three types:-
 - **Private:-** It means only the current user can view the file.
 - **Internal:-** It means all the users within the organization can view the file.
 - **Public:-** It means anyone can view the file.
6. The user can select the visibility from the dropdown menu as shown above. Select Internal visibility for our reference.
6. In case of any further help, the user can click on the  icon to access the AIV help documents.
6. Finally, in order to move the report, click on the Move button.
6. If the user is not satisfied and wants to cancel the share request, he can do this by clicking on cancel button next to share or by clicking on  button next to the  icon.
6. As the report is shared with user named Demo, the report will be visible in the Reports section when login is performed with the credentials of user Demo as follows:-



| File Name | Type | Full Path | Owner | Last Updated | Version | Options |
|-----------|--------|-----------|-------|---------------------|---------|---|
| AisReport | report | / | Admin | 2019-02-26 06:16:28 | 2 |     |

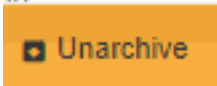
- In a similar manner, you can also perform the share operation on the folders selecting the folder you desire to share and choosing the share icon from the toolbar, or by right-clicking the folder and selecting the share option from the elapses shown.

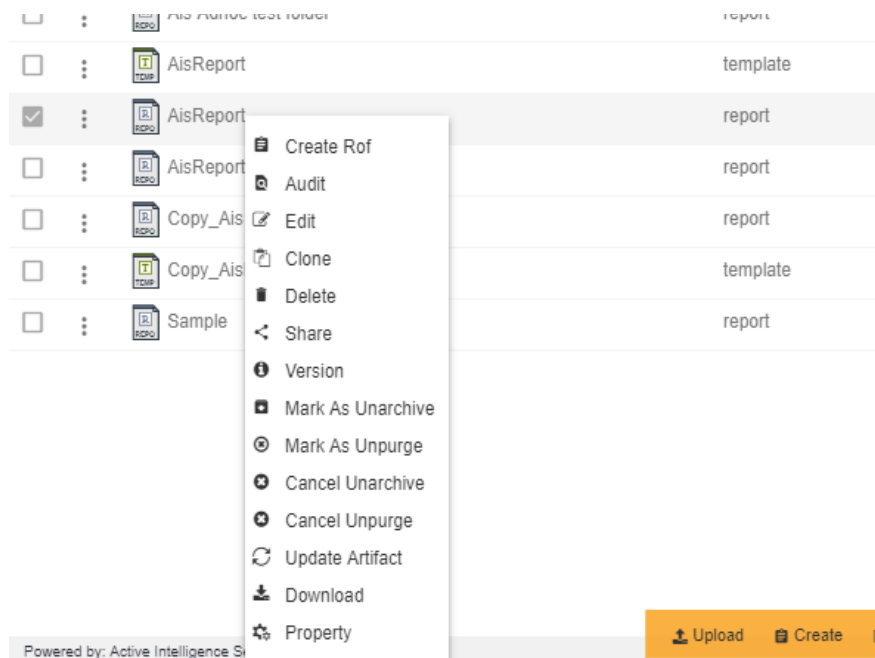
Unarchive

- The main purpose of unarchive in an AIV application is to enable the user to save some of his important files from being archived.
- Usually, each type of file is assigned to be archived after certain number of days by the Administrator, after which the file goes to the Archive mode.
- Once a file is marked as unarchive, then it will not get deleted when the cycle for archive runs in the AIV application.
- In order to change the settings of the file to be archived/unarchived you need to contact the Administrator.


To Unarchive file and folders follow these steps:

1. Select the file or folders you want to Mark as Unarchive . (Note: multiple file and folders or combination of file and folders can be selected).

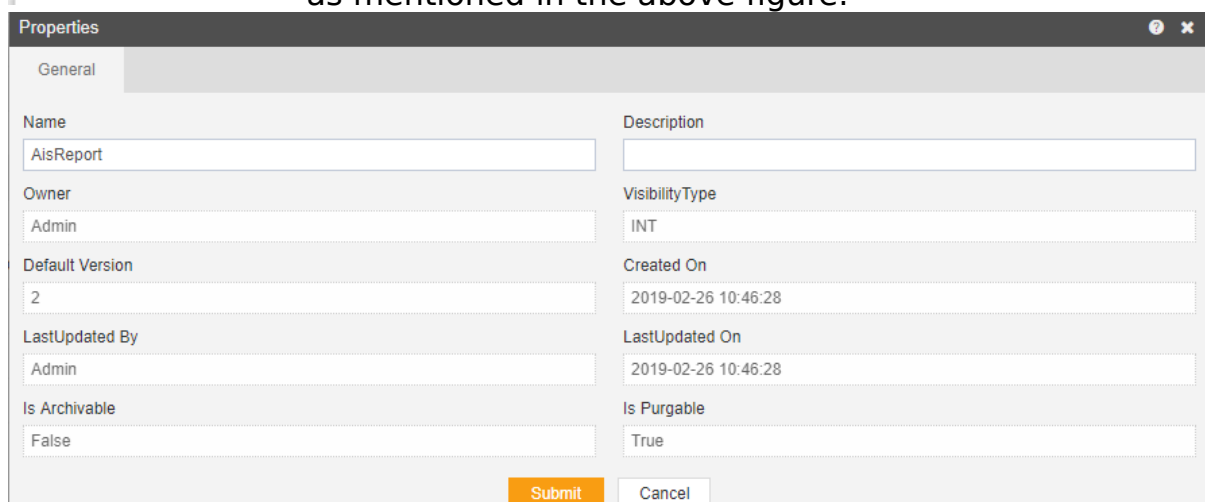
2. Right click and select the  button from the context menu or directly from the bottom menu as shown in the image below:



- Here AIVreport.report is marked as unarchive and hence it will not get deleted when all other adhoc report files are archived.
- You can check the archive status of the file by clicking on

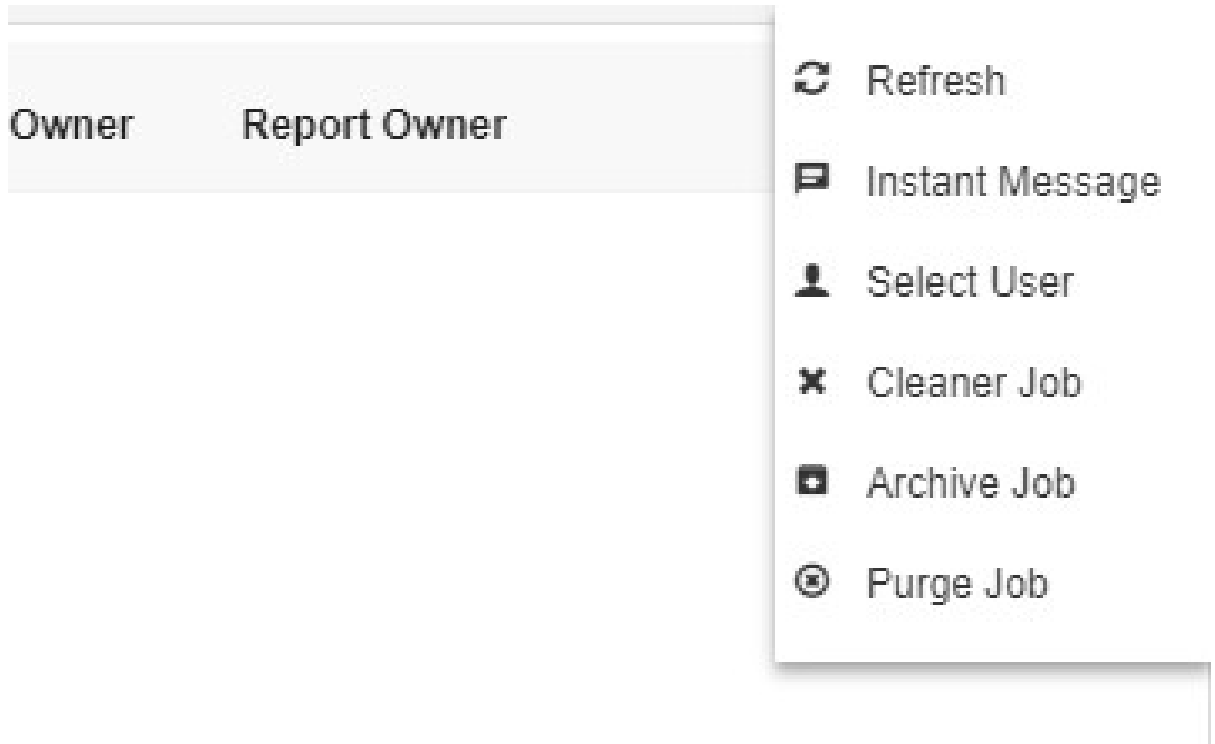
 Property

as mentioned in the above figure.

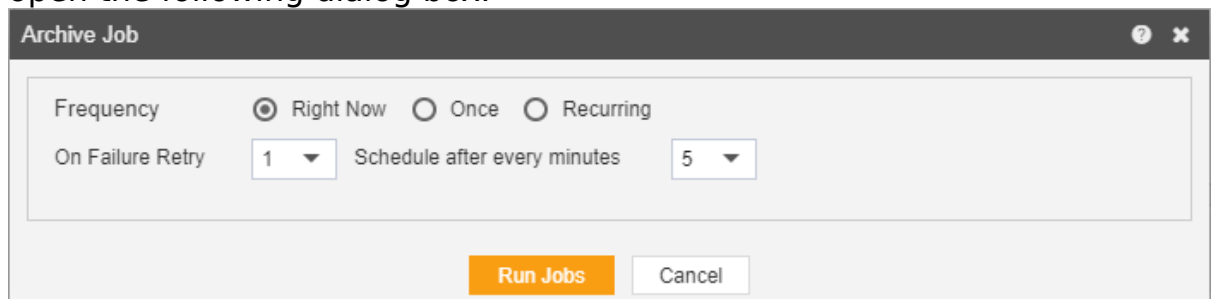


| Properties | |
|-----------------|---------------------|
| General | |
| Name | AisReport |
| Description | |
| Owner | Admin |
| Visibility Type | INT |
| Default Version | 2 |
| Created On | 2019-02-26 10:46:28 |
| Last Updated By | Admin |
| Last Updated On | 2019-02-26 10:46:28 |
| Is Archivable | False |
| Is Purgable | True |

- The Is Archivable property of AIVreport.report is False which means this file will not be archived when the cycle for Archive runs.
- In order to run archive jobs, go to the Requests of the Request section.

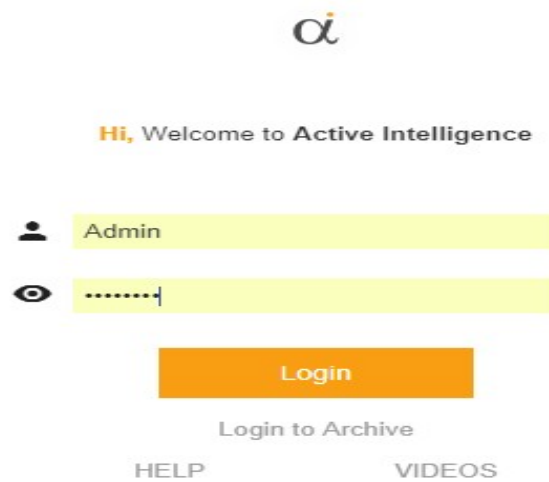


- Click on the Archive Job in order to perform the Archive which will open the following dialog box.



- Click on **Run Jobs** in order to run the Archive Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the archive jobs.

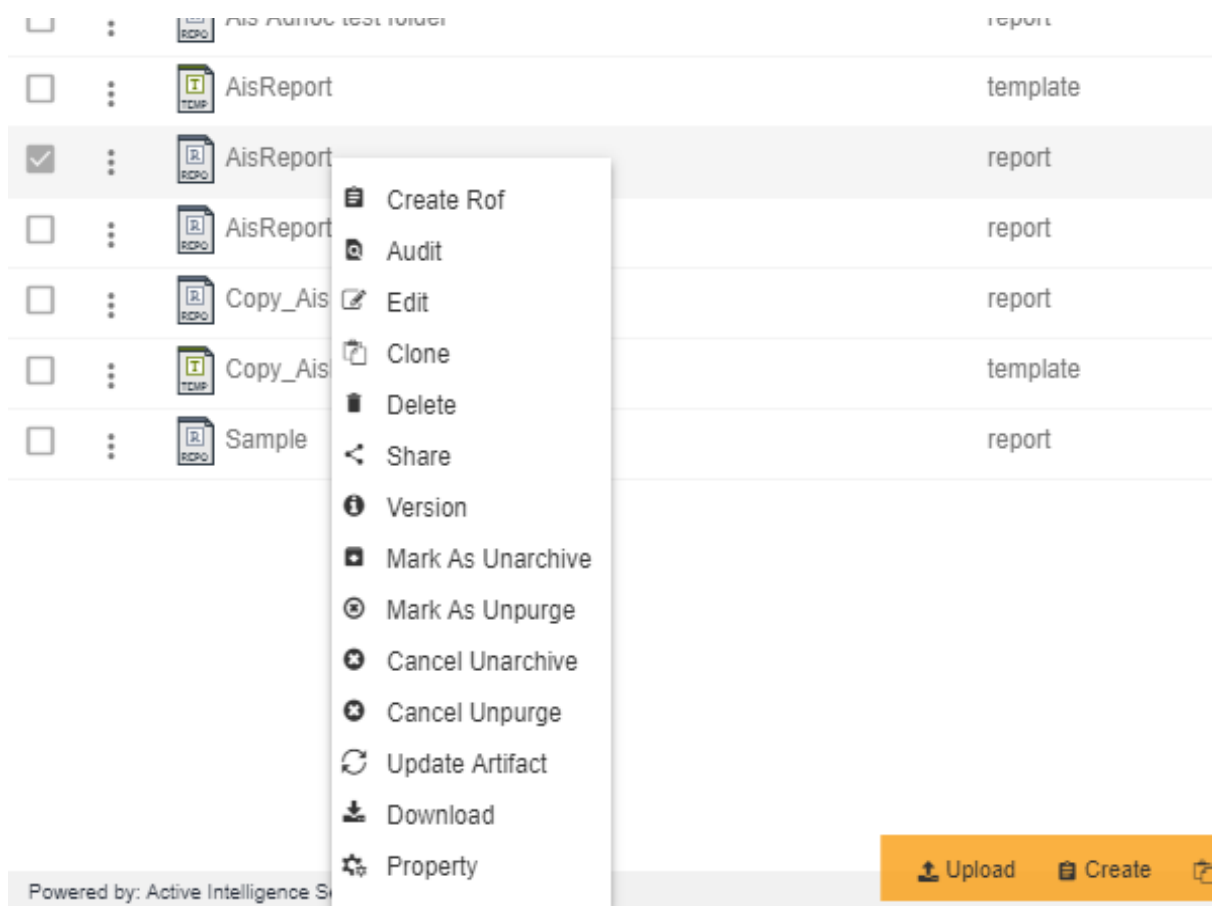
- The administrator user can Login to Archive mode to see the details of all the files that have been archived as follow



- After logging in, following screen will be displayed which shows all the Reports which have been archived.

| Reports | | | | | | | |
|---------------|--------|-----------|--------|-------------------------|---------|---------|--|
| File Name | Type | Full Path | Owner | Last Updated | Version | Options | |
| aaorhi_report | folder | / | Admin | 2019-03-11 14:49:12 IST | 1 | | |
| explain_copy | folder | / | Admin | 2019-03-18 16:42:08 IST | 1 | | |
| explain_move | folder | / | Admin | 2019-03-18 17:49:41 IST | 1 | | |
| new report | folder | / | Admin | 2019-03-12 17:12:03 IST | 1 | | |
| New Root | folder | / | Admin | 2019-03-09 10:39:06 IST | 1 | | |
| Output | folder | / | Admin | 2019-03-13 13:01:26 IST | 1 | | |
| Templates | folder | / | Admin | 2019-02-26 18:28:56 IST | 1 | | |
| test_report | folder | / | Admin | 2019-03-18 16:38:11 IST | 1 | | |
| test_share | folder | / | Aarohi | 2019-03-11 19:01:31 IST | 1 | | |
| ProductList | pdf | / | Admin | 2019-03-13 10:20:30 IST | 1 | | |

- You can cancel the unarchive by right clicking the report and selecting cancel unarchive:



- Now check properties to see that Is Archivable is true:-

| Properties | |
|---|---------------------|
| General | |
| Name | Description |
| AisReport | |
| Owner | VisibilityType |
| Admin | INT |
| Default Version | Created On |
| 2 | 2019-02-26 10:46:28 |
| LastUpdated By | LastUpdated On |
| Admin | 2019-02-26 10:46:28 |
| Is Archivable | Is Purgable |
| True | True |
| <input type="button" value="Submit"/> <input type="button" value="Cancel"/> | |


Unpurged

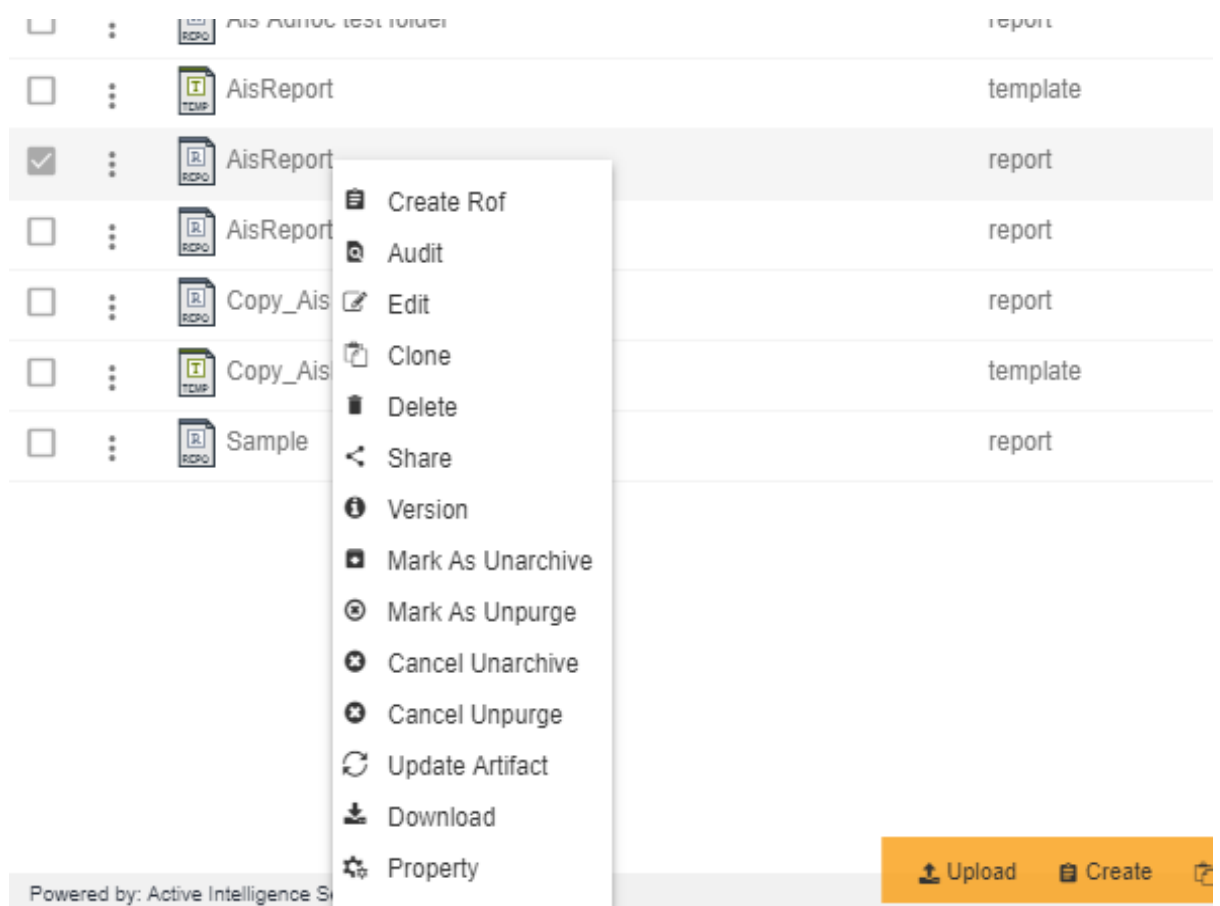
- The main purpose of unpurged in an AIV application is to enable the user to save some of his important files from being deleted permanently.

- Usually, each type of file is assigned to be purged after certain number of days by the Administrator, after which the file gets deleted permanently.
- Once a file is marked as unpurge, then it will not get deleted when the cycle for purge runs in the AIV application.
- In order to change the settings of the file to be purged/unpurged you need to contact the Administrator.


To Unpurge file and folders follow these steps:

1. Select the file or folders you want to Mark as Unpurge . (Note: multiple file and folders or combination of file and folders can be selected).

2. Right click and select the  button from the context menu or directly from the bottom menu as shown in the image below:



- Here AIVreport.report is marked as unpurge and hence it will not get deleted when all other pdf files are purged.
- You can check the purge status of the file by clicking on

 Property

as mentioned in the above figure.

The screenshot shows a 'Properties' dialog box with a 'General' tab. The fields are as follows:

| | | | |
|-----------------|-----------|-----------------|---------------------|
| Name | AisReport | Description | |
| Owner | Admin | Visibility Type | INT |
| Default Version | 2 | Created On | 2019-02-26 10:46:28 |
| Last Updated By | Admin | Last Updated On | 2019-02-26 10:46:28 |
| Is Archivable | True | Is Purgable | False |

Buttons: Submit (orange), Cancel (white)

- The Is Purgable property of AIVreport.report is False which means this file will not be archived when the cycle for Purge runs.
- In order to run purge jobs, go to the Requests of the Request section.

The screenshot shows a table with two columns: 'Owner' and 'Report Owner'. A context menu is open over the 'Report Owner' cell, listing the following actions:

- Refresh
- Instant Message
- Select User
- Cleaner Job
- Archive Job
- Purge Job

- Click on the Purge Job in order to perform the Archive which will open the following dialog box.

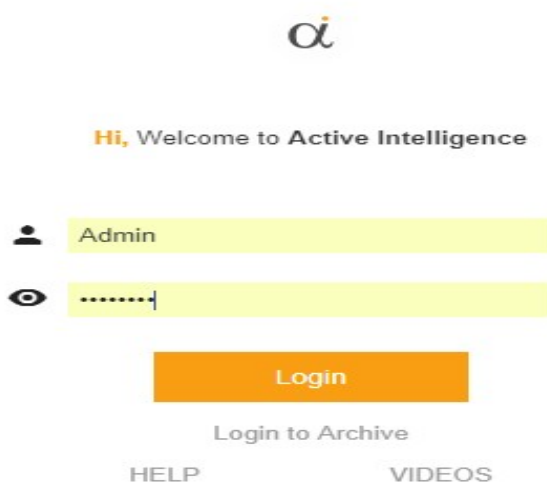
The screenshot shows a 'Purge Job' dialog box with the following configuration:

Frequency: Right Now Once Recurring

On Failure Retry: 1 (dropdown) Schedule after every minutes: 5 (dropdown)

Buttons: Run Jobs (orange), Cancel (white)

- Click on **Run Jobs** in order to run the Purge Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the archive jobs.
- The administrator user can Login to Archive mode to see the details of all the files that have been purged as follow



- After logging in, following screen will be displayed which shows all the Reports which have been purged.

| Reports | | | | | | | |
|--------------------------|-----------------|--------|-----------|--------|-------------------------|---------|---------|
| <input type="checkbox"/> | File Name | Type | Full Path | Owner | Last Updated | Version | Options |
| <input type="checkbox"/> | ■ aarohi_report | folder | / | Admin | 2019-03-11 14:49:12 IST | 1 | |
| <input type="checkbox"/> | ■ explain_copy | folder | / | Admin | 2019-03-18 16:42:08 IST | 1 | |
| <input type="checkbox"/> | ■ explain_move | folder | / | Admin | 2019-03-18 17:49:41 IST | 1 | |
| <input type="checkbox"/> | ■ new report | folder | / | Admin | 2019-03-12 17:12:03 IST | 1 | |
| <input type="checkbox"/> | ■ New Root | folder | / | Admin | 2019-03-09 10:39:06 IST | 1 | |
| <input type="checkbox"/> | ■ Output | folder | / | Admin | 2019-03-13 13:01:26 IST | 1 | |
| <input type="checkbox"/> | ■ Templates | folder | / | Admin | 2019-02-26 18:28:56 IST | 1 | |
| <input type="checkbox"/> | ■ test_report | folder | / | Admin | 2019-03-18 16:38:11 IST | 1 | |
| <input type="checkbox"/> | ■ test_share | folder | / | Aarohi | 2019-03-11 19:01:31 IST | 1 | |
| <input type="checkbox"/> | ■ ProductList | pdf | / | Admin | 2019-03-13 10:20:30 IST | 1 | |

- You can cancel the unarchive by right clicking the report and selecting cancel unarchive:

| | File Name | Type |
|-------------------------------------|-------------------|-----------|
| <input type="checkbox"/> | Create Folder | folder |
| <input type="checkbox"/> | Audit | folder |
| <input type="checkbox"/> | Copy | folder |
| <input type="checkbox"/> | Move | folder |
| <input type="checkbox"/> | Delete | folder |
| <input type="checkbox"/> | Share | folder |
| <input type="checkbox"/> | Version | folder |
| <input type="checkbox"/> | Mark As Unarchive | folder |
| <input type="checkbox"/> | Mark As Unpurge | folder |
| <input type="checkbox"/> | Cancel Unarchive | folder |
| <input type="checkbox"/> | Cancel Unpurge | folder |
| <input type="checkbox"/> | Embed | rptdesign |
| <input type="checkbox"/> | Download | rptdesign |
| <input type="checkbox"/> | Property | rptdesign |
| <input checked="" type="checkbox"/> | Employees | pdf |
| <input type="checkbox"/> | Employees | rptdesign |

- Now check properties to see that Is Purgable is true:-

Properties

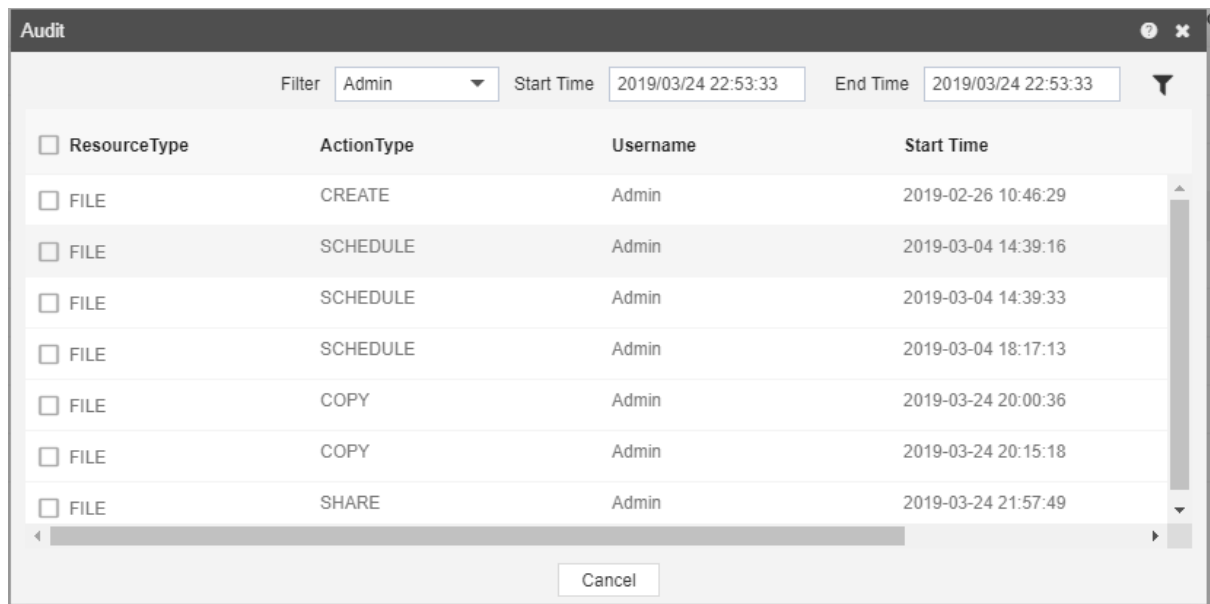
General

| | |
|-------------------------|---------------------------------------|
| Name AisReport | Description |
| Owner Admin | VisibilityType INT |
| Default Version 2 | Created On 2019-02-26 10:46:28 |
| LastUpdated By Admin | LastUpdated On 2019-02-26 10:46:28 |
| Is Archivable True | Is Purgable True |

Audit

Audit shows the actions like when the user created, uploaded or downloaded any particular file.

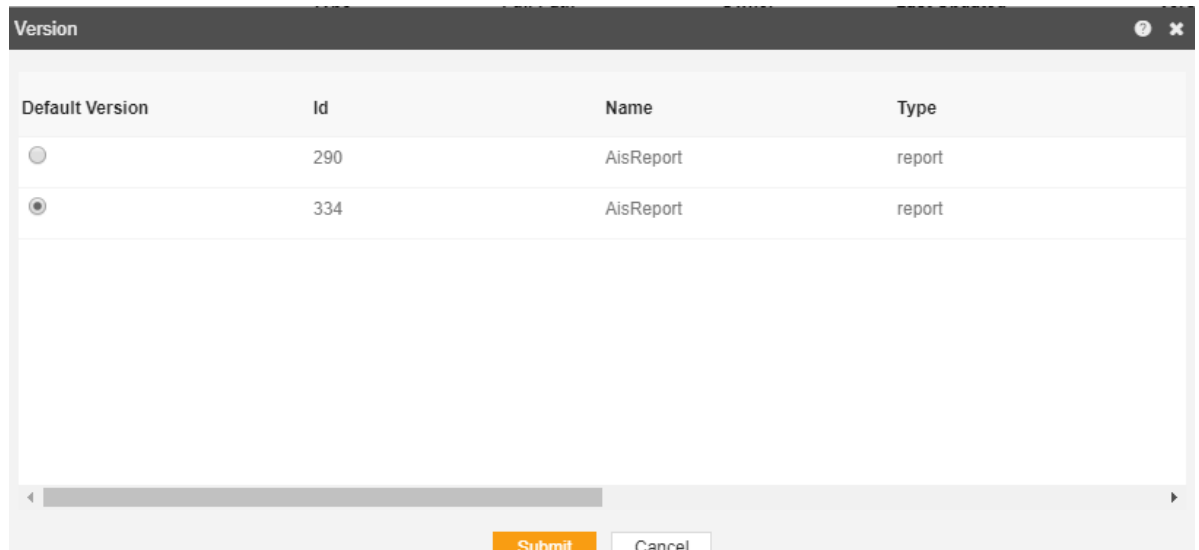
1. Following image describes the audit option.



Version

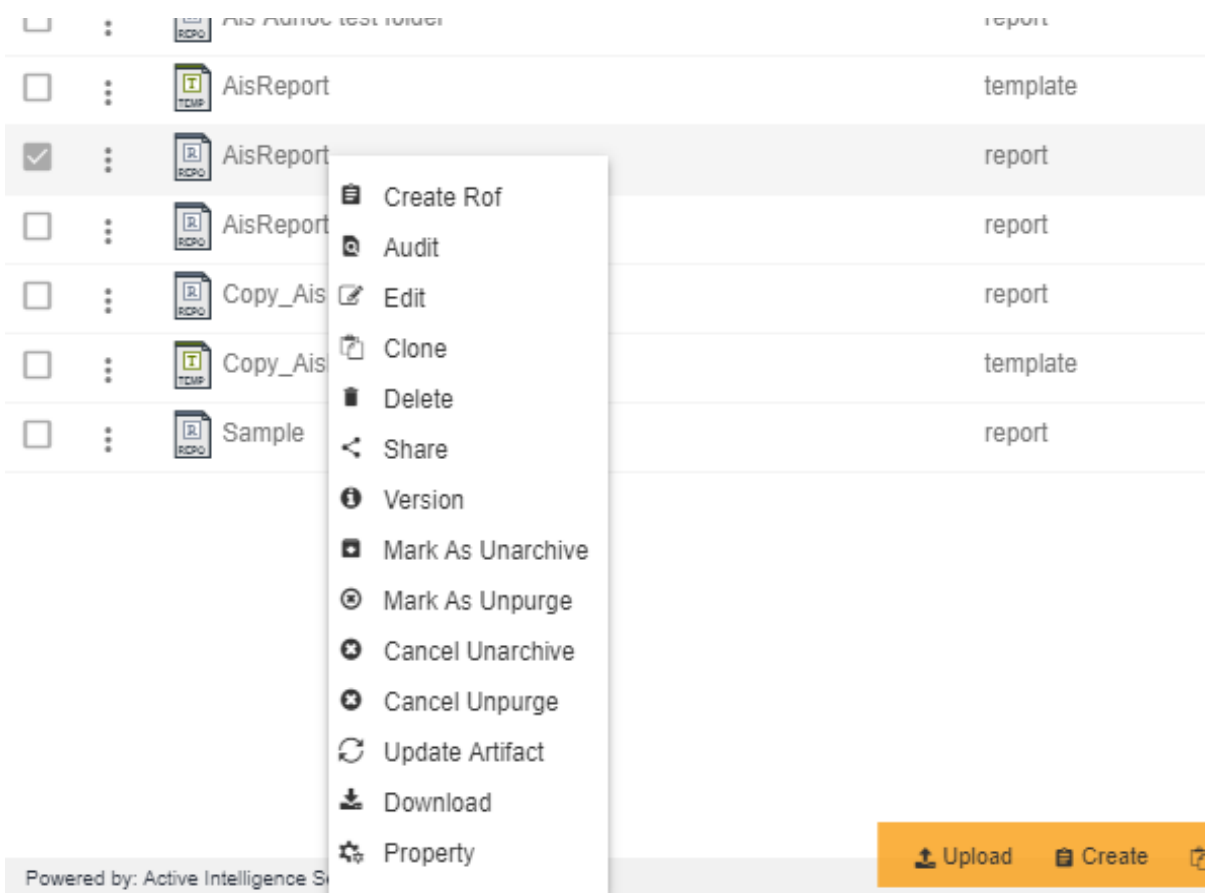
Version option shows the number of versions of the selected report as well as the version which user is using.

- Following is the image describing number of versions of selected adhoc report.



Download

User can download the selected alert by clicking download option from context menu.



Property

- Use Properties option of the file and folders for the following:
 - To update the Name of the file and folders
 - To change the Output Types of the File (Note: only applicable to files)
 - To view file and folders Properties such as owner information, last updated by, file created date, archive and purge options and file visibility i.e. (Private, Internal, Public) and much more.
- To view the Property for the file or folder follow the steps below:

1. Select file or folder you wish to see properties for or update the information such as Name or Output Type by selecting


 **Properties**

from the context menu, following dialog box will appear as shown in the image below:

The image shows a 'Properties' dialog box with a 'General' tab. The fields are as follows:

| Field | Value |
|-----------------|---------------------|
| Name | AisReport |
| Description | |
| Owner | Admin |
| VisibilityType | INT |
| Default Version | 2 |
| Created On | 2019-02-26 10:46:28 |
| LastUpdated By | Admin |
| LastUpdated On | 2019-02-26 10:46:28 |
| Is Archivable | True |
| Is Purgable | False |

Buttons: Submit, Cancel

2. The Name can be updated (Note: The above image is taken from the Folder Properties, File Properties will have additional tab for Output Type which will enable users to select/unselect the file Output visibility Type i.e pdf, doc, html etc.).
3. Finally click  button to save the changes to the file Properties, if any.

Shared Resources


Shared Resources contains all the artifacts which are by default shared between all users within the same organization. It is important that all the users within the same organization uses the same network connection and same repository to access the shared files.

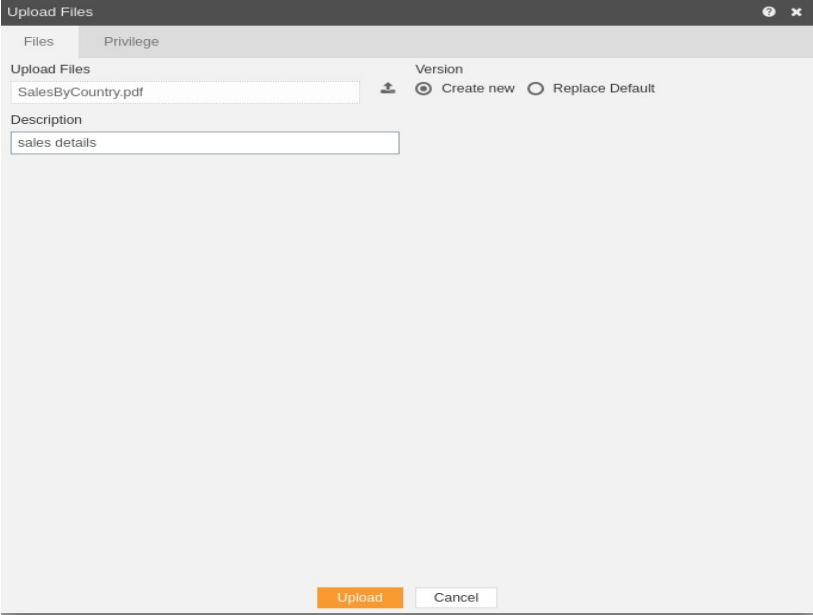
In simple words, **Shared** location in Repository from which the artifacts are accessible to all application users. Best practice is to place only files which are going to be used all across the organization i.e. Images, Theme, Data Source etc.

Some of the functionalities offered by Shared Resources are:-

1. Upload
2. Create
3. Copy
4. Move
5. Delete

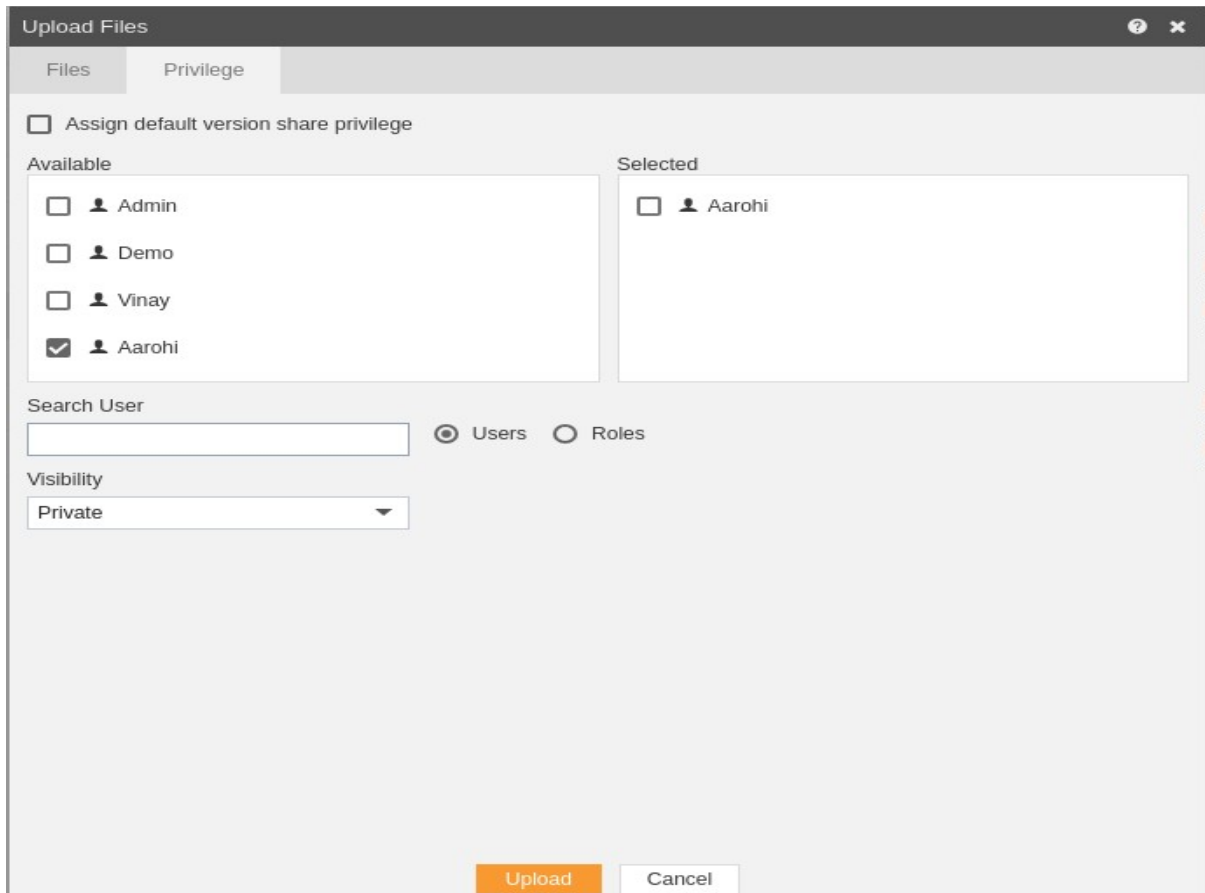
Upload

- The user can upload the shared resources such as Images, Themes, Datasource, etc. by clicking on the upload icon  on the toolbar located at the bottom of the Shared Resources page.
- On clicking the icon, following screen will be displayed...

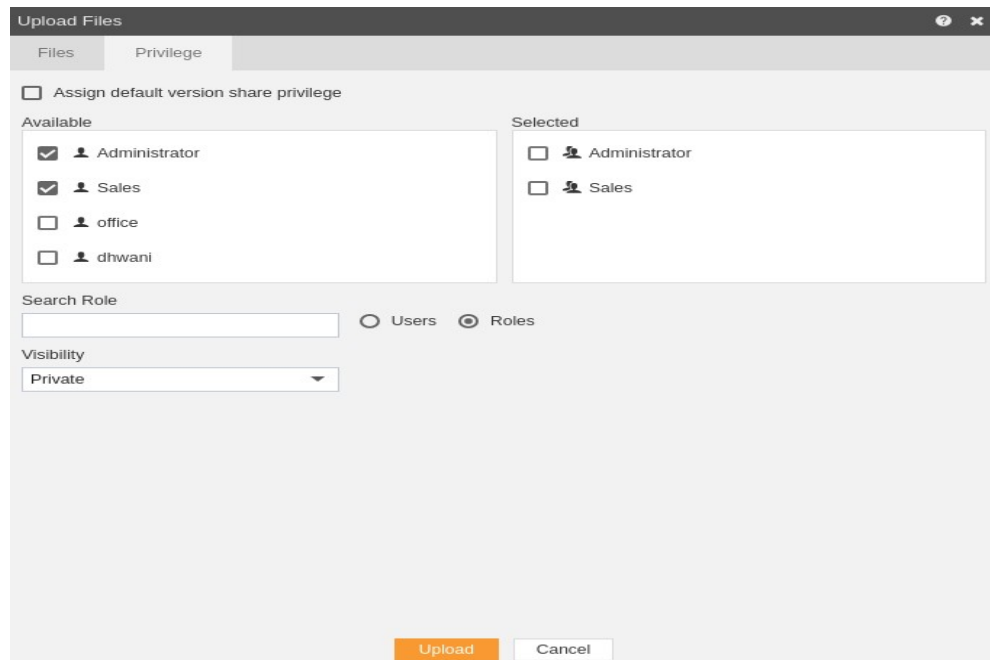


- In the Upload Files section as shown in the figure above, select the upload icon in order to upload your documents from your computer.
- If the document already exists on the AIV application, the user has an option to replace the default report or to create a new report using the version option as depicted above.
- Furthermore, the user can also provide any optional description for reference, in the description text area shown here.

- There is also an option to hide the visibility to certain users using the privileges tab as shown in the figure below:



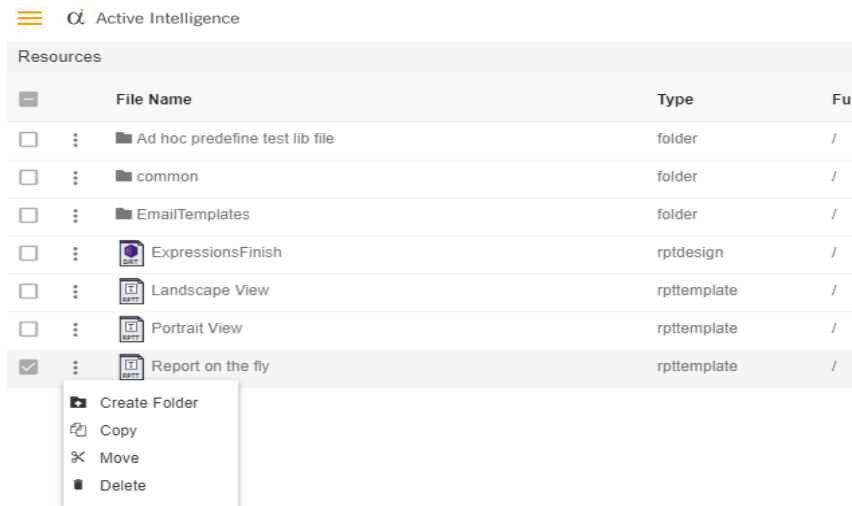
- In case of working with any new version of the document, you can assign the default version share privileges by checking the checkbox. For instance, if there are three versions of same image files and a new version is to be created of that report, then default share privileges can be applied to that image.
- The user can select other users with whom the document will be shared from the list of available users or search them in the search user bar.
- In the similar manner, user can apply privileges to different user roles as follows:-



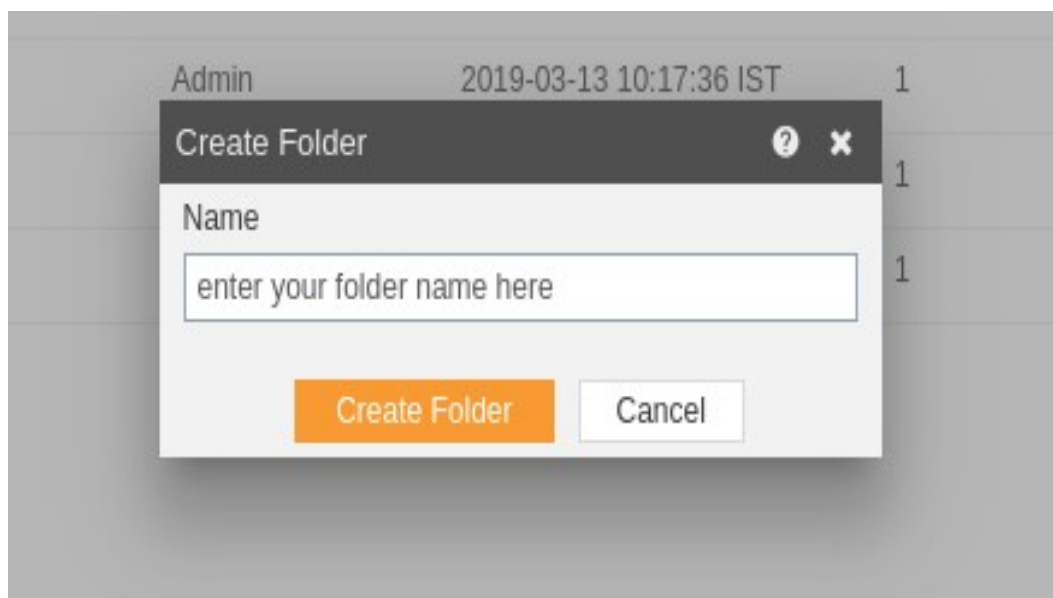
- Just as in case of users, the user can assign default share privileges to different user roles or can select the roles from the Available list of roles.
- The user can also search for roles in the Search Role bar.
- Visibility is used to mention who all can view the report and is of following three types:-
 1. **Private:-** It means only the current user can view the file.
 2. **Internal:-** It means all the users within the organization can view the file.
 3. **Public:-** It means anyone can view the file.
- The user can select the visibility from the dropdown menu as shown above.
- In case of any further help, the user can click on the icon to access the AIV help documents.
- Finally, in order to upload the document, click on the upload button.
- If the user is not satisfied and wants to cancel the upload request, he can do this by clicking on cancel button next to upload or by clicking on button next to the .


Create Folder



- There are two ways in which a user can create a new folder in the AIV application.
 1. By clicking on the create icon next to the upload icon at the bottommost toolbar.
 2. By right clicking on any existing file or folder on the reports page as follows:-




- On clicking on create folder, following popup will be opened:-

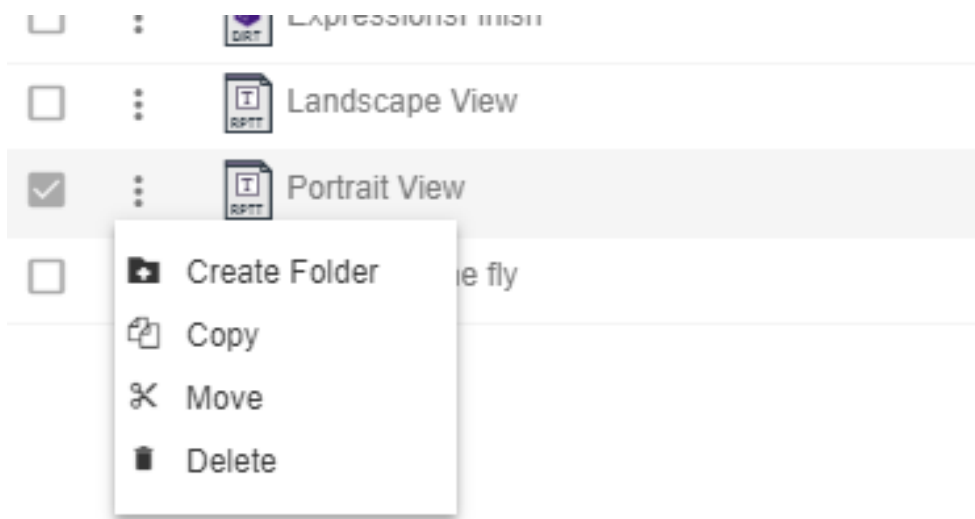


- In case of any further help, the user can click on the  icon to access the AIV help documents.
- Enter the name you want to give to your folder in the text area and click on create folder.

- If the user is not satisfied and wants to cancel the create request, he can do this by clicking on cancel button next to upload or by clicking on  button next to the  icon.

Copy

- There are two ways in which a user can copy a resource in the AIV application:-
 1. By clicking on the copy icon  located at the bottom most toolbar.
 2. By right clicking the resource you want to copy. We will use **Portrait View** rptdesign in this tutorial for the purpose of understanding.



