GUIDE

erwin Data Intelligence

Report Management Guide 15.0

Quest

Legal Notices

Contact erwin

Understanding your Support

Review support maintenance programs and offerings.

Registering for Support

Access the erwin support site and click Sign in to register for product support.

Accessing Technical Support

For your convenience, erwin provides easy access to "One Stop" support for erwin Data Intelligence (erwin DI), and includes the following:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- erwin Support policies and guidelines
- Other helpful resources appropriate for your product

For information about other erwin products, visit http://erwin.com/.

Provide Feedback

If you have comments or questions, or feedback about erwin product documentation, you can send a message to distechpubs@erwin.com.

News and Events

Visit News and Events to get up-to-date news, announcements, and events. View video demos and read up on customer success stories and articles by industry experts.

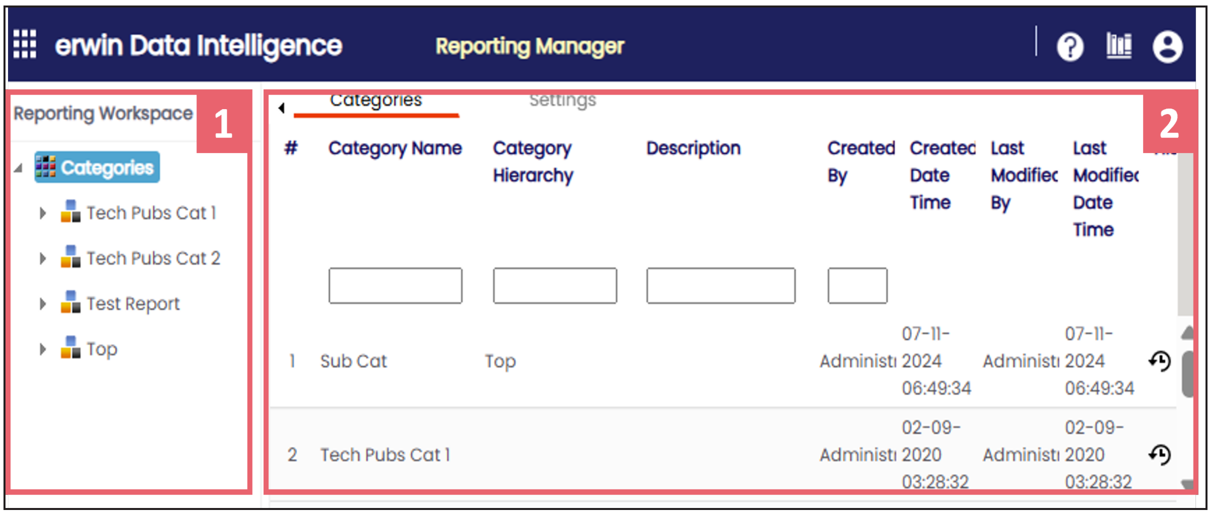
Contents

Reporting Manager

You can view, create, manage reports, and dashboard configurations from the Reporting Manager. You can also evaluate the team's productivity and create statistical reports. It involves creating and publishing reports and dashboards. From the Reporting Manager, you can generate custom reports of your data integration project using SQL queries.

To access the Reporting Manager, go to **Application Menu** > **Miscellaneous** > **Reporting Manager**.

The Reporting Manager dashboard appears:



UI Section	Function
1-Reporting Workspace	Use this pane to browse through categories, reports, and dashboards. It enables you to create and categorize reports and dashboards.
2-Right Pane	Based on the selection in the Reporting Workspace, use this pane to view and edit reports, dashboard details and category details.