- Now

perform the following steps in order to copy the design Portrait View-

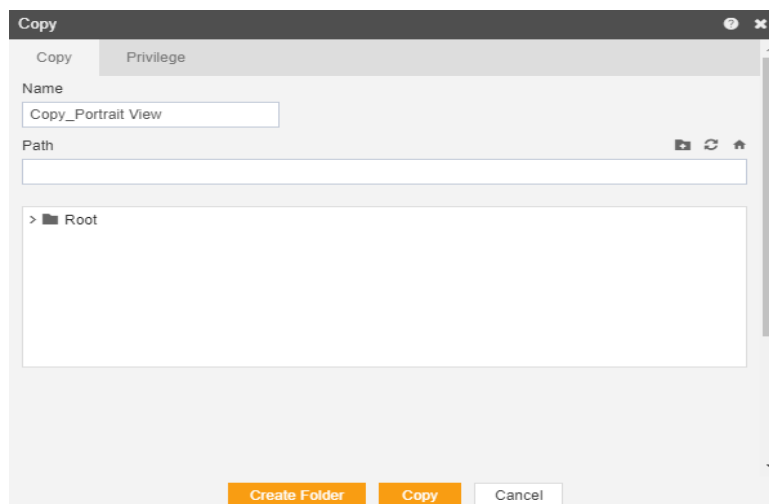
1. Click on Copy using one of the methods mentioned above which will open the following popup..

2. The will be View.

own

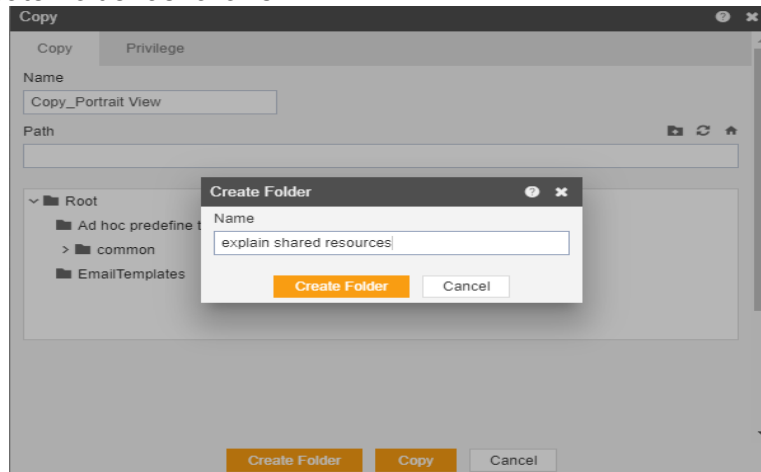
3. In

you of the in the

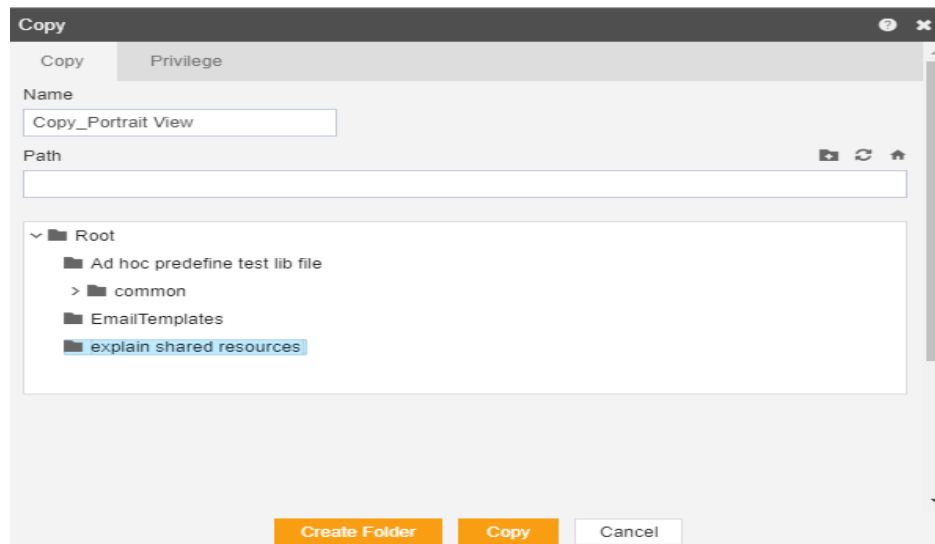


default name Copy_Portrait You can provide your name while copying a design. order to provide copy destination, can select any folders present popup or can

create a new folder by selecting the folder where new folder must be created and clicking on Create Folder as follows:-



4. Here we have created a folder named explain_copy within root where we will copy our Portrait View report.
4. Select explain_copy from the list shown below:-






6. In order to assign privileges to the report, click on the privileges tab next to the copy tab. By default, Copy current privileges and visibility checkbox will be checked which will retain the same privileges and visibility of the original report in the copied version.
7. If you want to assign privileges uncheck Copy current privileges and visibility checkbox.

8. The user can select other users with whom the copied report will be shared from the list of available users or search them in the search user bar.

The screenshot shows a 'Copy' dialog box with two tabs: 'Copy' and 'Privilege'. The 'Copy' tab is active. At the top, there is a checkbox labeled 'Copy current privileges and visibility' which is unchecked. Below this, there are two columns: 'Available' and 'Selected'. The 'Available' column contains a list of users with checkboxes: Admin (checked), Demo (unchecked), Vinay (unchecked), and Aarohi (checked). The 'Selected' column contains a list of users: Aarohi and Admin. Below the columns, there is a 'Search User' text input field. To the right of the search field, there are two radio buttons: 'Users' (selected) and 'Roles'. Below the search field, there is a 'VisibilityType' dropdown menu set to 'Private'. At the bottom, there are three buttons: 'Create Folder' (orange), 'Copy' (orange), and 'Cancel' (white).


9. In the similar manner, user can apply privileges to different user roles as follows:-

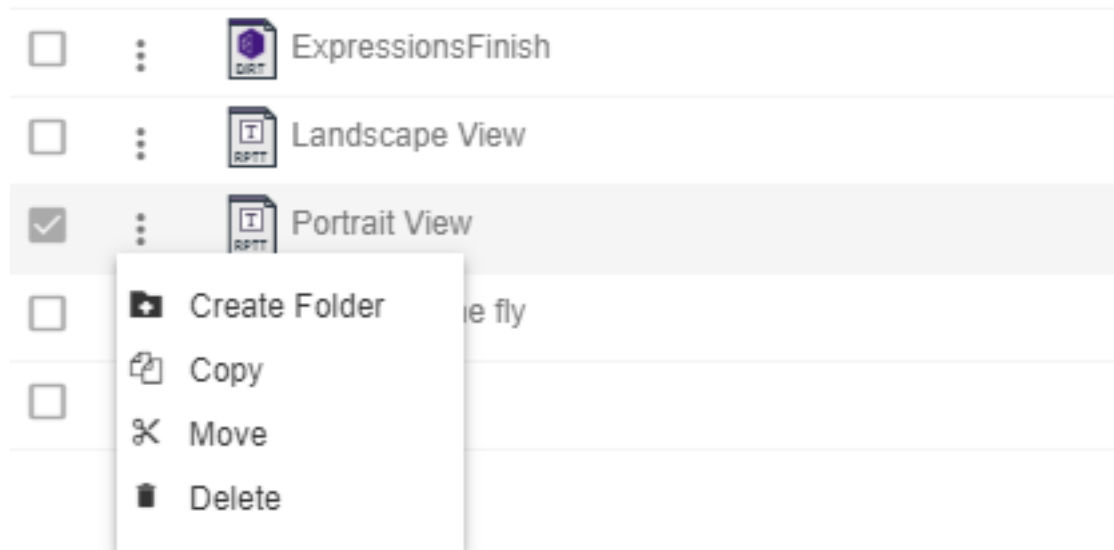
The screenshot shows a 'Copy' dialog box with two tabs: 'Copy' and 'Privilege'. The 'Privilege' tab is active. At the top, there is a checkbox labeled 'Copy current privileges and visibility' which is unchecked. Below this, there are two columns: 'Available' and 'Selected'. The 'Available' column contains a list of roles with checkboxes: Administrator (checked), Sales (checked), office (unchecked), and dhwani (unchecked). The 'Selected' column contains a list of roles: Administrator and Sales. Below the columns, there is a 'Search Role' text input field. To the right of the search field, there are two radio buttons: 'Users' (unchecked) and 'Roles' (selected). Below the search field, there is a 'VisibilityType' dropdown menu set to 'Private'. At the bottom, there are three buttons: 'Create Folder' (orange), 'Copy' (orange), and 'Cancel' (white).

10. The user can also search for roles in the Search Role bar.
11. Visibility is used to mention who all can view the report and is of following three types:-
 - **Private:-** It means only the current user can view the file.
 - **Internal:-** It means all the users within the organization can view the file.
 - **Public:-** It means anyone can view the file.
12. The user can select the visibility from the dropdown menu as shown above.
12. In case of any further help, the user can click on the  icon to access the AIV help documents.
12. Finally, in order to copy the design, click on the Copy button.
12. If the user is not satisfied and wants to cancel the copy request, he can do this by clicking on cancel button next to copy or by clicking on  button next to the  icon.
12. You can see the Copy_Portrait View appears in the explain shared resources folder by opening it.

In a similar manner, you can also perform the copy operation on the folders selecting the folder you desire to copy and choosing the copy icon from the toolbar, or by right-clicking the folder and selecting the copy option from the elapses shown.

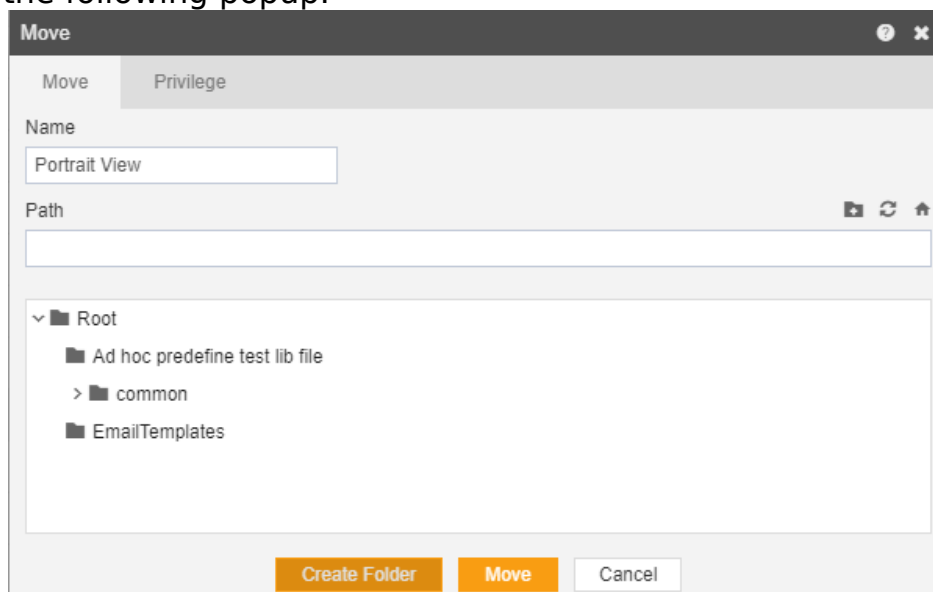
Move

- There are two ways in which a user can move a design in the AIV application:-
- By clicking on the move icon  located at the bottom most toolbar.
- By right clicking the design you want to move. We will use Portrait View report in this tutorial for the purpose of understanding.

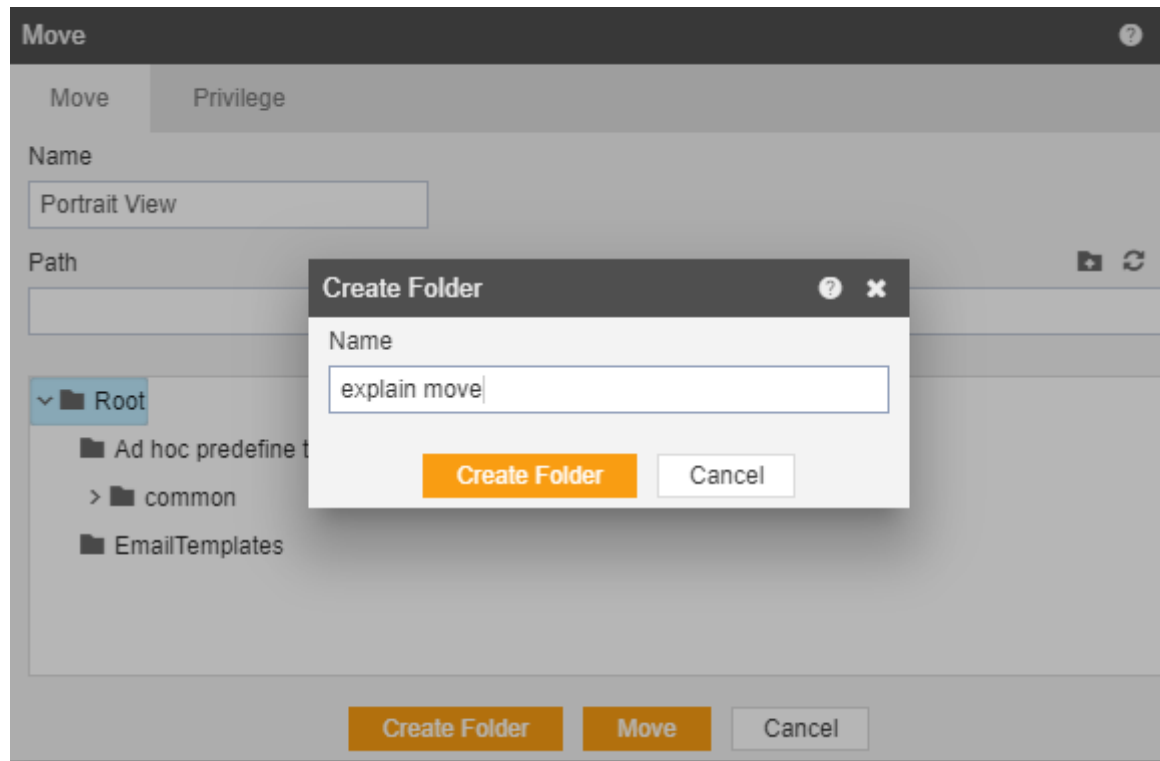


Now perform the following steps in order to move the report Employee List:-

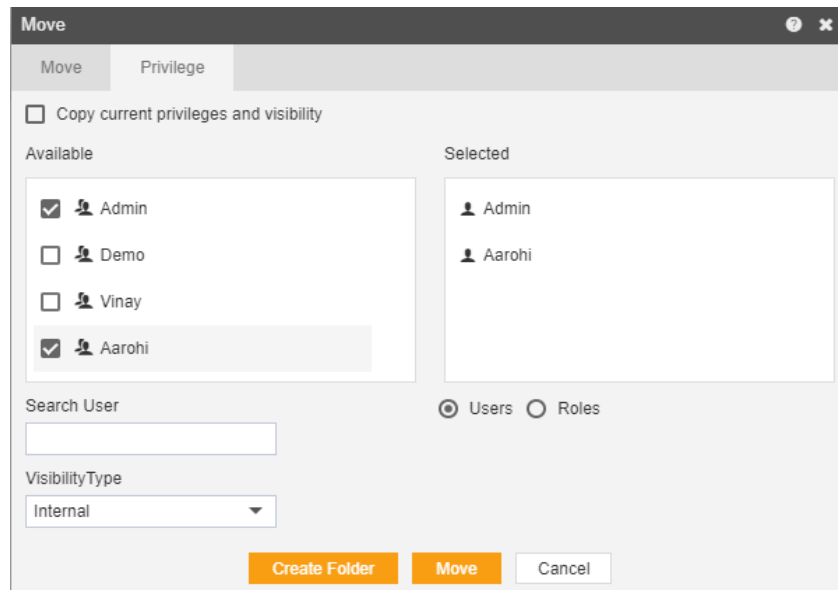
1. Click on Move using one of the methods mentioned above which will open the following popup.-



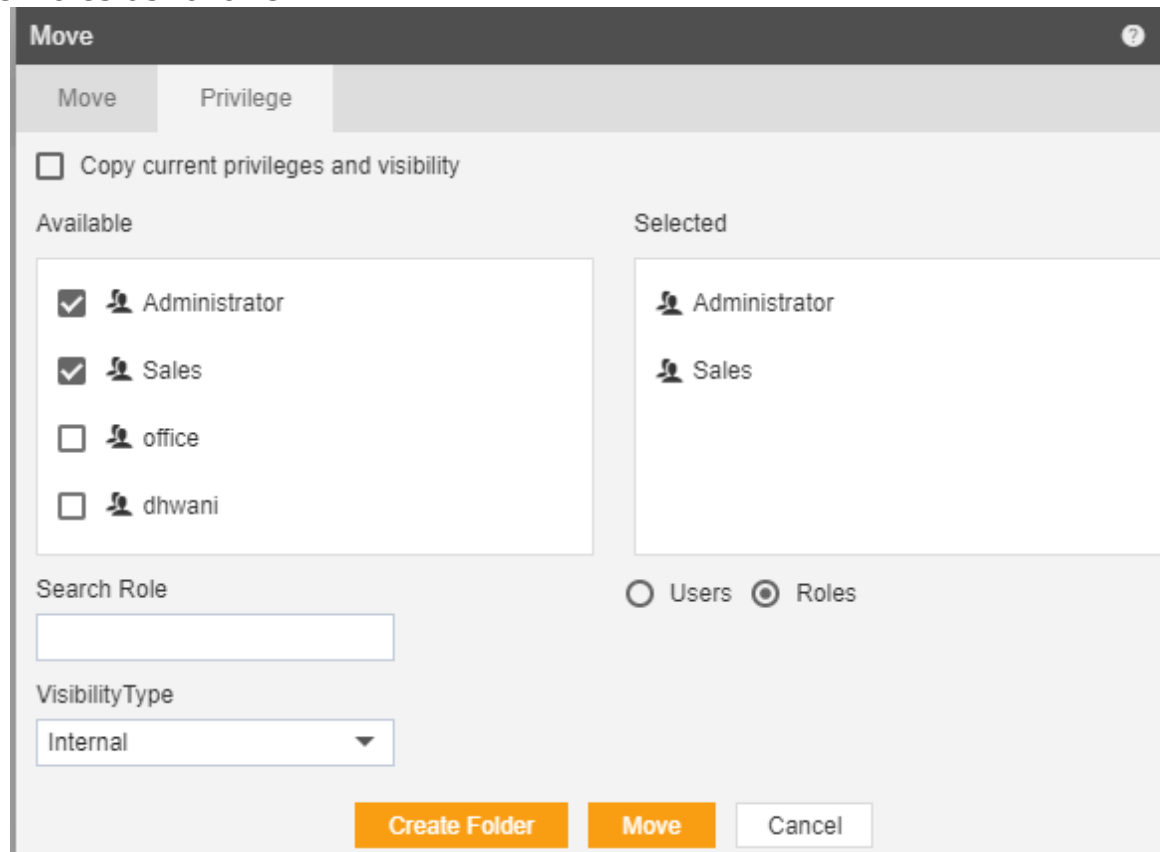
- 2.
3. The default name will be Portrait View. You can provide your own name while moving a report.
4. In order to provide move destination, you can select any of the folders present in the popup or can create a new folder by selecting the folder where new folder must be created and clicking on Create Folder as follows:-



1. Select explain move from the list shown below:-
2. In order to assign privileges to the report, click on the privileges tab next to the move tab. By default, Copy current privileges and visibility checkbox will be checked which will retain the same privileges and visibility of the original report in the moved version.
3. If you want to assign privileges uncheck Copy current privileges and visibility checkbox.
4. The user can select other users with whom the moved report will be shared from the list of available users or search them in the search user bar.






8 In the similar manner, user can apply privileges to different user roles as follows:-



- 9 The user can also search for roles in the Search Role bar.
5. Visibility is used to mention who all can view the report and is of following three types:-
 6. Private:- It means only the current user can view the file.
 7. Internal:- It means all the users within the organization can view the file.
 - 10 Public:- It means anyone can view the file.

11 The user can select the visibility from the dropdown menu as shown above.


5. In case of any further help, the user can click on the  icon to access the AIV help documents.
6. Finally, in order to move the report, click on the Move button.
7. If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on  button next to the  icon.

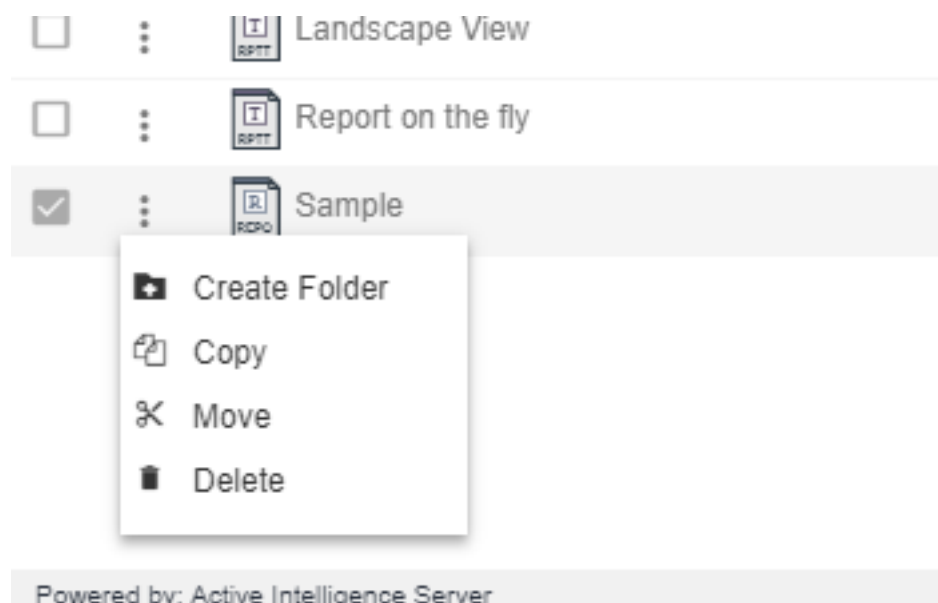
8. As the report is moved, it will be removed from the Reports page and will be added to the explain_moved folder

9. In a similar manner, you can also perform the move operation on the folders selecting the folder you desire to move and choosing the move icon from the toolbar, or by right-clicking the folder and selecting the move option from the elapses shown.

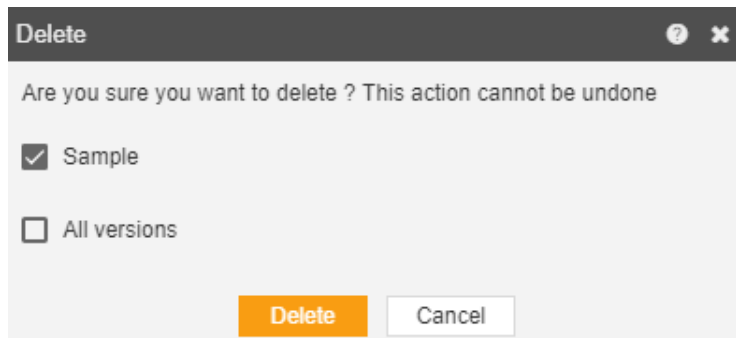
Delete

- There are two ways in which a user can delete a report in the AIV application:-

- 1 By clicking on the delete icon  located at the bottom most toolbar.
- 2 By right clicking the report you want to delete. We will use Sample.report report in this tutorial for the purpose of understanding.



- Finally press on delete after selecting the document using any one of the above mentioned methods which will open following dialog box:-

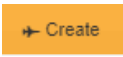


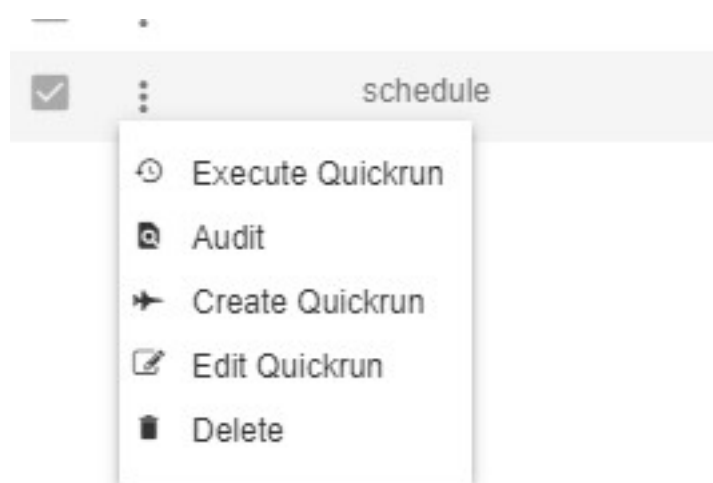
- For a resource with multiple versions, you can select whether you want to delete current version or all versions of specified resource.
- The report will be deleted and a message will be displayed report deleted successfully.
- In a similar manner, you can also perform the delete operation on the folders selecting the folder you desire to move and choosing the move icon from the
- toolbar, or by right-clicking the folder and selecting the move option from the elapses shown.

Quick Run

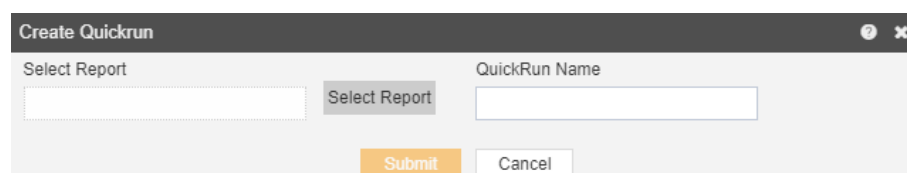
- If you want to run report with different parameter and you want some easier way to manage then Quickrun comes into action.
- Main purpose of using QuickRun is that you don't have write parameter of the report again and again you just save it to use in future.
- QuickRuns has following items:
 1. [Create](#) Quickrun
 2. Audit
 3. Execute [Quickrun](#)
 4. [Edit Quickrun](#)
 5. [Delete](#)

Create Quickrun:-

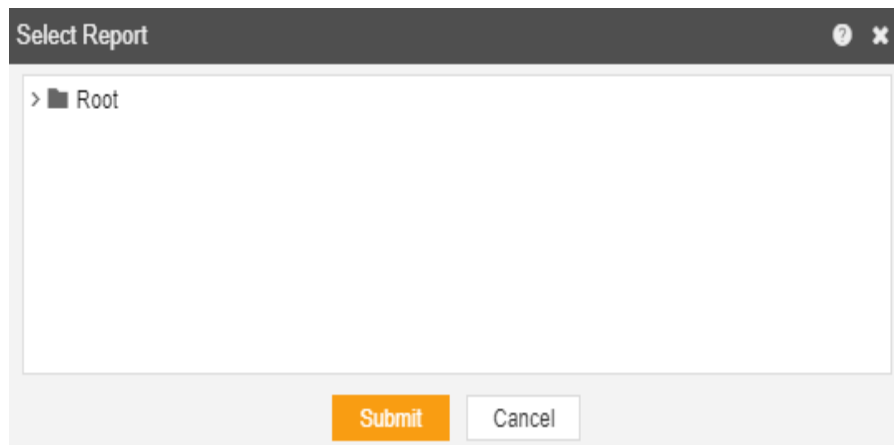
- There are two ways in which a user can create quick run in the AIV application:-
 1. By clicking on the create icon  located at the bottom most toolbar.
 2. By right clicking any existing quick run as follows:-



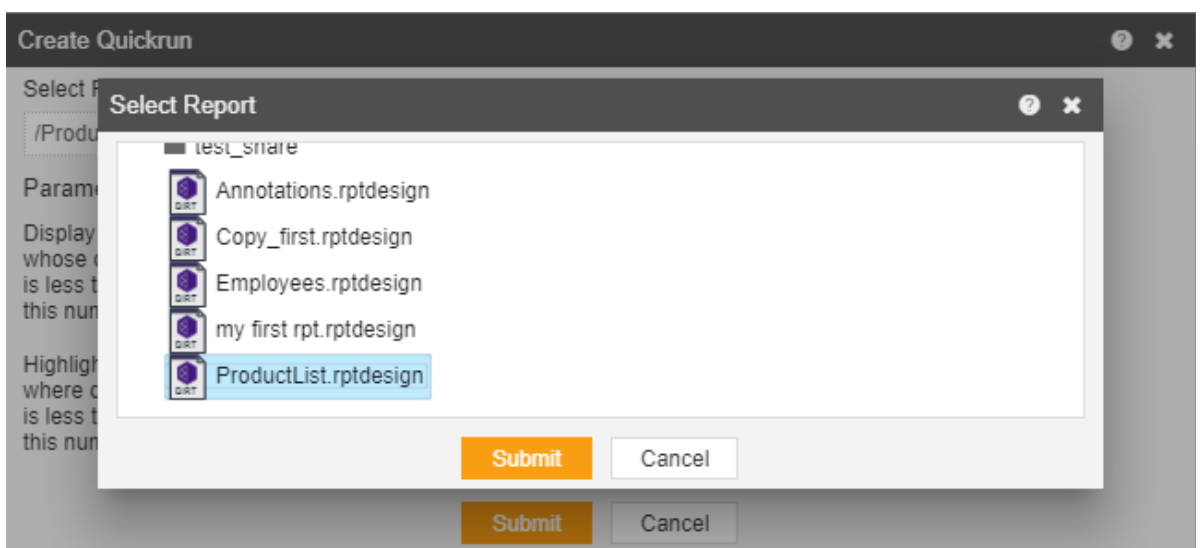
- By selecting create quick run using any of the above mentioned methods opens the following dialog box:-

A screenshot of the 'Create Quickrun' dialog box. The dialog has a title bar with 'Create Quickrun' and standard window controls. It contains two input fields: 'Select Report' and 'QuickRun Name'. The 'Select Report' field has a 'Select Report' button next to it. At the bottom, there are two buttons: 'Submit' (orange) and 'Cancel' (white).

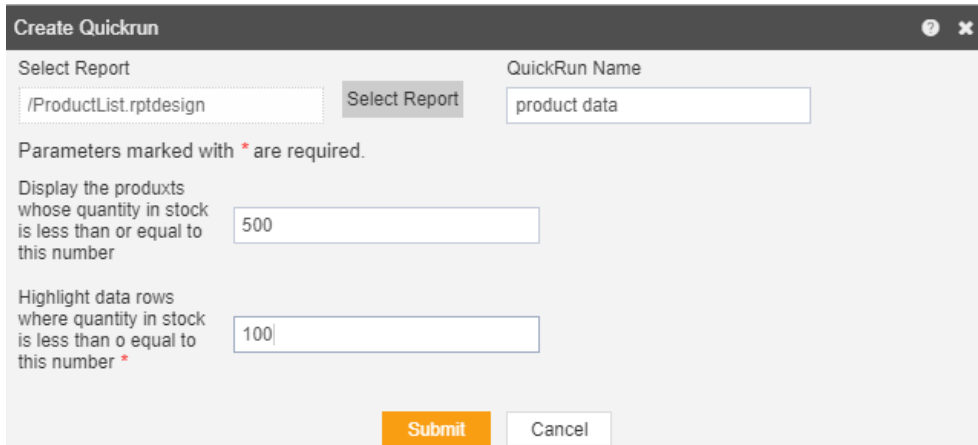
- Select the Report by pressing **Select Report** will open the following dialog box:-



- Expand Root and select ProductList.rptdesign and hit submit button.



- You can also provide a name to your quick run as follows:-



Create Quickrun

Select Report: /ProductList.rptdesign

QuickRun Name: product data

Parameters marked with * are required.

Display the products whose quantity in stock is less than or equal to this number: 500

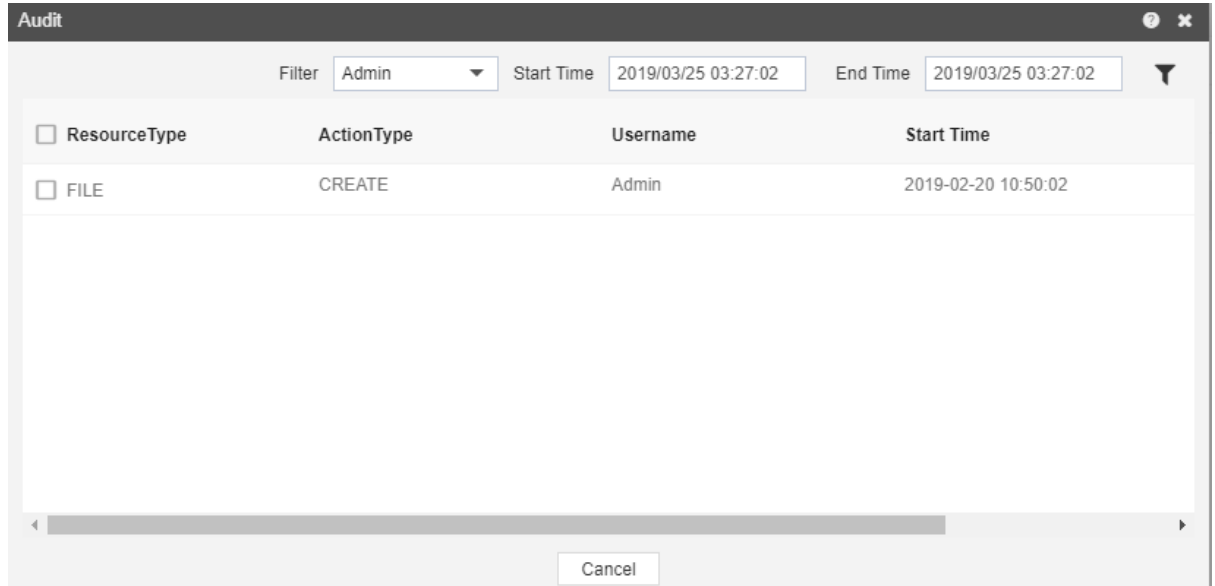
Highlight data rows where quantity in stock is less than or equal to this number *: 100

Submit Cancel

- Enter the parameters as shown in the figure above and hit the submit button.
- You have now successfully created a quick run named product data.

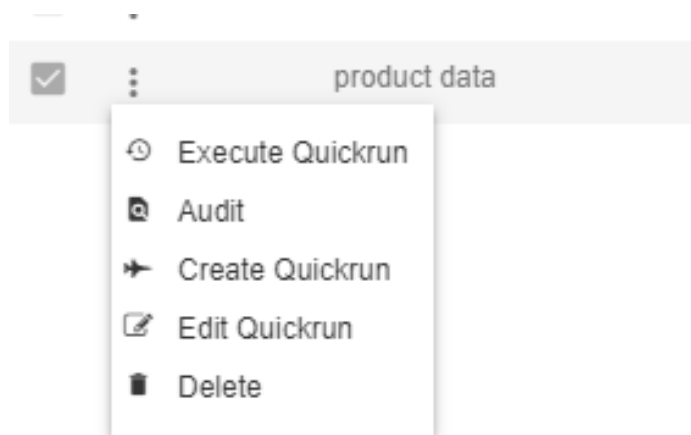
Audit

- Audit shows the actions like when the user created, uploaded or downloaded any particular file.
- Following image describes the audit option.

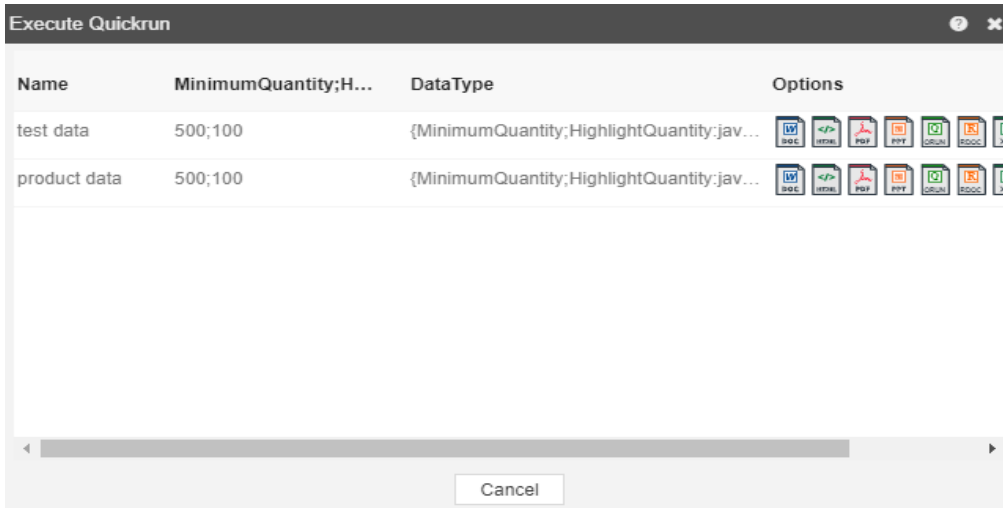


Execute Quickrun


- The execute quickrun option helps the user to execute a quickrun.
- This shows a list of quickrun associated with same parameterized report.
- For instance, when we perform execute quickrun on product data it gives a list of all the quickrun associated with **ProductList.rptdesign**.
- In order to execute quickrun, right click product data and select execute quickrun as follows:-



- This will open the following dialog box displaying list of quickrun using ProductList.rptdesign.



Edit Quickrun

- **Edit QuickRun** allows you to update **QuickRun** which includes updating the parameters of report. (Only users with **QuickRun** privilege have access to this section)
- To edit Quickrun follow below steps:
 1. Select Quickrun product data and right click and select  **Edit Quickrun**
 2. The following dialog box will appear:-

Select Report: ProductList Select Report QuickRun Name: product data

Parameters marked with * are required.

Display the products whose quantity in stock is less than or equal to this number: 500

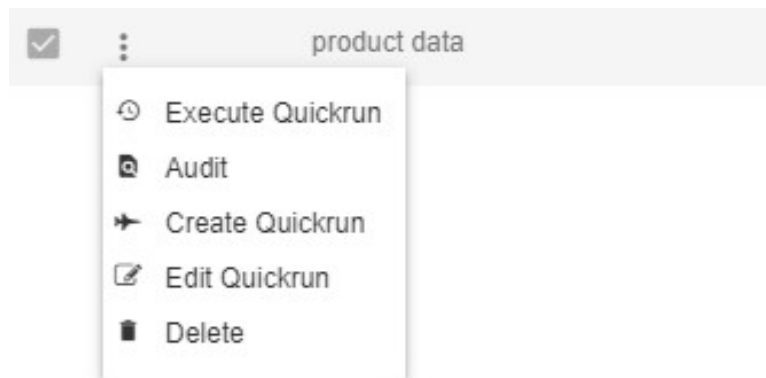
Highlight data rows where quantity in stock is less than or equal to this number *: 200

Submit Cancel

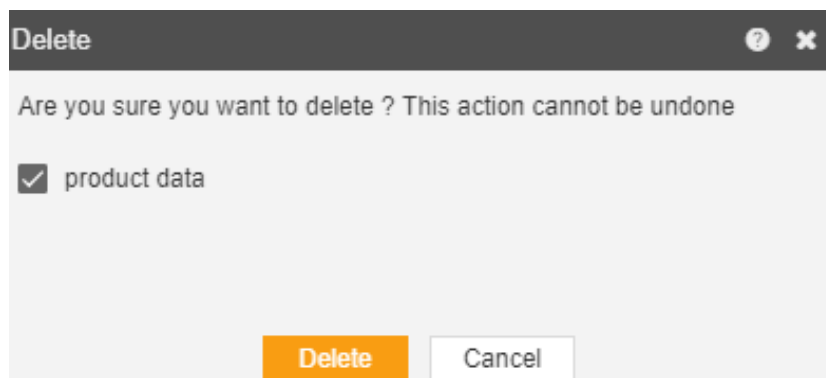
3. Update value as shown above and click on **Submit** button to update Quickrun.

Delete

- There are two ways in which a user can delete a quick run in the AIV application:-
 1. By clicking on the delete icon **Delete** located at the bottom most toolbar.
 2. By right clicking the quickrun you want to delete. We will use product data in this tutorial for the purpose of understanding.



- Finally press on delete after selecting the report using any one of the above mentioned methods which will open the dialog box as shown below:-



- Click on the **Delete** button to delete the quickrun.
- The quickrun will be deleted and a message will be displayed report deleted successfully.

Mappings

Dynamic Messages

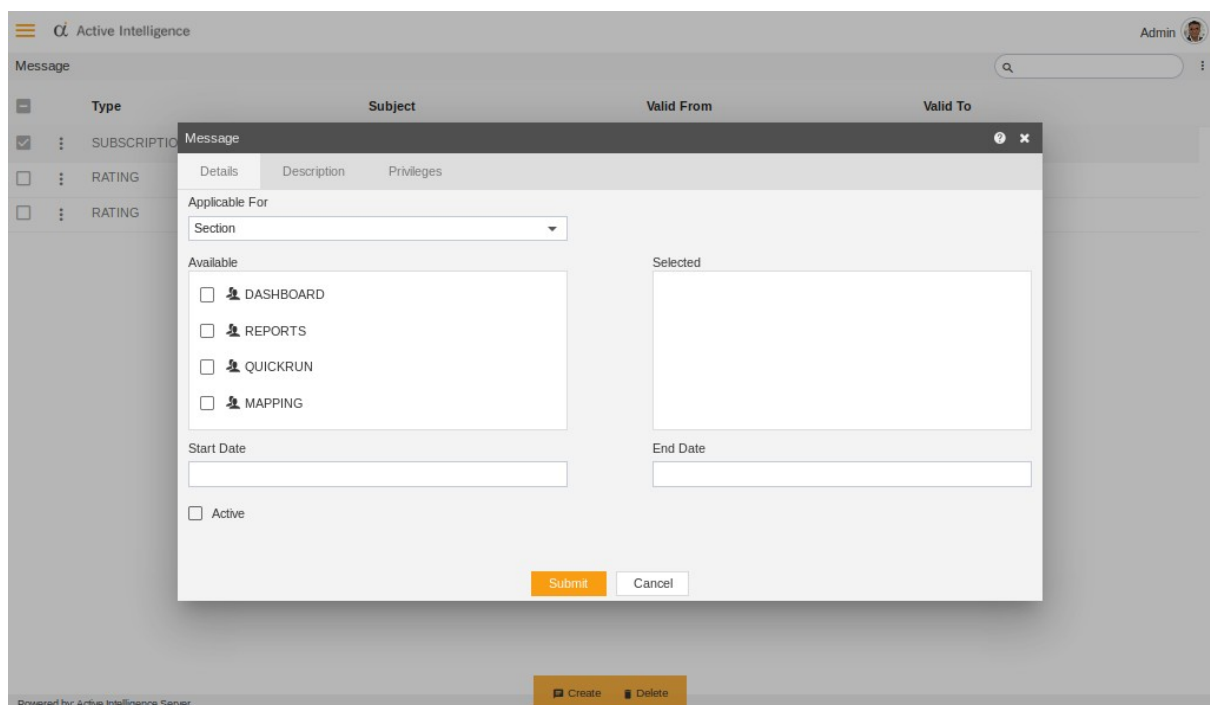
- The user can use a dynamic message to give feedback or rate or survey any report.
- Message Types are Message, Survey, Rating, Subscription, and Feedback.

- Messages contains following items:
 - Create Message
 - Audit
 - Edit
 - Delete
 - Comment
 - Preview
 - Generate Report

Create Dynamic Message

- Create Message allows you to create a new Message.
- There are multiple ways you can create Message.

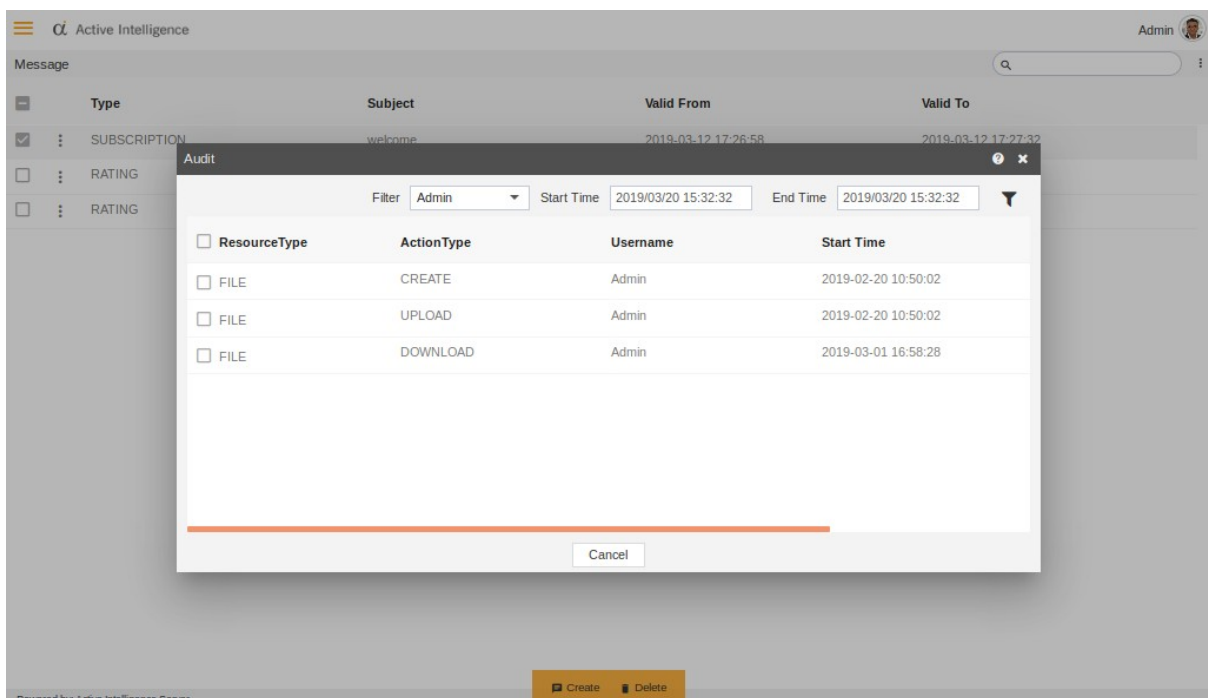
- Click **Create** button from the footer menu bar.
- The following dialogue box will appear:
-



- The user can create Messages that are applicable to a particular File or Section.
- Choose the option to make Messages that are applicable to a particular File or Section.
- Fill all the desired information in Description Tab and Privilege Tab.
- Click on **Submit** button to create a message.

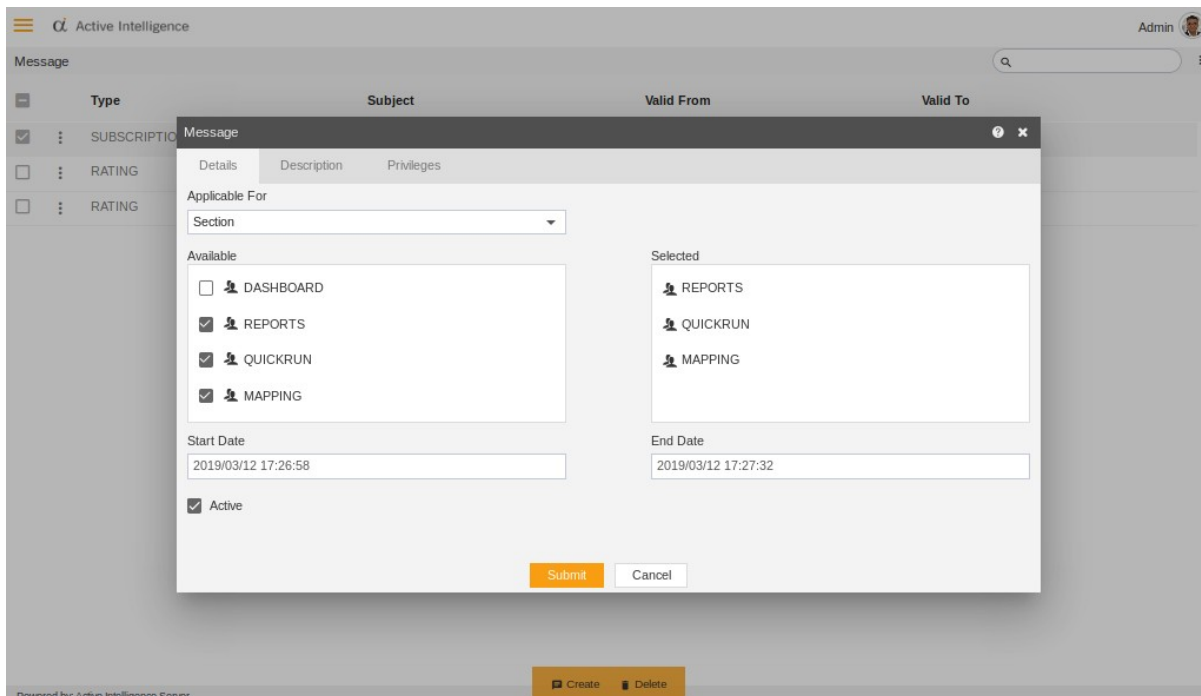
Audit

- Audit shows the actions like when the user created, uploaded or downloaded any particular file.
- Following image describes the audit option.

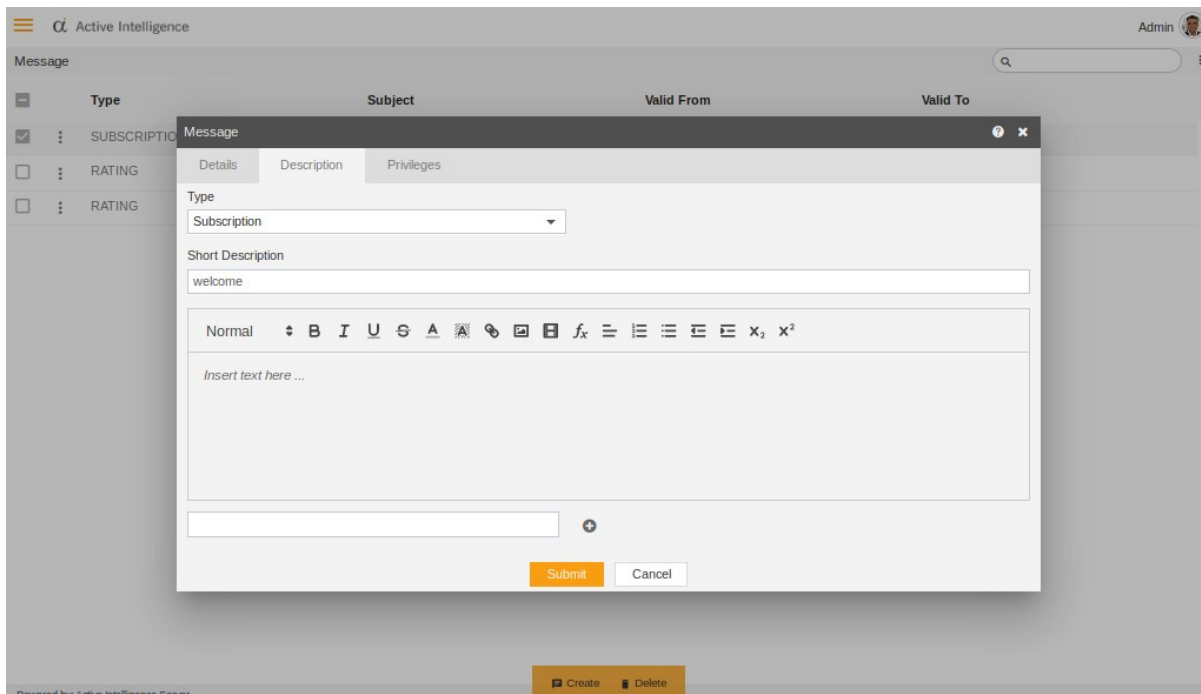


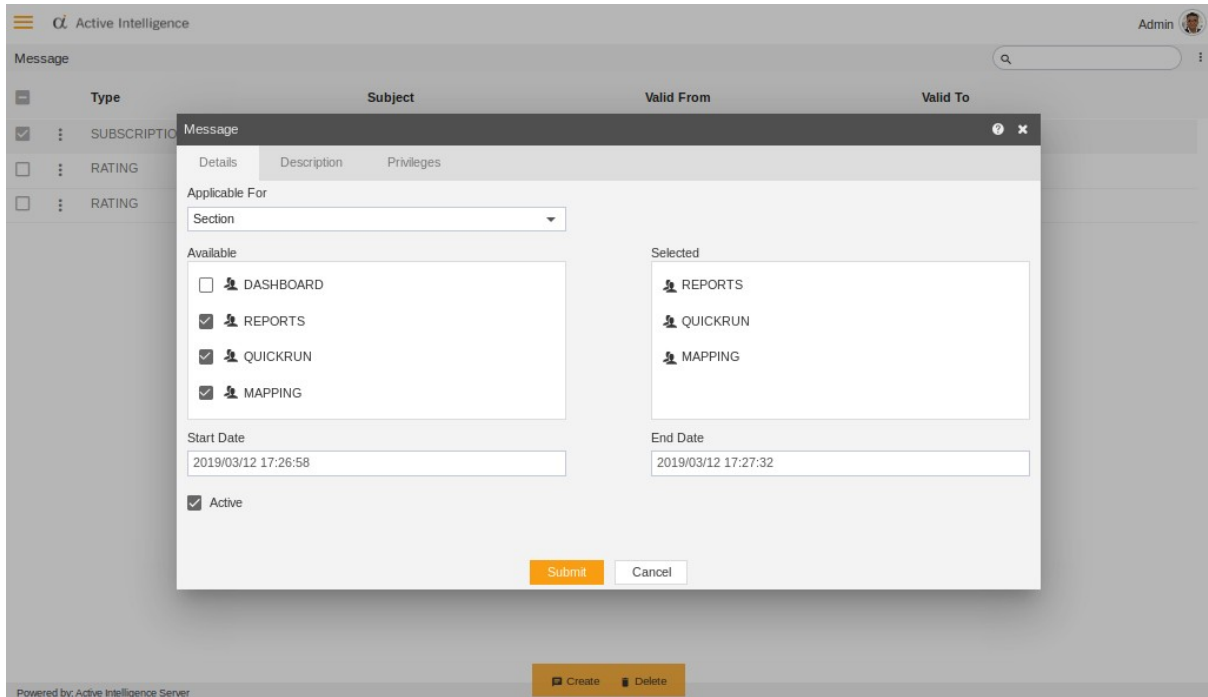
Edit Message

- Edit Message allows you to do the changes in Created Message.
- To edit message follow below steps:
- Select a message and right click and select **Edit**
- The following dialog box will appear.



- Update the desired values in Details and Description Tabs and set Privileges accordingly

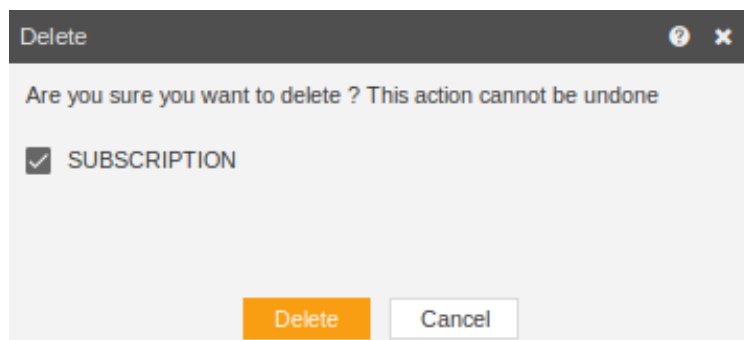




- Click on **Submit** button and message updated.




Delete

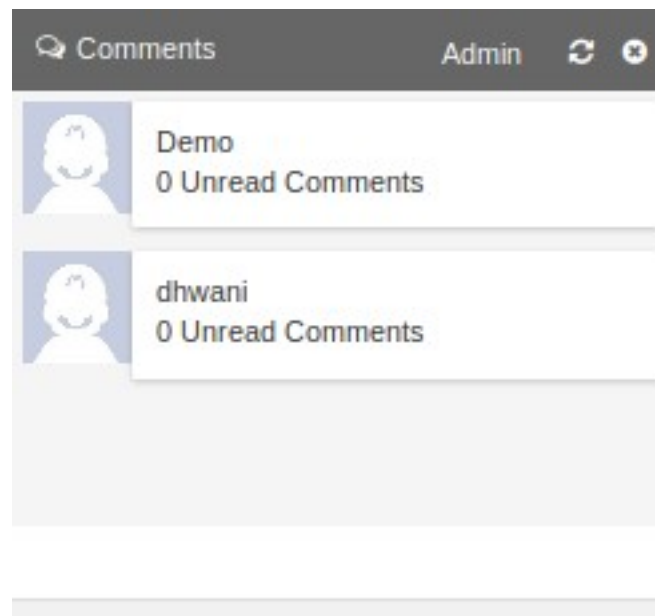
- The delete option is used to delete the selected message.
- To Delete a Message, follow these steps:
- There are multiple ways you can Delete Message (select the desired Message and right click and select **Delete** from the context menu or select **Delete** from the footer menu bar
- Note: Multiple Message Delete is permitted.
- Select the Message you wish to delete and Click **Delete** button from the footer menu bar.
- The following dialog box will appear:

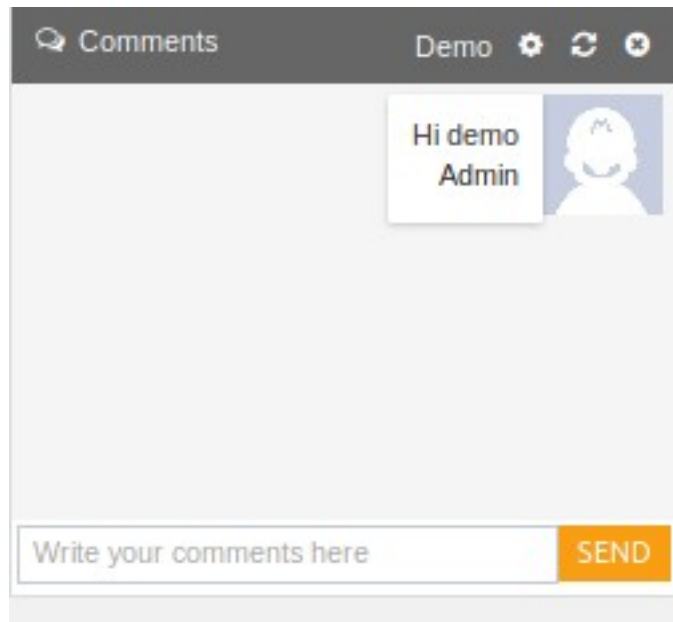


- Finally click **Delete** button to permanently delete a Dynamic Message, alternatively you can press **Cancel** button to cancel the action.

Comment


- Comments allows users to send Messages to each other for a particular  File or the whole  Section which are shared between them.
- Select the Message from the Message section and right click and select  Comment
- The Comments box would appear at the bottom right of the screen as follows





- User can reply to the message or he can send message to someone.

Preview



- Preview option is used to view the Messages in preview mode.
- Select the Message from the Message section and right click and select  Preview in the options of the Message, the Preview of the Message would appear at the top right of the screen as follows:



Message Type: RATING



Message Type: SUBSCRIPTION


- These are the Preview of different Message Types which would be displayed for the selected  File or  Section.

Generate Report

- Generate report is used to generate the report of acknowledged message.
- Once the message is submitted, it has been acknowledged successfully and can be seen in generate reports.
- Following image shows the generate report.


Master Data

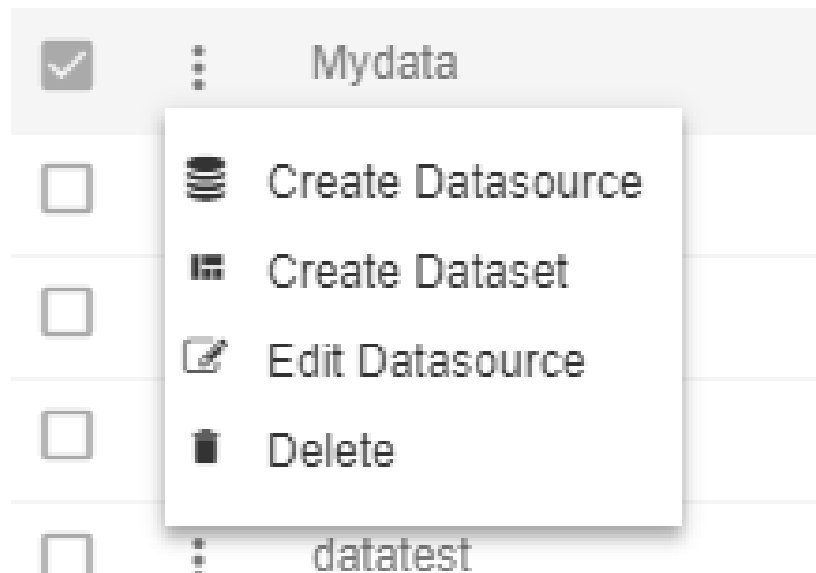
Datasource

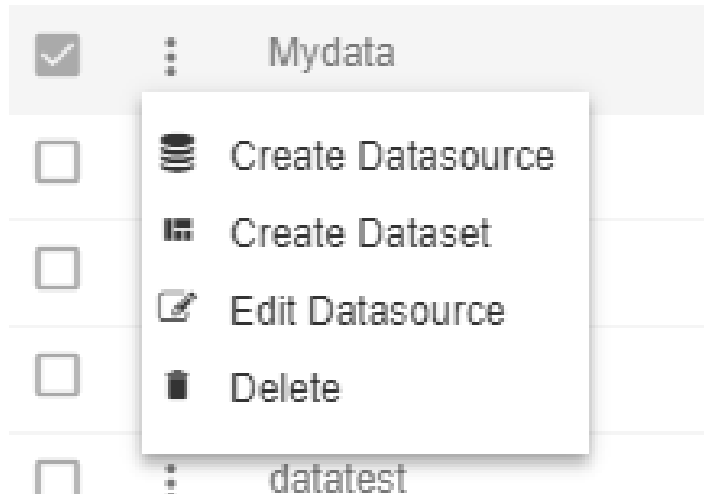
The Datasource tab is the first sub-tab under the Master Data tab in AIV application. The main purpose of this tab is to create different databases and to connect to different database management systems. The Datasource section can be accessed by clicking on Datasource or by clicking on  next to the Datasource tab, which will open the Datasource in a new tab. The primary purpose of the Datasource section to perform different functionalities related to reports such as:

1. Create Datasource
2. Create Dataset
3. Delete
4. Edit Datasource
5. Search
6. Instant Messages
7. Admin Details

Create Datasource

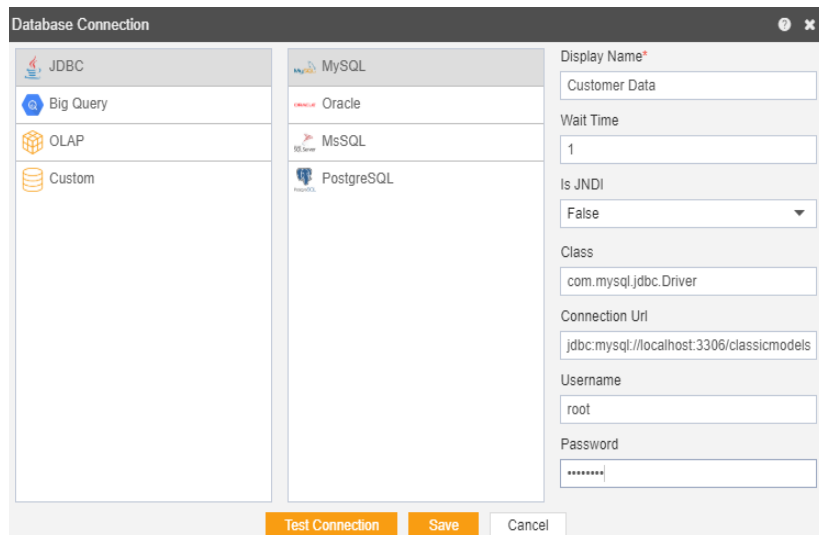
- There are two ways in which a user can create a datasource in the AIV application:-
 1. By clicking on the create icon  located at the bottom most toolbar.
 2. By right clicking on any existing datasource as follows:-





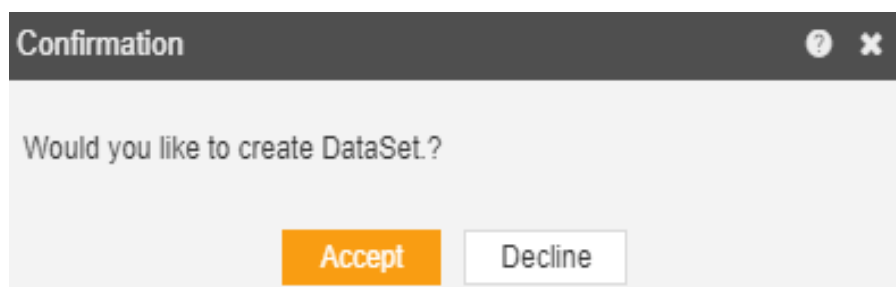
- Click on the Create Datasource using any of the methods above which will open the dialog box as shown below:-

- Here we are creating a datasource named Customer Data which will store data related to the customers and hence the display name.
- Put wait time as 1.
- Is JNDI is kept False.
- As we are connecting JDBC with MySQL “com.mysql.jdbc.Driver” driver is used to connect.
- Provide your connection URI as shown in the figure.
- The Username is root and password is password to connect to the server.
- After that test connection, if it is successful click on save else click cancel.




- the you an well.

While saving database, will be given option to create a dataset as

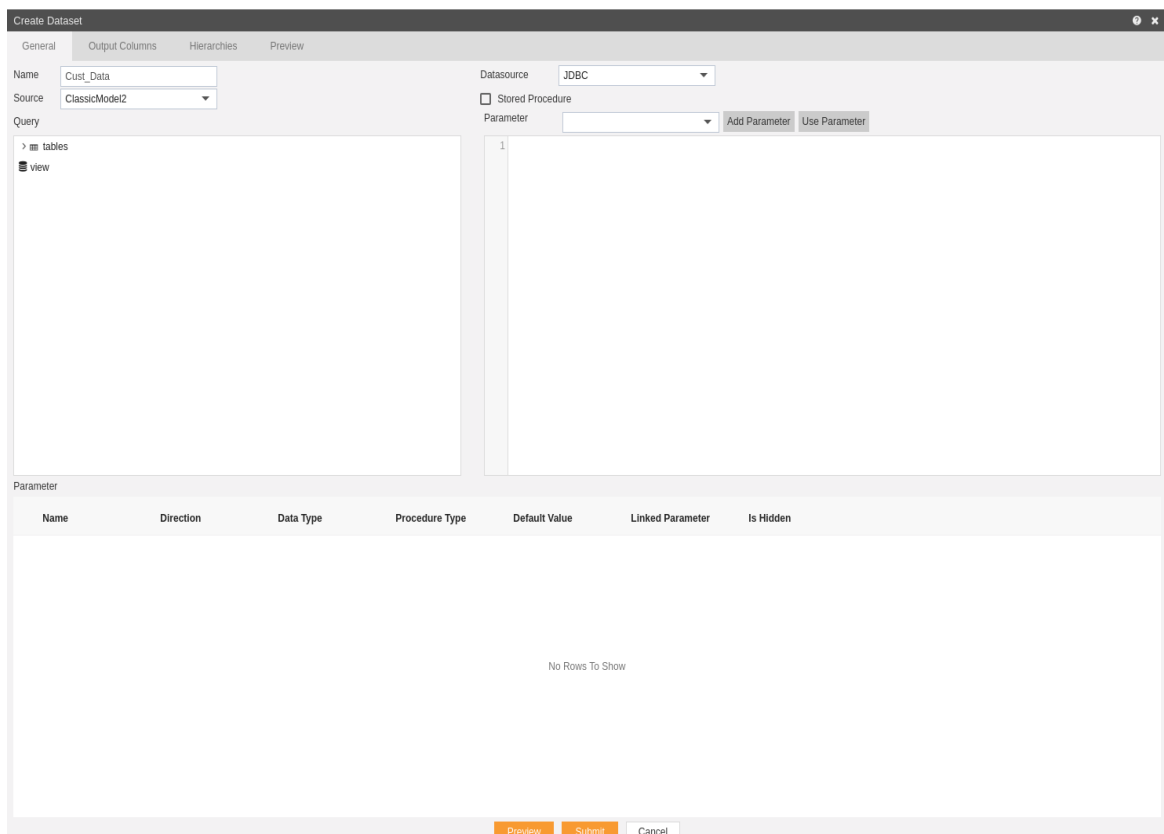


- Accept if you want to create a DataSet right now or decline for later.
- You have successfully created a datasource in the AIV application.

Create Dataset

- There are three methods to create a dataset:-
 1. Accept to create dataset while creating a Datasource.
 2. Click on the create dataset button  at the bottommost toolbar to create a dataset.
 3. Right click the datasource and select create Create Dataset to create new dataset.

- After clicking the create dataset following pop-up will be opened:-
- In the name section give dataset name as "Cust_Data".
- Select ClassicModel2 as the Datasource.

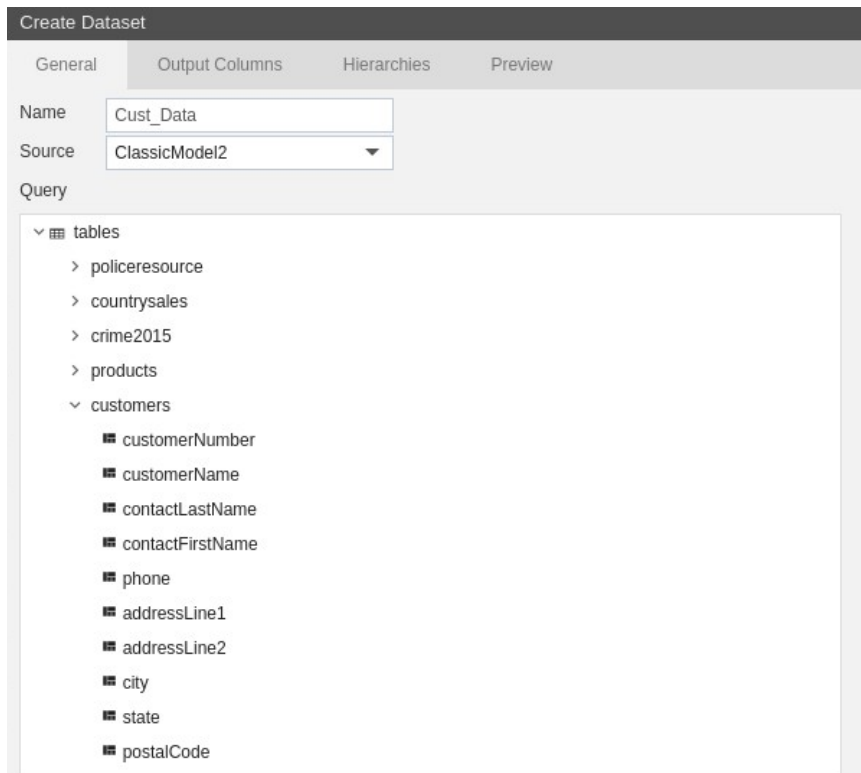


The screenshot shows the 'Create Dataset' dialog box with the following details:

- Name:** Cust_Data
- Source:** ClassicModel2
- Datasource:** JDBC
- Query:** A tree view showing 'tables' and 'view'.
- Parameter:** A list containing the number '1'.
- Parameter Table:**

| Name | Direction | Data Type | Procedure Type | Default Value | Linked Parameter | Is Hidden |
|-----------------|-----------|-----------|----------------|---------------|------------------|-----------|
| No Rows To Show | | | | | | |
- Buttons:** Preview, Submit, Cancel

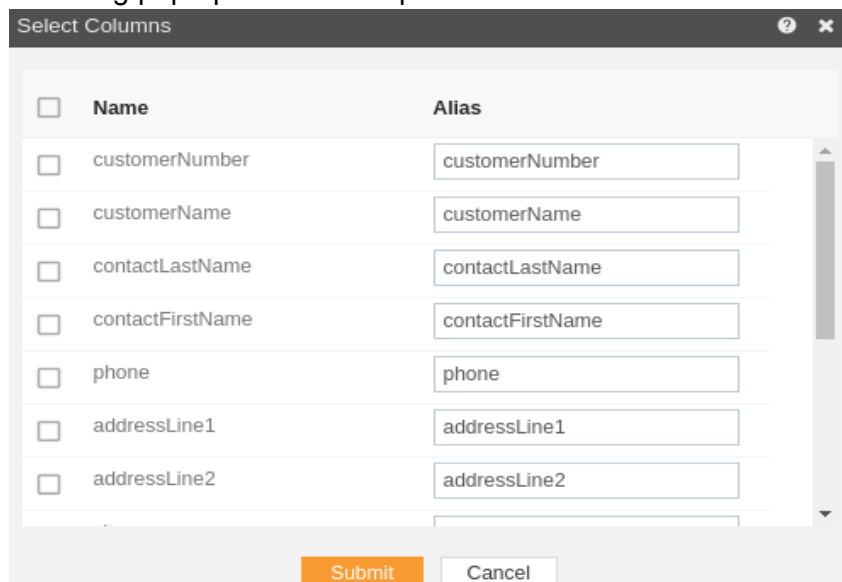
- In the Query section expand tables to see the tables that exist in the current Datasource.



- Expand the customers table.

- Drag and drop customers on the empty screen to write query.

- The following pop-up box will be opened.



- Select the columns customerNumber, customerName, phone, addressLine1, addressLine2, city,state, country from the List Box and press Submit.

- The following sql query will be displayed:-
- Keep the Datasource as JDBC.
- Press **Preview** to preview the results and **Submit** in order to submit the query and create the dataset
- In order to view Output Columns, click on the Output Column tab that displays

Columns as follows:-


| Name | Type | Alias | Format | Data Type | | |
|----------------|------------------------------|--------------------------------------|--------------|---------------|----------|-----------|
| CustomerNumber | CustomerName | AddressLine1 | AddressLine2 | City | State | Country |
| 103 | Atelier graphique | 54, rue Royale | | Nantes | | France |
| 112 | Signal Gift Stores | 8489 Strong St. | | Las Vegas | NV | USA |
| 114 | Australian Collectors, Co. | 636 St Kilda Road | Level 3 | Melbourne | Victoria | Australia |
| 119 | La Rochelle Gifts | 67, rue des Cinquante Otages | | Nantes | | France |
| 121 | Baane Mini Imports | Erling Skakkes gate 78 | | Stavern | | Norway |
| 124 | Mini Gifts Distributors Ltd. | 5677 Strong St. | | San Rafael | CA | USA |
| 125 | Havel & Zbyszek Co | ul. Filitrowa 68 | | Warszawa | | Poland |
| 128 | Blauer See Auto, Co. | Lyonerstr. 34 | | Frankfurt | | Germany |
| 129 | Mini Wheels Co. | 5557 North Pendale Street | | San Francisco | CA | USA |
| 131 | Land of Toys Inc. | 897 Long Airport Avenue | | NYC | NY | USA |
| 141 | Euro+ Shopping Channel | C/ Moraltzarzal, 86 | | Madrid | | Spain |
| 144 | Volvo Model Replicas, Co | Berguvsvägen 8 | | Luleå | | Sweden |
| 145 | Danish Wholesale Imports | VinbÅllet 34 | | Kobenhavn | | Denmark |
| 146 | Saveley & Henriot, Co. | 2, rue du Commerce | | Lyon | | France |
| 148 | Dragon Souvenirs, Ltd. | Bronz Sok., Bronz Apt. 3/6 Tesviklye | | Singapore | | Singapore |

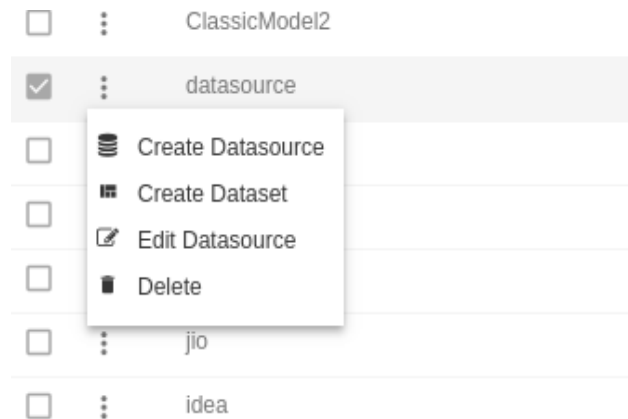
After this, preview to check if you have performed steps correctly.

- In order to view the dataset, go to the Dataset section , and you will notice Cust_Data has been created over there with the date that you have last updated it.
- In this manner, you can create a new dataset for your datasource.

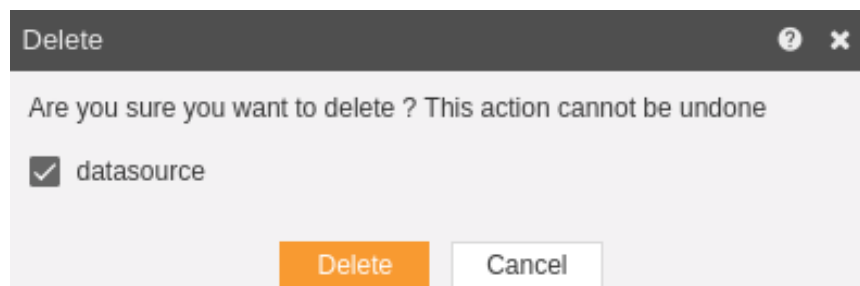
Delete

- There are two methods to delete a datasource:-


1. Click on the delete button  at the bottommost toolbar to delete the dataset.
2. Right click the datasource and select Delete to delete the dataset.



- In this case, we have deleted a Datasource named “datasource”.
- After you press, following popup will be opened:-



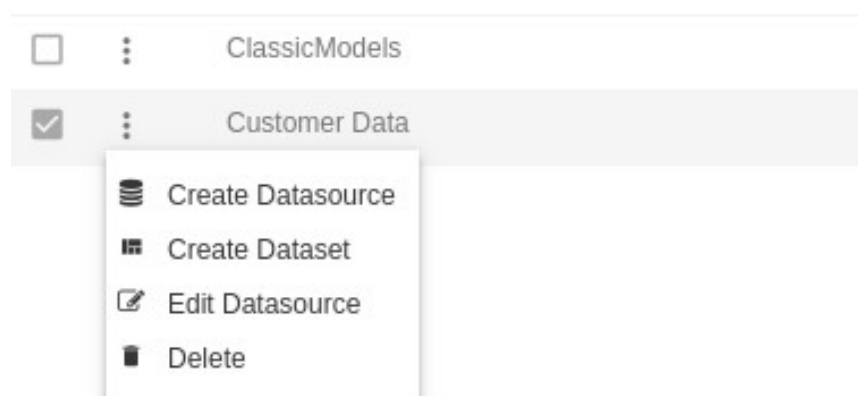
Press on

Delete button and Refresh the page from the top right elapses .

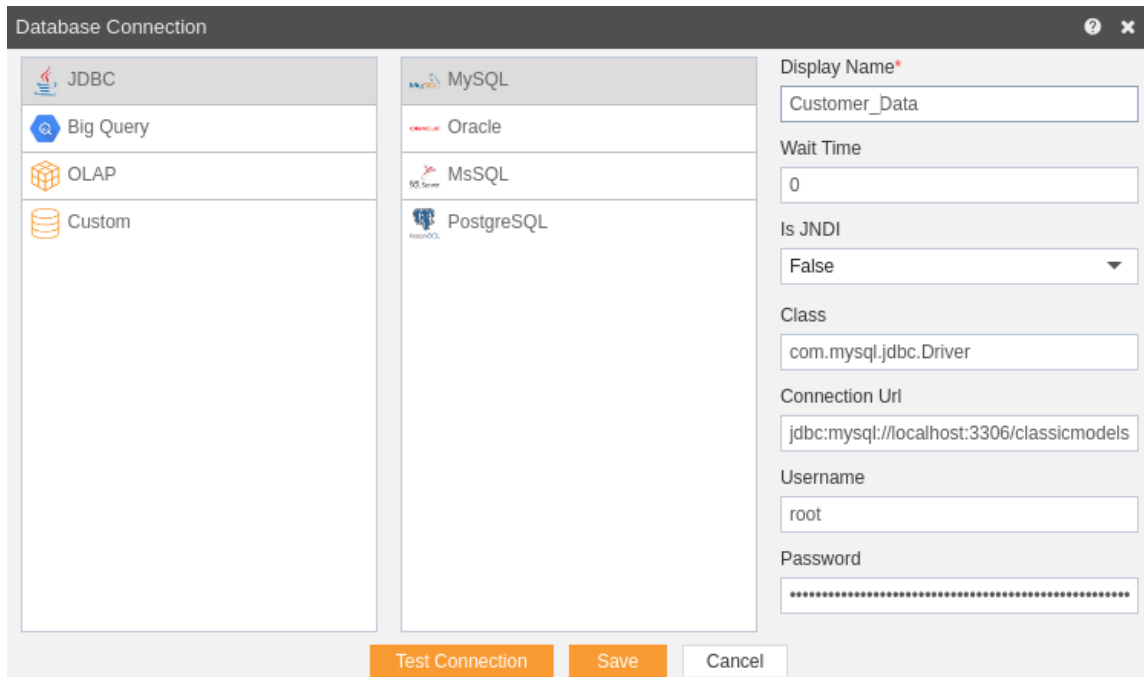
- You can see “datasource” has been deleted from the Datasource page.

Edit Datasource

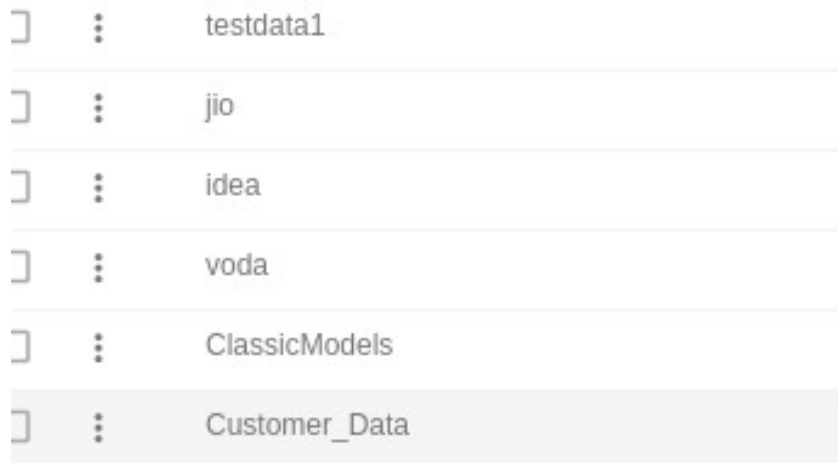
- In order to edit the datasource, right click on the desired datasource.
- We are working with Customer Data for our example.
- Let us edit the Datasource and rename it as Customer_Data.
- Right click Customer Data and select Edit datasource as follows:-



- This will open a popup. Rename Datasource as Customer_Data as follows:-



- You can change your driver as well as data source using edit data source.
- In our case, we will leave everything else as it is and rename display name as Customer_Data.
- Test Connection, and if it is successful save changes by clicking Save button.
- As you can see, datasource name has been updated to Customer_Data.



Datasource Mapping

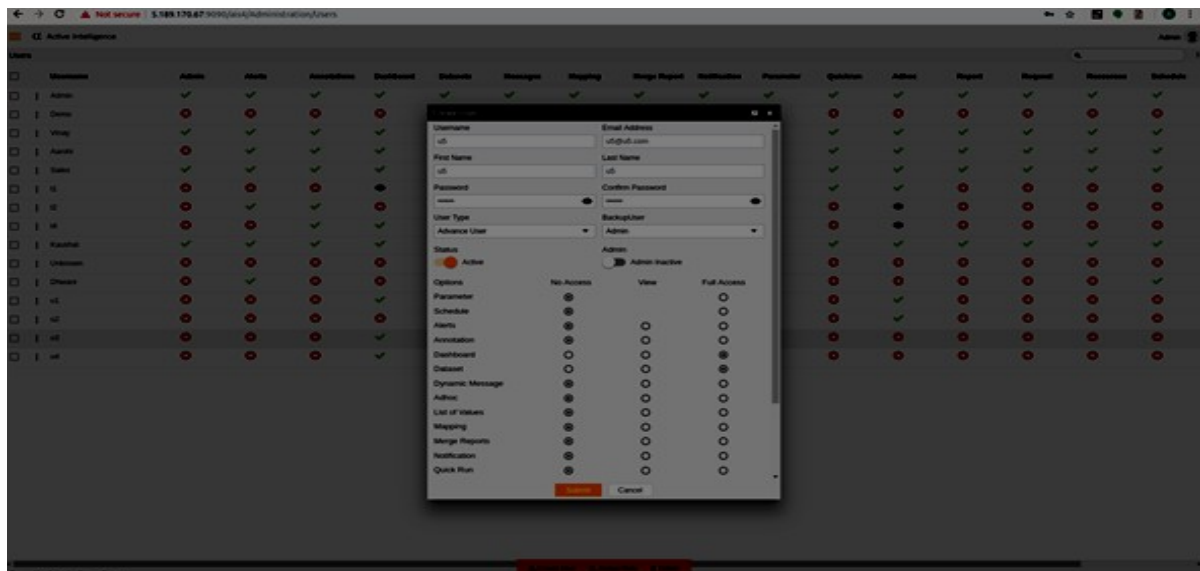
Active Intelligence Visualization Tutorials

Topic:- How to perform the Datasource mapping for different users and user roles

Datasource mapping plays an important role in a scenario where there are multiple users connected to different data sources and working on the same AIV v4 application.

- For instance, there is a common dashboard named telecom which is being shared by different service providers such as Reliance-Jio, Idea, Vodafone to name a few.
- They want to display a table depicting the list of their current users on the dashboard.
- In such case, depending on the telecommunications giant a particular user is registered with, different data must be shown to the users, i.e. if a user is registered with Reliance-Jio, then he should see only the data of Jio customers and not that of Idea or Vodafone users.
- Without Datasource mapping, one has to create multiple dashboards in order to achieve this which increases the complexity and also the time to maintain different dashboards.
- Hence, in order to ease the process, this can be implemented on the AIV v4 application using Datasource mapping by following some simple steps as below:-

1) Go to the Users tab in the administration section of the AIV v4 application and create 3 new users by clicking on create user as follows.



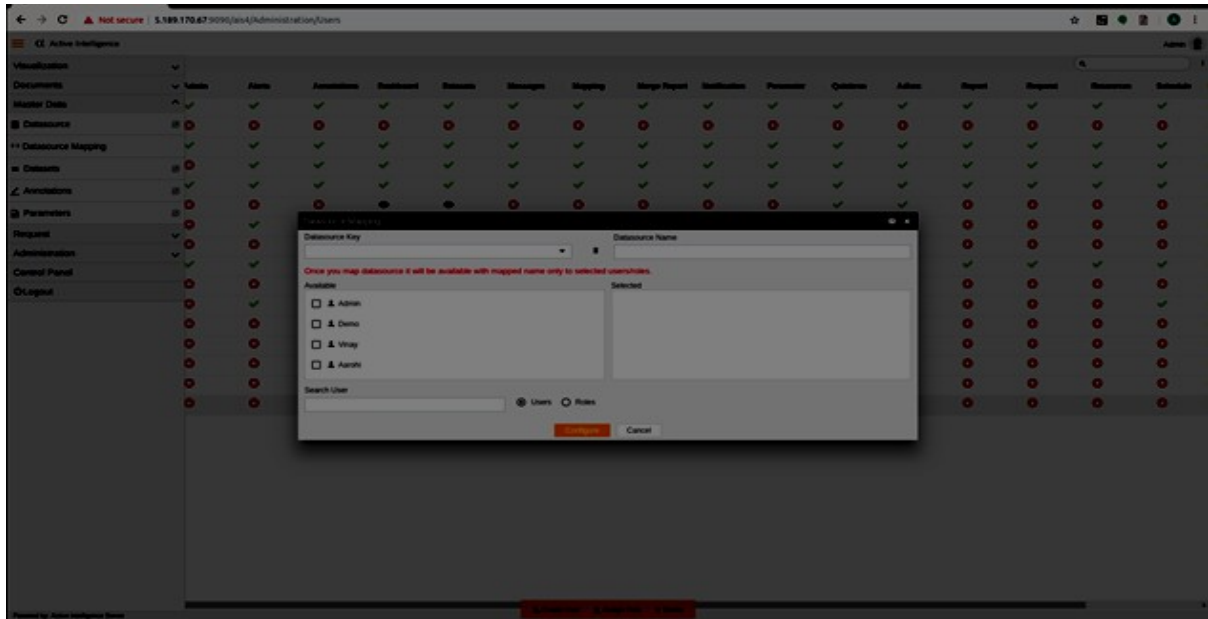
2) Assign different roles to the users by right clicking on the user and selecting edit user role or by selecting a user and clicking on Assign role button at the footer of the page.

- Assign user1 to idea.
- Assign user2 to jio.
- Assign user3 to voda.

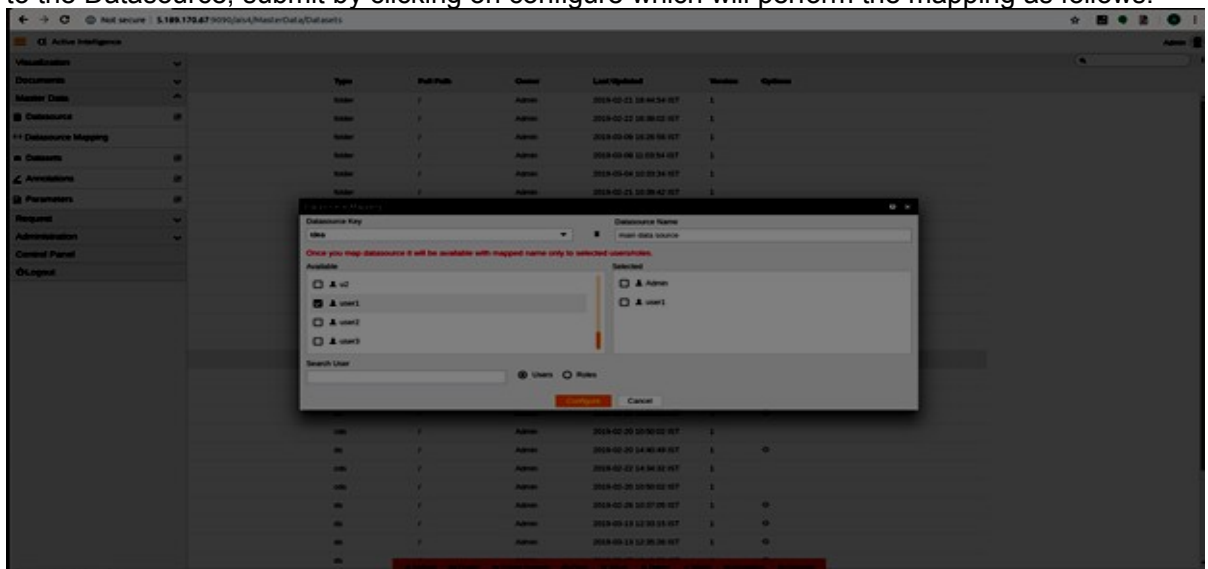
An example has been shown for your reference in which user1 is assigned to role idea Datasource.

| Username | Admin | Alerts | Annotations | Dashboard | Datasets | Messages | Mapping | Merge Report | Notification | Parameter | Quickrun | Adhoc | Report | Request | Resource | Schedule |
|---------------|-------|--------|-------------|-----------|----------|----------|---------|--------------|--------------|-----------|----------|-------|--------|---------|----------|----------|
| Admin | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Demo | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Willy | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| April | ✗ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Salv | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| IC | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ | ✓ | ✗ | ✗ | ✗ | ✗ |
| IC | ✗ | ✓ | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| W | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Kaushal | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Unknown | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Chetan | ✗ | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ | ✓ |
| vt | ✗ | ✗ | ✗ | ✓ | ✓ | ✓ | ✗ | ✗ | ✓ | ✗ | ✗ | ✓ | ✗ | ✗ | ✗ | ✗ |
| sd | ✗ | ✗ | ✗ | ✗ | ✓ | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| user1 | ✗ | ✗ | ✗ | ✓ | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Create User | ✗ | ✗ | ✗ | ✓ | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Edit User | ✗ | ✗ | ✗ | ✓ | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Edit UserRole | ✗ | ✗ | ✗ | ✓ | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Delete | ✗ | ✗ | ✗ | ✓ | ✓ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |

In a similar manner, user2 is assigned to jio and user3 is assigned to voda data source.
3) Next, go to the Master Data section and select on Datasource mapping, a popup shown as below will be opened by clicking it.

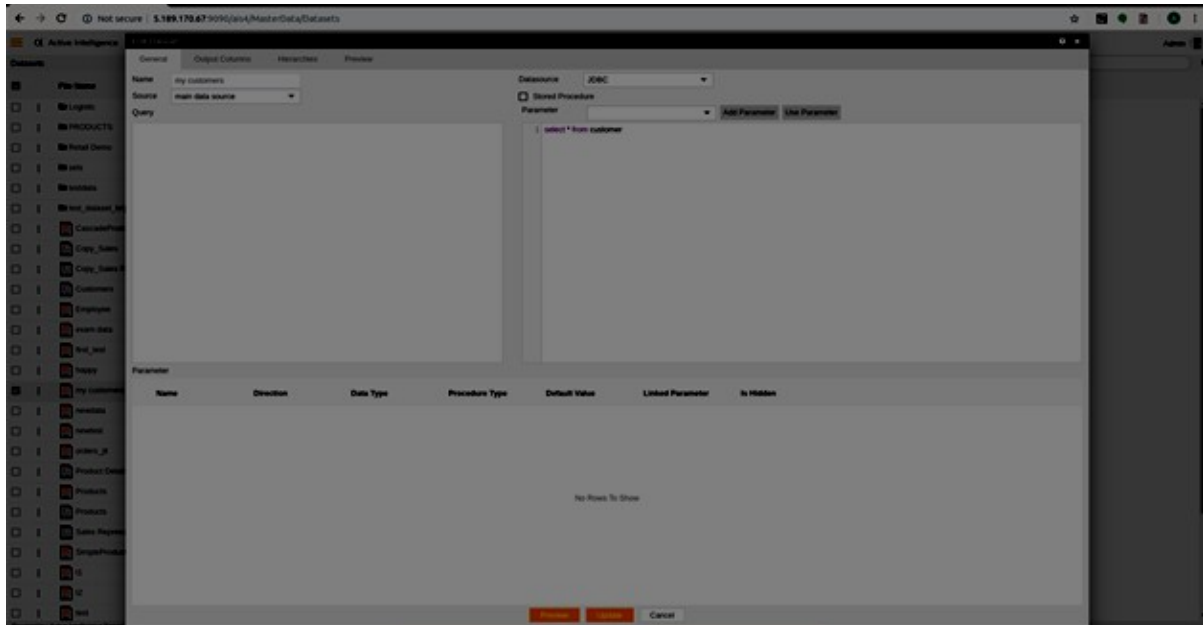


4) In order to perform the mapping, for user1 select idea as the Datasource key and give a name to the Datasource, submit by clicking on configure which will perform the mapping as follows.*



* Note:- It is important to note that the Datasource will be visible with the name mentioned in the Datasource name only to the users whose name is selected from the list. Hence, In order to view the Datasource in your account, you need to select your user name which was registered with AIV v4. Currently, main_data_source will be visible only to Admin and user1.

5) In order to view the Datasource, go to the Master Data -> Datasets. For this particular example, my customers dataset is created and double-click on it in order to open it. You can create your own dataset by clicking on create a dataset. This will open the following pop-up. As the current user is Admin, you can see main_data_source is available in the drop-down list.

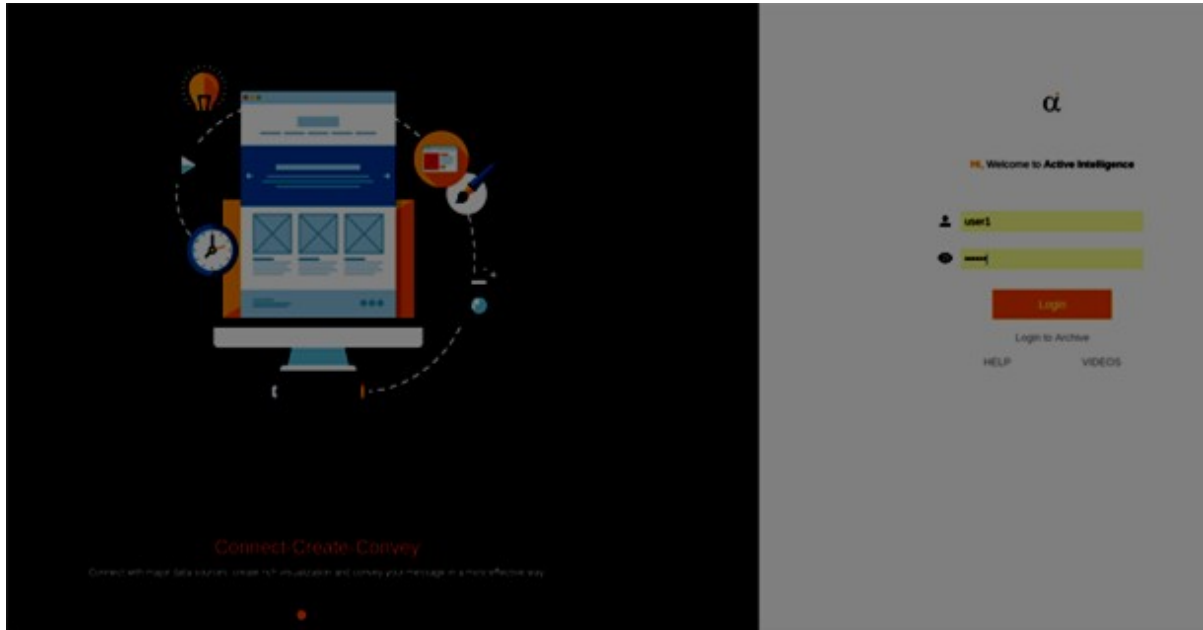


6) In order to preview the results, click on the preview tab which will show the list of all the idea users as current user Admin is assigned to an idea as seen in the previous steps.

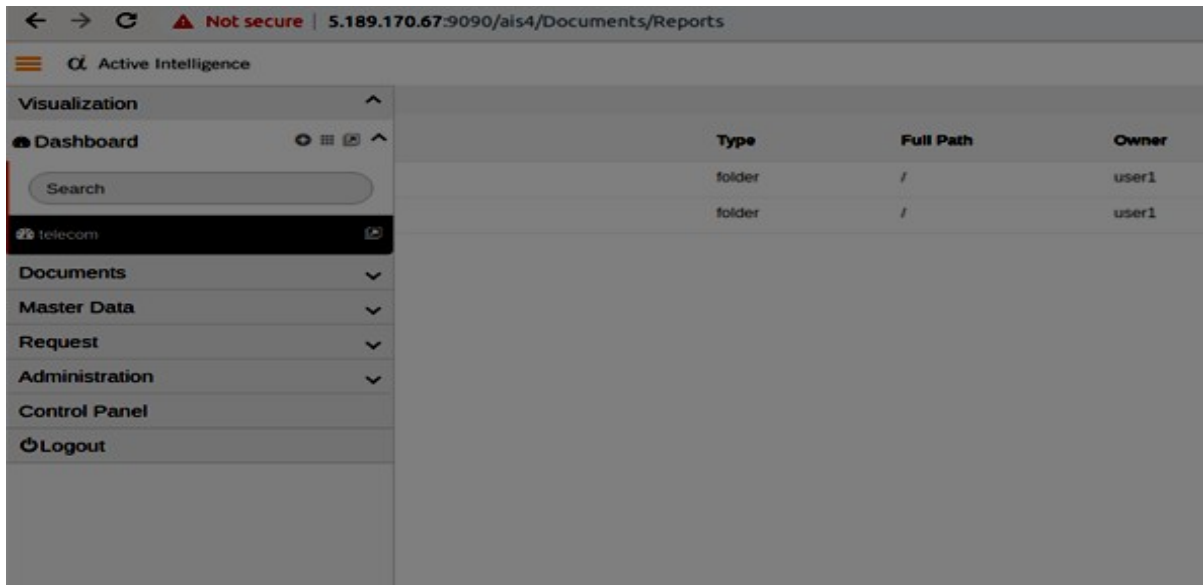
| Id | Name | Company |
|-----------|-------------|----------------|
| 1 | Jitendra | IDEA |
| 2 | Hiral | IDEA |
| 3 | Suraj | IDEA |

7) Now, in order to view the list of customers on the dashboard telecom login with the particular user details and go to the dashboard telecom. Let us login with user1 credentials in order to understand how this can be performed.

- Login with user1 username and password.



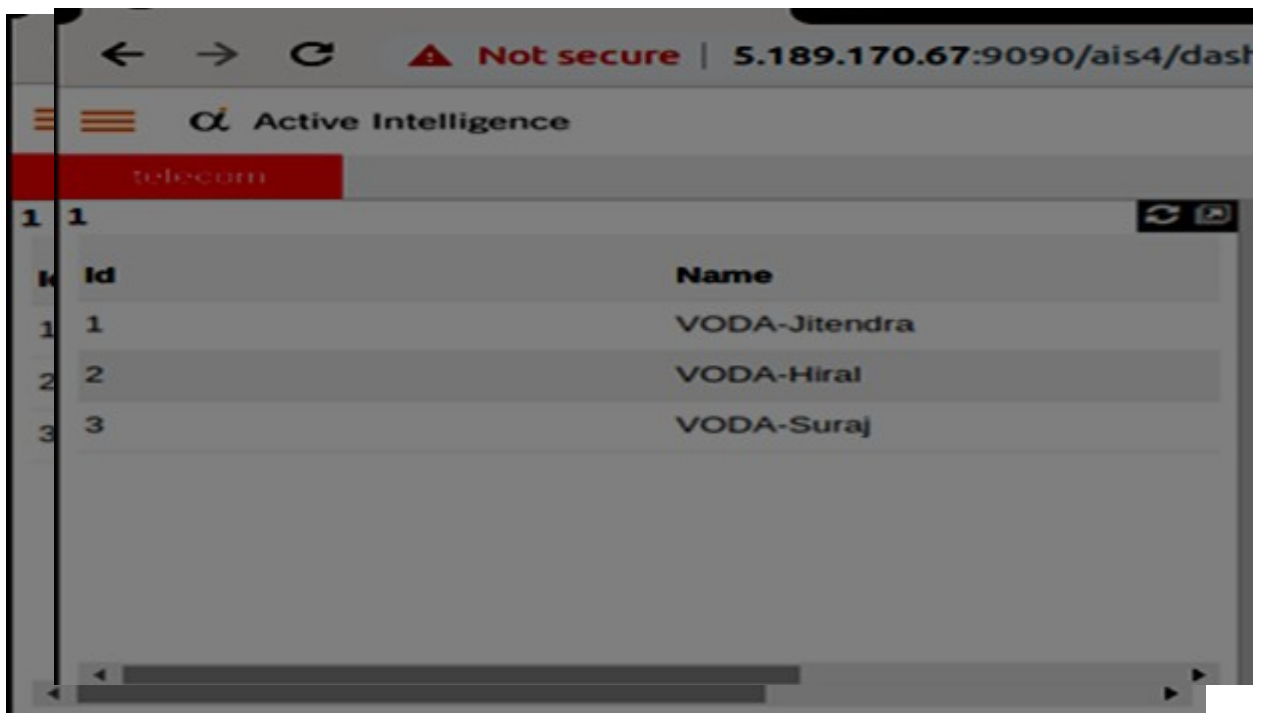
- Go to the dashboard and double-click on telecom dashboard, if it is not visible then you can enter telecom in search and press enter.



- Double-click telecom and the following screen will be displayed which illustrates the list of all the idea customers as user1 was mapped to idea service provider.



- Similarly, you can log in with user2 to see a list of jio customers and user3 to see a list of Vodafone customers as follows:-



In this way, Datasource mapping can be used when different data is to be displayed to different users on the same dashboard.

Datasets

A **Dataset** is a collection of data of one or more columns from a single table or multiple tables organized for processing by business intelligence software to extract meaningful information and generate reports, charts, maps and create different visualization.


The source of the data can vary depending on how the organization are managing their data, It can be a JDBC, Flat file, Web service, etc. regardless of how the data is stored, once the connection bridge is built between the Database and AIV (Active Intelligence Visualization) user can create different datasets relevant to different departments and users within the organization.

Note: Only user with the Dataset privilege can access this section, contact your server Administrator if this option is not available to you

Using the Datasets section user can perform the following tasks:-

1. Upload
2. Create Folder
3. Create Dataset
4. Edit Dataset
5. Open Folder
6. Copy
7. Move
8. Delete
9. Share
10. Create Dataset Mapping
11. Run Dataset Mapping
12. Schedule Dataset
13. Unarchive
14. Unpurge
15. Audit
16. Version
17. Download
18. Property
19. Instant Messages
20. Search

Upload

- The user can upload dataset of the format .ds or .cds by clicking on the upload icon  on the toolbar located at the bottom of the Datasets page.
- On clicking the icon, following screen will be displayed.

Upload Files

Files | Privilege

Upload Files

Employee.ds

Version

Create new Replace Default

Description

upload employee database

Upload Cancel

- In the Files section as shown in the figure above, select the upload icon in order to upload your datasets from your computer.
- If the dataset already exists on the AIV application, the user has an option to replace the default dataset or to create a new dataset using the version option as depicted above.
- Furthermore, the user can also provide an optional description for reference, in the description text area shown here.
- There is also an option to hide the visibility to certain users using the privileges tab as shown in the figure below:

Upload Files

Files | Privilege

Assign default version share privilege

Available

Admin

Demo

Vinay

Aarohi

Selected

Aarohi

Search User

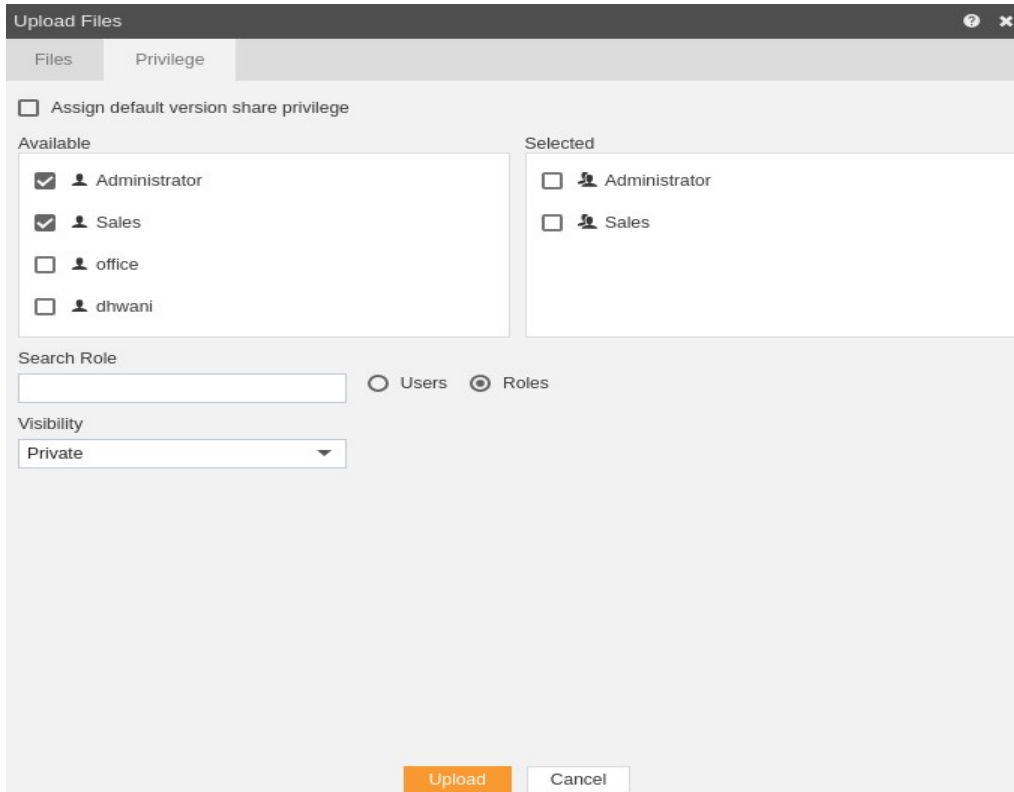
Users Roles




Visibility

Private


Upload Cancel

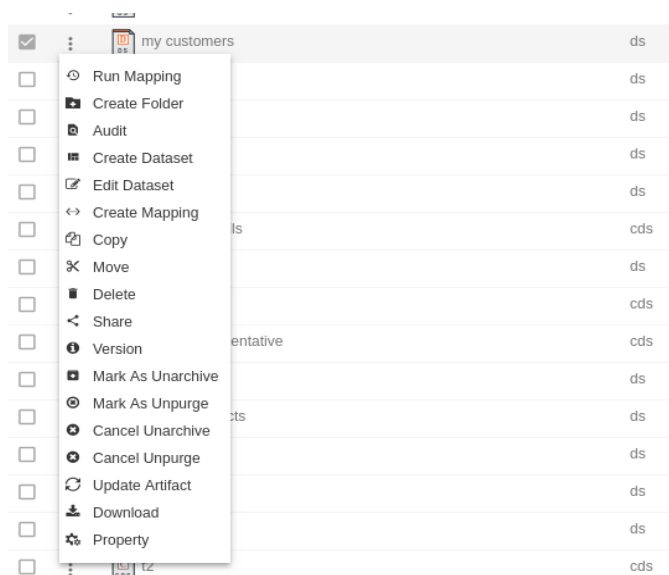
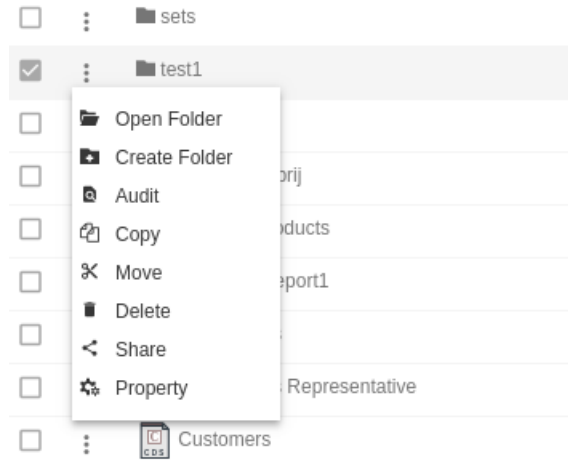
- In case of working with any new version of the dataset, you can assign the default version share privileges by checking the checkbox. For instance, if there are three versions of same dataset and a new version is to be created of that dataset, then default share privileges can be applied to that dataset..
- The user can select other users who can share the dataset from the list of available users or search them in the search user bar.
- In a similar manner, the user can apply privileges to different user roles as follows:-



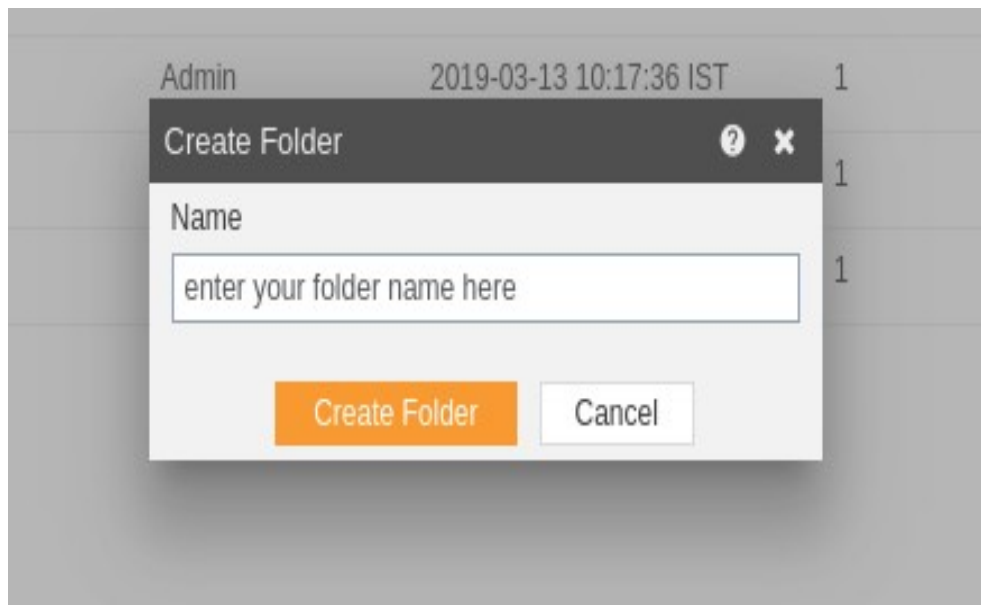
- Just as in case of users, the user can assign default share privileges to different user roles or can select the roles from the Available list of roles.
- The user can also search for roles in the Search Role bar.
- Visibility is used to mention who all can view the report and is of following three types:-
 1. **Private:-** It means only the current user can view the file.
 2. **Internal:-** It means all the users within the organization can view the file.
 3. **Public:-** It means anyone can view the file.
- The user can select the visibility from the dropdown menu as shown above.
- In case of any further help, the user can click on the  icon to access the AIV help documents.
- Finally, in order to upload the dataset, click on the upload button.
- If the user is not satisfied and wants to cancel the upload request, he can do this by clicking on the cancel button next to upload or by clicking on  button next to the  icon.




Create Folder

- There are two ways in which a user can create a new folder in the AIV application.
 1. By clicking on the create icon  next to the upload icon at the bottommost toolbar.
 2. By right clicking on any existing file or folder on the dataset page as follows:



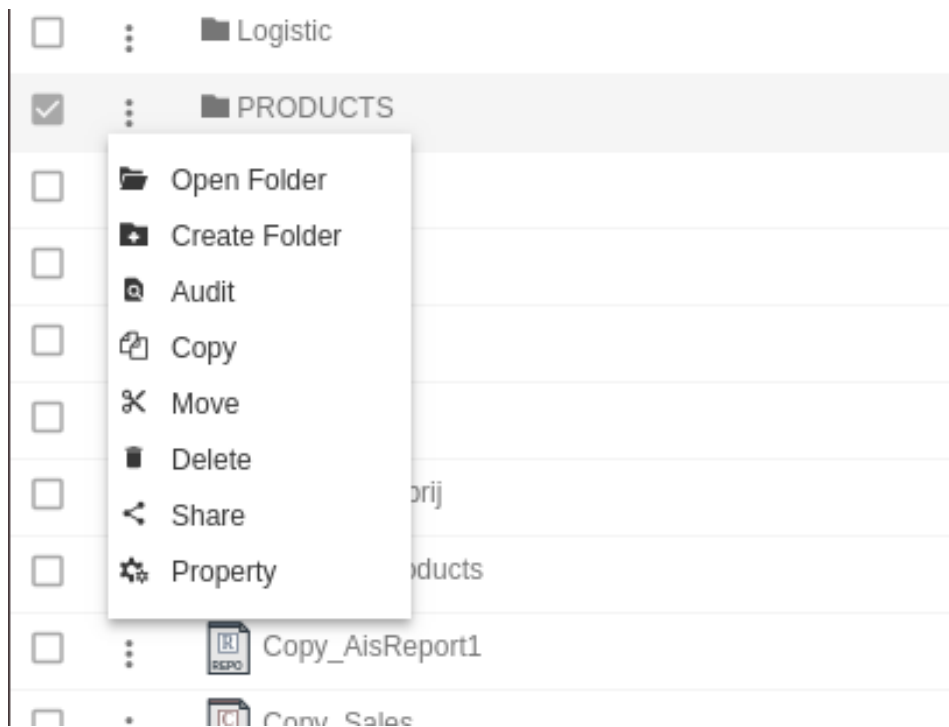
1. On clicking on create folder, following popup will be opened.



2. In case of any further help, the user can click on the  icon to access the AIV help documents.
2. Enter the name you want to give to your folder in the text area and click on create folder.
2. If the user is not satisfied and wants to cancel the create request, he can do this by clicking on cancel button next to upload or by clicking on  button next to the  icon.


Open Folder

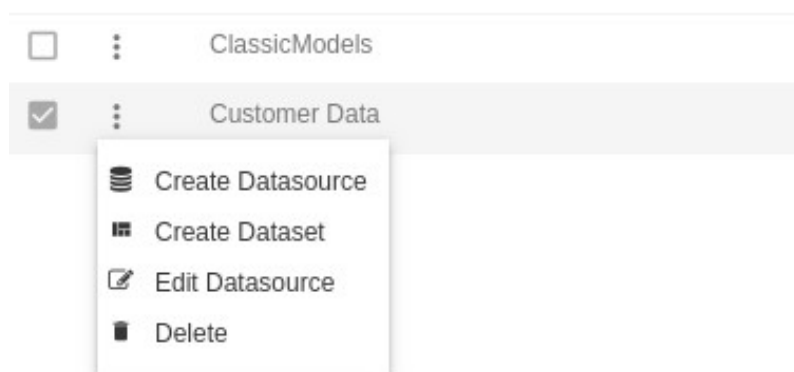
- There are two ways in which a user can open a folder in the AIV application:-
 1. On right clicking any of the existing folder, following menu will be displayed. To open folder PRODUCTS, click on Open Folder.



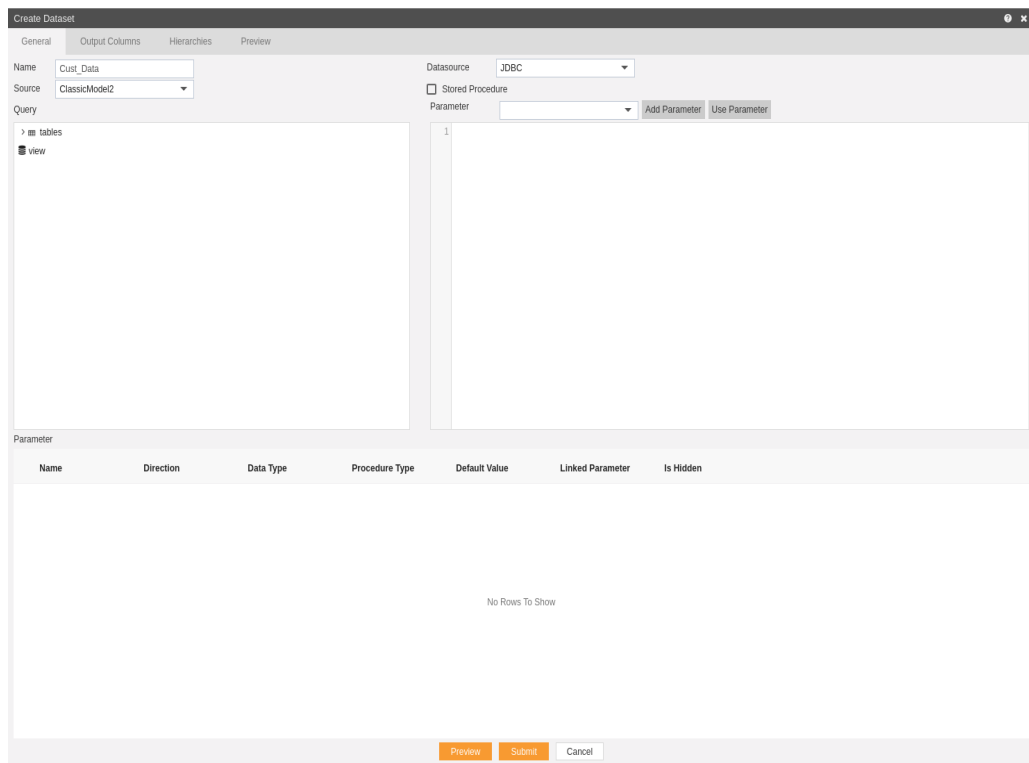
2. By double clicking the folder which you desire to open.

Create Dataset

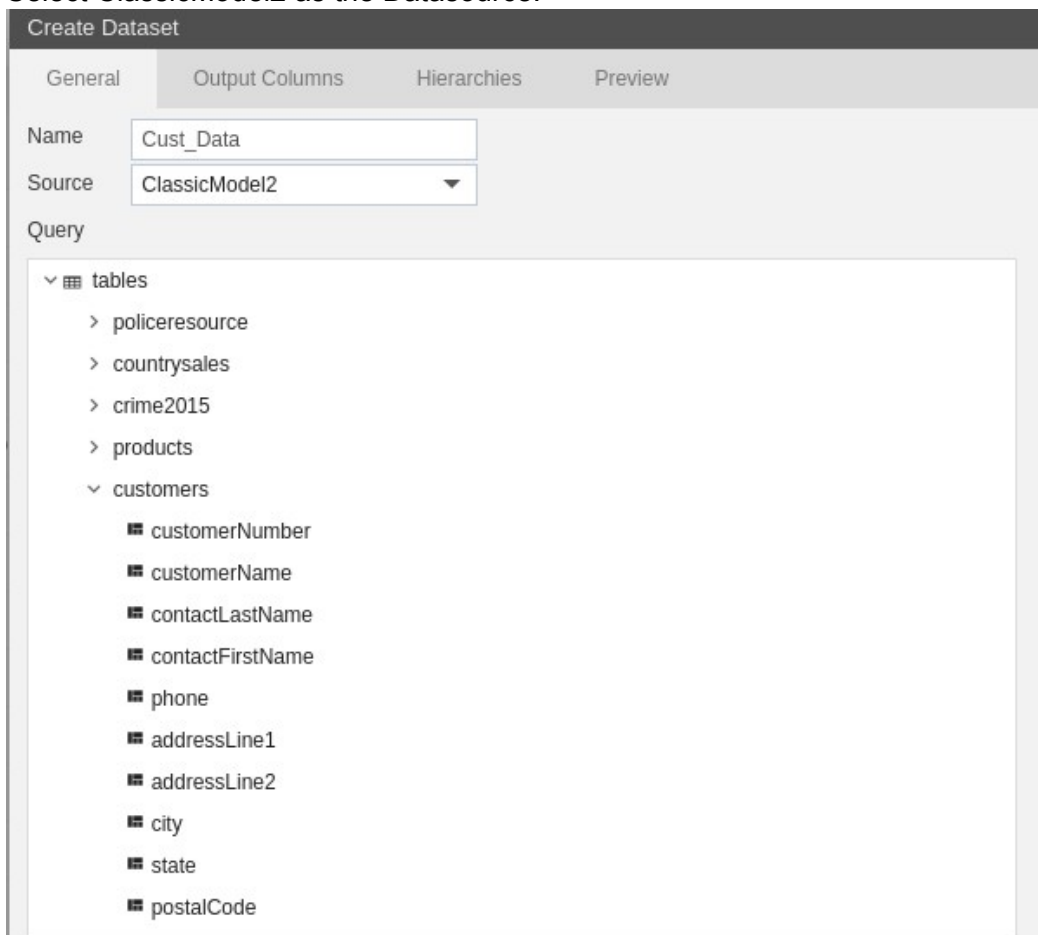
- There are three methods to create a dataset:-
 1. Accept to create dataset while creating a Datasource.
 2. Click on the create dataset button  at the bottommost toolbar to create a dataset.
 3. Right-click the datasource and select create Create Dataset to create the new dataset.



- After clicking the create dataset following pop-up will be opened:-



- In the name section give dataset name as "Cust_Data".
- Select ClassicModel2 as the Datasource.



- In the Query section expand tables to see the tables that exist in the current Datasource as shown above.
- Expand the customers table.
- Drag and drop customers on the empty screen to write a query.
- The following pop-up box will be opened.

Select Columns

| <input type="checkbox"/> | Name | Alias |
|--------------------------|------------------|------------------|
| <input type="checkbox"/> | customerNumber | customerNumber |
| <input type="checkbox"/> | customerName | customerName |
| <input type="checkbox"/> | contactLastName | contactLastName |
| <input type="checkbox"/> | contactFirstName | contactFirstName |
| <input type="checkbox"/> | phone | phone |
| <input type="checkbox"/> | addressLine1 | addressLine1 |
| <input type="checkbox"/> | addressLine2 | addressLine2 |

Submit Cancel

- Select the columns customerNumber, customerName, phone, addressLine1, addressLine2, city, state, country from the List Box and press Submit.
- The following SQL query will be displayed:-

Datasource: JDBC

Stored Procedure

Parameter: Add Parameter Use Parameter

```

1 select customerNumber AS "customerNumber",customerName AS "customerName",addressLine1 AS "addressLine1",addressLine2 AS
"addressLine2",city AS "city",state AS "state",country AS "country" From customers

```

- Keep the Datasource as JDBC.

- Press **Preview** to preview the results and **Submit** in order to submit the query and create the dataset
- In order to view Output Columns, click on the Output Column tab that displays Columns as follows:-

Create Dataset

General Output Columns Hierarchies Preview

| Name | Type | Alias | Format | Data Type |
|----------------|---------|----------------|----------------------|-----------|
| customerNumber | Integer | customerNumber | <input type="text"/> | Integer |
| customerName | String | customerName | Σ undefined | |
| addressLine1 | String | addressLine1 | Σ undefined | |
| addressLine2 | String | addressLine2 | Σ undefined | |
| city | String | city | Σ undefined | |
| state | String | state | Σ undefined | |
| country | String | country | Σ undefined | |

- After this, preview to check if you have performed steps correctly.

Edit Dataset

General Output Columns Hierarchies Preview

| CustomerNumber | CustomerName | AddressLine1 | AddressLine2 | City | State | Country |
|----------------|------------------------------|--------------------------------------|--------------|---------------|----------|-----------|
| 103 | Atelier graphique | 54, rue Royale | | Nantes | | France |
| 112 | Signal Gift Stores | 8489 Strong St. | | Las Vegas | NV | USA |
| 114 | Australian Collectors, Co. | 636 St Kilda Road | Level 3 | Melbourne | Victoria | Australia |
| 119 | La Rochelle Gifts | 67, rue des Cinquante Otages | | Nantes | | France |
| 121 | Baane Mini Imports | Erling Skakkes gate 78 | | Stavem | | Norway |
| 124 | Mini Gifts Distributors Ltd. | 5677 Strong St. | | San Rafael | CA | USA |
| 125 | Havel & Zbyszek Co | ul. Filtrowa 68 | | Warszawa | | Poland |
| 128 | Blauer See Auto, Co. | Lyonerstr. 34 | | Frankfurt | | Germany |
| 129 | Mini Wheels Co. | 5557 North Perndale Street | | San Francisco | CA | USA |
| 131 | Land of Toys Inc. | 897 Long Airport Avenue | | NYC | NY | USA |
| 141 | Euro+ Shopping Channel | C/ Moratzarzal, 86 | | Madrid | | Spain |
| 144 | Volvo Model Replicas, Co | Berguvsvägen 8 | | Luleå | | Sweden |
| 145 | Danish Wholesale Imports | Vindhøtlet 34 | | Kobenhavn | | Denmark |
| 146 | Saveley & Henriot, Co. | 2, rue du Commerce | | Lyon | | France |
| 148 | Dragon Souvenirs, Ltd. | Bronz Sok., Bronz Apt. 3/6 Tesvikoye | | Singapore | | Singapore |

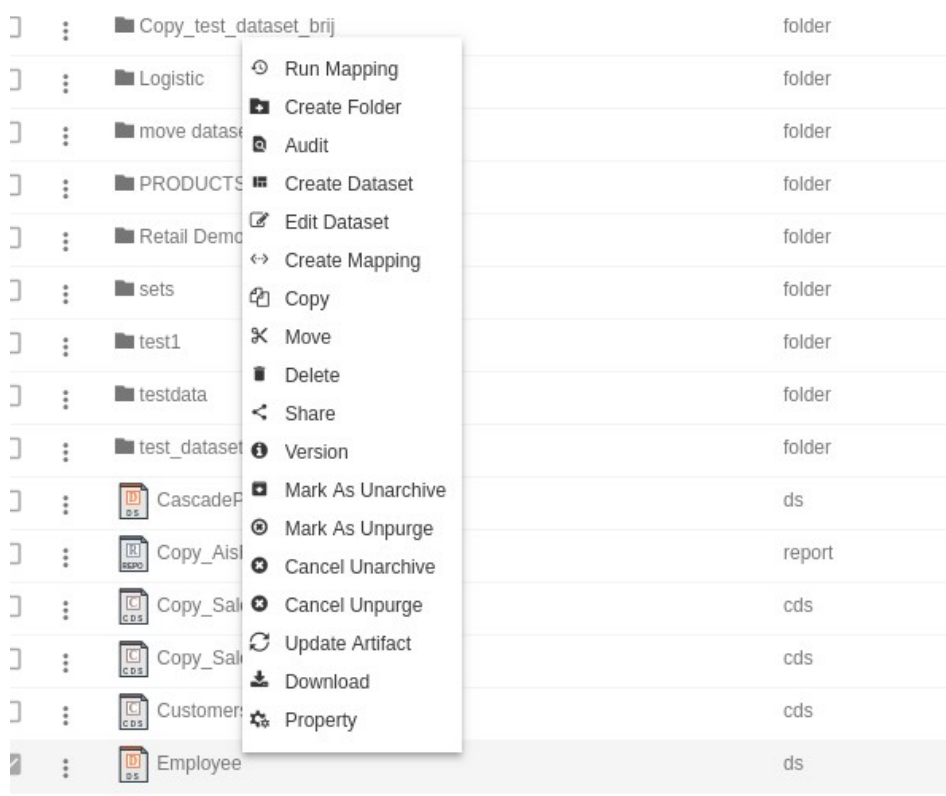
- In order to view the dataset, go to the Dataset section , and you will notice Cust_Data has been created over there with the date that you have last updated it.
- In this manner, you can create a new dataset for your datasource.

Edit Dataset

- The purpose of edit dataset is to enable the users to update the datasource or to provide a query with your own input parameters.
- To Edit Dataset, follow these steps:(Only users with Dataset privilege have access to this section)

1. To Edit Dataset select the desire Dataset and right click and select

 Edit Dataset from the context menu as shown below:-



2. Here we are using Employees.ds for the purpose of understanding in this tutorial.
3. The following dialog box will appear on clicking edit dataset:

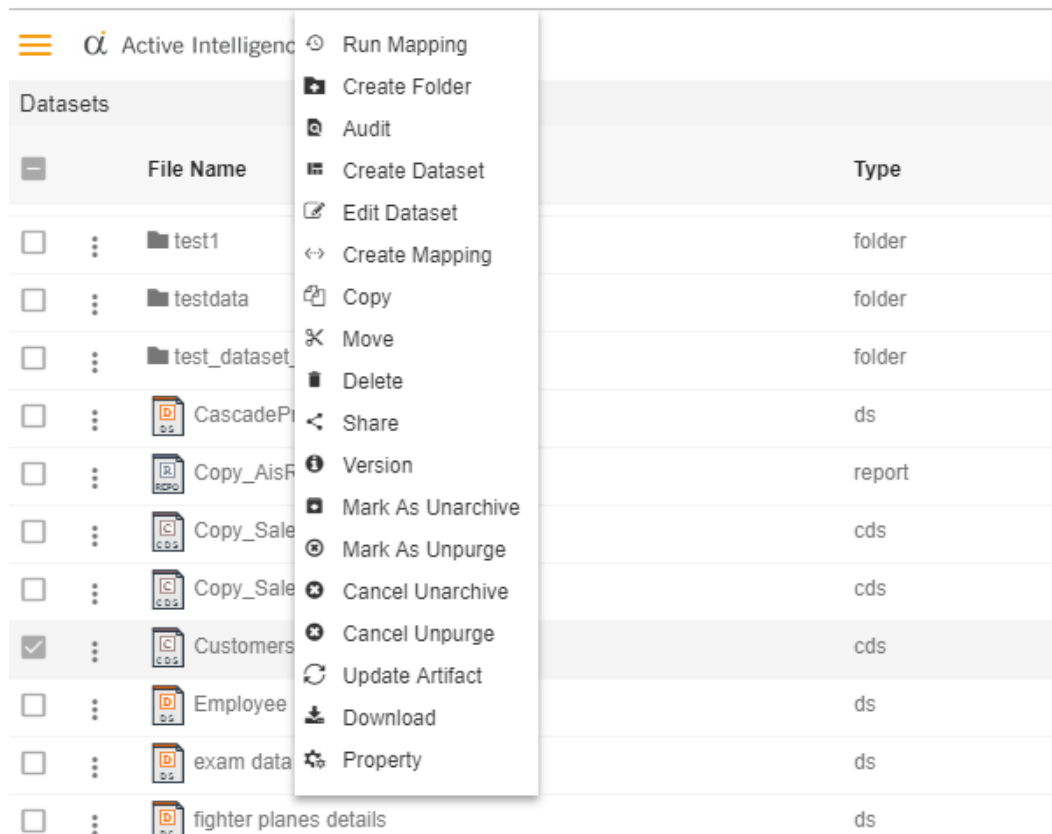
Parameter

| Name | Direction | Data Type | Procedure Type | Default Value | Linked Parameter | Is Hidden |
|-----------------|-----------|-----------|----------------|---------------|------------------|-----------|
| No Rows To Show | | | | | | |

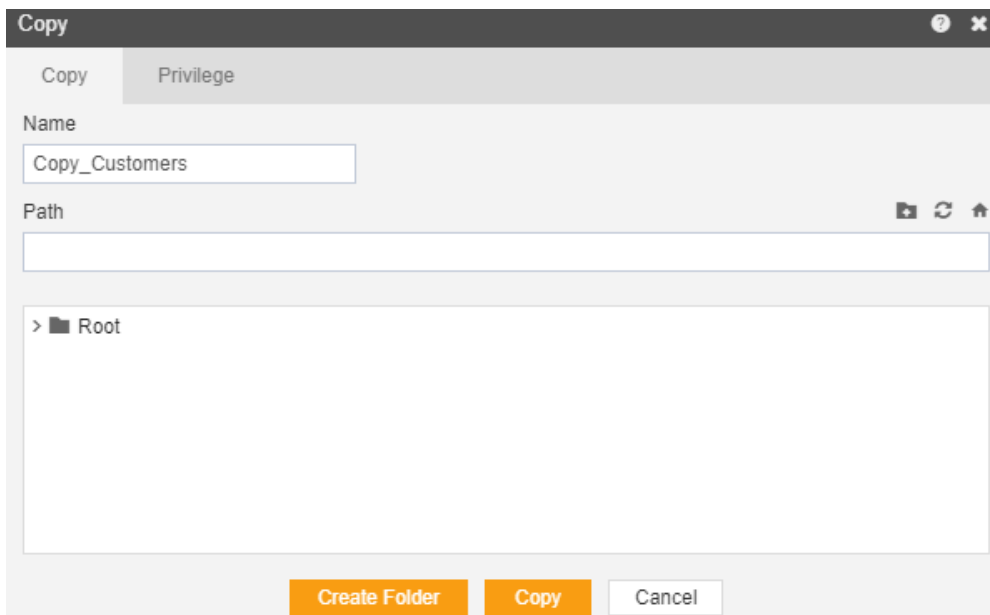
4. Make the changes you would like to changes to the selected Dataset (Note: Name cannot be updated from Edit Dataset option, in order to update the Dataset Name one should use the Properties option from the context menu instead)
5. Finally click **Submit** to save the changes to the Dataset.

Copy

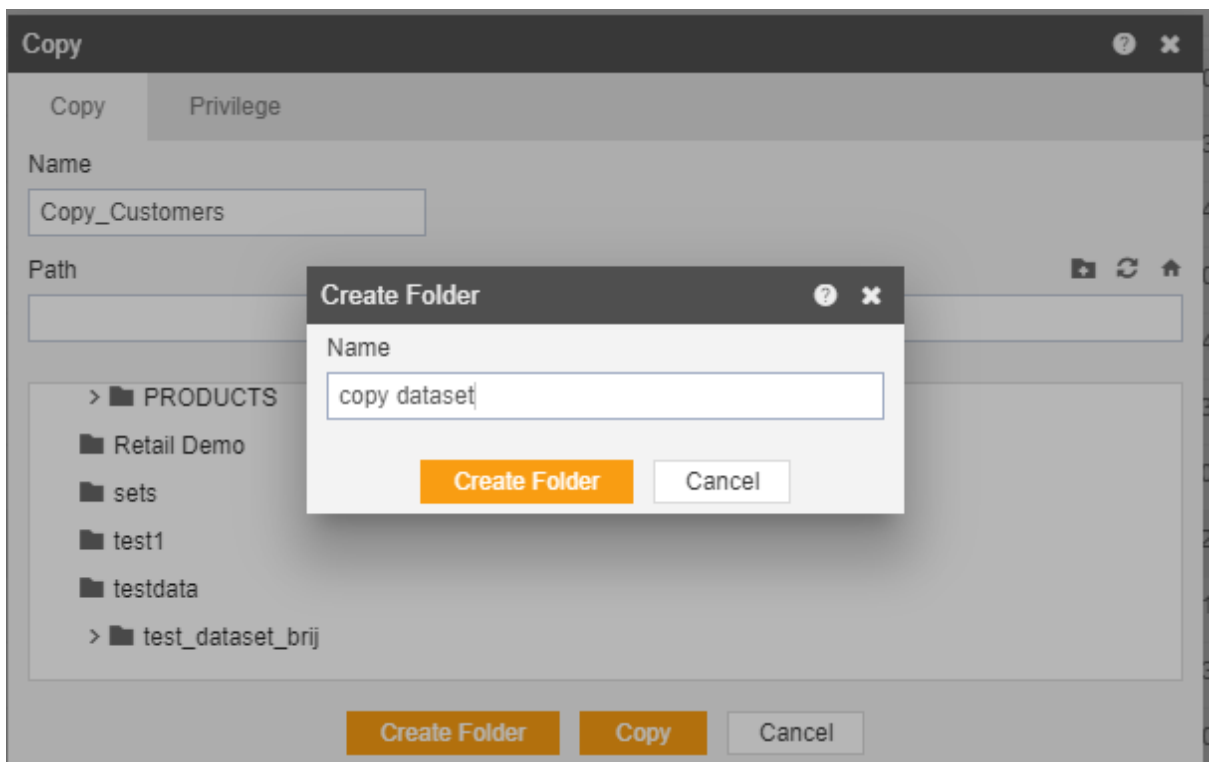
- There are two ways in which a user can copy a dataset in the AIV application:-
 1. By clicking on the copy icon **Copy** located at the bottom most toolbar.
 2. By right clicking the dataset you want to copy. We will use **Customers** dataset in this tutorial for the purpose of understanding.



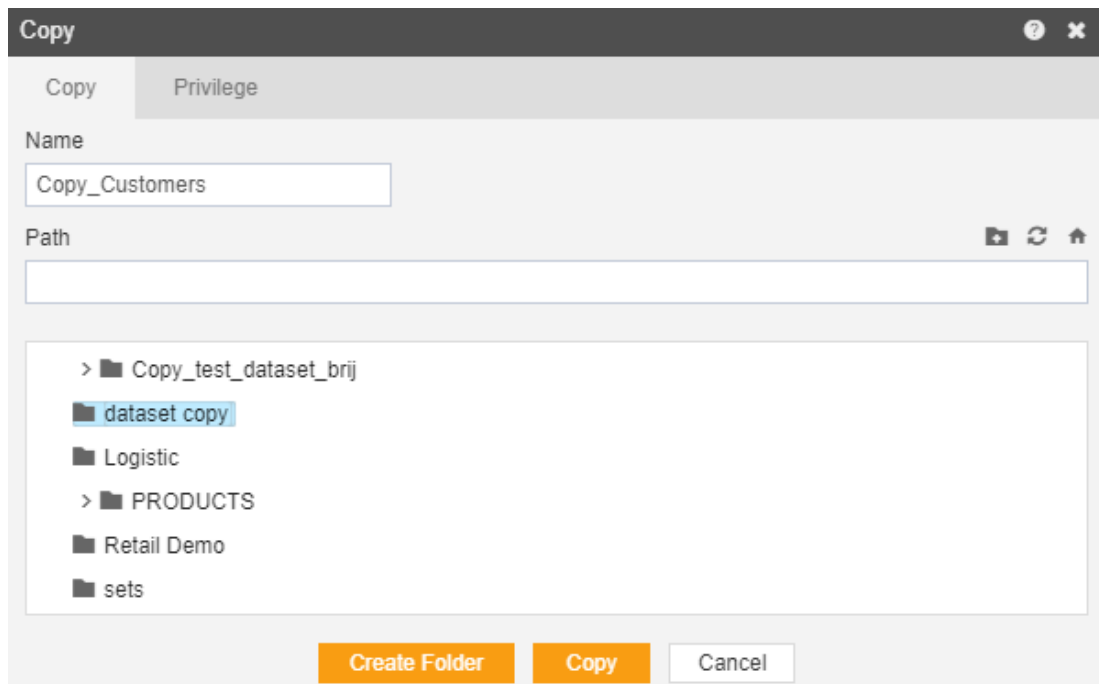
- Now perform the following steps in order to copy the dataset Employees:-
- Click on Copy using one of the methods mentioned above which will open the following popup..



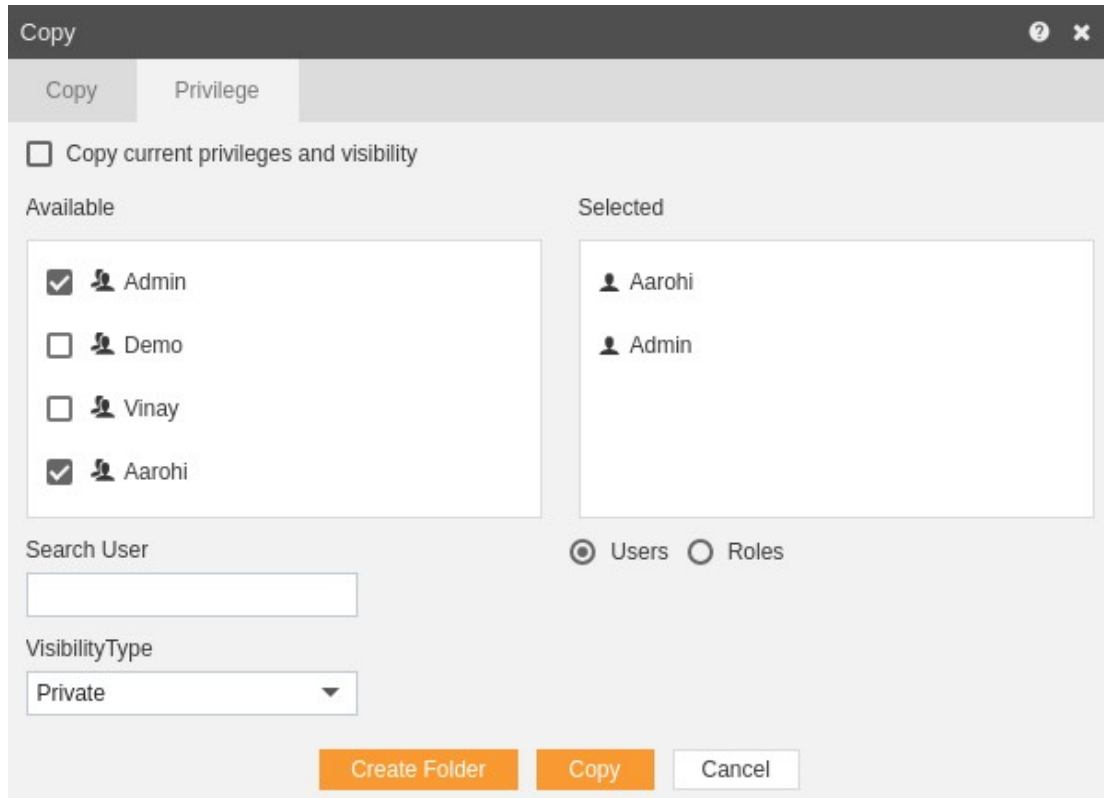
- The default name will be Copy_Customers. You can provide your own name while copying a dataset.
- In order to provide copy destination, you can select any of the folders present in the popup or can create a new folder by selecting the folder where new folder must be created and clicking on Create Folder as follows:-



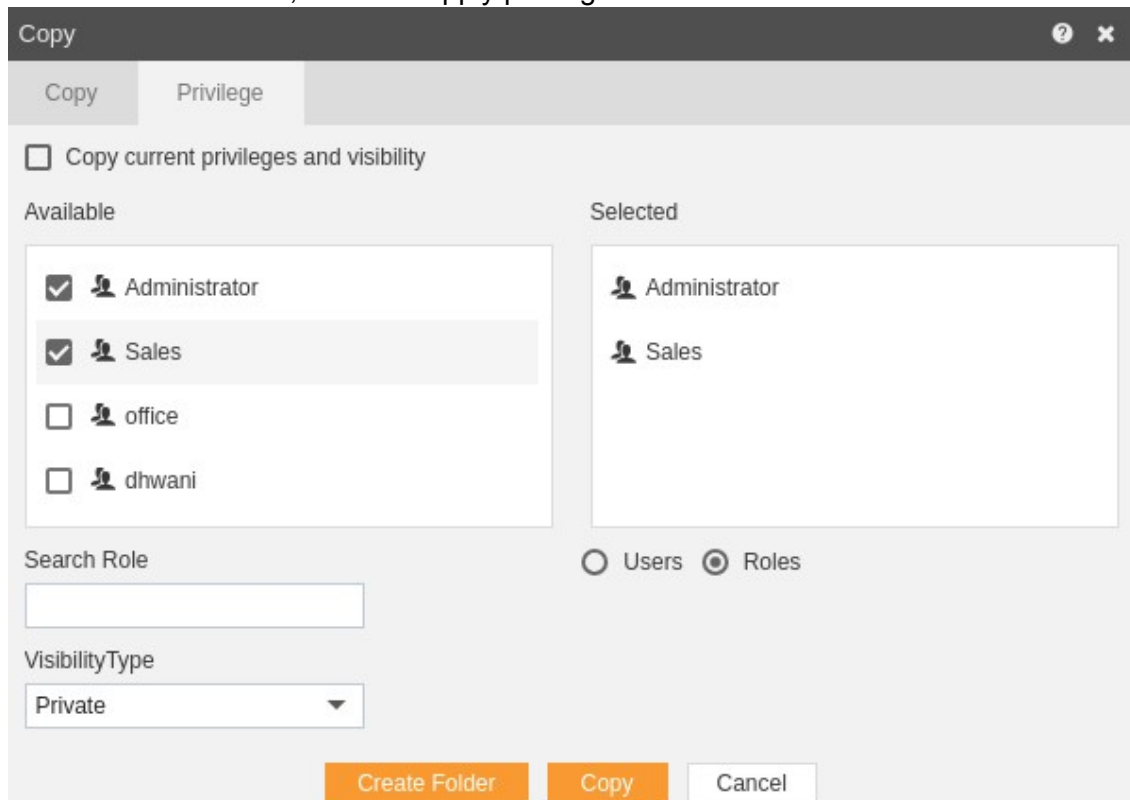
- Here we have created a folder named copy dataset within root where we will copy our Customers dataset.
- Select copy dataset from the list shown below:-






- In order to assign privileges to the design, click on the privileges tab next to the copy tab. By default, Copy current privileges and visibility checkbox will be checked which will retain the same privileges and visibility of the original design in the copied version.
- If you want to assign privileges, uncheck Copy current privileges and visibility checkbox.
- The user can select other users with whom the copied design will shared from the list of available users or search them in the search user bar.



- In the similar manner, user can apply privileges to different user roles as follows:-




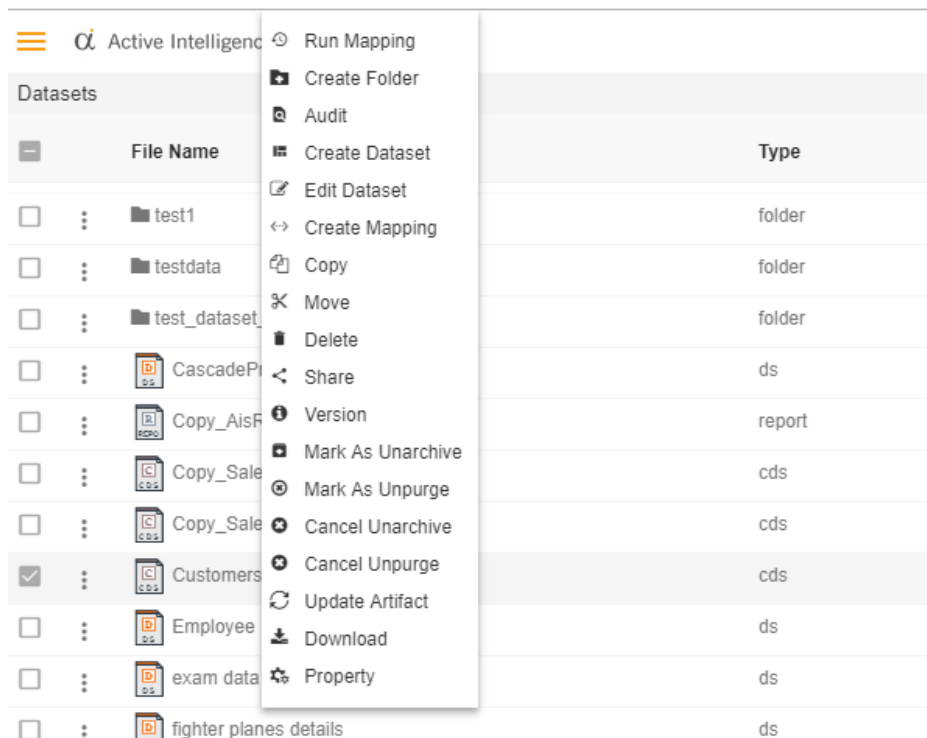
- The user can also search for roles in the Search Role bar.
- Visibility is used to mention who all can view the report and is of following three types:-

1. **Private:-** It means only the current user can view the file.
 2. **Internal:-** It means all the users within the organization can view the file.
 3. **Public:-** It means anyone can view the file.
- The user can select the visibility from the dropdown menu as shown above.
 - In case of any further help, the user can click on the  icon to access the AIV help documents.
 - Finally, in order to copy the design, click on the Copy button.
 - If the user is not satisfied and wants to cancel the copy request, he can do this by clicking on cancel button next to copy or by clicking on  button next to the  icon.
 - You can see the Copy_Customers appears in the explain folder by opening it.

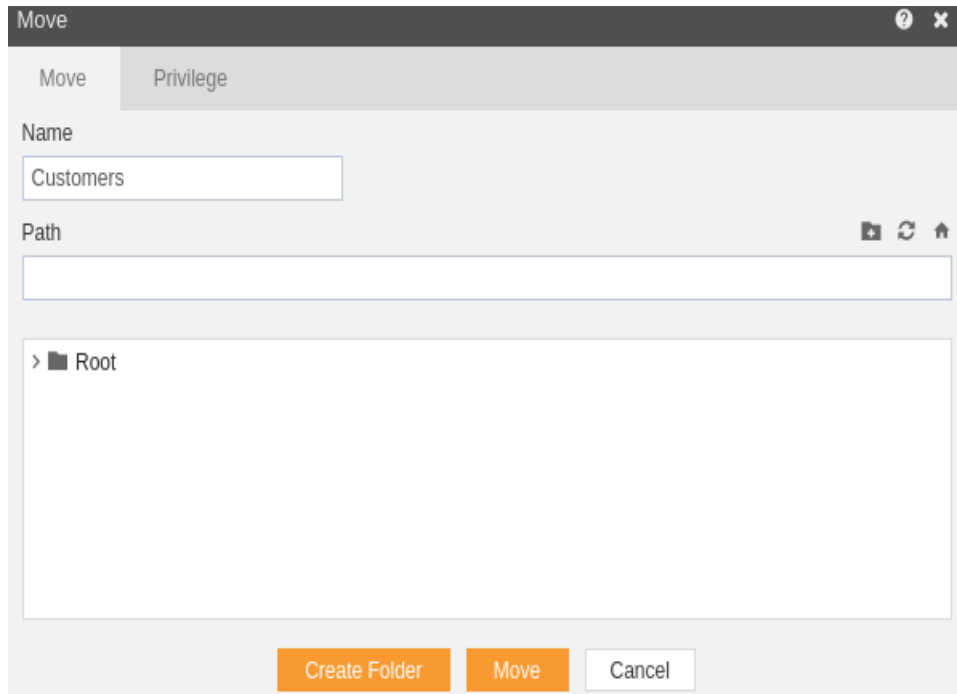
In a similar manner, you can also perform the copy operation on the folders selecting the folder you desire to copy and choosing the copy icon from the toolbar, or by right-clicking the folder and selecting the copy option from the elapses shown.

Move

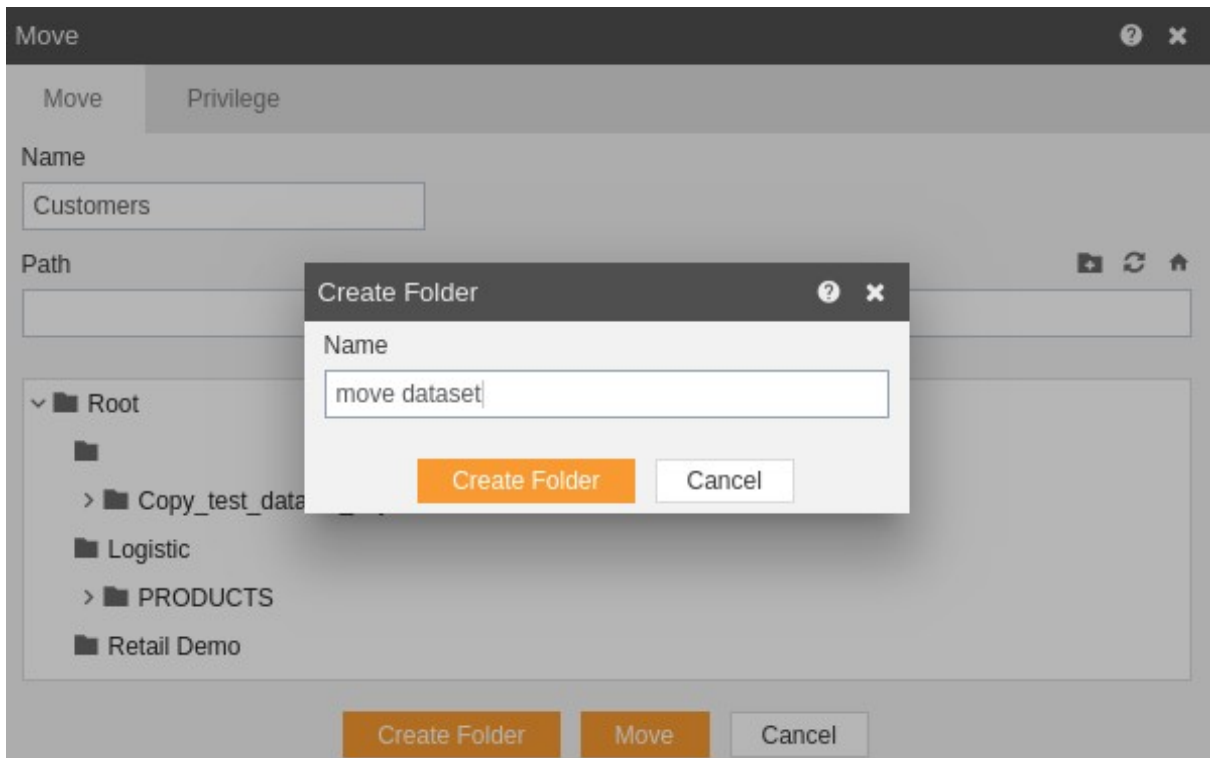
- There are two ways in which a user can move a dataset in the AIV application:-
 1. By clicking on the move icon  located at the bottom most toolbar.
 2. By right clicking the report you want to move. We will use **Employee List** report in this tutorial for the purpose of understanding.



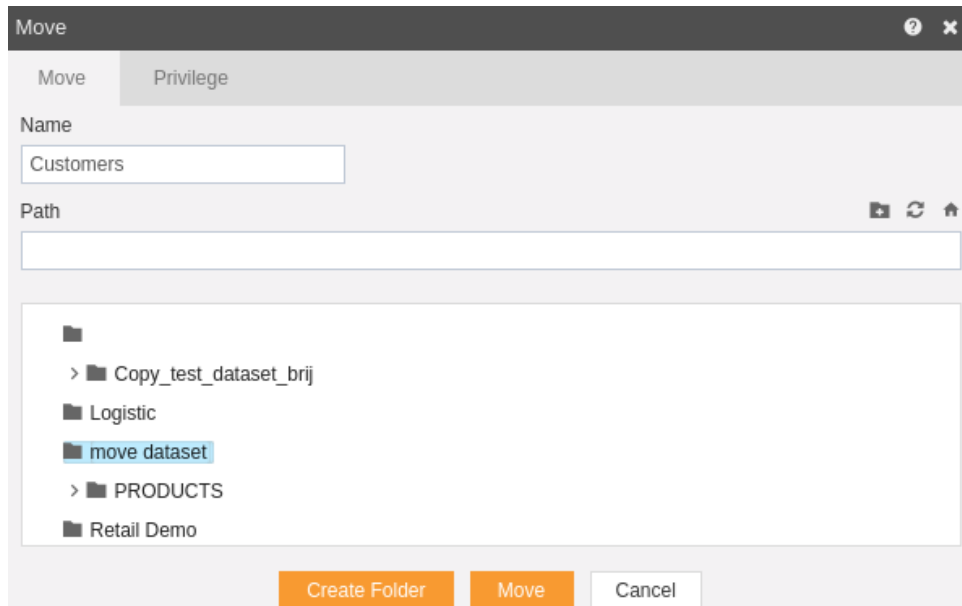
- Now perform the following steps in order to move the report Employee List:-
 1. Click on Move using one of the methods mentioned above which will open the following popup..



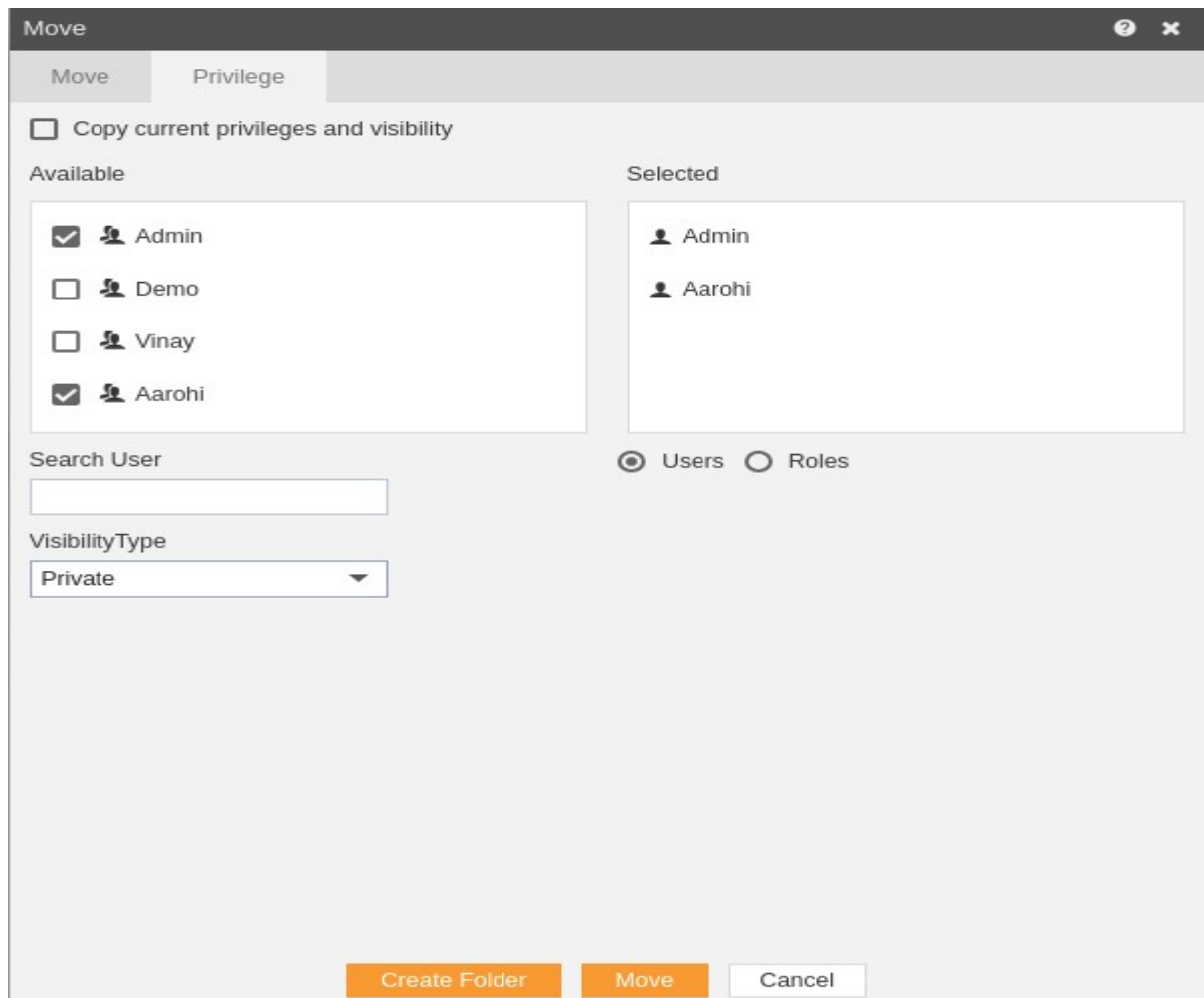
2. The default name will be Customers. You can provide your own name while moving a report.
2. In order to provide move destination, you can select any of the folders present in the popup or can create a new folder by selecting the folder where new folder must be created and clicking on Create Folder as follows:-



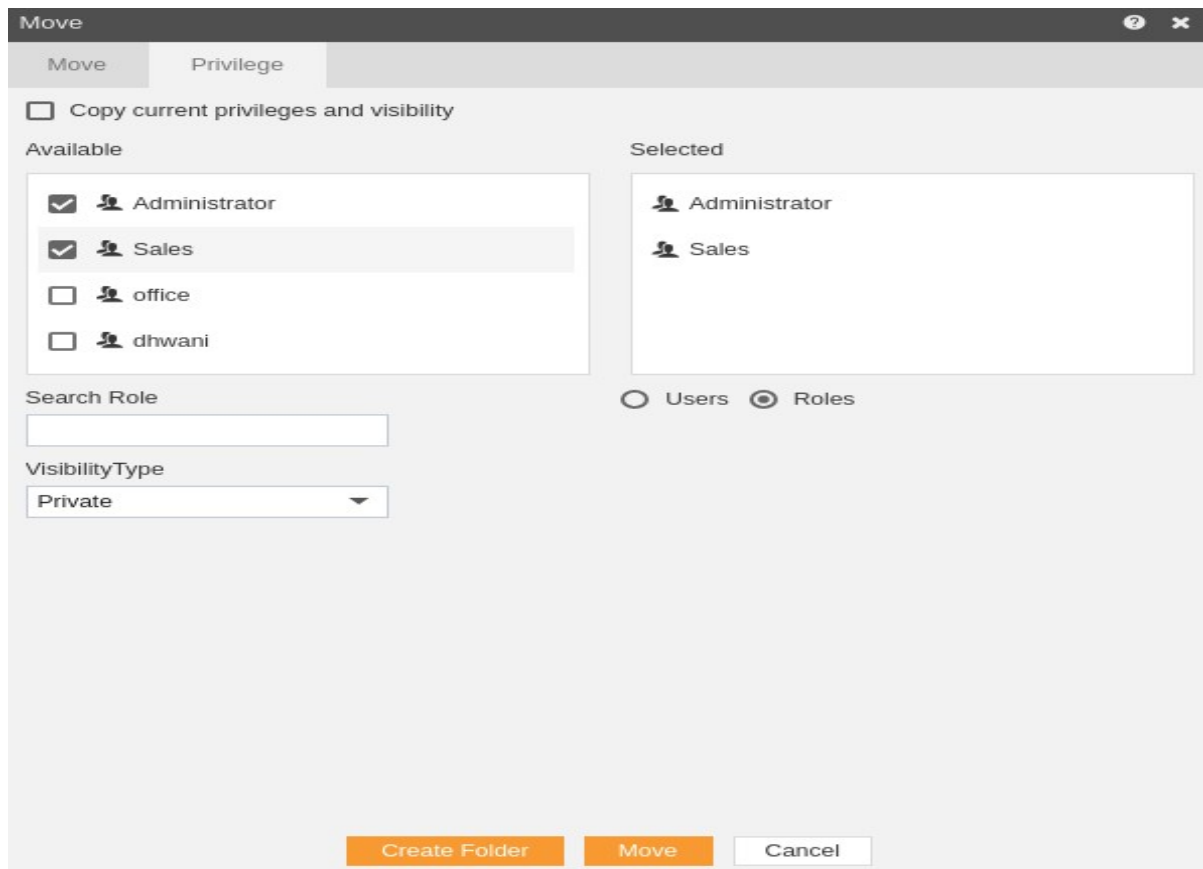
4. Here we have created a folder named move dataset within root where we will copy our Customers dataset.
4. Select move dataset from the list shown below:-



6. In order to assign privileges to the report, click on the privileges tab next to the move tab. By default, Copy current privileges and visibility checkbox will be checked which will retain the same privileges and visibility of the original report in the moved version.
6. If you want to assign privileges uncheck Copy current privileges and visibility checkbox.
6. The user can select other users with whom the moved report will shared from the list of available users or search them in the search user bar.



9. In the similar manner, user can apply privileges to different user roles as follows:-




10. The user can also search for roles in the Search Role bar.



10. Visibility is used to mention who all can view the report and is of following three types:-

- **Private:-** It means only the current user can view the file.
- **Internal:-** It means all the users within the organization can view the file.
- **Public:-** It means anyone can view the file.

12. The user can select the visibility from the dropdown menu as shown above.

12. In case of any further help, the user can click on the  icon to access the AIV help documents.


12. Finally, in order to move the report, click on the Move button.

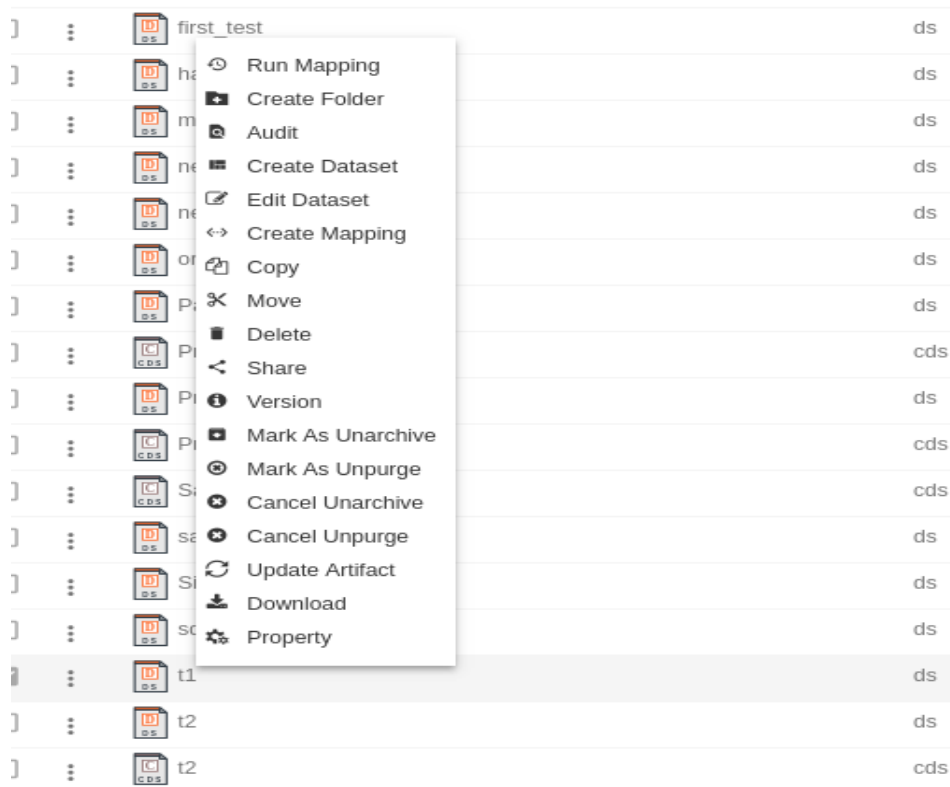
12. If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on  button next to the .

12. As the report is moved, it will removed from the Reports page and will be added to the explain_moved folder

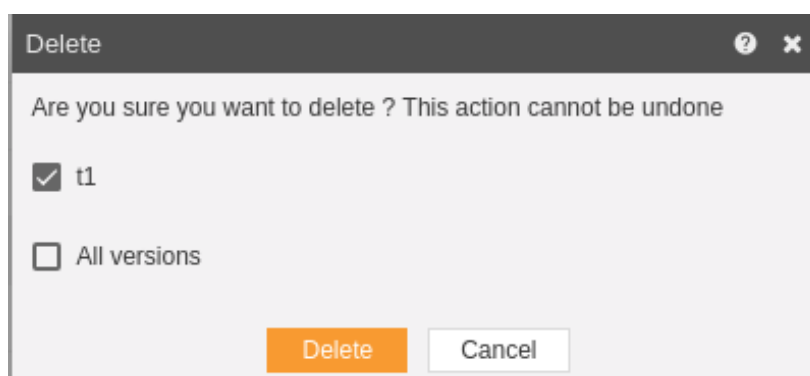
- In a similar manner, you can also perform the move operation on the folders selecting the folder you desire to move and choosing the move icon from the toolbar, or by right-clicking the folder and selecting the move option from the elapses shown.

Delete

- There are two ways in which a user can delete a dataset in the AIV application:-
 1. By clicking on the delete icon  located at the bottom most toolbar.
 2. By right clicking the report you want to delete. We will use **t1.ds** dataset in this tutorial for the purpose of understanding.




- Finally press on delete after selecting the dataset using any one of the above mentioned methods which will open the following popup:-

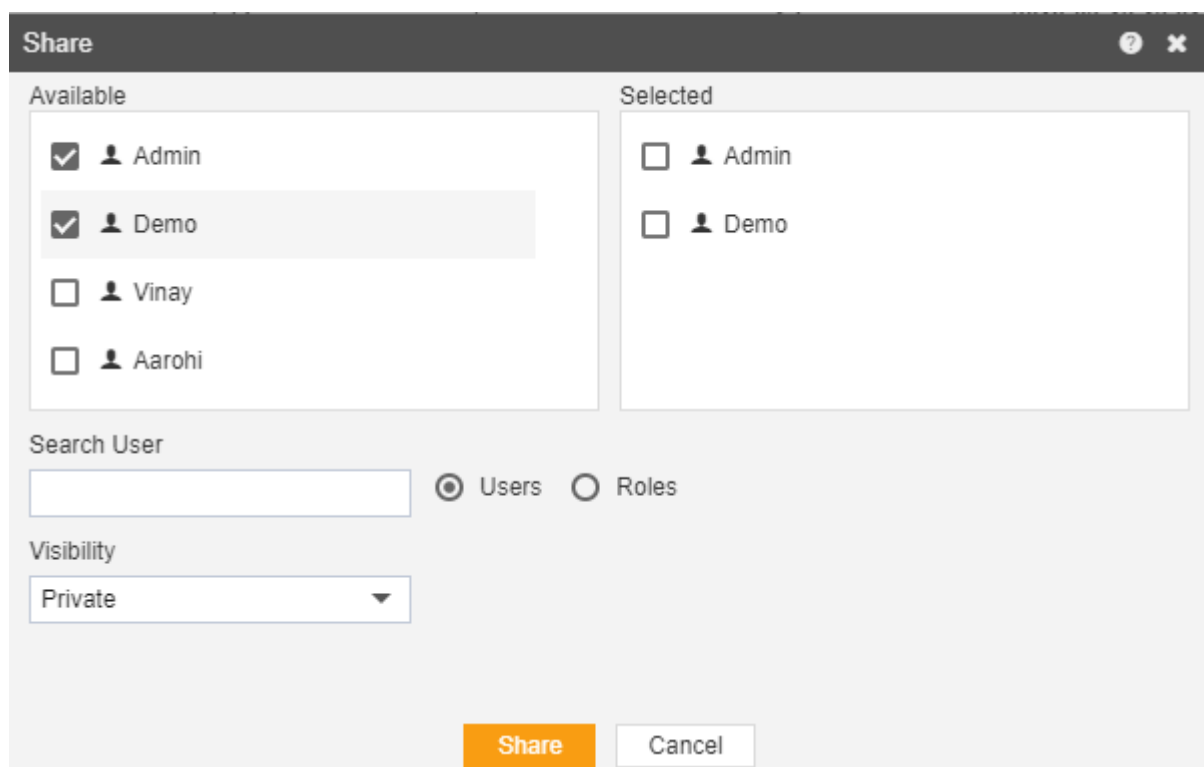


- You can select to delete current version or all versions of a dataset in case it has multiple versions.
- The dataset will be deleted and a message will be displayed report deleted successfully.
- In a similar manner, you can also perform the delete operation on the folders selecting the folder you desire to move and choosing the move icon from the

toolbar, or by right-clicking the folder and selecting the move option from the elapses shown.

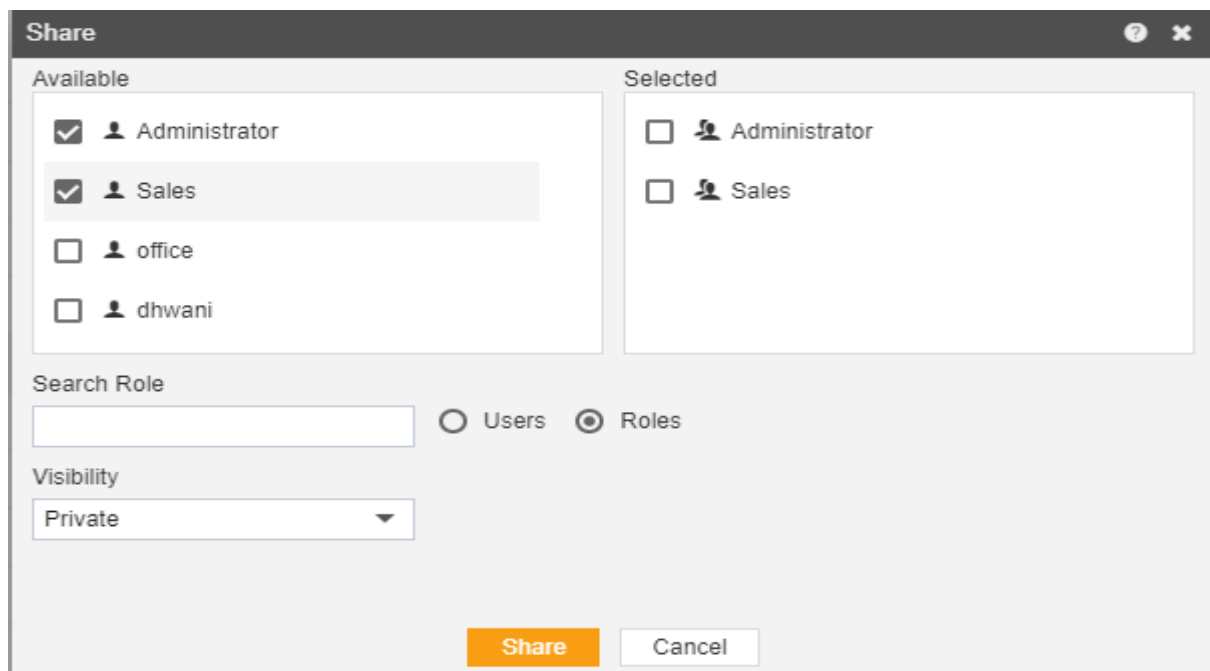
Share




- There are two ways in which a user can share a dataset in the AIV application:-
 1. By clicking on the share icon  located at the bottom most toolbar.
 2. By right clicking the dataset you want to share. We will use **Customers** dataset in this tutorial for the purpose of understanding.
- Now perform the following steps in order to share the dataset:
 1. Click on Share using one of the methods mentioned above which will open the following popup.











2. The user can select other users with whom the dataset will be shared from the list of available users or search them in the Search User.

3. In a similar manner, the user can select different user roles with whom the report will be shared as follows:-



4. The user can also search for roles in the Search Role.
4. Visibility is used to mention who all can view the report and is of following three types:-
 - **Private:-** It means only the current user can view the file.
 - **Internal:-** It means all the users within the organization can view the file.
 - **Public:-** It means anyone can view the file.
6. The user can select the visibility from the dropdown menu as shown above. Select Internal visibility for our reference.
6. In case of any further help, the user can click on the  icon to access the AIV help documents.
6. Finally, in order to share the dataset, click on the share button.
6. If the user is not satisfied and wants to cancel the share request, he can do this by clicking on cancel button next to share or by clicking on  button next to the  icon.
6. As the dataset is shared with user named Demo, the dataset will be visible in the Dataset section when login is performed with the credentials of user Demo as follows:-

| Datasets | | | | | | | |
|--------------------------|--|--------|-----------|-------|---------------------|---------|---------|
| <input type="checkbox"/> | File Name | Type | Full Path | Owner | Last Updated | Version | Options |
| <input type="checkbox"/> |  Customers | cds | / | Admin | 2019-02-23 11:46:21 | 3 | |
| <input type="checkbox"/> |  Employee | ds | / | Admin | 2019-03-19 17:14:48 | 2 | ⊕ |
| <input type="checkbox"/> |  newtest | ds | / | Admin | 2019-03-08 10:39:03 | 1 | ⊕ |
| <input type="checkbox"/> |  Product Details | cds | / | Admin | 2019-02-20 10:50:02 | 1 | |
| <input type="checkbox"/> |  Sales Representative | cds | / | Admin | 2019-02-20 10:50:02 | 1 | |
| <input type="checkbox"/> |  Top 5 Customers | cds | / | Admin | 2019-02-20 10:50:02 | 1 | |
| <input type="checkbox"/> |  test_dataset_brij | folder | / | Admin | | 1 | |
| <input type="checkbox"/> |  Copy_test_dataset_brij | folder | / | Admin | | 1 | |


- In a similar manner, you can also perform the share operation on the folders selecting the folder you desire to share and choosing the share icon from the toolbar, or by right-clicking the folder and selecting the share option from the elapses shown.

Create Dataset Mapping

Run Dataset Mapping

Schedule Dataset


- The schedule Dataset option is used when you want to schedule your dataset. It creates Cache Dataset (.cds). There are two methods to schedule the datasets:-
 1. Time scheduling:- This includes three methods to schedule events.
 - Right now:- If you want to schedule the dataset at the current moment.

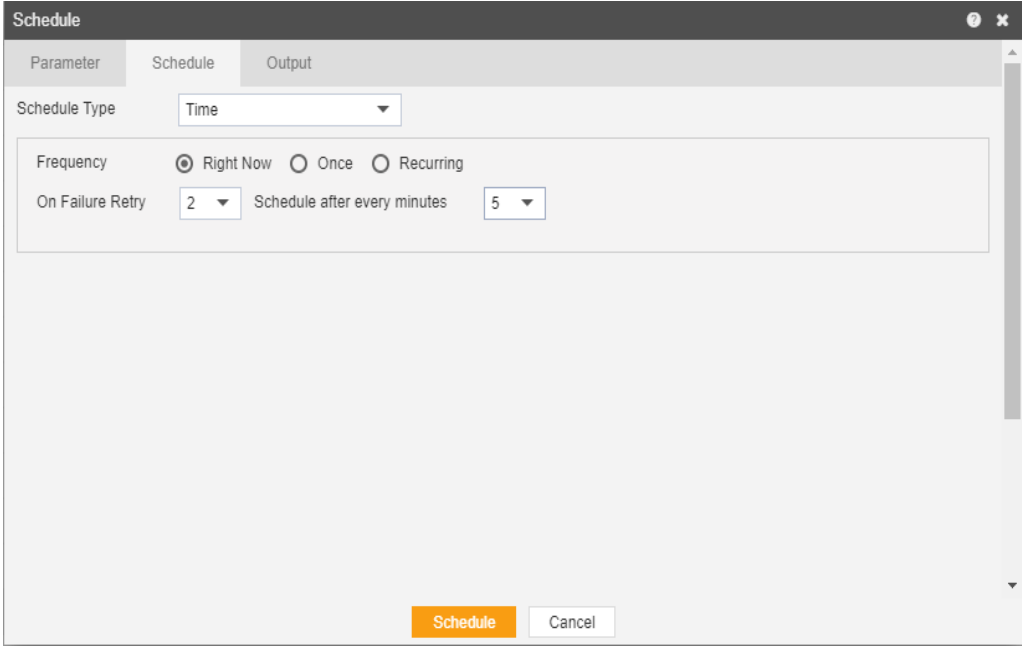
- Once:- The dataset will run once at the specific time on the day mentioned by the user.
 - Recurring:- If you want to run your dataset for multiple times within an hour, day, week, month or year.
2. Event Scheduling:- When the user want to schedule their event, after some event is fired, then this type of scheduling comes into picture.
- You can schedule a dataset by clicking on  under the Options column.
 - Let us understand each of them in detail now:-

Time Scheduling

- The events can be scheduled at different moments of time based on the requirement of the user.

Right now

- In order to schedule the dataset at the present moment following steps should be followed:-
- We will be using Employees.ds for the purpose of understanding.
- Click on  which will open the following dialog box:-



- Go to the schedule tab as shown in the figure above. By default Time will be selected else select schedule type time from the drop down menu.
- By default Right Now will be selected as the output frequency.
- You can also specify how many times the report should re-execute in case of failure and after how much duration from the drop down menu shown in the figure. For instance, in our case the report will be executed twice in case of failure within duration of 5 minutes.
- In order to specify the output, go to the output tab as follows:-

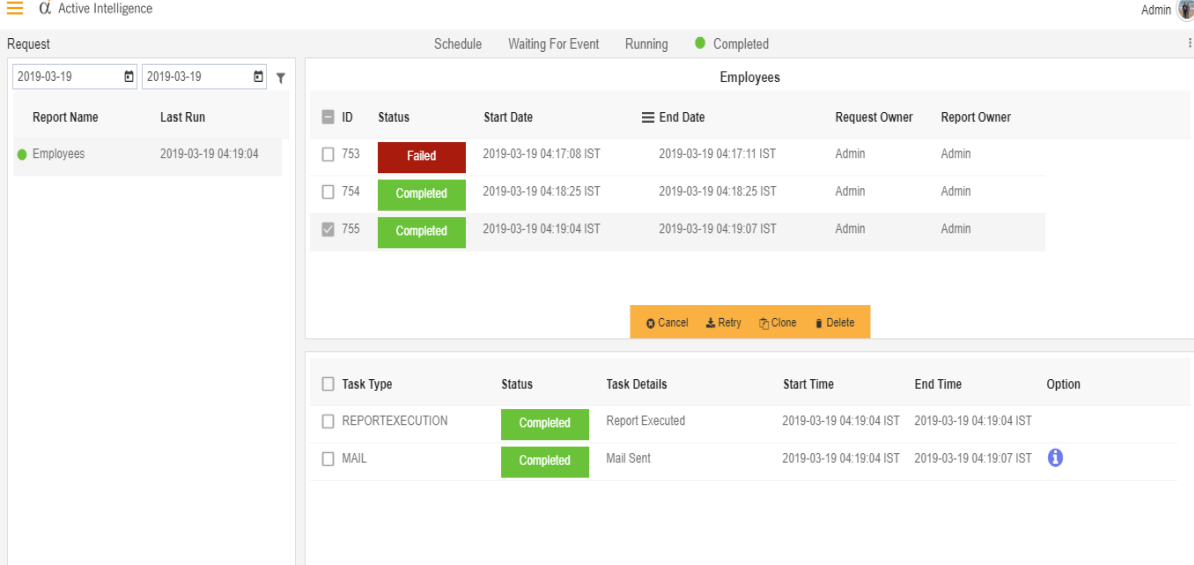
The screenshot shows a 'Schedule' dialog box with three tabs: 'Parameter', 'Schedule', and 'Output'. The 'Output' tab is active. It contains the following fields and controls:

- Name:** Text input field containing 'Employee'.
- Suffix:** Dropdown menu with 'None' selected.
- Format:** Empty dropdown menu.
- Path:** Text input field containing '/', with a home icon to its right.
- Delivery Path:** Unchecked checkbox.
- Replace Default:** Unchecked checkbox.
- Email:** Unchecked checkbox.
- Event on Success:** Empty dropdown menu.
- Event on Fail:** Empty dropdown menu.
- Buttons:** 'Schedule' (orange) and 'Cancel' (white) buttons at the bottom right.

- Enter the name by which you want to schedule the dataset in the Name text area, also provide optional suffix if required.
- You can also specify event on success/failure of dataset which will trigger an event and execute all the waiting for event dataset. We will discuss about this in detail in the event scheduling.
- You can also specify the delivery path on your computer where the datasets will be downloaded as follows.


- If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on  button next to the  icon.

The dataset is scheduled and converted to .cds format in the dataset section. The user can see the schedule request in the Request section of AIV application. This section displays all the datasets that have completed, running, waiting for event or scheduled. In case of dataset schedule failure, error is also displayed on this page.



The screenshot shows the 'Request' section of the Active Intelligence application. The interface includes a top navigation bar with 'Schedule', 'Waiting For Event', 'Running', and 'Completed' tabs. The main content area displays a table of requests for the 'Employees' dataset. The table has columns for ID, Status, Start Date, End Date, Request Owner, and Report Owner. Three requests are listed: ID 753 (Failed), ID 754 (Completed), and ID 755 (Completed). Below the table are buttons for 'Cancel', 'Retry', 'Clone', and 'Delete'. A secondary table below shows task details for 'REPORTEXECUTION' and 'MAIL', both with a 'Completed' status.

| ID | Status | Start Date | End Date | Request Owner | Report Owner |
|-----|-----------|-------------------------|-------------------------|---------------|--------------|
| 753 | Failed | 2019-03-19 04:17:08 IST | 2019-03-19 04:17:11 IST | Admin | Admin |
| 754 | Completed | 2019-03-19 04:18:25 IST | 2019-03-19 04:18:25 IST | Admin | Admin |
| 755 | Completed | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:07 IST | Admin | Admin |

| Task Type | Status | Task Details | Start Time | End Time | Option |
|-----------------|-----------|-----------------|-------------------------|-------------------------|---|
| REPORTEXECUTION | Completed | Report Executed | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:04 IST | |
| MAIL | Completed | Mail Sent | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:07 IST |  |

Once

- In order to schedule the dataset once during a hour, day, week, month or year following steps should be followed:-
- We will be using Employees.ds for the purpose of understanding.
- Double click on the dataset which will open the following dialog box:-

- Go to the schedule tab as shown in the figure above. By default Time will be selected, else select schedule type time from the drop down menu.
- Choose Once in the Frequency.
- You can also specify how many times the dataset should re-execute in case of failure and after how much duration from the drop down menu shown in the figure. For instance, in our case the dataset will be executed once in case of failure within duration of 5 minutes.
- Click on Share in case you want to share the dataset with other users

The screenshot shows the 'Schedule' dialog box with the following configuration:

- Parameter Tab:** Not visible.
- Schedule Tab:**
 - Schedule Type:** Time
 - Frequency:** Right Now Once Recurring
 - Start Time:** 2019-03-20 11:22:25
 - On Failure Retry:** 1 (dropdown) Schedule after every minutes 5 (dropdown)
 - Report output owner:** Admin (dropdown) Share
 - Available Roles:**
 - Administrator
 - Sales
 - office
 - dhwani
 - Selected Roles:**
 - Aarohi
 - Administrator
 - Sales
 - Search Role:** (empty text box) Users Roles
 - Visibility:** Internal (dropdown)
 - Approval Required
 - Send Reminder:** 1 (dropdown) After Days 1 (dropdown)
 - Approved By:** USER (dropdown) With Name Admin (dropdown)
- Output Tab:** Not visible.
- Buttons:** Schedule, Save as QuickRun, Cancel

- Similarly, you can share the dataset with different user roles as follows:-
 - Here the Visibility is kept Internal for this example.
 - If you want you dataset to be approved before sending to other users, then check Approval Require.
 - Send Reminder specifies how many reminder should be sent.
 - After days specifies after how many days should the Reminder be sent again.
 - Approved by specifies the user name, which is Admin in our case.
 - In order to specify the output, go to the output tab as follows:-

Schedule

Parameter Schedule Output

Name: Employee Suffix: None

Format: [Empty]

Path: /

Delivery Path Replace Default

Email

Event on Success: [Empty] Event on Fail: [Empty]

Schedule Cancel

- Enter the name by which you want to schedule the dataset in the Name text area, also provide optional suffix if required.
- You can also specify event on success/failure of dataset which will trigger an event and execute all the waiting for event datasets. We will discuss about this in detail in the event scheduling.
- You can also specify the delivery path on your computer where the datasets will be downloaded as follows.

Schedule

Parameter Schedule Output

Name: Employee Suffix: None

Format: [Empty]

Path: /

Delivery Path: /home/aarohi/Downloads Replace Default

Email

Event on Success: None Event on Fail: None

Schedule Cancel

-

The dataset is scheduled and output is displayed. The user can see the schedule request in the Request section of AIV application. This section displays all the reports that have completed, running, waiting for event or scheduled. In case of report failure, error is also displayed on this page.

The screenshot shows the 'Request' section of the Active Intelligence application. The top navigation bar includes 'Active Intelligence' and 'Admin'. The main content area is titled 'Request' and has tabs for 'Schedule', 'Waiting For Event', 'Running', and 'Completed'. The 'Completed' tab is active. On the left, there is a table with columns 'Report Name' and 'Last Run'. The main area displays a table titled 'Employees' with columns: ID, Status, Start Date, End Date, Request Owner, and Report Owner. Below this table are buttons for 'Cancel', 'Retry', 'Clone', and 'Delete'. At the bottom, there is another table with columns: Task Type, Status, Task Details, Start Time, End Time, and Option.

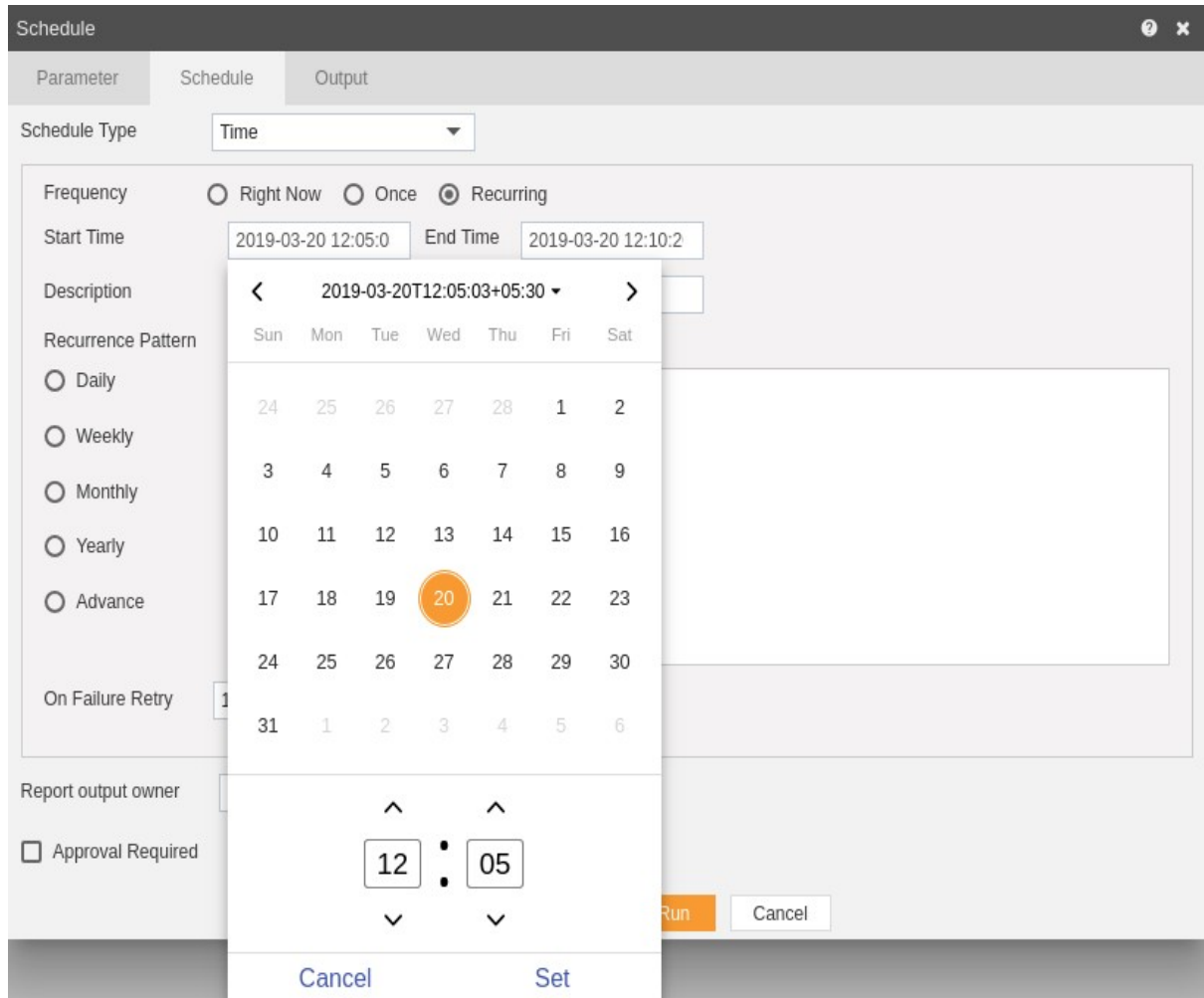
| Report Name | Last Run |
|-------------|---------------------|
| Employees | 2019-03-19 04:19:04 |

| ID | Status | Start Date | End Date | Request Owner | Report Owner |
|-----|-----------|-------------------------|-------------------------|---------------|--------------|
| 753 | Failed | 2019-03-19 04:17:08 IST | 2019-03-19 04:17:11 IST | Admin | Admin |
| 754 | Completed | 2019-03-19 04:18:25 IST | 2019-03-19 04:18:25 IST | Admin | Admin |
| 755 | Completed | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:07 IST | Admin | Admin |

| Task Type | Status | Task Details | Start Time | End Time | Option |
|-----------------|-----------|-----------------|-------------------------|-------------------------|-------------------|
| REPORTEXECUTION | Completed | Report Executed | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:04 IST | |
| MAIL | Completed | Mail Sent | 2019-03-19 04:19:04 IST | 2019-03-19 04:19:07 IST | i |

Recurring

- In order to schedule the dataset in a recurring pattern during a hour, day, week, month or year following steps should be followed:-
- We will be using Employees.ds for the purpose of understanding.



- Go to the schedule tab as shown in the figure above. By default Time will be selected, else select schedule type time from the drop down menu.
- Choose Recurring in the Frequency.
- Mention the Start time and End Time by setting the time as shown in the figure depicted above.
- You can provide optional description for your reference.
- Now, you have to mention recurrence pattern which can be daily, weekly, monthly, yearly or advance.
- In Daily, you can mention the dataset to recur after specify number of days or to schedule every weekday at specified scheduled time.

Schedule

Parameter Schedule Output

Schedule Type Time

Frequency Right Now Once Recurring

Start Time 2019-03-20 12:05:0 End Time 2019-03-20 12:10:2

Description

Recurrence Pattern

Daily

Weekly

Monthly

Yearly

Advance

Every 1 Days

Every Weekday

Schedule Time 12:08:40 0 8 12 1/1 * ? *

On Failure Retry 1 Schedule after every minutes 5

Report output owner Admin Share

Approval Required

Schedule Save as QuickRun Cancel

- You can specify dataset to run weekly on specified day/days as follows:-

Schedule

Parameter Schedule Output

Schedule Type Time

Frequency Right Now Once Recurring

Start Time 2019-03-20 12:05:0 End Time 2019-03-20 12:10:2

Description

Recurrence Pattern

Daily

Weekly

Monthly

Yearly

Advance

Monday Tuesday Wednesday

Thursday Friday Saturday

Sunday

Schedule Time 12:08:40 0 8 12 ? * THU,SAT *

On Failure Retry 1 Schedule after every minutes 5

Report output owner Admin Share

Approval Required

Schedule Save as QuickRun Cancel

- Here we have mentioned that the dataset will run on every Thursday and Saturday at the scheduled time.

Schedule

Schedule Type Time

Frequency Right Now Once Recurring

Start Time 2019-03-22 03:00:1 End Time 2019-03-22 03:10:3

Description recurring

Recurrence Pattern

Daily

Weekly

Monthly

Yearly

Advance

day 1 of every 1 month(s)

First Monday of every 1 month(s)

Schedule Time 03:08:46

On Failure Retry 1 Schedule after every minutes 5

Save & Merge Merge Cancel

- In the above figure, we have mentioned that dataset will run every first day each month at scheduled time till the end time, or you can mention like First Monday of every month as mentioned above.

The screenshot shows the 'Schedule' dialog box with the following configuration:

- Schedule Type:** Time
- Frequency:** Recurring
- Start Time:** 2019-03-20 12:05:0
- End Time:** 2019-03-20 12:15:2
- Description:** Recurring report
- Recurrence Pattern:**
 - every January 1
 - First Monday of every February
 - Schedule Time:** 12:08:40
 - CRON Expression:** 0 8 12 1 1 ? *
- On Failure Retry:** 1
- Schedule after every minutes:** 5
- Report output owner:** Admin
- Share
- Approval Required
- Buttons:** Schedule, Save as QuickRun, Cancel

- You can also specify report to run every year, as mentioned above, here the dataset will run every year on January 1 at scheduled time or you can select like First Monday of every February at scheduled time till the end time.

Schedule

Parameter Schedule Output

Schedule Type Time

Frequency Right Now Once Recurring

Start Time 2019-03-20 12:25:3 End Time 2019-03-20 12:30:3

Description

Recurrence Pattern

Daily

Weekly

Monthly

Yearly

Advance


Expression : 0 0/1 *** ?

On Failure Retry 1 Schedule after every minutes 5

Report output owner Admin Share

Approval Required

Schedule Save as QuickRun Cancel

- To understand in detail about expressions of this type click on  which will guide you in detail about how to use these expressions.
- You can also specify how many times the dataset should re-execute in case of failure and after how much duration from the drop down menu shown in the figure. For instance, in our case the report will be executed once in case of failure within duration of 5 minutes.
- Click on Share in case you want to share the dataset with other users.
- Similarly, you can share the dataset with different user roles as follows:-

- Here the Visibility is kept Internal for this example.

The screenshot shows the 'Schedule' configuration window with the following details:

- Parameter** | **Schedule** | **Output**
- Schedule Type:** Time
- Frequency:** Right Now Once Recurring
- Start Time:** 2019-03-20 11:22:25
- On Failure Retry:** 1 | **Schedule after every minutes:** 5
- Report output owner:** Admin | Share
- Available:**
 - Administrator
 - Sales
 - office
 - dhwani
- Selected:**
 - Aarohi
 - Administrator
 - Sales
- Search Role:** [] | Users Roles
- Visibility:** Internal
- Approval Required
- Send Reminder:** 1 | **After Days:** 1
- Approved By:** USER | **With Name:** Admin
- Buttons:** Schedule, Save as QuickRun, Cancel

- If you want your dataset to be approved before sending to other users, then check Approval Required.
- Send Reminder specifies how many reminders should be sent.
- After days specifies after how many days should the reminder be sent again.
- Approved by specifies the user name, which is Admin in our case.
- In order to specify the output, go to the output tab as follows:-

Schedule

Parameter Schedule Output

Name: Employee Suffix: None

Format: [Empty]

Path: /

Delivery Path Replace Default

Email

Event on Success: [Empty] Event on Fail: [Empty]

Schedule Cancel

- Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.
- You can also specify event on success/failure of report which will trigger an event and execute all the waiting for event reports. We will discuss about this in detail in the event scheduling.
- You can also specify the delivery path on your computer where the reports will be downloaded as follows.

Schedule

Parameter Schedule Output

Name: Employee Suffix: None

Format: [Empty]

Path: /

Delivery Path: /home/aarohi/Downloads Replace Default

Email


Event on Success: None Event on Fail: None

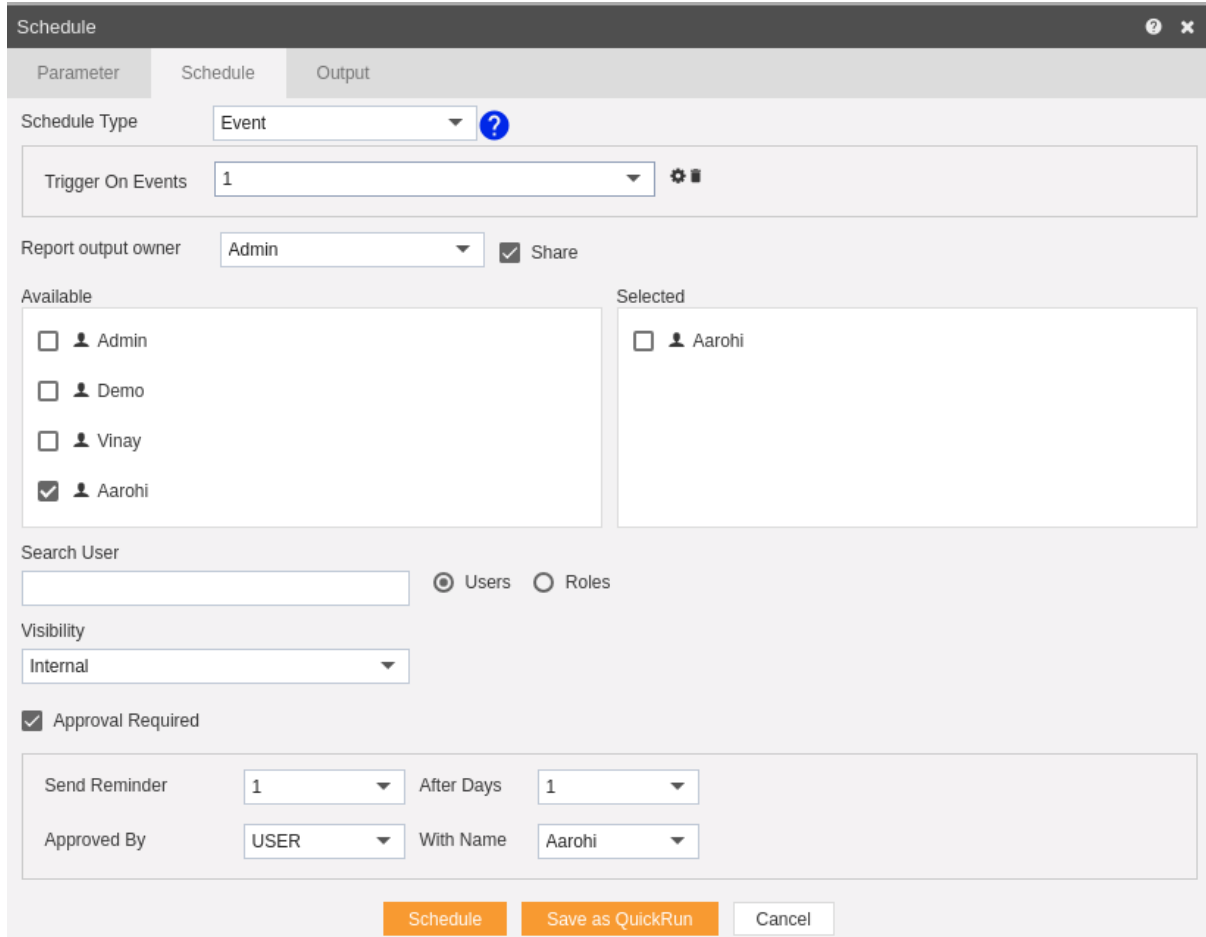
Schedule Cancel

- The user can also send the dataset as email to the other users using following steps:-

Event Scheduling

In order to schedule the report based on event following steps should be followed:-

- We will be using Employees.ds for the purpose of understanding.
- Click on  which will open the following dialog box:-




The screenshot shows the 'Schedule' dialog box with the following configuration:

- Schedule Type:** Event
- Trigger On Events:** 1
- Report output owner:** Admin
- Share:**
- Available Users:** Admin, Demo, Vinay, Aarohi (checked)
- Selected Users:** Aarohi
- Search User:** (empty)
- Users/Roles:** Users, Roles
- Visibility:** Internal
- Approval Required:**
- Send Reminder:** 1
- After Days:** 1
- Approved By:** USER
- With Name:** Aarohi

Buttons at the bottom: Schedule, Save as QuickRun, Cancel

Go to the schedule tab as shown in the figure above. By default Time will be selected hence select schedule type Event from the drop down menu.

- Trigger on Events define events on the trigger of which report will be scheduled.
- Currently event 1 has been created for this example, you can create an event of your own by clicking on  which will open the following dialog box.

- Now you have successfully created an event which will be visible in the dropdown as follows:-

The screenshot shows the 'Schedule' configuration page with the following settings:

- Schedule Type:** Event
- Trigger On Events:** 1 (selected from a dropdown menu)
- Report output owner:** 1
- Available:**
 - Admin
 - Demo
 - Vinay
 - Aarohi
- Search User:** (empty field)
- Visibility:** Internal
- Approval Required
- Send Reminder:** 1
- After Days:** 1
- Approved By:** USER
- With Name:** Aarohi

Buttons at the bottom: Schedule, Save as QuickRun, Cancel

- We will use predefined event 1 for our example so select event 1.
- Click on Share in case you want to share the dataset with other users or user roles
- Here the Visibility is kept Internal for this example.
- If you want your dataset to be approved before sending to other users, then check Approval Required.
- Send Reminder specifies how many reminders should be sent.
- After days specifies after how many days should the reminder be sent again.
- Approved by specifies the user name, which is Admin in our case.
-

- Enter the name by which you want to schedule the dataset in the Name text area, also provide optional suffix if required.

The screenshot shows the 'Schedule' dialog box with the following fields and options:

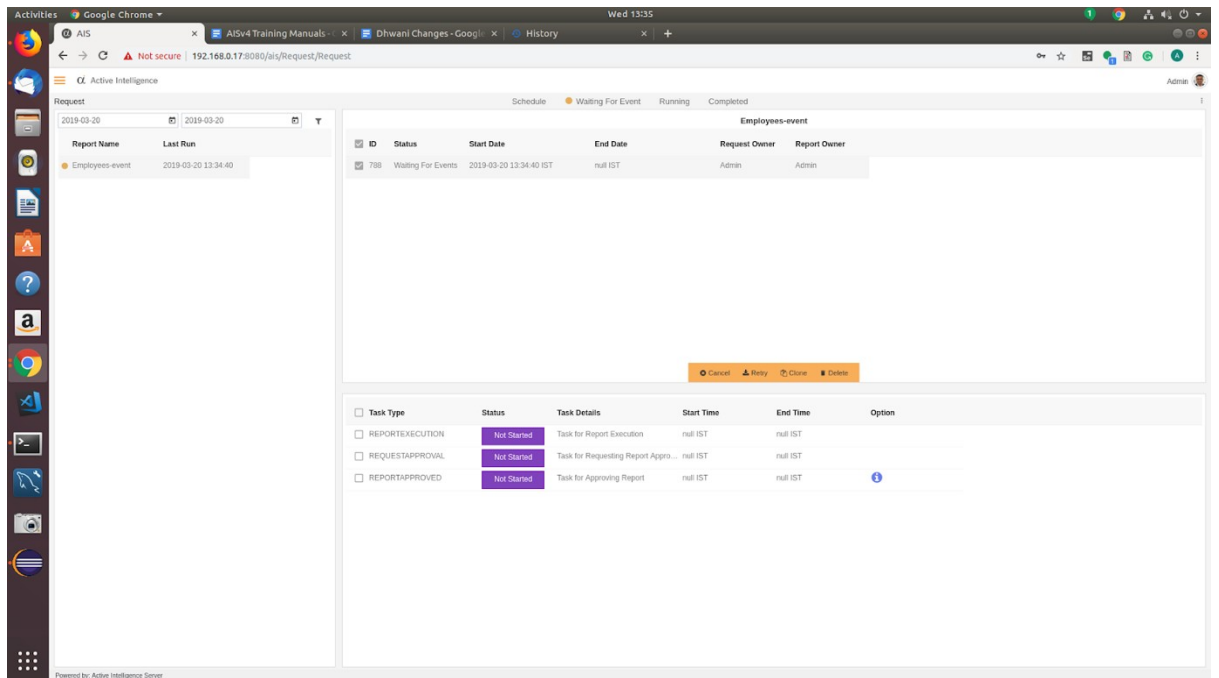
- Name:** Employee
- Suffix:** None
- Format:** (empty dropdown)
- Path:** /
- Delivery Path:**
- Replace Default:**
- Email:**
- Event on Success:** (empty dropdown)
- Event on Fail:** (empty dropdown)

- You can also specify event on success/failure of dataset which will trigger an event and execute all the waiting for event reports. We will discuss about this in detail in the event scheduling.
- You can also specify the delivery path on your computer where the reports will be downloaded as follows.

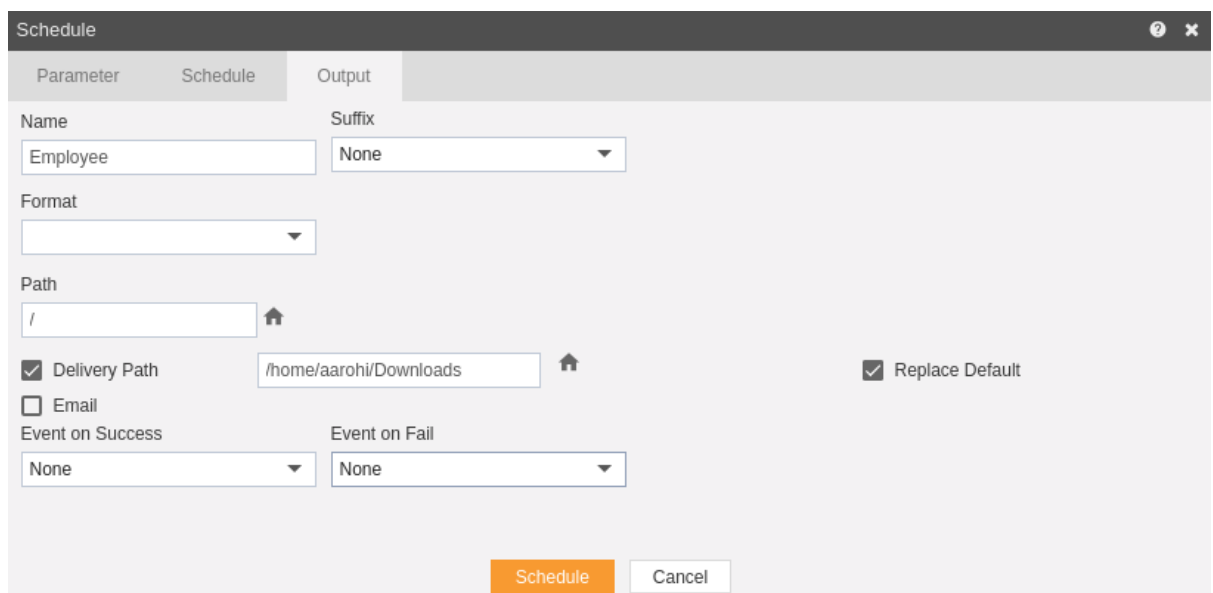
The screenshot shows the 'Schedule' dialog box with the following fields and options:

- Name:** Employee
- Suffix:** None
- Format:** (empty dropdown)
- Path:** /
- Delivery Path:** /home/aarohi/Downloads
- Replace Default:**
- Email:**
- Event on Success:** None
- Event on Fail:** None

- The user can also send the report as email to the other users using following steps:-



- You can trigger an event with another report as follows:-

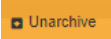


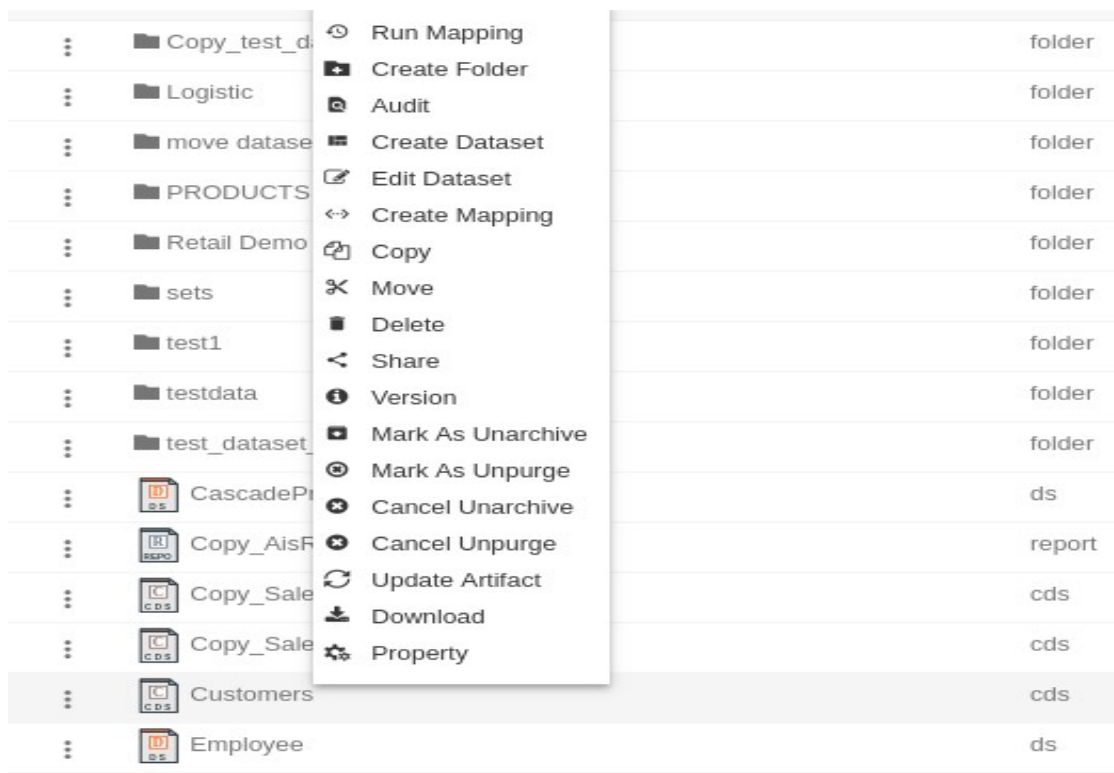
- Here we schedule a dataset named Event Trigger which will trigger event 1 when run successfully.
- After this event is triggered, our Employee dataset will be executed.


Unarchive

- The main purpose of unarchive in an AIV application is to enable the user to save some of his important files from being archived.
- Usually, each type of file is assigned to be archived after certain number of days by the Administrator, after which the file goes to the Archive mode.
- Once a file is marked as unarchive, then it will not get deleted when the cycle for archive runs in the AIV application.
- In order to change the settings of the file to be archived/unarchived you need to contact the Administrator.

To Unarchive file and folders follow these steps:

1. Select the file or folders you want to Mark as Unarchive . (Note: multiple file and folders or combination of file and folders can be selected).
2. Right click and select the  Unarchive button from the context menu or directly from the bottom menu as shown in the image below:



- Here Customers.cds dataset is marked as unarchive and hence it will not get deleted when all other dataset files are archived.
- You can check the archive status of the file by clicking on  Property as mentioned in the above figure.

Properties

General

Name: Customers

Description:

Owner: Admin

VisibilityType: INT

Default Version: 3

Created On: 2019-02-23 11:46:21

LastUpdated By: Admin

LastUpdated On: 2019-02-23 11:46:21

Is Archivable: False

Is Purgable: True

Submit Cancel

- The “Is Archivable” property of Customers.cds is False which means this file will not be archived when the cycle for Archive runs.
- In order to run archive jobs, go to the Requests of the Request section.

Owner Report Owner

- Refresh
- Instant Message
- Select User
- Cleaner Job
- Archive Job
- Purge Job

- Click on the Archive Job in order to perform the Archive which will open the following dialog box.

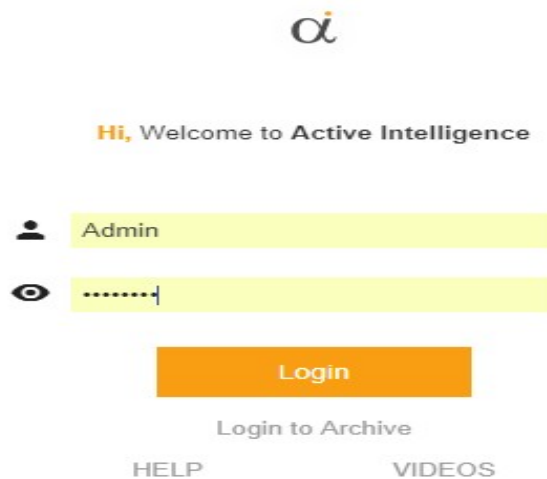
Archive Job

Frequency: Right Now Once Recurring

On Failure Retry: 1 Schedule after every minutes: 5

Run Jobs Cancel

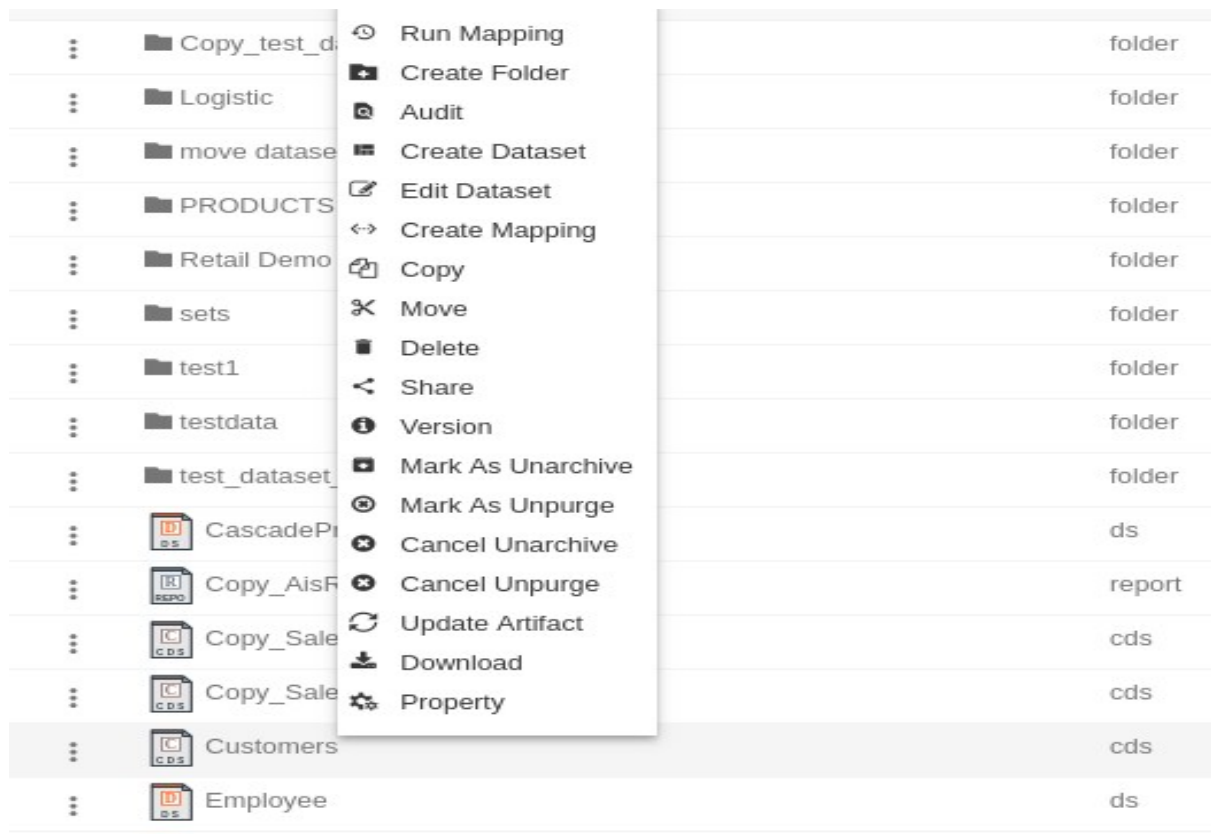
- Click on **Run Jobs** in order to run the Archive Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the archive jobs.
- The administrator user can Login to Archive mode to see the details of all the files that have been archived as follow



- After logging in, following screen will be displayed which shows all the datasets which have been archived.

| Reports | | | | | | | |
|---------------|--------|-----------|--------|-------------------------|---------|---------|--|
| File Name | Type | Full Path | Owner | Last Updated | Version | Options | |
| aarohi_report | folder | / | Admin | 2019-03-11 14:49:12 IST | 1 | | |
| explain_copy | folder | / | Admin | 2019-03-18 16:42:08 IST | 1 | | |
| explain_move | folder | / | Admin | 2019-03-18 17:49:41 IST | 1 | | |
| new report | folder | / | Admin | 2019-03-12 17:12:03 IST | 1 | | |
| New Root | folder | / | Admin | 2019-03-09 10:39:06 IST | 1 | | |
| Output | folder | / | Admin | 2019-03-13 13:01:26 IST | 1 | | |
| Templates | folder | / | Admin | 2019-02-26 18:28:56 IST | 1 | | |
| test_report | folder | / | Admin | 2019-03-18 16:38:11 IST | 1 | | |
| test_share | folder | / | Aarohi | 2019-03-11 19:01:31 IST | 1 | | |
| ProductList | pdf | / | Admin | 2019-03-13 10:20:30 IST | 1 | | |

- You can cancel the unarchive by right clicking the dataset and selecting cancel unarchive:



- Now check properties to see that “Is Archivable” is true:-

| Properties | |
|-----------------|---------------------|
| General | |
| Name | Customers |
| Owner | Admin |
| Default Version | 3 |
| LastUpdated By | Admin |
| Is Archivable | True |
| Description | |
| VisibilityType | INT |
| Created On | 2019-02-23 11:46:21 |
| LastUpdated On | 2019-02-23 11:46:21 |
| Is Purgable | True |

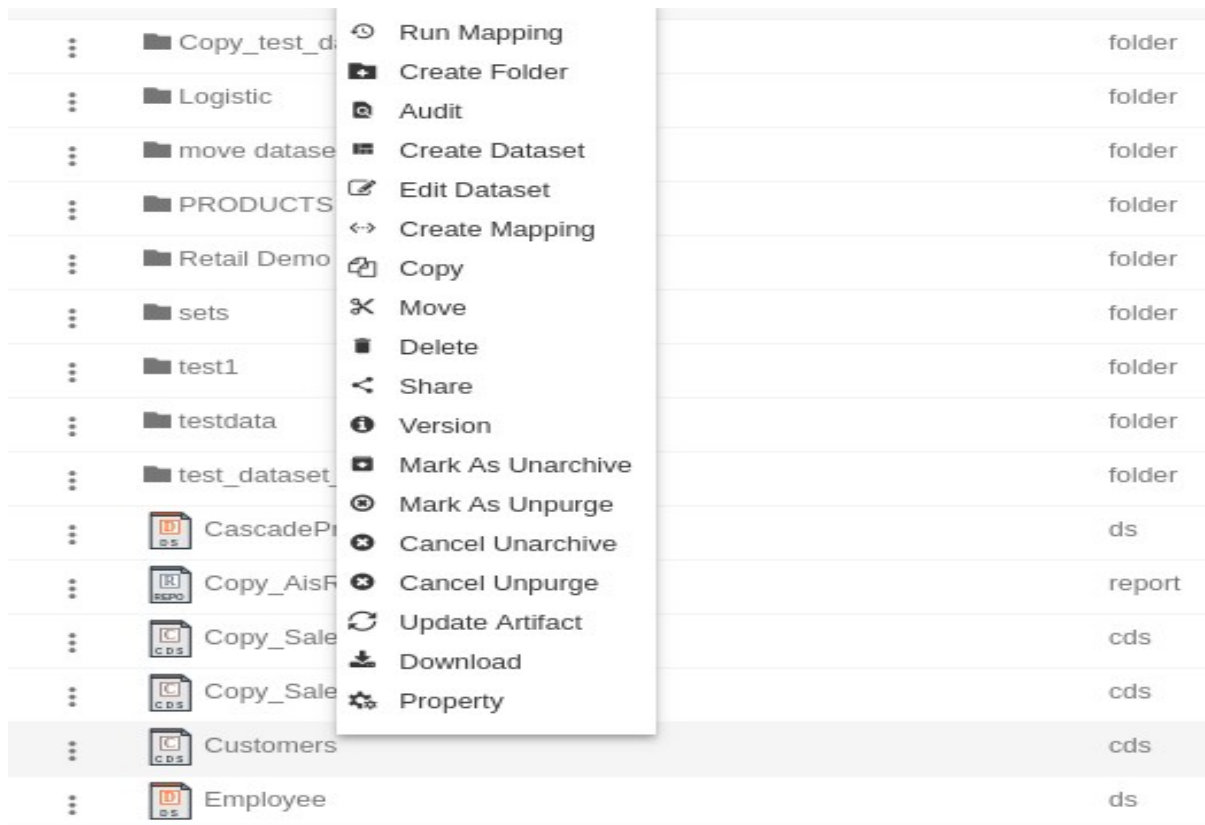
Unpurged


- The main purpose of the unpurge in an AIV application is to enable the user to save some of his important files from being deleted permanently.
- Usually, each type of file is assigned to be purged after certain number of days by the Administrator, after which the file gets deleted permanently.

- Once a file is marked as unpurge, then it will not be deleted when the cycle for purge runs in the AIV application.
- In order to change the settings of the file to be purged/unpurged you need to contact the Administrator.

To Unpurge file and folders follow these steps:

3. Select the file or folders you want to Mark as Unpurge . (Note: multiple file and folders or combination of file and folders can be selected).
4. Right click and select the  button from the context menu or directly from the bottom menu as shown in the image below:



- Here Customers.cds dataset is marked as unpurge and hence it will not get deleted when all other files are purged.
- You can check the purge status of the file by clicking on  Property as mentioned in the above figure.

Properties

General

Name: Customers

Description:

Owner: Admin

VisibilityType: INT

Default Version: 3

Created On: 2019-02-23 11:46:21

LastUpdated By: Admin

LastUpdated On: 2019-02-23 11:46:21

Is Archivable: True

Is Purgeable: False

Submit Cancel

- The “Is Purgeable” property of Customers.cds is False which means this file will not be archived when the cycle for Purge runs.
- In order to run purge jobs, go to the Requests of the Request section.

Owner Report Owner

- Refresh
- Instant Message
- Select User
- Cleaner Job
- Archive Job
- Purge Job

- Click on the Purge Job in order to perform the Archive which will open the following dialog box.

Purge Job

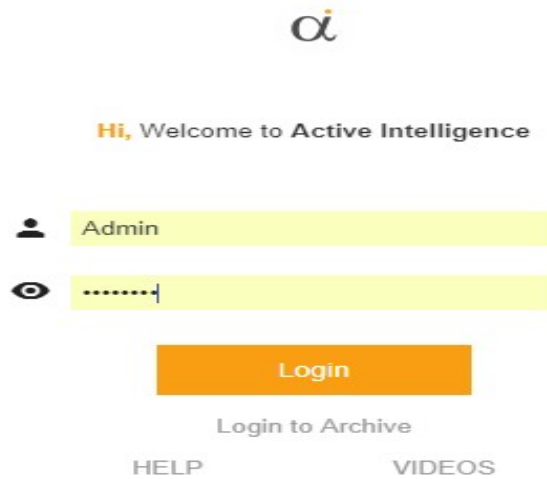
Frequency: Right Now Once Recurring

On Failure Retry: 1 Schedule after every minutes: 5

Run Jobs Cancel

- Click on **Run Jobs** in order to run the Purge Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the archive jobs.

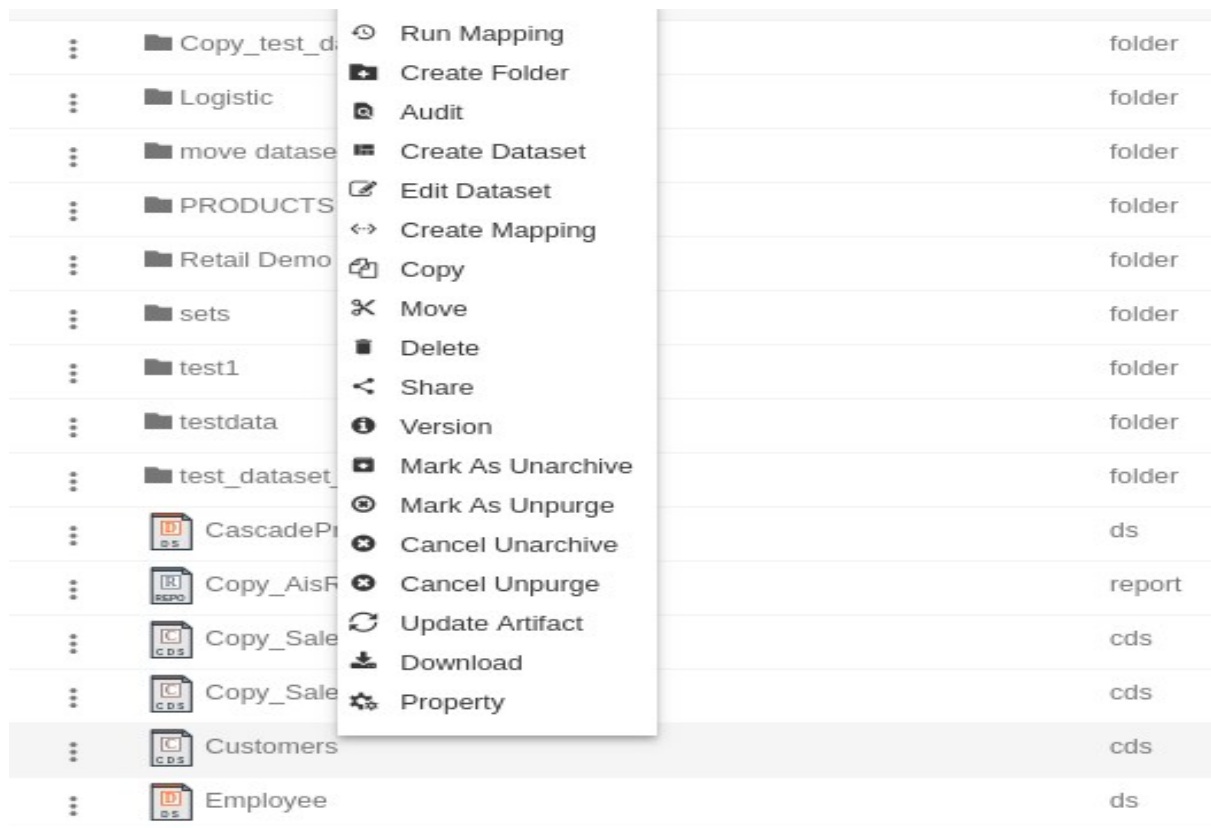
- The administrator user can Login to Archive mode to see the details of all the files that have been purged as follow



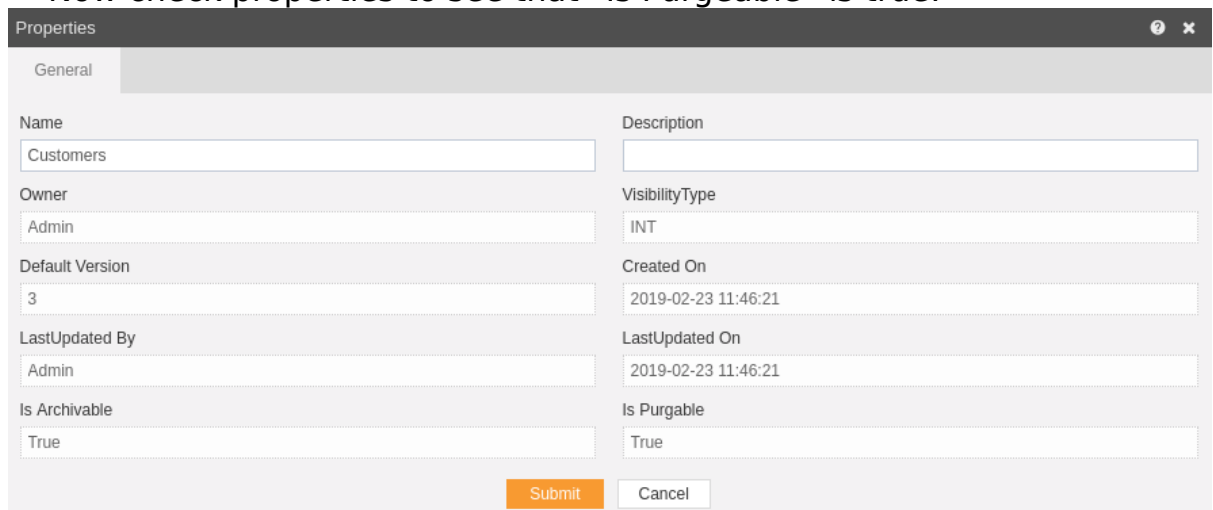
- After logging in, following screen will be displayed which shows all the Reports which have been purged.

| Reports | | | | | | | |
|---------------|--------|-----------|--------|-------------------------|---------|---------|--|
| File Name | Type | Full Path | Owner | Last Updated | Version | Options | |
| aarohi_report | folder | / | Admin | 2019-03-11 14:49:12 IST | 1 | | |
| explain_copy | folder | / | Admin | 2019-03-18 16:42:08 IST | 1 | | |
| explain_move | folder | / | Admin | 2019-03-18 17:49:41 IST | 1 | | |
| new report | folder | / | Admin | 2019-03-12 17:12:03 IST | 1 | | |
| New Root | folder | / | Admin | 2019-03-09 10:39:06 IST | 1 | | |
| Output | folder | / | Admin | 2019-03-13 13:01:26 IST | 1 | | |
| Templates | folder | / | Admin | 2019-02-26 18:28:56 IST | 1 | | |
| test_report | folder | / | Admin | 2019-03-18 16:38:11 IST | 1 | | |
| test_share | folder | / | Aarohi | 2019-03-11 19:01:31 IST | 1 | | |
| ProductList | pdf | / | Admin | 2019-03-13 10:20:30 IST | 1 | | |

- You can cancel the unpurged by right clicking the dataset and selecting cancel unarchive:



- Now check properties to see that “Is Purgeable” is true:-



Audit

- Audit shows the actions like when the user created, uploaded or downloaded any particular file.
- Following image describes the audit option.

| ResourceType | ActionType | Username | Start Time |
|--------------|------------|----------|---------------------|
| FILE | CREATE | Admin | 2019-02-23 11:46:22 |
| FILE | UPLOAD | Admin | 2019-02-23 11:46:22 |
| FILE | SHARE | Admin | 2019-03-25 10:36:09 |

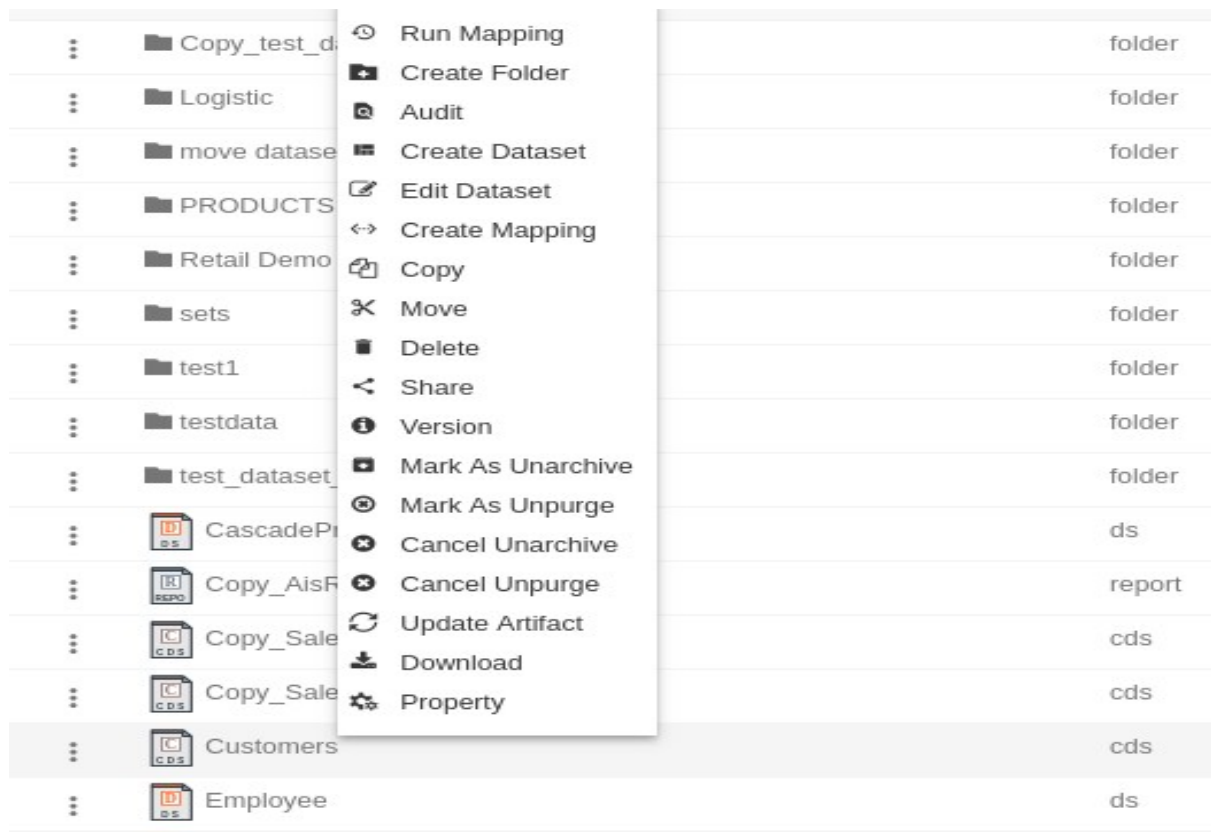
Version

- Version option shows the number of versions of the selected report as well as the version which user is using.
- Following is the image describing number of versions of selected dataset.


| Default Version | Id | Name | Type |
|----------------------------------|-----|-----------|------|
| <input type="radio"/> | 37 | Customers | cds |
| <input type="radio"/> | 186 | Customers | cds |
| <input checked="" type="radio"/> | 226 | Customers | cds |

Download

- The User can download the selected alert by clicking download option from context menu.




Property

- Use Properties option of the file and folders for the following:
 - To update the Name of the file and folders
 - To change the Output Types of the File (Note: only applicable to files)
 - To view file and folders Properties such as owner information, last updated by, file created date, archive and purge options and file visibility i.e. (Private, Internal, Public) and much more.
 - To view the Property for the file or folder follow the steps below:
 1. Select file or folder you wish to see properties for or update the information such as Name or Output Type by selecting  Properties from the context menu, following dialog box will appear as shown in the image below:

The screenshot shows a 'Properties' dialog box with a 'General' tab. The fields are as follows:

| | | | |
|-----------------|-----------|----------------|---------------------|
| Name | Customers | Description | |
| Owner | Admin | VisibilityType | INT |
| Default Version | 3 | Created On | 2019-02-23 11:46:21 |
| LastUpdated By | Admin | LastUpdated On | 2019-02-23 11:46:21 |
| Is Archivable | True | Is Purgable | False |



Buttons: Submit, Cancel

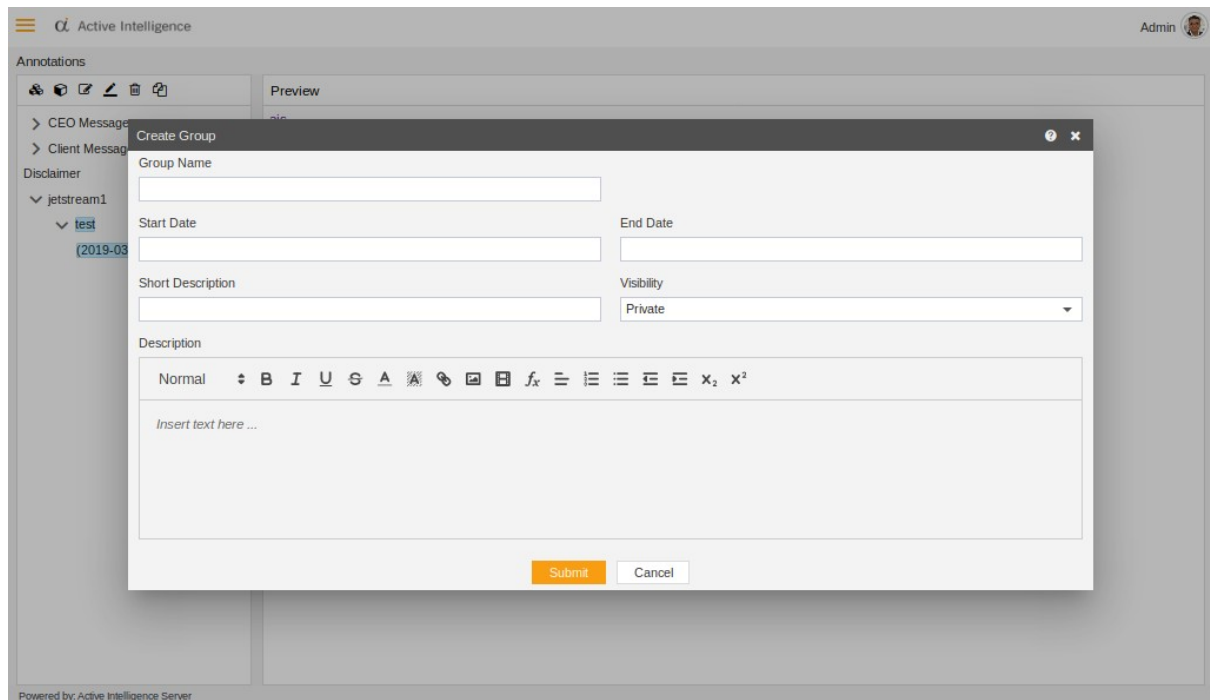
2. The Name can be updated (Note: The above image is taken from the Folder Properties, File Properties will have additional tab for Output Type which will enable users to select/unselect the file Output visibility Type.).
3. Finally click  button to save the changes to the file Properties, if any.


Annotations

- **Annotations** are critical or explanatory notes added to a text, image or other data. They are references that point to the specific part of data.
- **Annotations** enables users to add shapes and text to make information more meaningful for the business.
- **Annotations** section is located under **Master Data** from the main menu bar (Only users with **Annotations** privilege have access to this section)
- Annotations provides the user with the following functionality:-
 1. Create group
 2. Create item
 3. Edit
 4. Rename
 5. Delete
 6. Copy

Create group

- You can create new annotations group and item key using create group  in the Annotations section.
- Follow these steps to create a new Annotations group:-
 1. To create **Annotation** Group, click on  button from the list of top left corner icons.
 2. This will open the following dialog box:-



- Fill in the required fields in the Create Annotation:
 - 1) Group Name - Group Name must be Unique (required field)
 - 2) Start Date - Start date for your group Annotation (required field)
 - 3) End Date - End Date for your group Annotations (not a required field)
 - 4) Visibility Type - Select Visibility type from the drop-down list i.e. Private, Public or Internal (selecting Private will restrict the visibility to the file owner only, Internal will make the file available to the Internal users only, and selecting Public will extend file visibility to the end users as well).
 - 5) Short Description - Helpful for user to know more about the group
 - 6) Description - Detail description which will be sent to the consumers
- Finally, click on **Submit** button to create a new Annotation Group.
- All the groups user creates will be available under the Annotations as shown in the image below, the below example has three groups (Note: Groups can be identified by  icon)

Create Item

Create Item allows user to generate a key of its respective group. Following image describes the use of create item.


The screenshot shows a 'Create Group' dialog box. The fields are as follows:

| Field | Value |
|-------------------|------------|
| Group Name | Disclaimer |
| Key | annot_test |
| Start Date | 2019/03/20 |
| End Date | 2019/03/20 |
| Short Description | Disclaimer |
| Visibility | Private |

The Description field contains the following text: "This report contains confidential information and is intended solely for the individual to whom it is addressed. This is an example of *disclaimer annotation messages*."

- Click **Submit** button to generate the item.

Edit Annotation

- To Edit Annotations, follow these steps: (Only the users with Annotations privilege have access to this section)
- To Edit Annotations select the desire Group or Item Key.
- Click  button from top left icons.
- The following dialog box will appear:


The screenshot shows an 'Edit Item' dialog box. The fields are as follows:

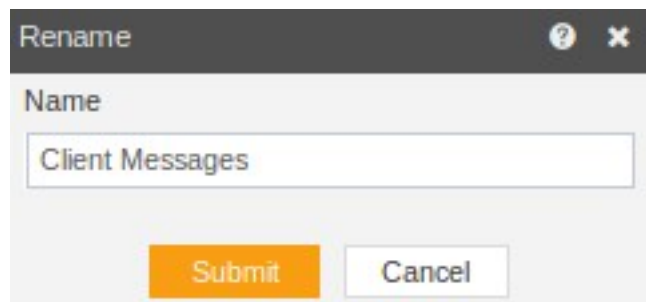
| Field | Value |
|-------------------|------------|
| Group Name | jetstream1 |
| Key | test |
| Start Date | 2019/03/16 |
| End Date | 2019/03/16 |
| Short Description | annotation |
| Visibility | Internal |

The Description field contains the following text: "als"

- Update the fields you would like to make changes to.
- Finally click on **Submit** button to apply the changes.


Rename

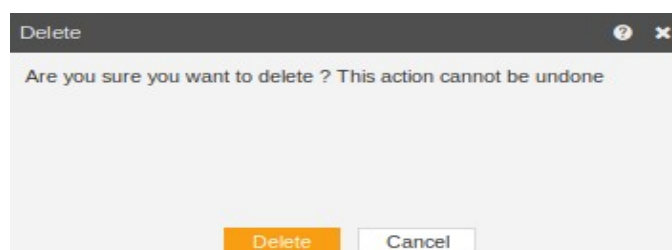
- Rename Annotation allows you to change the name of any existing Annotation Group or Item.
- To rename Annotations Group or Item key select the desire Group or Item Key.
- Select Group or Item you want rename and click  button from top left icons.
- The following dialogue box will appear:



- Update name as desired
- Finally click on **Submit** button to rename the selected Annotation Group or Item.


Delete

- Annotation groups or annotation items can be deleted using delete option.
- To Delete Annotation Group or Item key, follow these steps:
- Select the Annotation Group or Item key you wish to delete and click  button from the top left icons
- The following dialog box will appear:



- Finally click  button to permanently delete an annotation.




Copy_

- Copy allows you to copy the desired annotation.
- It copies an annotation to the clipboard.
- Click  button to copy an annotation.

Parameters

- Parameter allows the user to input the value based on which the data/information will be displayed (Parameters are specific values entered by the user to determine what data to display), when you create a dataset and want to specify certain criteria to display a certain set of data from the dataset, Parameters are used.
- For example: In an ordered dataset, a user may want to view only orders in a particular region, or order over a certain amount, or maybe the orders that closed in the last 30 days, the easiest and most efficient ways to manage this is using the parameter for that dataset to filter value based on user input.
- Parameters section is located under Master Data from the main menu bar (Only users with Parameter privilege have access to this section)
- Parameters tab has the following items:
 - Create Parameter
 - Edit Parameter
 - Clone
 - Delete

Create Parameters

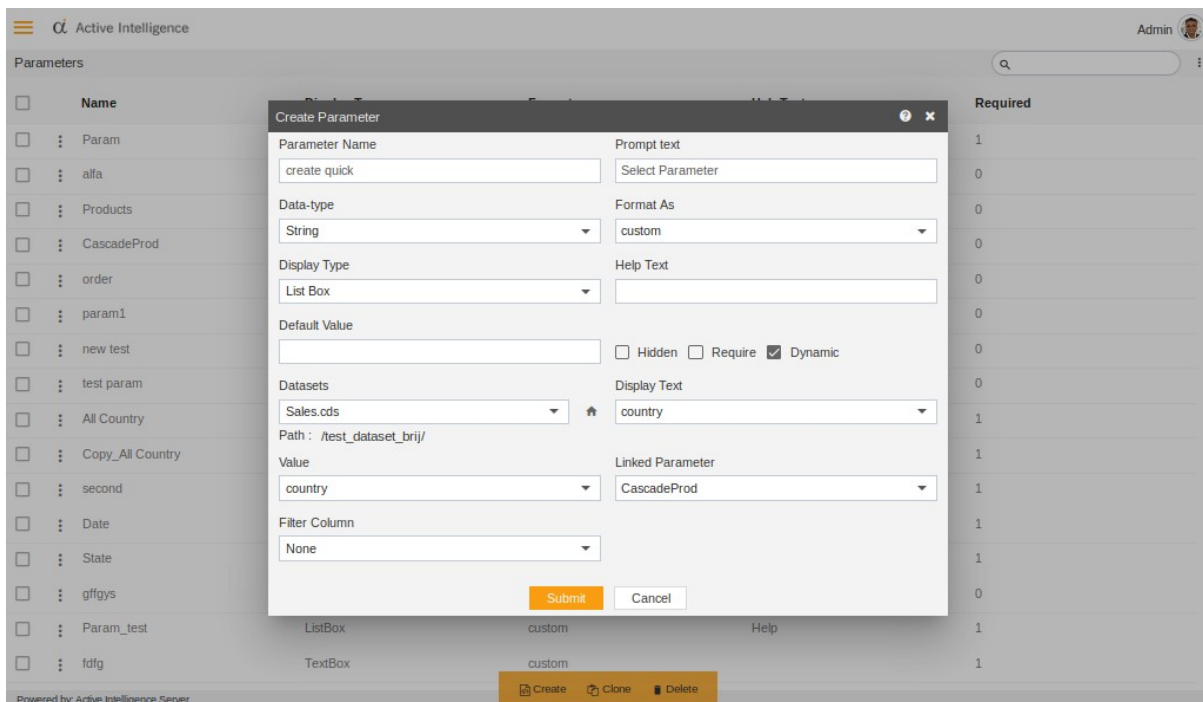
- To Create Parameter, follow these steps:
- There are multiple ways you can Create a Parameter (select any Parameter whilst in Parameter section and right click and select  Create Parameter from the context menu, select  Create from the footer menu bar
- Click on  Create button from the footer menu bar to create a new Parameter
- The following dialog box will appear:

The screenshot shows a 'Create Parameter' dialog box with the following fields and options:

- Parameter Name:** A text input field.
- Prompt text:** A text input field.
- Data-type:** A dropdown menu currently showing 'String'.
- Format As:** A dropdown menu currently showing 'custom'.
- Display Type:** A dropdown menu currently showing 'Text Box'.
- Help Text:** A text input field.
- Default Value:** A text input field.
- Options:** Three checkboxes labeled 'Hidden', 'Require', and 'Dynamic', all of which are currently unchecked.
- Buttons:** 'Submit' (orange) and 'Cancel' (white) buttons at the bottom.

- Fill in the required fields in the Create Parameter form:
- Parameter Name - Parameter Name must be Unique, this will be used for linking the parameter when creating parameter dataset (required field)
- Prompt Text - To help the user when Parameter box prompts for input (required field)
- Data Type - Select the Data Type for the Parameter (required field)
- Format as - This is selected as a custom by default (required field)
- Display Type - User can decide how they would like Parameter value to be presented using the Display Type, there is three Display Type to choose from (required field):
 - Text Box (Plain Text box where the user can put parameter value text, this can only be static)
 - List Box (This can be static or dynamic)
 - Radio Button (This can be static or dynamic)
- Help Text - This can be added if required (not a required field)
- The user can decide to enable the following option for the Parameter:
- Hidden - Parameter value will be applied, however, it will not be visible to end user
- Require - Currently in all the cases Parameter will be required whether the box is checked or unchecked.

- Dynamic - This option only gets active when Display Type is selected as List Box or Radio Button, the user can pull the parameter value dynamically from the Dataset.
- Select Dataset - This option will be enabled only when Dynamic checkbox is checked, the user must then select the dataset to pull the parameter value
- Display Text - Display text for the end user
- Value - Column name from where the values of the parameter will be displayed and applied
- Linked Parameter and Filter Column - This option is only required when creating a Cascading parameter.
- Following image shows all the above features.



- Finally click on **Submit** button to create a new Parameter.

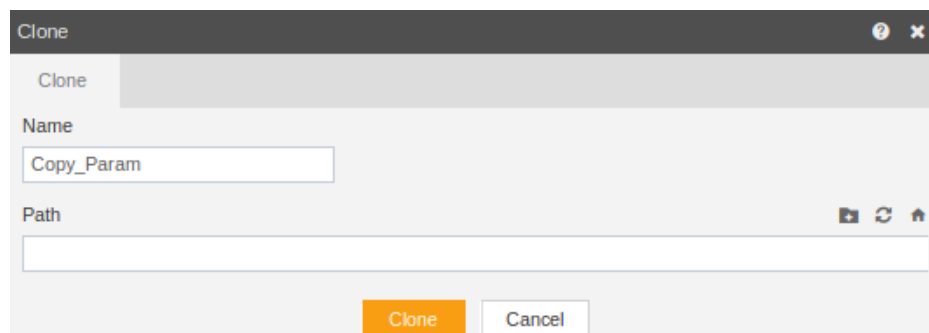
Edit Parameters

- Edit parameters edit the selected parameter.
- To Edit Parameter, follow these steps:
- To Edit Parameter select the desire Parameter from the list whilst in the Parameter section and right click and select **Edit Parameter** from the context menu.

- The following dialog box will appear:
- Updated the value as required and click on **Submit** button to update the changes to the parameter.

Clone Parameters

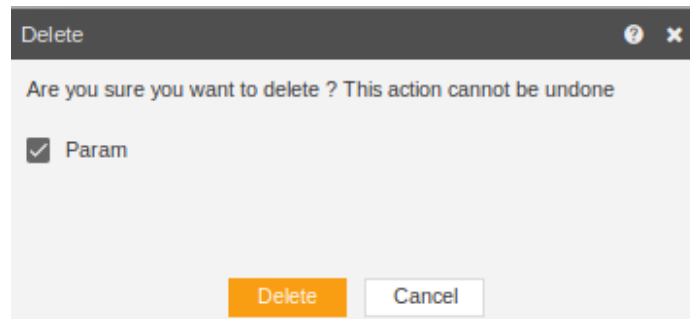
- Clone enables user to make a new instance/copy of the selected file.
- There are multiple ways user can Clone Parameter.
- select any desired Parameter whilst in Parameter section and right click and select **Clone** from the context menu or select **Clone** from the footer menu bar.
- To clone Parameter click on **Clone** button from the footer menu bar.
- The following dialog box will appear:



- The user has option to update the File Name and can refresh it, set the path and also can create new folder.
- Finally click on **Clone** button to finish creating a copy of selected Parameter.

Delete Parameters

- Delete Parameters delete the selected parameter.
- To Delete Parameter, follow these steps:
- There are multiple ways you can Delete Parameter.
- Select the desire Parameter and right click and select **Delete** from the context menu or select **Delete** from the footer menu bar.
- Note: Multiple Parameter Delete is permitted.
- Select the Parameter you wish to delete and Click **Delete** button from the footer menu bar.
- The following dialog box will appear:



- Finally click **Delete** button to permanently delete a Parameter, alternatively you can press **Cancel** button to cancel the action.

Request

Request tab options can be used to see all notifications from system and users, schedule request/recurring request (reports), retry the request.

Also, it includes alerts and alert reports sub-sections where the user can create alerts of his choice and can be able to see the reports of alerts once the reports are scheduled.

Request tab has the following options:

Notifications

Notifications are the actions to notify a specific piece of information or the method in which notice is given to the particular user.



Notifications contain three different types:

Approvals


Approval Notifications shows the pending notifications shared with you to approve or reject.


Detail explanation for approval notification follow below steps:

Messages

Message Notifications shows the different message from  Instant Message and  Dynamic Message.

Alerts

Alert Notifications shows the alert notifications such as  Informative (Alerts).

- Click on  Alerts tab to see all Alerts available.
- The following image describes the alerts:

| Sender | Message | Created On | Last Updated | Acknowledgement | Read Status | Options |
|--------|----------------------------------|-------------------------|--------------|-----------------|-------------|---------|
| System | Fail to execute the Report re... | 2018-12-12 15:36:44 IST | null IST | | | |
| System | Sorry you have no more trial... | 2018-12-12 15:36:44 IST | null IST | | | |
| System | Fail to execute the Report re... | 2018-12-12 15:32:09 IST | null IST | | | |
| System | Sorry you have no more trial... | 2018-12-12 15:32:09 IST | null IST | | | |
| System | Fail to execute the Report re... | 2018-12-12 15:31:00 IST | null IST | | | |
| System | Sorry you have no more trial... | 2018-12-12 15:31:00 IST | null IST | | | |
| System | Report executed successfully... | 2018-12-12 15:21:10 IST | null IST | | | |
| System | Report executed successfully... | 2018-12-12 15:21:05 IST | null IST | | | |
| System | Fail to execute the Report re... | 2018-12-12 15:20:59 IST | null IST | | | |
| System | Sorry you have no more trial... | 2018-12-12 15:20:59 IST | null IST | | | |
| System | Fail to execute the Report re... | 2018-12-12 15:20:54 IST | null IST | | | |
| System | Sorry you have no more trial... | 2018-12-12 15:20:54 IST | null IST | | | |
| System | Sorry you have no more trial... | 2018-12-12 15:20:49 IST | null IST | | | |
| System | Fail to execute the Report re... | 2018-12-12 15:20:49 IST | null IST | | | |
| System | Fail to execute the Report re... | 2018-12-12 15:20:44 IST | null IST | | | |
| System | Sorry you have no more trial... | 2018-12-12 15:20:44 IST | null IST | | | |

Requests

Request displays the status of any task which is scheduled as a Request. A user can schedule the request to execute the specific task or Re-Execute a particular task which would be added in Request and also can Retry, Cancel or Clone a particular request.

Once the request comes in the request section, it moves to either:

- Schedule,
- Waiting for the event,
- Running or
- Completed

All of the above tabs have common ID, Status, Start Date, End Date, Request Owner, Report Owner.

The report is scheduled when it comes to schedule tab.

The report goes to waiting for state when it does not get scheduled and falls into the waiting for event tab.

The report falls into the running tab when it is being running.

Report gets its state as failed or completed in the completed tab. Once it gets completed, it can be downloaded.

Request reports have other functionalities like :

- Cancel,
- Retry,
- Clone,
- Delete.

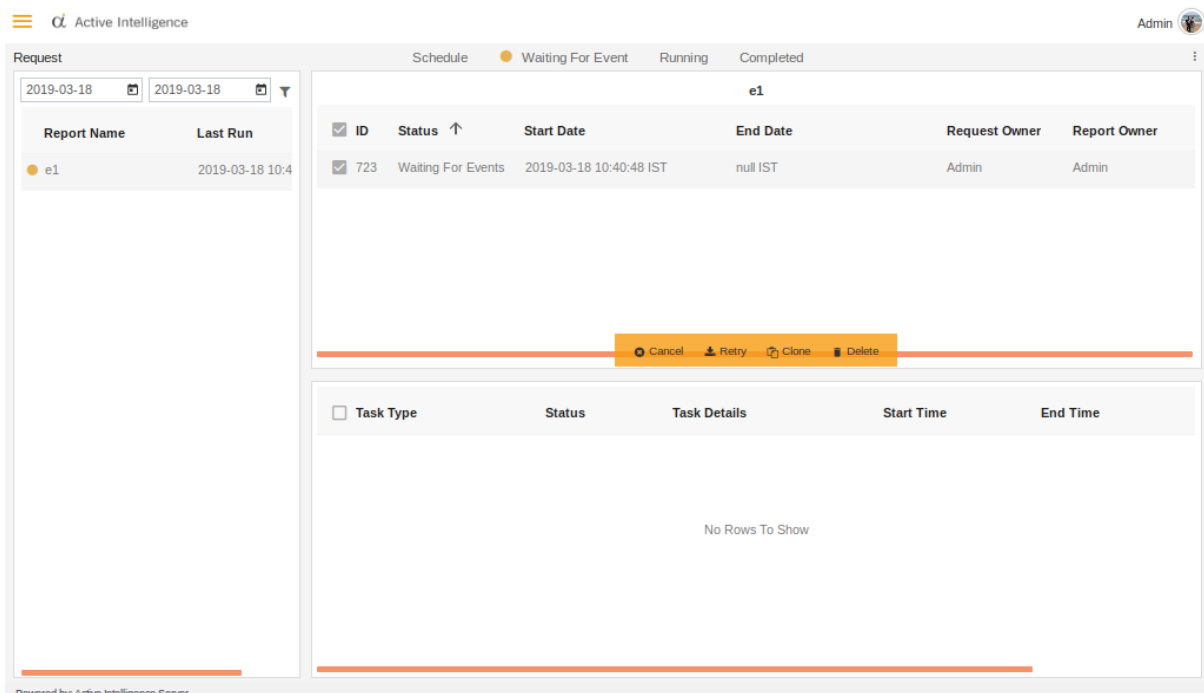
Cancel Request

Cancel Request allows you to cancel any currently running or scheduled request. A request cannot be cancelled if it has completed or failed its execution.

1. To cancel request a user should select a request (make sure Checkbox selected), an only single request can be cancelled at ones.

2. Click on button or right click on the selected request and Click Cancel to Cancel Request.

- Below is the image where request is selected.



Retry Request

Retry Request is a way to re-run an existing request again.

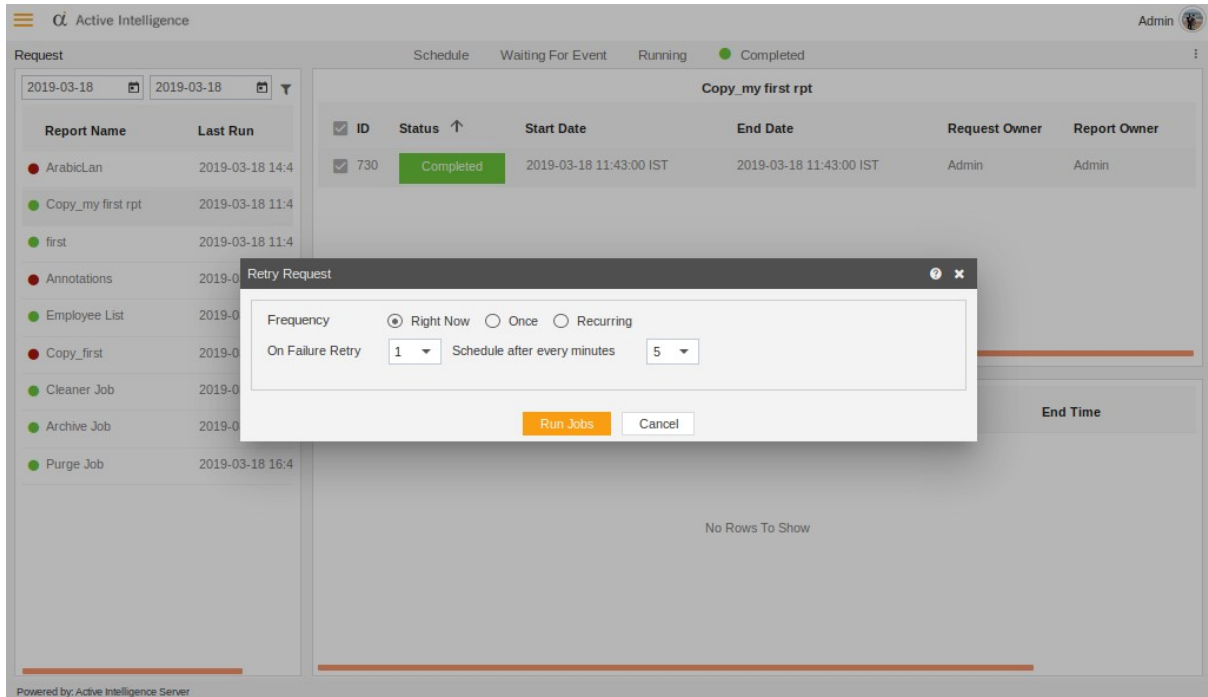
1. To retry request you need to follow below steps:

- Select a request which you want to retry.
- As show in below image.

2. Click on retry button to retry a request (or right click on Status context menu will prompt to select).

- Retry dialog box will appear as below:

3. Select desired frequency and click on button to retry.

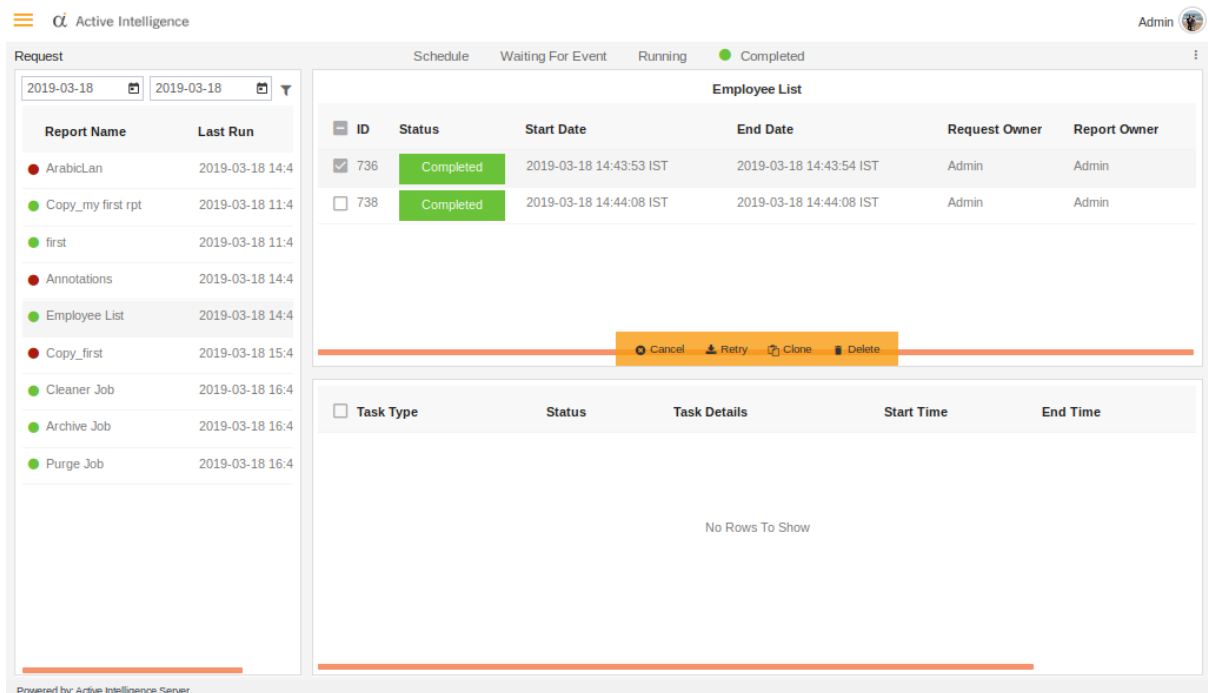


Clone request

Clone Request allows you to clone any particular Request.

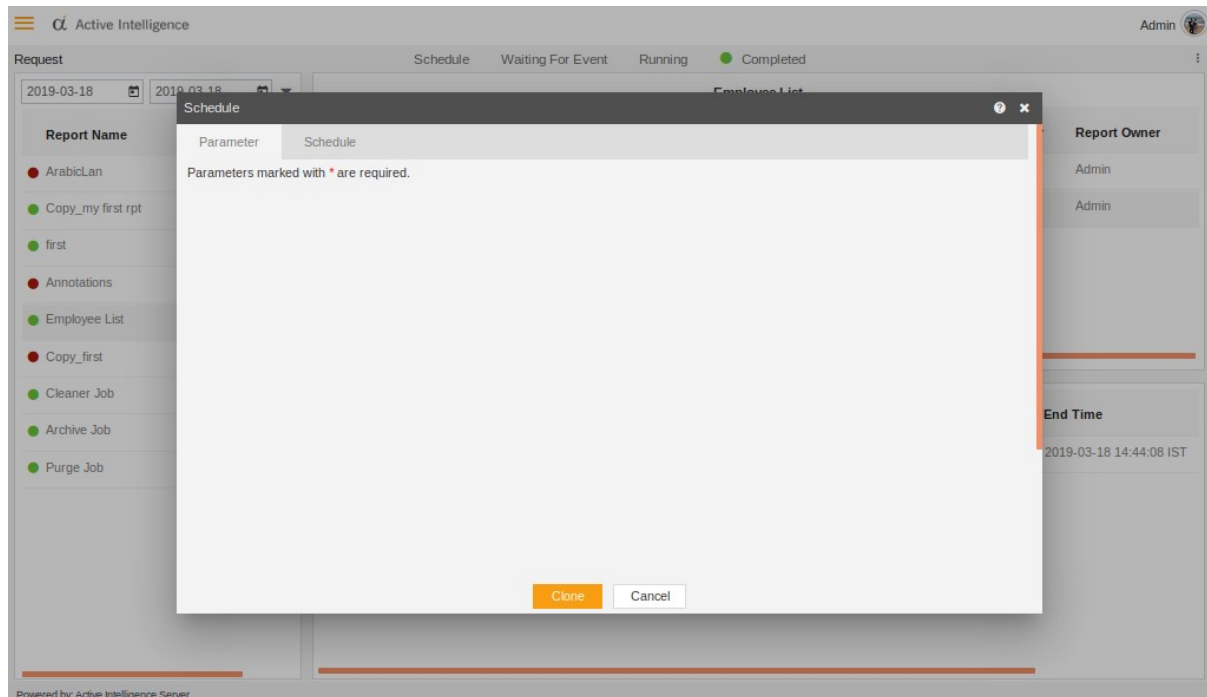
1. To clone a request you need to follow below steps:

- Select a request which you want to clone.
- As show in below image.



2. Click on button to clone a request (or right click on Status context menu will prompt to select).

- Schedule dialog box will appear as below:



3. Fill the dialog as desired and click on **Clone** button to clone a request.

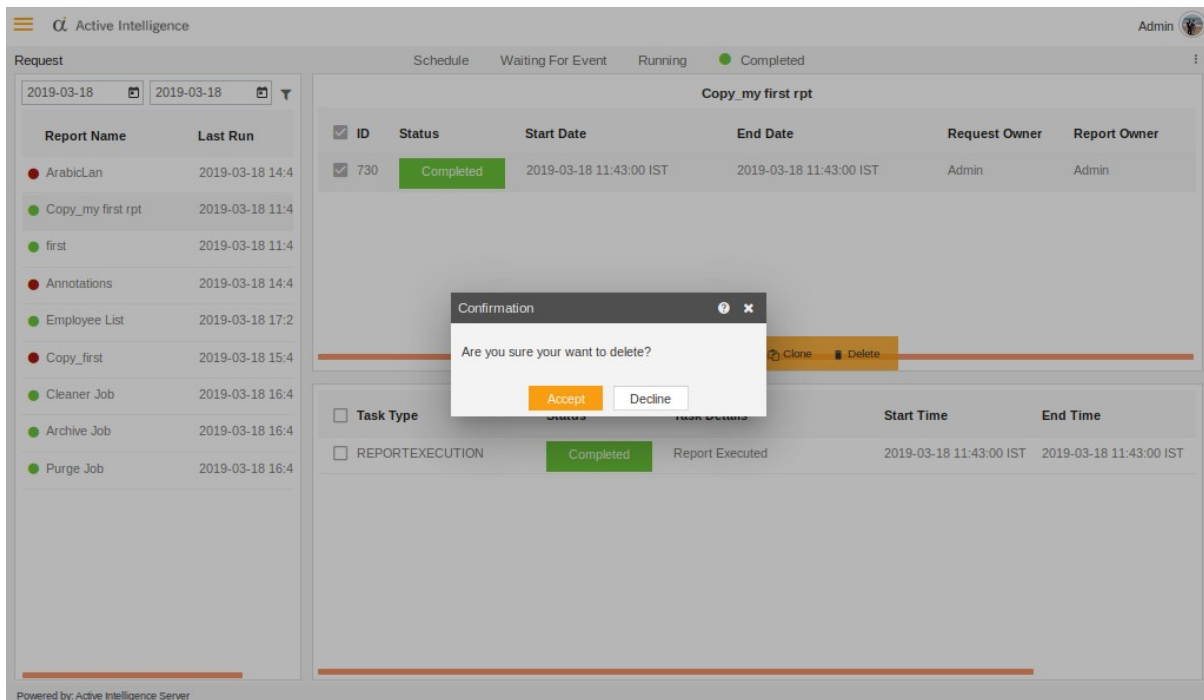
Delete Request

Delete Request allows you to delete any particular Request.

1. To delete request a user should select a request (make sure Checkbox selected), on only single request can be deleted at ones.

2. Click on button or right click on the selected request and Click Cancel to Cancel Request.

- Below is the image where the request is selected.



The Request has certain types such as:

- Archive
- Purge
- Cleaner Job
- Refresh
- Instant Message
- Select User

Alerts

Alerts section allows users to create alerts.

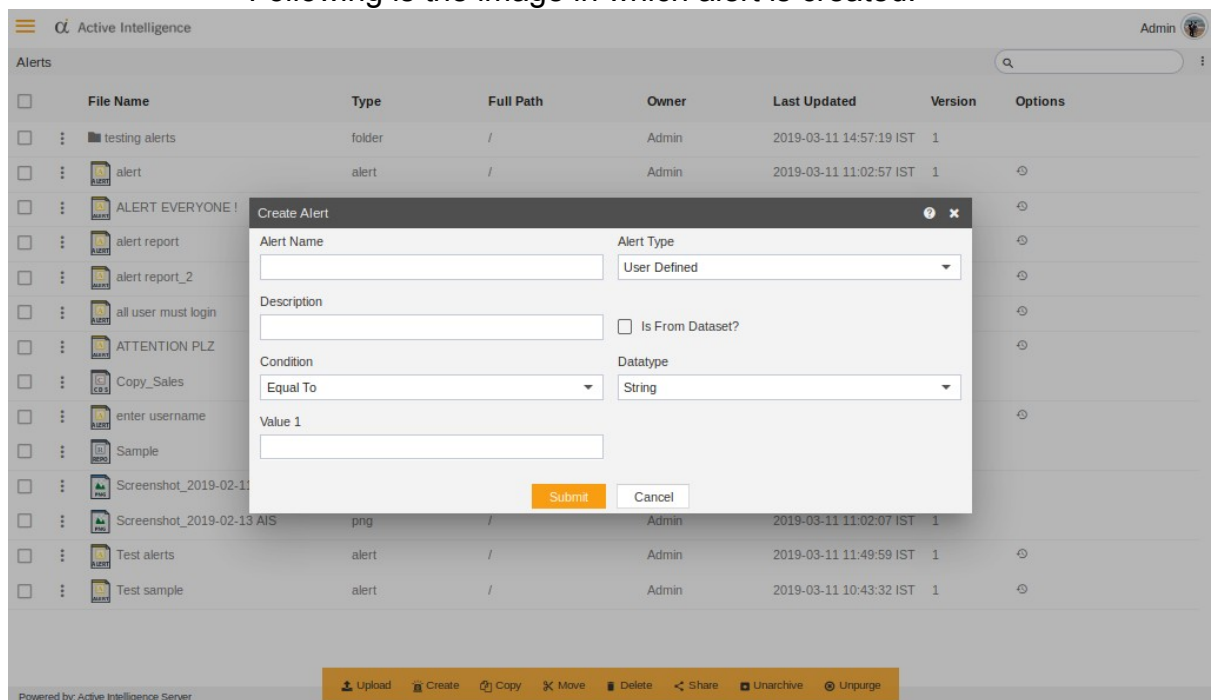
Alerts section has following functionalities :

- Upload
- Create
- Move
- Copy
- Delete
- Share
- Unarchive
- Unpurge

Create alert

1) The Users can create alerts either from bottom menu or from alerts context menu.

- Following is the image in which alert is created.

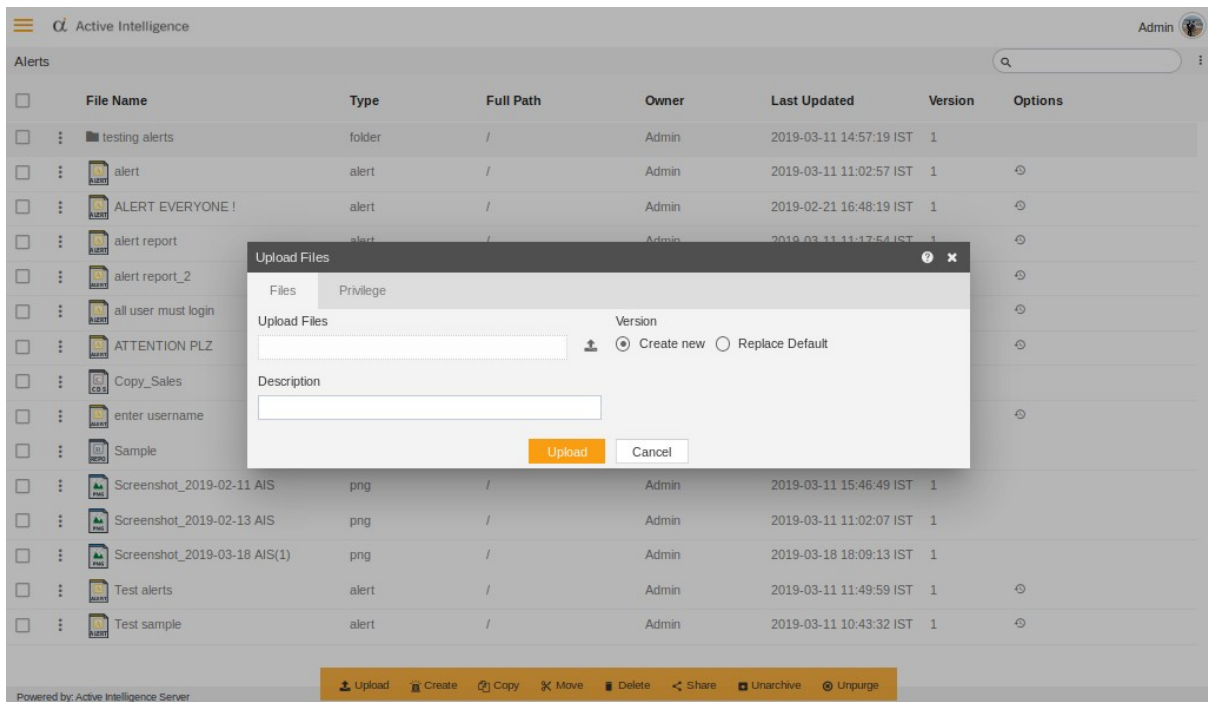


2) Click **Submit** button to create the alert.

Upload

1) Upload allows user to upload the desired files.

- Below is the image of file uploading.

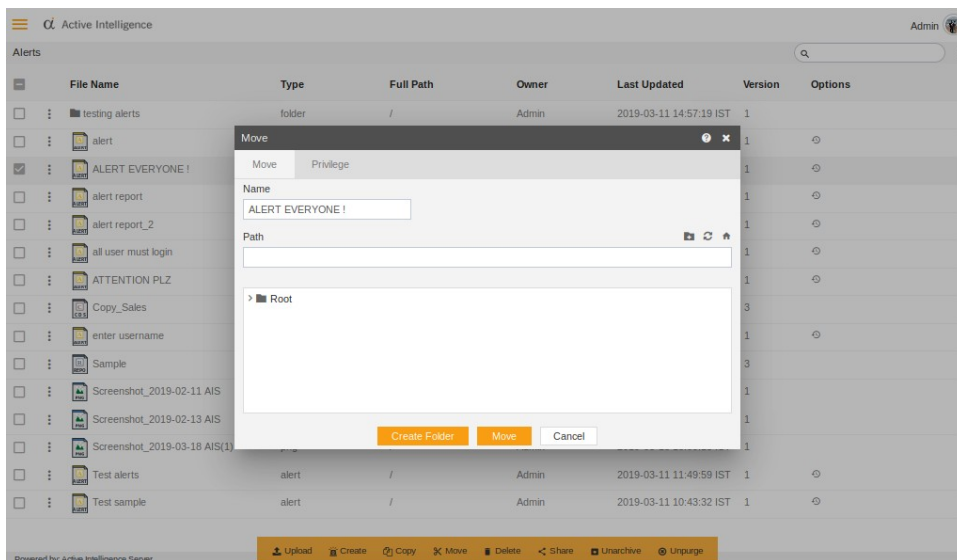


2) Click at **Upload** icon to upload the file.

Move

Alerts can be moved to the desired folder by clicking the move option from the bottom menu or else by right-clicking the context menu.

- Below is the image when user selects move option.

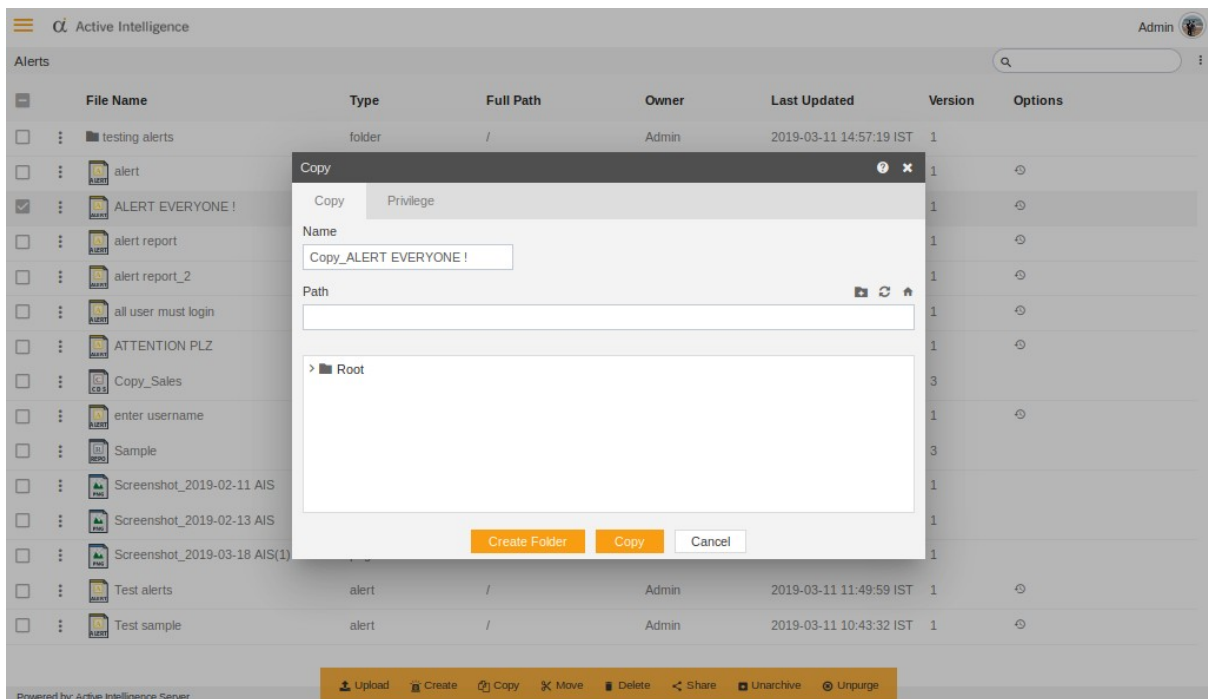


- 2) To copy at any new folder, create new folder by clicking **Create Folder** icon.
- 3) Click **Move** icon to move the alert.

Copy

1) A user can copy alerts by using the copy option from the bottom menu or from the context menu.

- Below is the image to copy any alert.

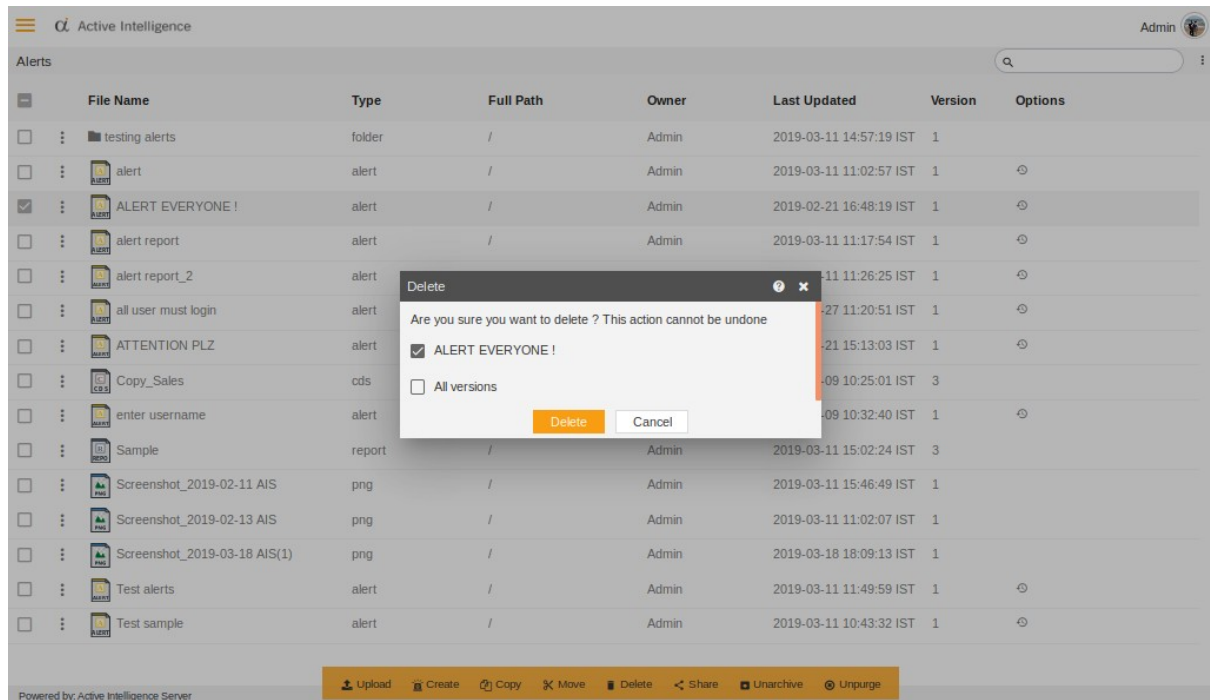


2) Click **Copy** icon to copy the alert.

Delete

1. Alerts can be deleted by clicking **Delete** icon from the bottom menu or from the context menu of alerts.

- Following is the image of how to delete the alert.

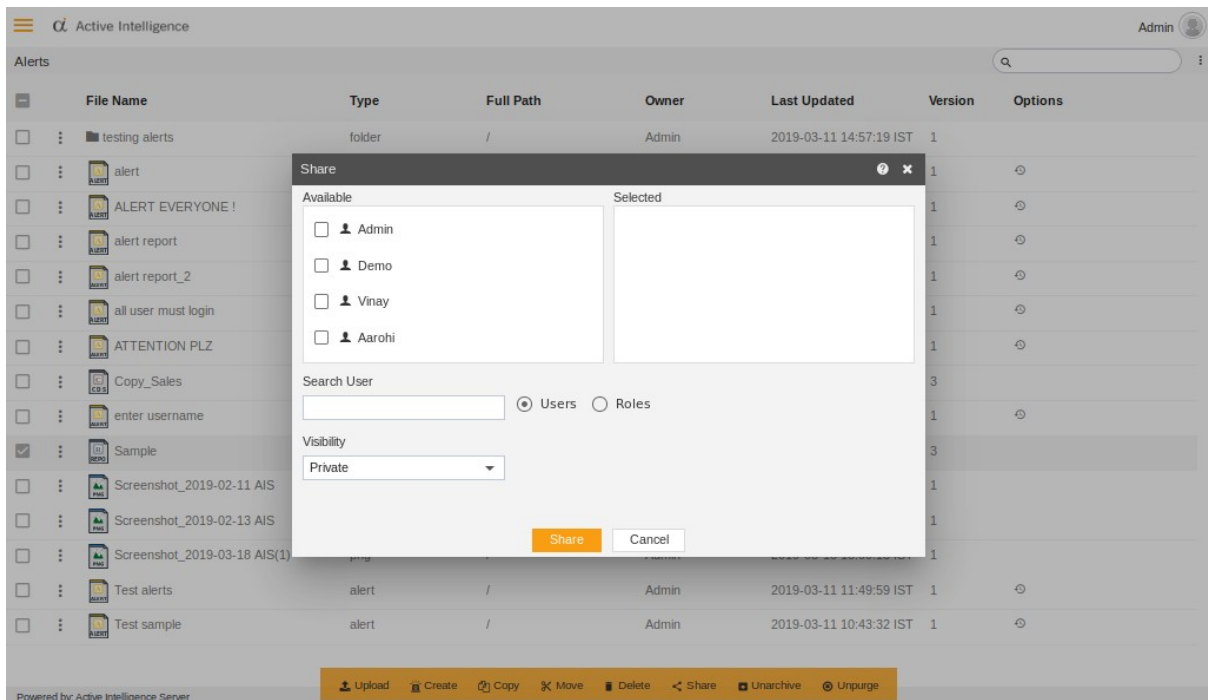


- 2) Click **Delete** button to delete the selected alert or multiple alerts.

Share

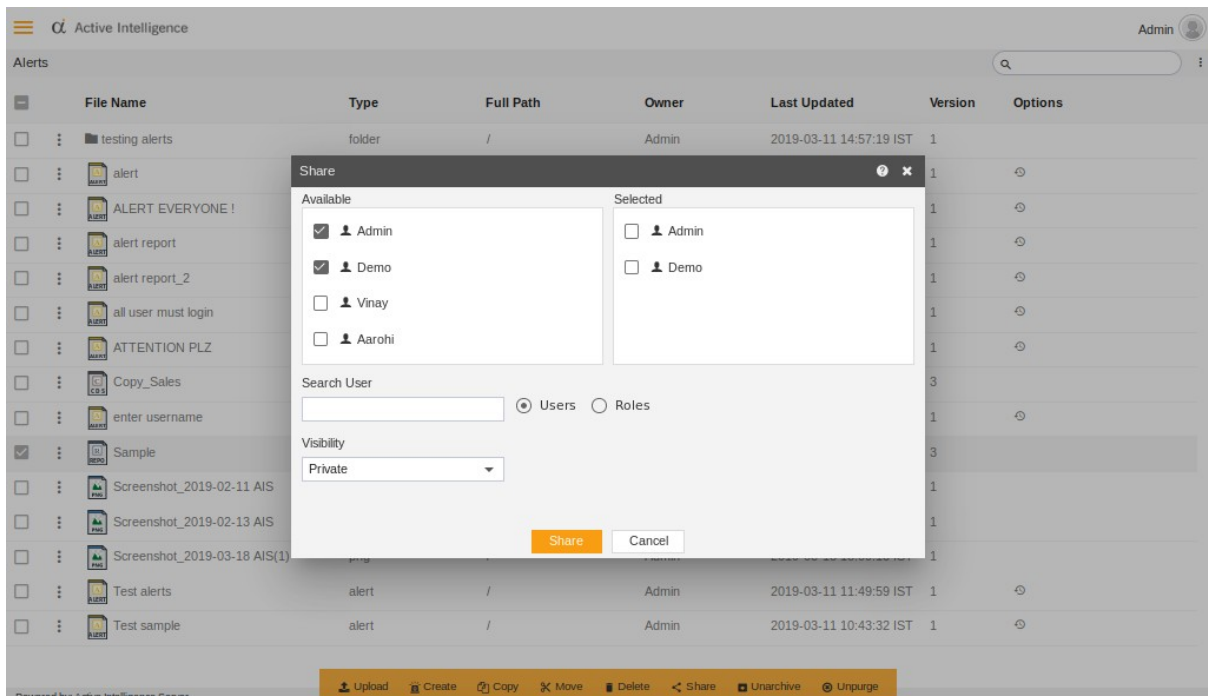
Share is used to share any alert with other users.

1. The user can share alerts by clicking **Share** icon from the bottom menu or from context menu of alerts.
 - Below is the image of how to share an alert with other users.



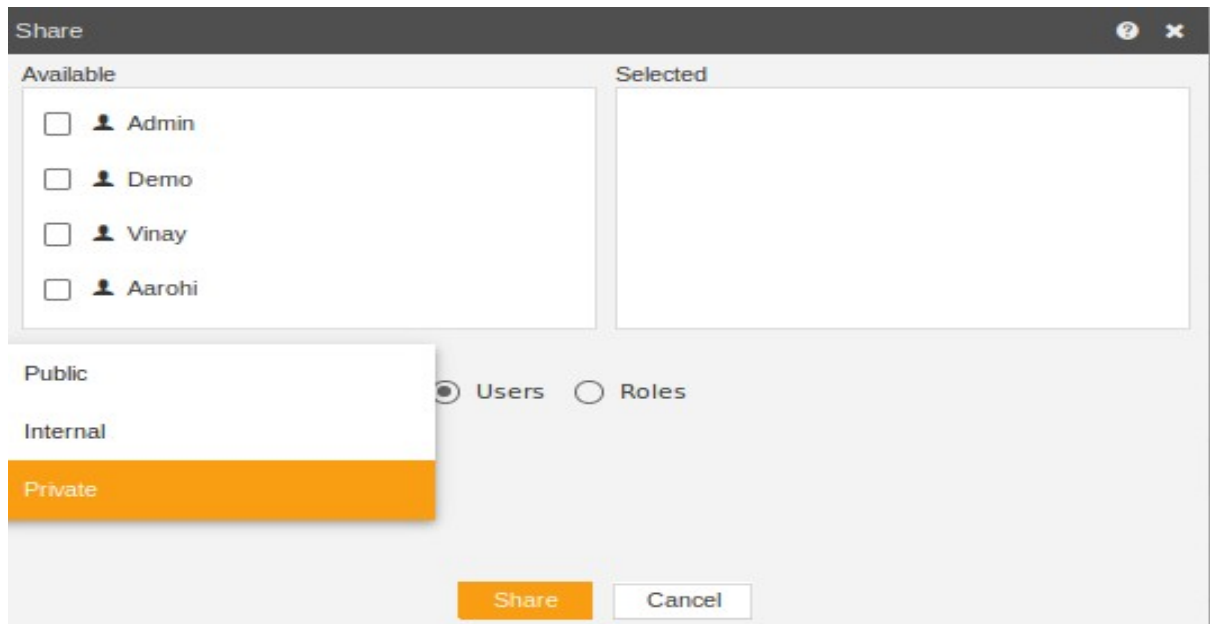
2) Select the user with whom you want to share an alert.

- Below image shows how to select the other user to share the selected alert.



3) Search the user from Search User Users Roles textbox.

4) User can change the visibility to private, Internal or Public mode by clicking these options.

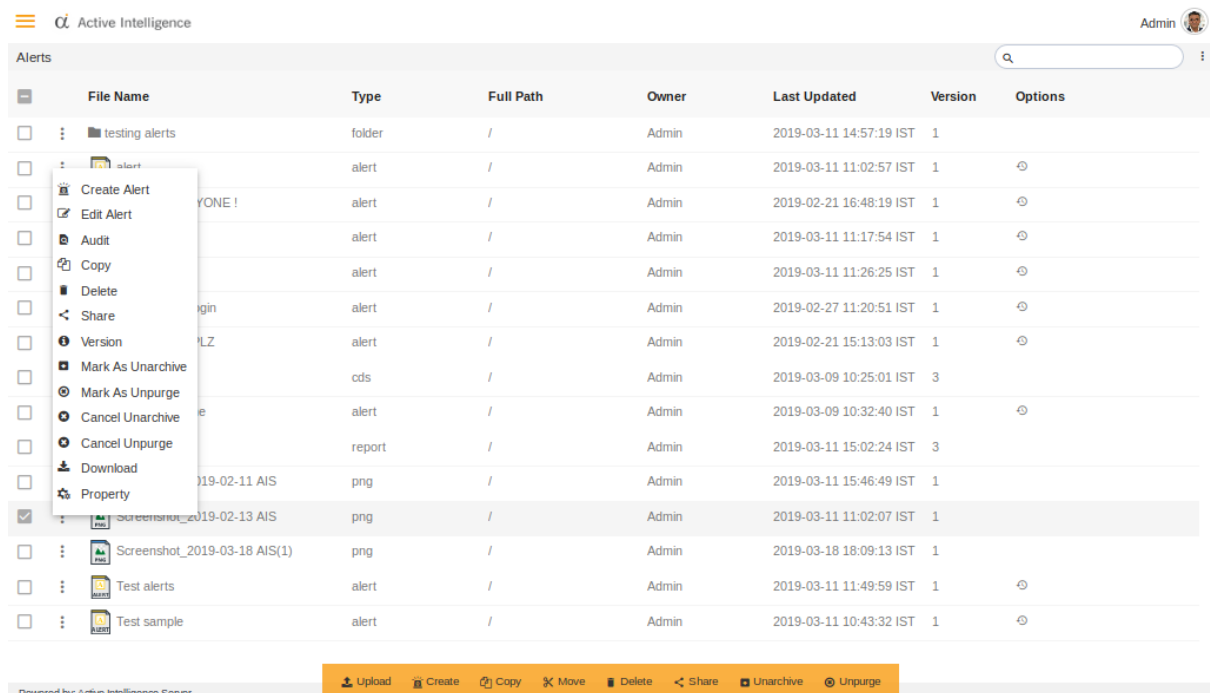


5) Click **Share** button to share the alert.

Unarchive


To Unarchive file and folders follow these steps:

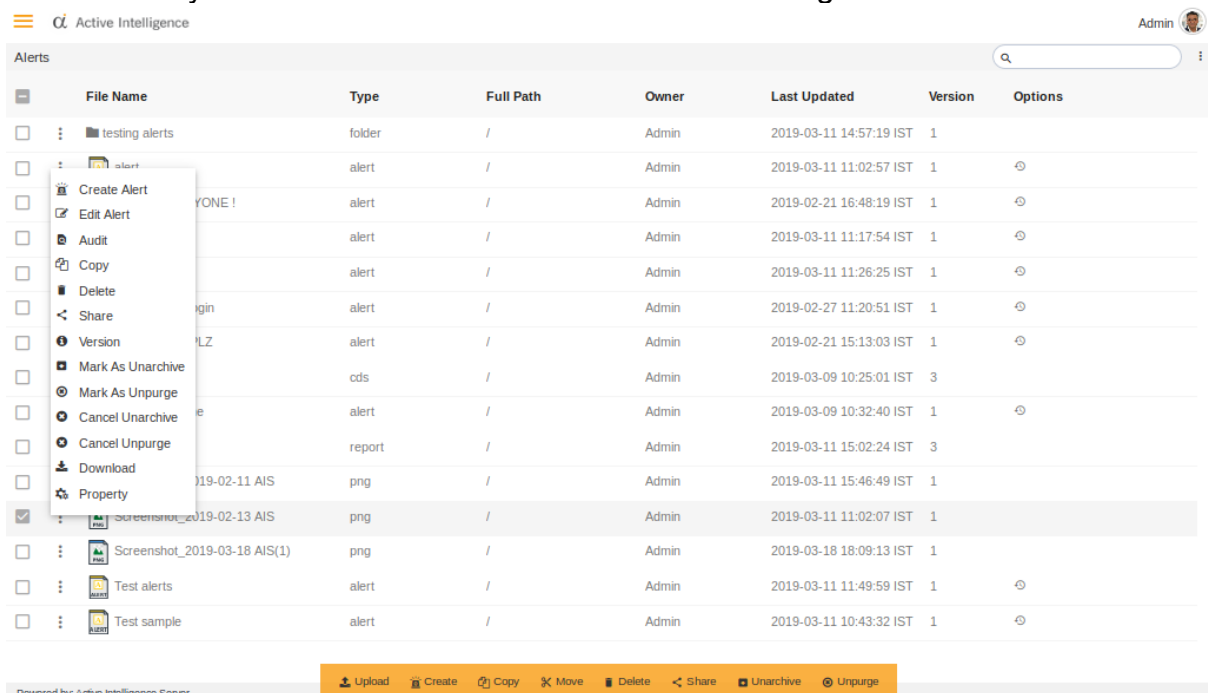
1. Select the file or folders you want to Mark as Unarchive.
(Note: multiple file and folders or combination of file and folders can be selected).
2. Right-click and select the **Mark As Unarchive** button from the context menu or directly from the bottom menu as shown in the image below:



Unpurge

To Unarchive file and folders follow these steps:

1. Select the file or folders you want to Mark as Unpurge (Note: multiple file and folders or combination of file and folders can be selected).
2. Right click and select the  Mark As Unpurge button from the context menu or directly from the bottom menu as shown in the image below:



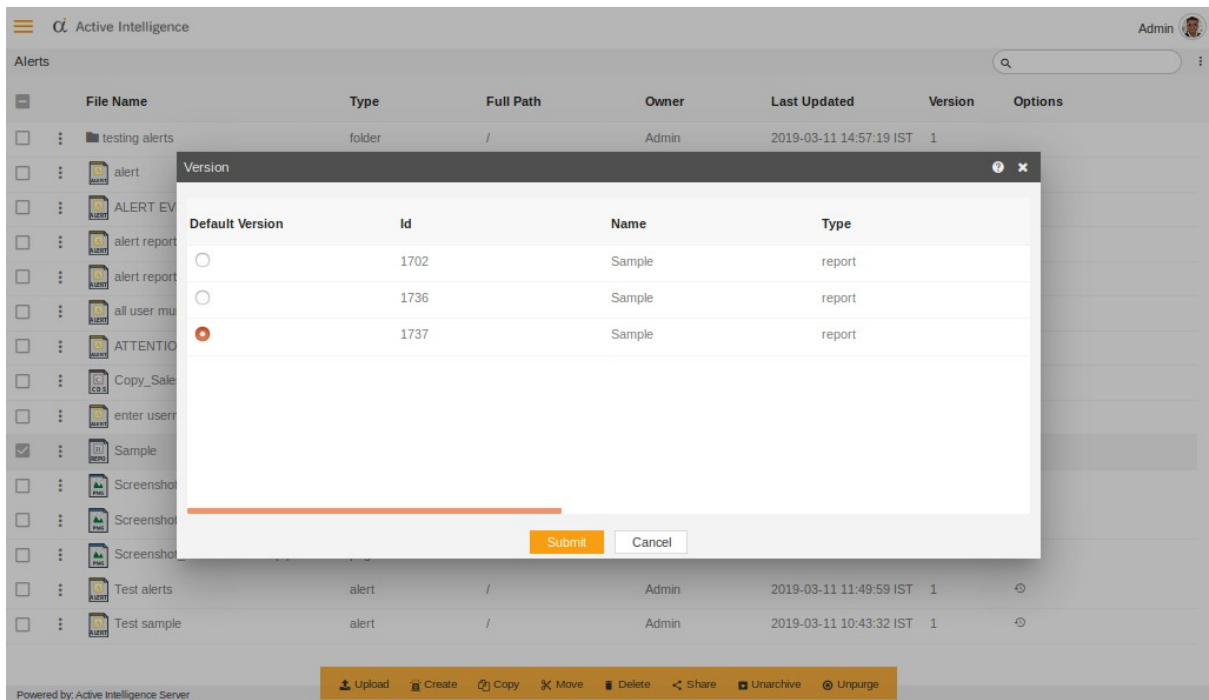
Download

The User can download the selected alert by clicking download option from context menu.

Version

Version option shows the number of versions of the selected alert as well as the version which user is using.

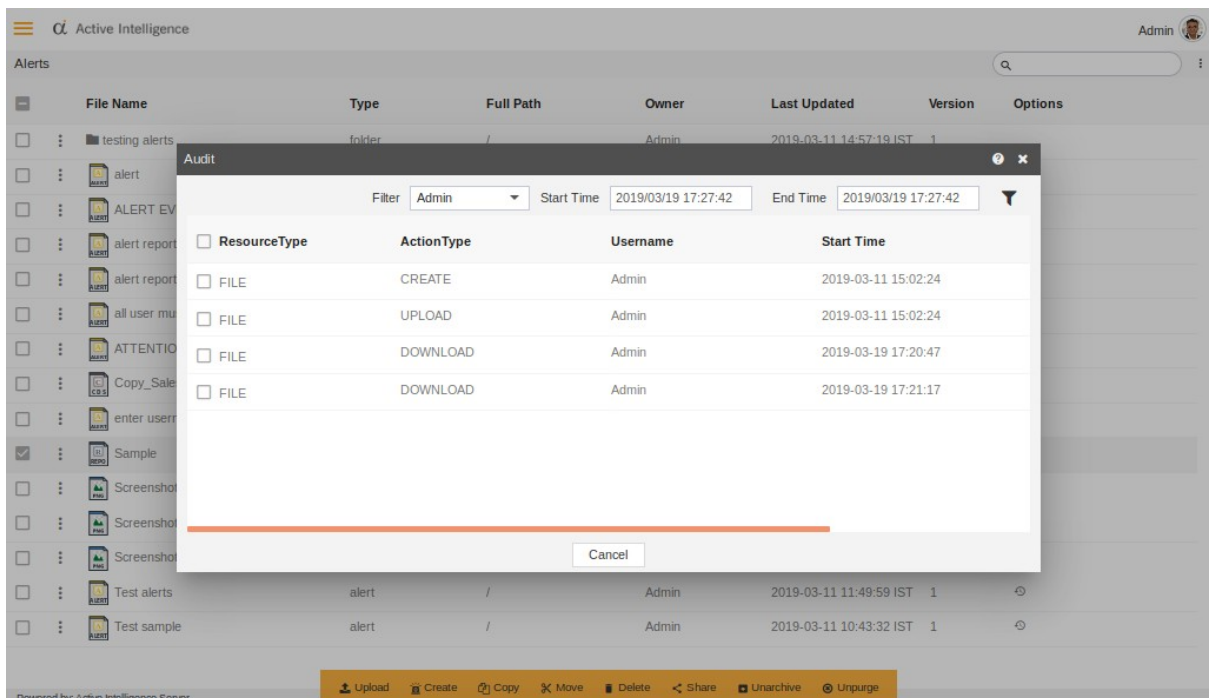
- Following is the image describing number of versions of selected alert.



Audit

Audit shows the actions like when the user created, uploaded or downloaded any particular file.

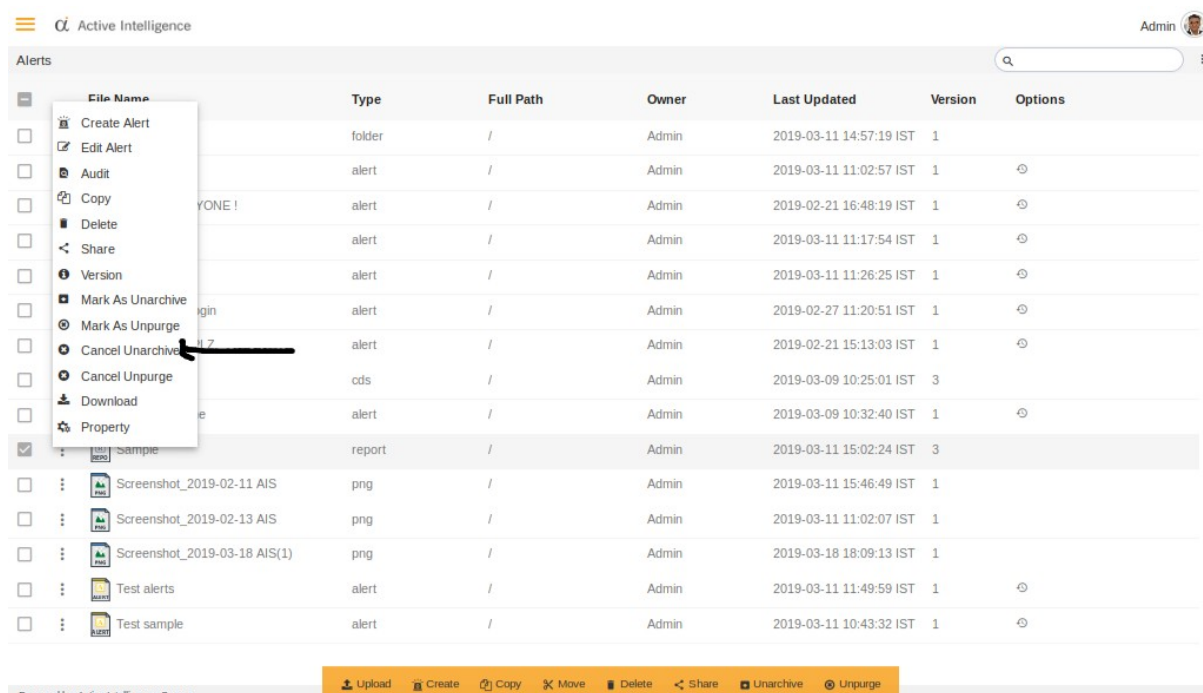
- Following image describes the audit option.



Cancel Unarchive

To Cancel Unarchive file and folders follow these steps:

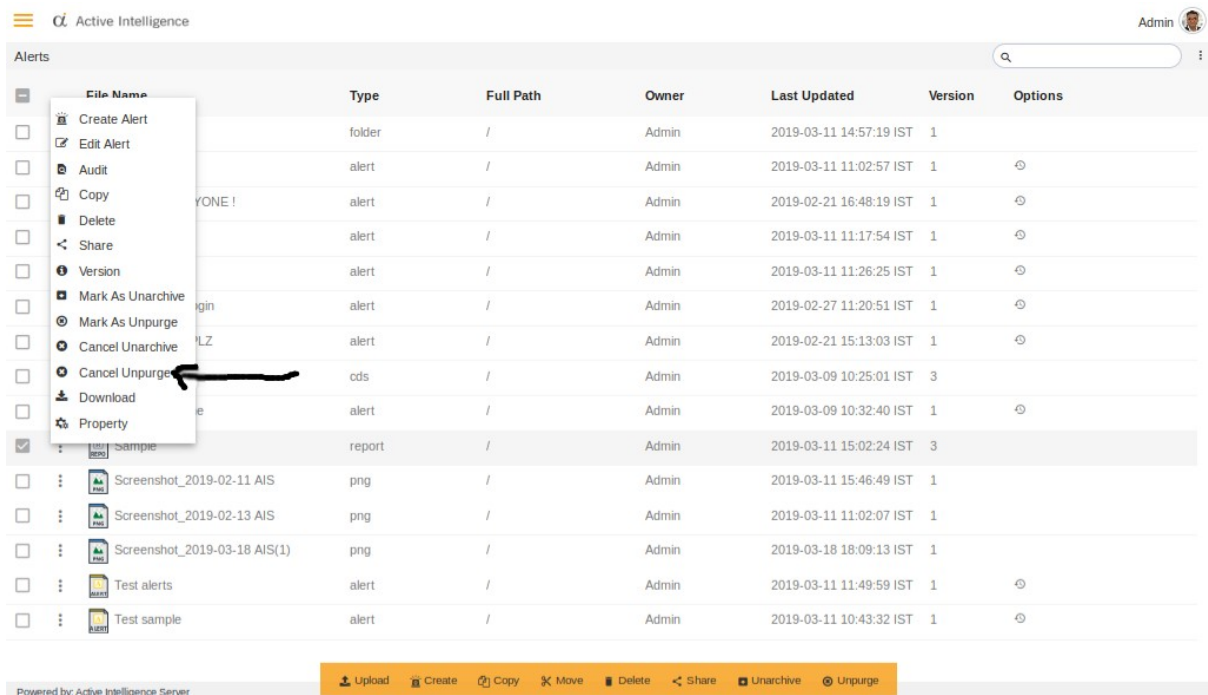
1. Select the file or folders you want to Cancel Unarchive.
(Note: multiple file and folders or combination of file and folders can be selected).
2. Right click and select the **Cancel Unarchive** button from the context menu as shown in the image below:



Cancel Unpurged

To Cancel Unarchive or Unpurge file and folders follow these steps:

1. Select the file or folders you want to Cancel Unpurge.
(Note: multiple file and folders or combination of file and folders can be selected).
2. Right-click and select the **Cancel Unpurge** button from the context menu as shown in the image below:




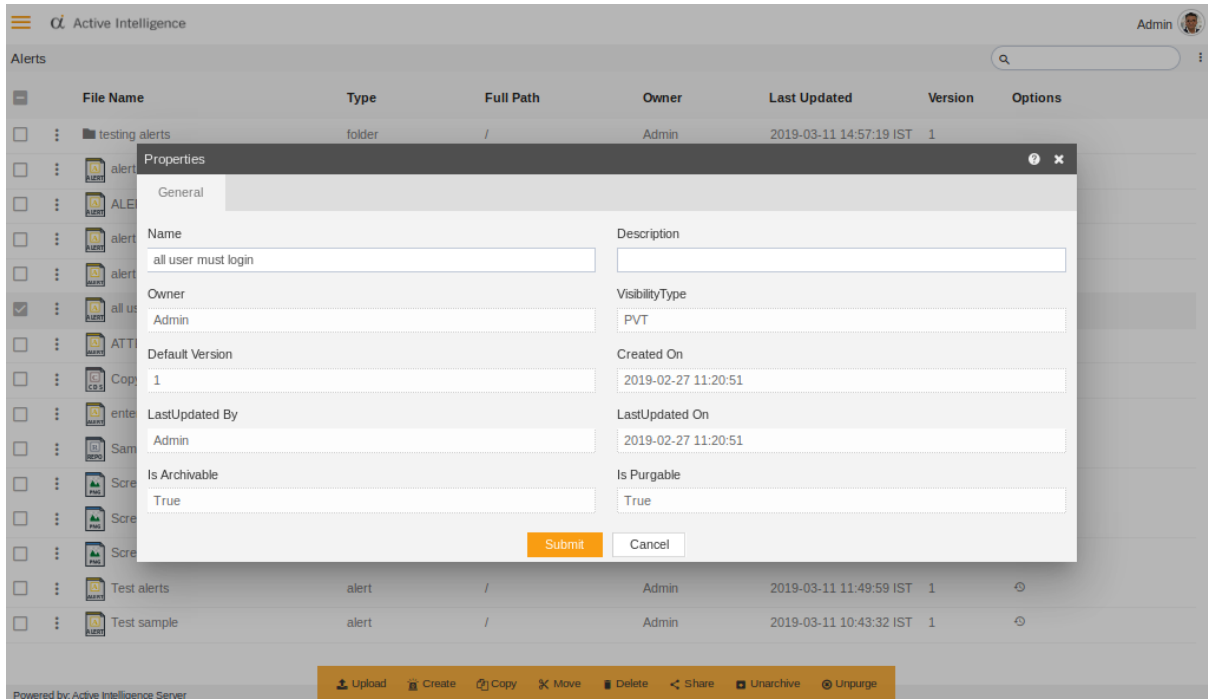
Property

Use Properties option of the file and folders for the following:

- To update the Name of the file and folders
- To change the Output Types of the File (Note: only applicable to files)
- To view file and folders Properties such as owner information, last updated by, the file created date, archive and purge options, and file visibility i.e. (Private, Internal, Public) and much more.

To view the Property for the file or folder follow the steps below:

1. Select file or folder you wish to see properties for or update the information such as Name or Output Type by selecting  Properties from the context menu, following dialog box will appear as shown in the image below:



2) The Name can be updated (Note: The above image is taken from the Folder Properties, File Properties will have additional tab for Output Type which will enable users to select/unselect the file Output visibility Type i.e pdf, doc, html etc.).

3) Finally click **Submit** button to save the changes to the file Properties, if any.

Alert Reports



Alert reports shows the details of alerts in report form.

- It has name of the alert, status, Date executed, Executed By, Actual value, Condition, Value one, Value two.
- Below image shows the alert reports.

The screenshot shows the 'Alert Reports' interface with a table containing the following data:

| Name | Status | Date Executed | Executed By | Actual Value | Condition | Value One | Value Two |
|---|-----------|-------------------------|-------------|--------------|-----------------------|-----------|-----------|
| <input checked="" type="checkbox"/> Test alerts | SATISFIED | 2019-03-11 11:50:46 IST | Admin | 48.81 | Greater Than Equal To | 47 | |
| <input type="checkbox"/> Test alerts | SATISFIED | 2019-03-11 12:15:09 IST | Admin | 48.81 | Greater Than Equal To | 47 | |

Administration

After login into AIV , you can navigate to administration section from the   Active Intelligence menu.

Administrators can use this section to manage repository, users, roles, and file type in the server.

Administration tab has following options:

Repository

The Repository can be used to manage various artifacts (including analytic, approval, dashboard, datasets, data source, list of values, mapping, merge, parameters, quick run, reports, resources, widget) created by users. The Repository contains all the artifacts created by users.

Following are the steps to use Repository:

1. Click Administration from the top menu -> Click Repository.
2. This will redirect the user to Repository section which will have further two drop down menu on the right hand top corner which are User and Category.
3. Select the desired User and Category which will then provide the detail list of the selected user artifacts as shown below:

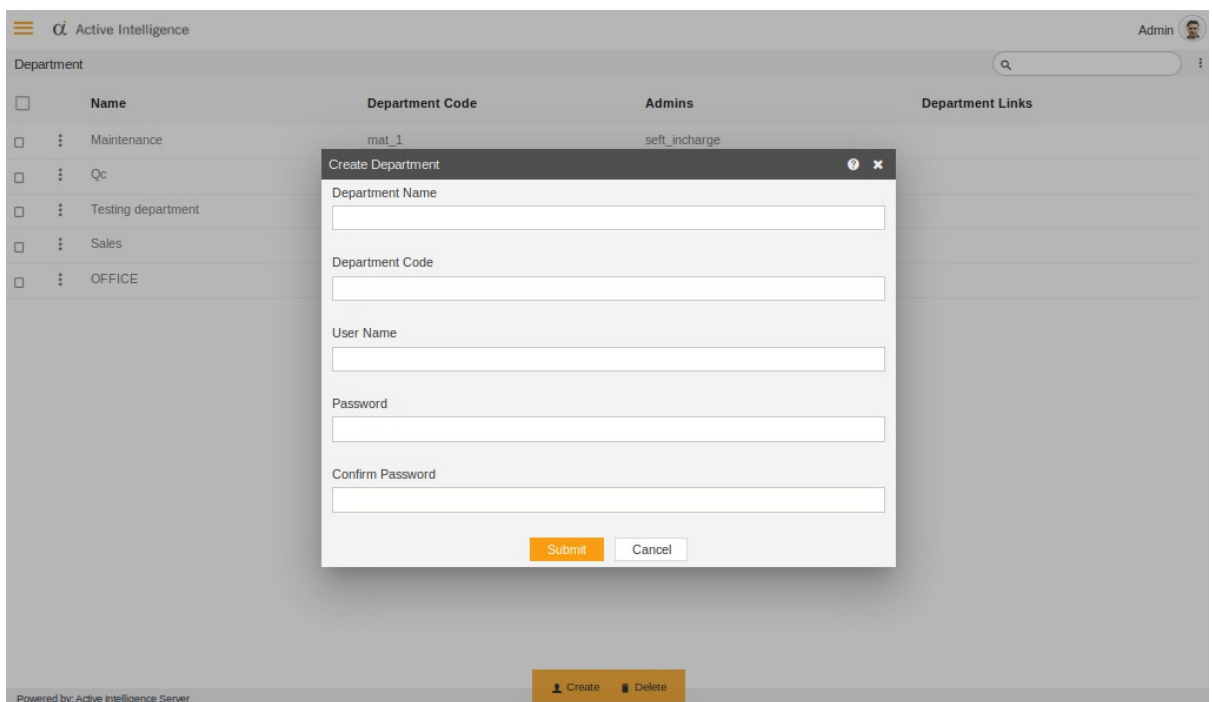


Department

Department is used to create an individual user to identify each department besides the default.

Create Department

Create the department from the bottom 'create' option or from the rightmost icon. Then enter the values. Go to submit and thus your department is created.

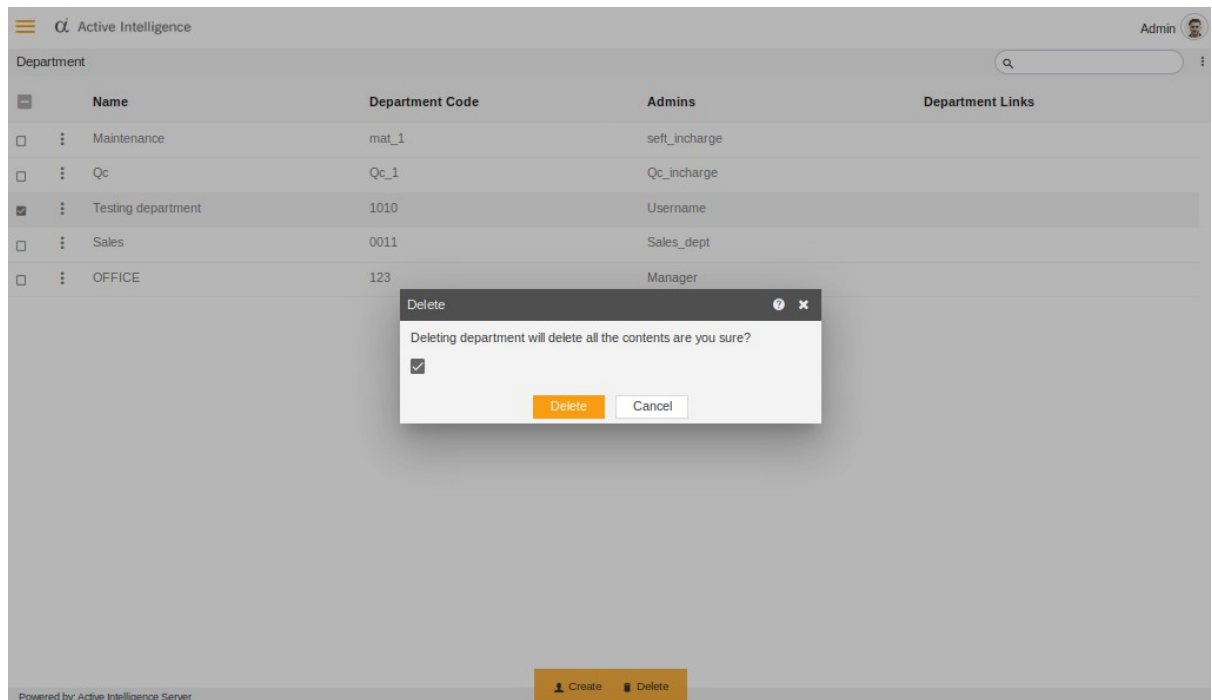


The screenshot displays the 'Active Intelligence' web interface. At the top, there is a navigation bar with a menu icon, the text 'Active Intelligence', and a user profile icon labeled 'Admin'. Below this is a table titled 'Department' with columns for 'Name', 'Department Code', 'Admins', and 'Department Links'. The table contains several rows, including 'Maintenance', 'Qc', 'Testing department', 'Sales', and 'OFFICE'. A modal window titled 'Create Department' is open in the center, featuring five input fields: 'Department Name', 'Department Code', 'User Name', 'Password', and 'Confirm Password'. At the bottom of the modal are 'Submit' and 'Cancel' buttons. At the bottom of the main interface, there is a 'Create' button with a person icon and a 'Delete' button with a trash icon. The footer text reads 'Powered by: Active Intelligence Server'.

You can check this in users where admin and department code can be observed.

Delete Department

Same way if you want to delete then click 'delete' option from the bottom or select 'delete' from the elapses.



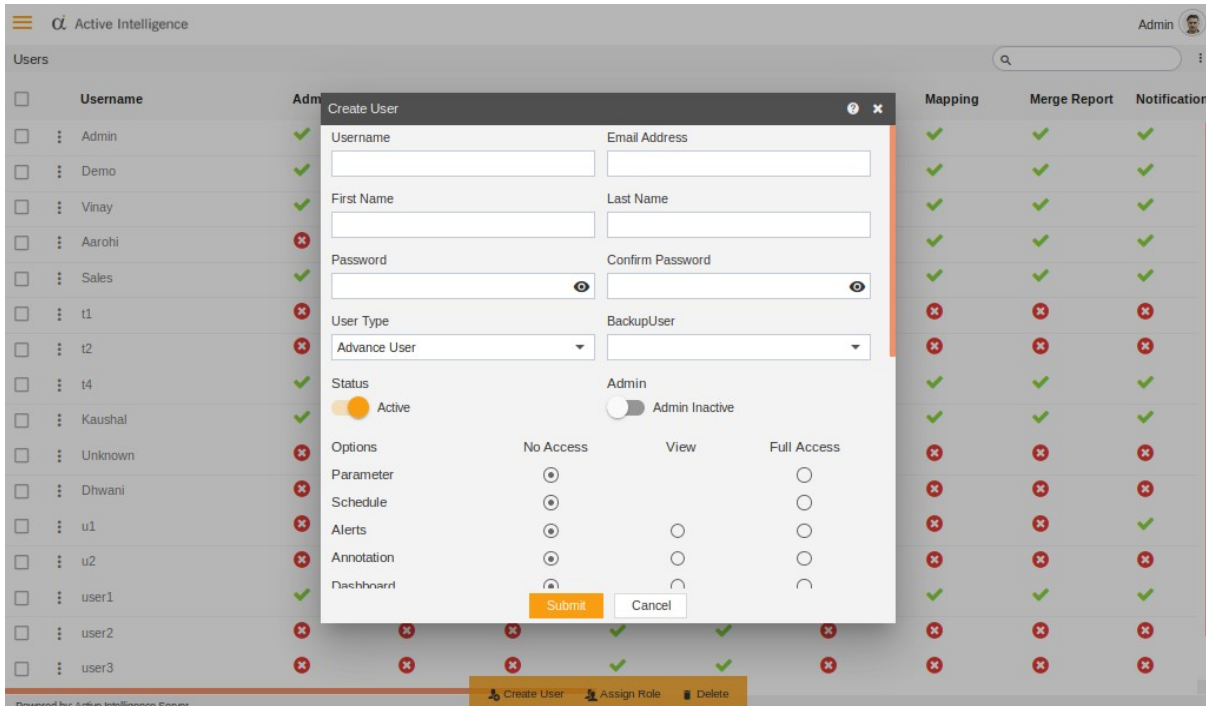
Users

Only users with Administrator privileges have access to Users section (Users information can be seen by clicking Users under Administration tab from the main menu bar), using Users option Administrator can:

Create User

To Create a user, follow these steps: (Only users with Administrator privileges have access to Users section). There are multiple ways you can Create a User (select any User Name whilst in Users section and right click and select from the context menu, select create from the footer menu bar. Click 'create' from the bottom menu. At last click, the 'Submit' button and the user will be created.

The following dialog box will appear:



Edit User:

To Edit user, follow these steps: (Only users with Administrator privileges have access to Users section).

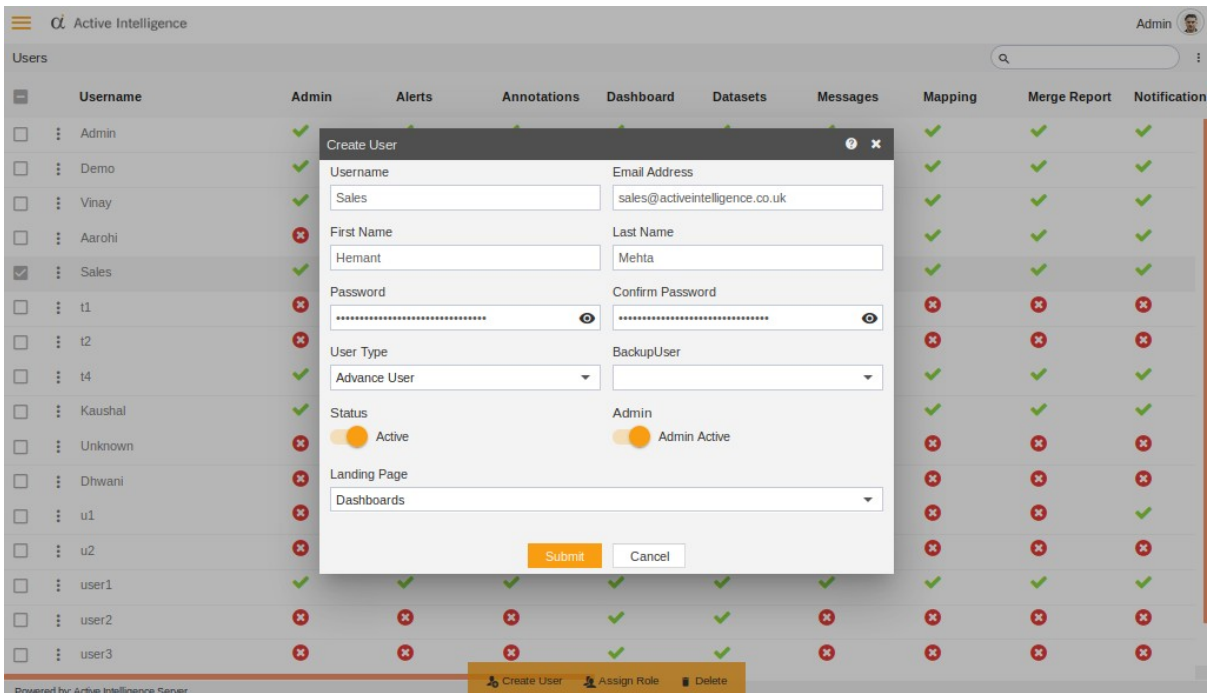
To Edit User select the desired Username and right click and select edit user from the context menu.

An administrator can Edit the User properties

(Note: Username cannot be changed).

Finally, click on Submit to save the changes to the User.

The following dialog box will appear:



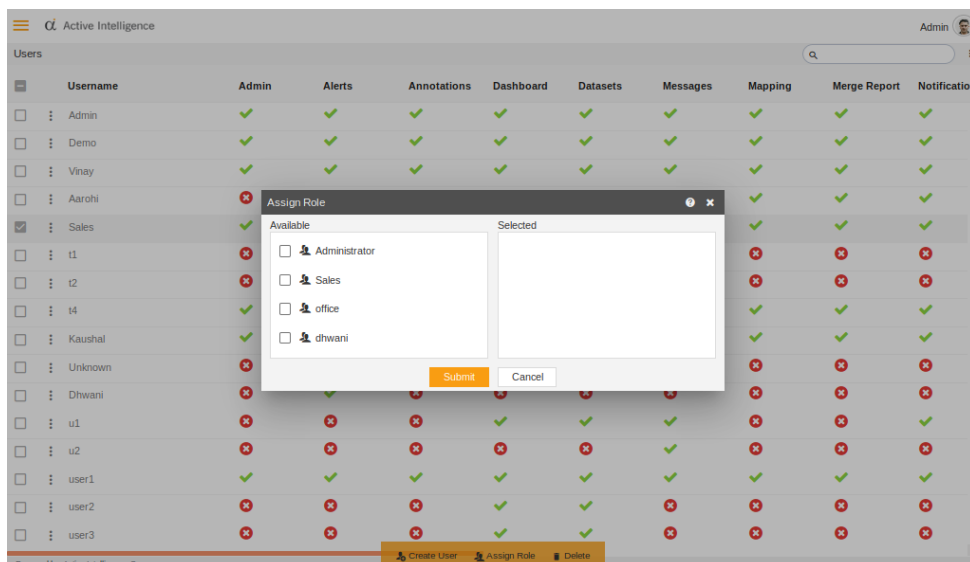
Assign Role:

To Assign Role to a user, follow these steps: (Only users with Administrator privileges have access to Users section)

There are multiple ways you can Assign Role to a User (Select the desired Username and right click and select assign role from the context menu and from the footer menu bar. (Note: Roles can be Assign to one user at a time)

Click assign role button from the footer menu bar. At last click 'Submit'.

The following dialog box will appear:

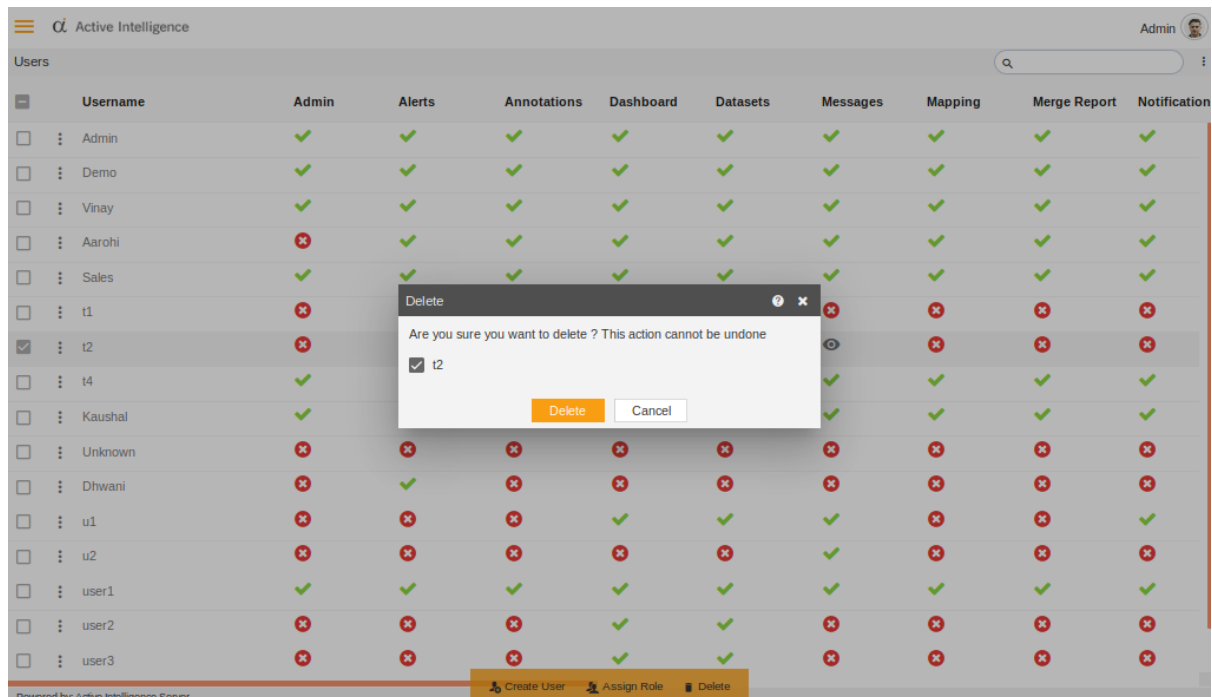


Delete

To Delete a User, follow these steps:(Only users with Administrator privileges have access to Users section)

There are multiple ways you can Delete a User (select the desired Username and right click and select delete from the context menu or from the footer menu bar (Note: Administrator can only Delete one user at a time)

Select the User you wish to delete and Click the 'Delete' button from the footer bar. The following dialog box will appear:



Roles

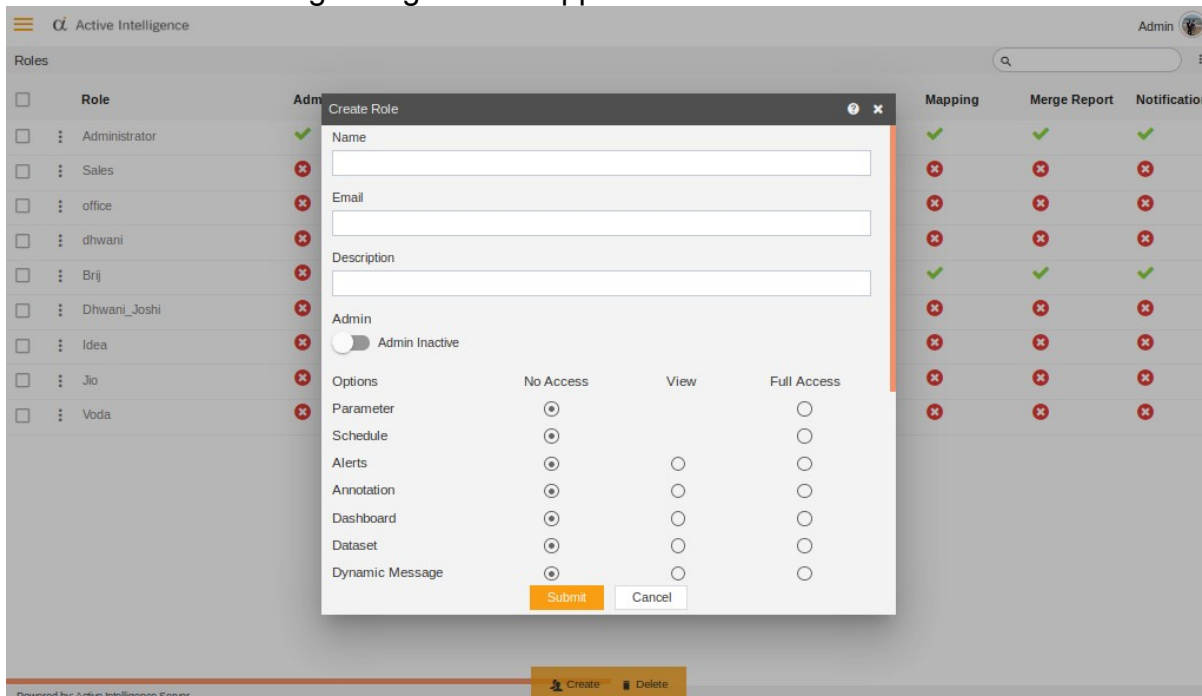
Only users with Administrator privileges have access to Roles section (Roles information can be seen by clicking Roles under Administration tab from the main menu bar), using Roles option Administrator can:

Create Role

To Create a Role, follow these steps: (Only users with Administrator privileges have access to Roles section)

There are multiple ways you can Create a Role select any Roles in Role section and right click and select Create Role from the context menu, select Create from the footer menu bar.

Click Create button from the footer menu bar.
The following dialog box will appear:



To create Admin Role, simply active Admin by moving the slider to the right, the bar will turn Green and all the other options will get disabled. (This will give role Admin privileges)

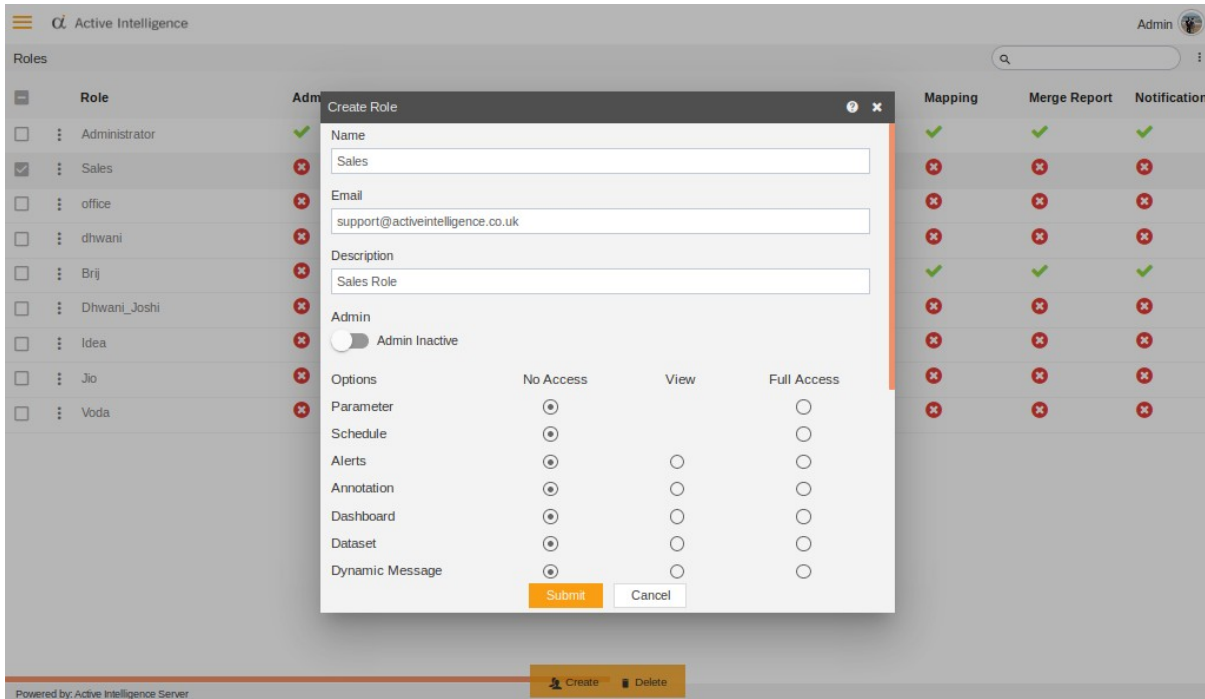
When Role is not part of Admin Role, Administrator can assign different privilege to the Role depending on the Role they are creating, this can be done using the various options, there are three Options available for each sections i.e. No Access (Users with this Role will have no access to the selected sections) View (Users with this Role will have only view privileges, that means they cannot edit or create new files in the selected sections) Full Access (Users with this Role will have all the rights such as create, edit, upload and delete the files for the sections with Full Access)

Click 'Submit' to create a new Role.

Edit Role

To Edit Role, follow these steps:

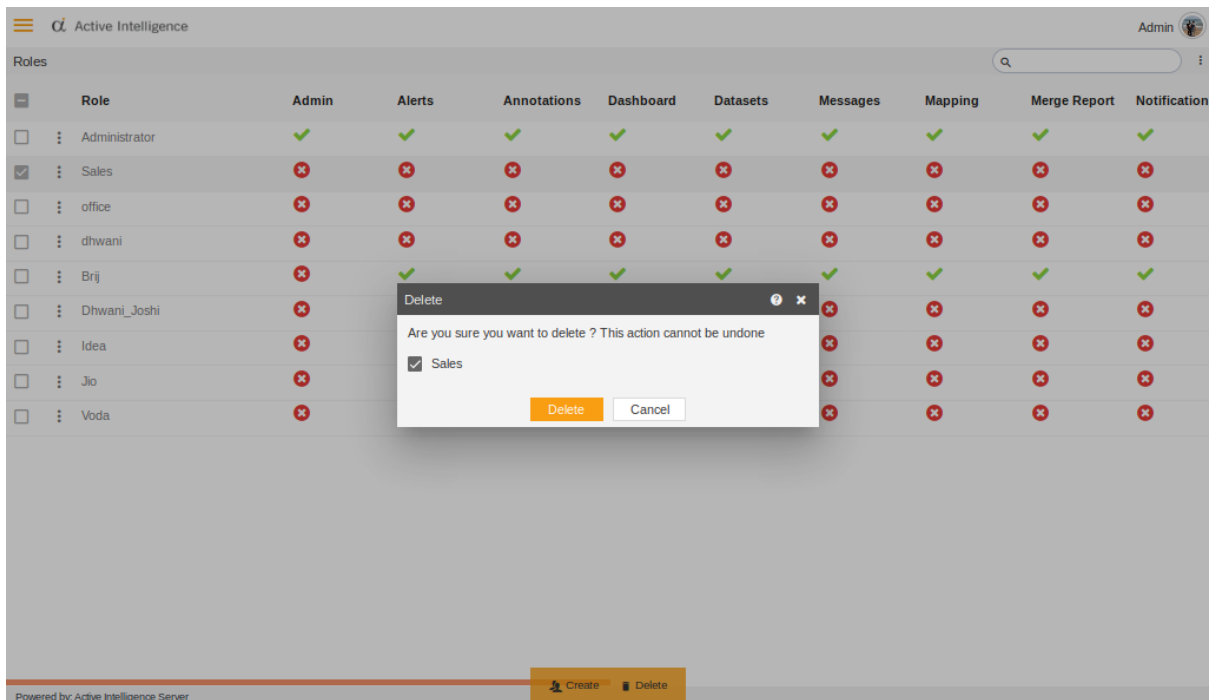
To Edit Role, select the desired Role and right click and select from the context menu.



Delete

To Delete a Role, follow these steps:

There are multiple ways you can Delete a Role: -select the desired Role and right click and select delete from the context menu or from the footer menu



File Types

Using File Types option Administrator can create a file in different formats such as docx, jasper, json, rptdocument, xls, etc. An administrator can define their own custom file type as well. File Types have the following functions:

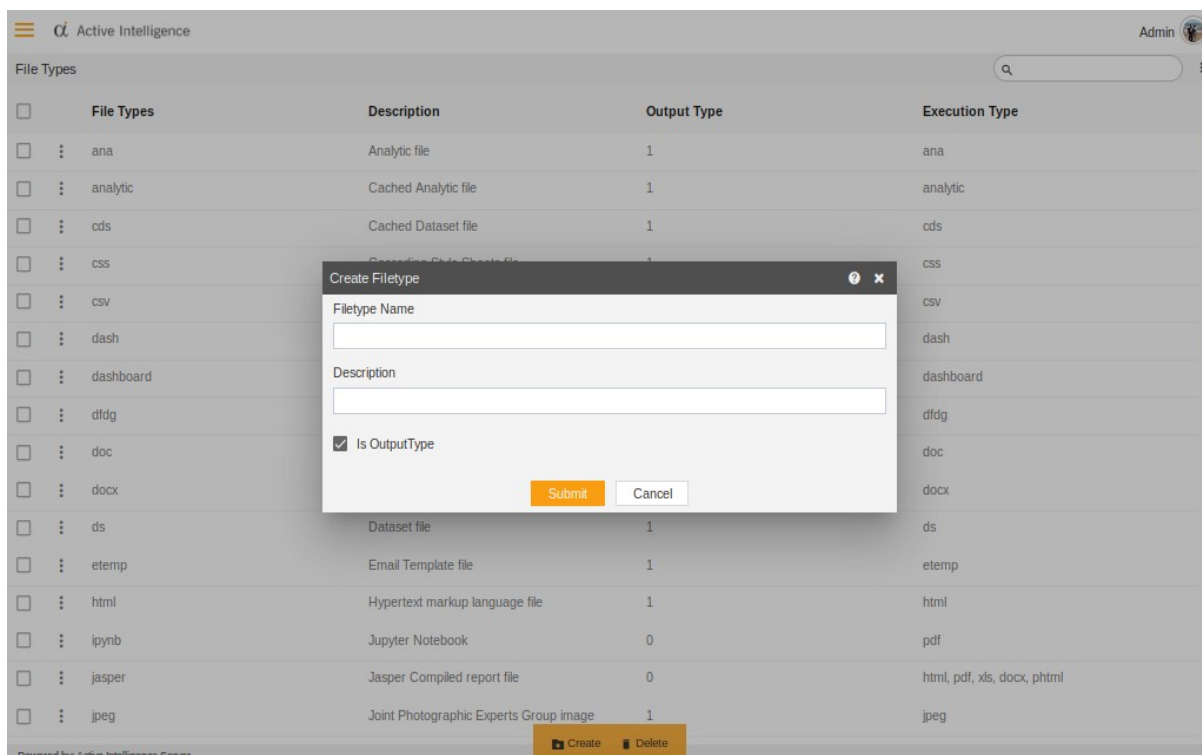
Create File Type

To Create a File Type, follow these steps:

Select any available File Types in File Types section and right click and select create file type from the context menu, select 'Create' from the footer menu bar.

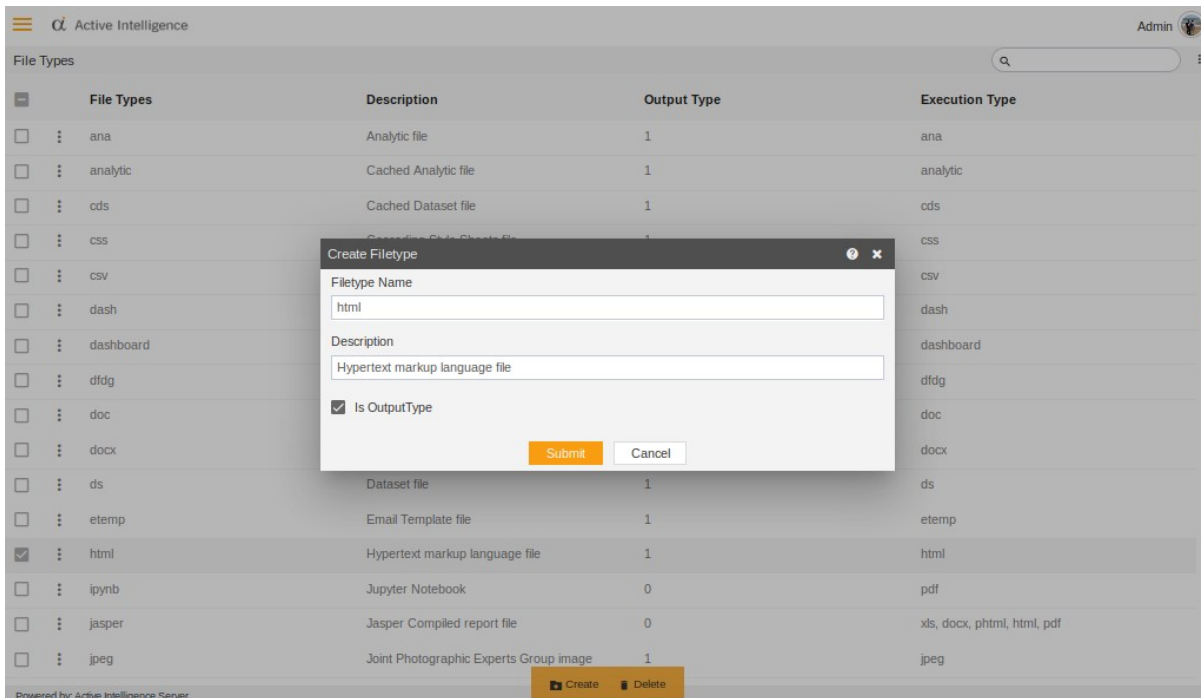
If the File Type you are creating is Output Type itself then check the box which is Is OutputType else select the existing File Type from the Available list.

Enter the values and hit the submit button. Your file type is ready.



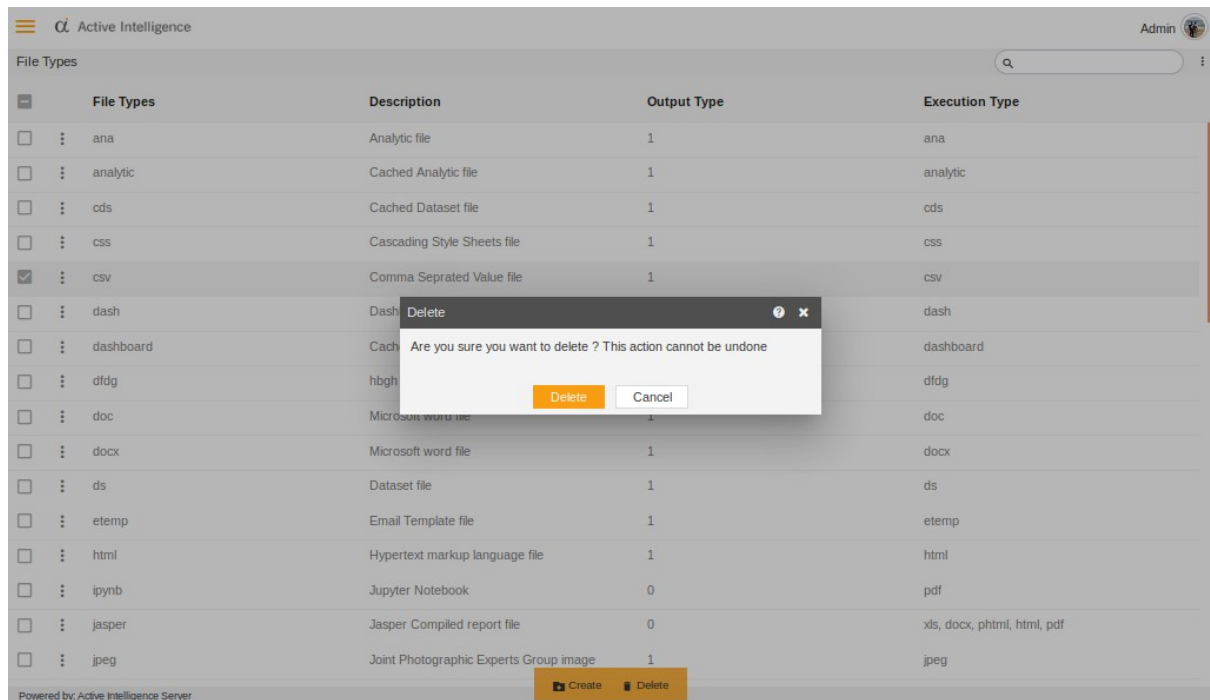
Edit File Type

To Edit File Type, select the desired File Type whilst in File Types section, right click and select edit file type from the context menu.



Delete File

To Delete a File Type, follow these steps:
Select the desired File Type and right click and select DELETE from the context menu or click DELETE from the footer menu bar.



License

License information can be seen by clicking License under Administration tab from the main menu bar.




Only users with Administrator privileges have access to License information

using License option you can:

- View the detailed License Information such as supported report designers version, license type, license expiry date and much more (as shown in the image below)
- Update the License or,
- Request a new License.

Control Panel

Control Panel enables user-specific customization such as Language settings i.e. Dutch, Arabic, French, Chinese, etc. set the Time zone, enable the Backup User and much more.

To access Control Panel click on the drop-down menu next to the user name  Admin  at top right corner and select  Control Panel

Control Panel enables the users to customize/update the below preferences:

Default Dashboard - Enable user to choose their Default Dashboard from the list of available dashboards.


Landing Page - Landing page can be user specific, which means each time when a user logs in to AIV the section set as a Landing Page Will be displayed as a first page.

Locale (Language) - User can set any Locale (Language) from the list of available Locale (Languages), this will enable a user to see all the menu items in their native/set language.

Time zone - Set the server Time Zone of your own choice

Backup User - Backup User are the users who can manage user/users account in their absence from work or simply can't access AIV for the set duration of time, Assigned Backup User can access user/users account for a set time allowing an organization to operate smoothly in the user/users absence. The User can easily Enable or Disable Backup User also can specify future dates.

Change Password - User can make changes to their login password to AIV.

- Click on Save icon  on the top right corner in Control Panel for changes to take effect.



Default Dashboard
Jitendra



Landing Page
Visualization/GridDashboard



Locale

English



Timezone
+5:30 IST Indian Standard Time



Backup User
Disabled



Change Password

Logout

Users can directly logout from their recent using account with the help of logout option.

Common Functionalities

AIV application offers the following common functionalities across all the sections of the applications which are as follows:-

1. Send Instant Messages to other users
2. Search
3. Check Admin Details
4. Navigate to Control Panel
5. Access Help documents