From the Reporting Manager you can:

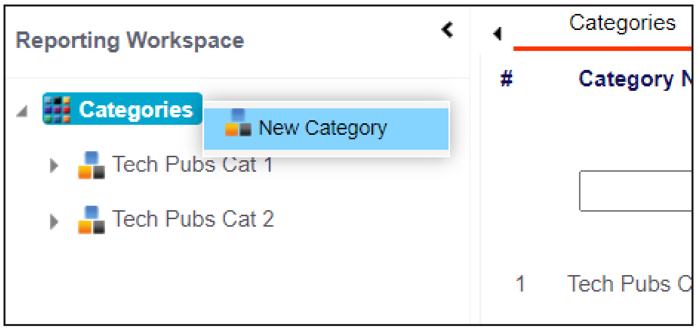
- Create custom reports
- Create dashboard

Creating Categories

You can create custom reports and group them under different categories. Also, you can create multiple reports under a category.

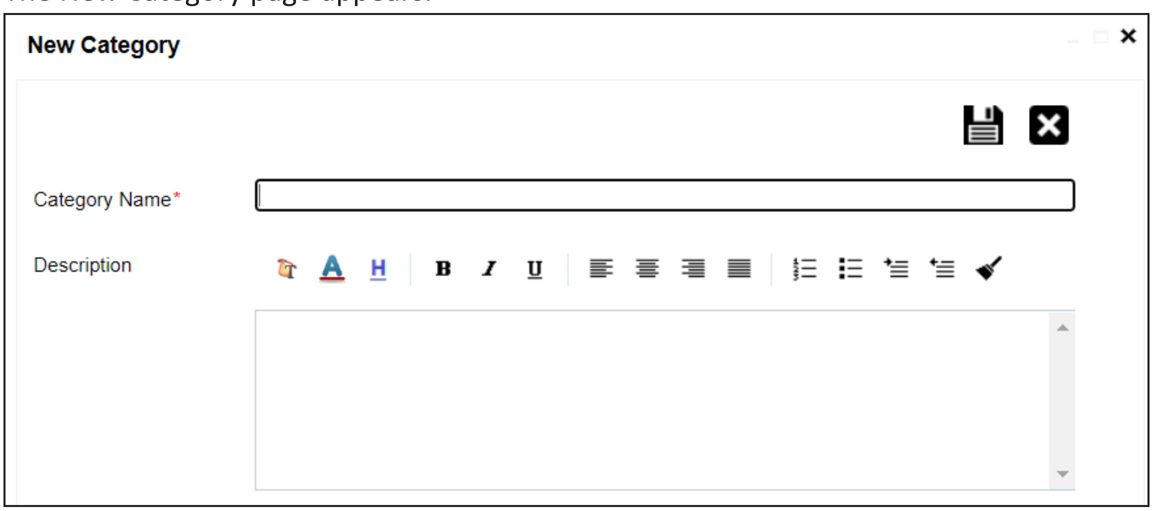
To create categories, follow these steps:

1. Go to **Application Menu** > **Miscellaneous** > **Reporting Manager**.
2. In the **Reporting Workspace** pane, right-click the **Categories** node.



3. Click **New Category**.

   The New Category page appears.



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

   For example:

- **Description:** The category contains workflow related reports.

5. Click .

   The category is created and saved in the Categories tree.

Creating Custom Reports

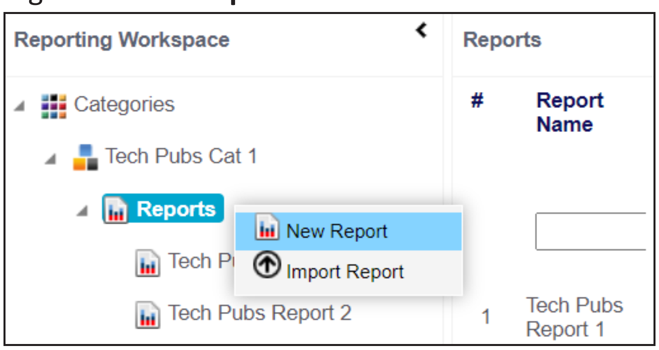
You can create custom reports and classify them under different categories. The reports are generated based on the SQL queries and can be exported to an excel sheet. You can generate reports key metrics from your data integration project and view these reports in a chart and in a grid view.

You can also import reports, and export reports in a .arp format.

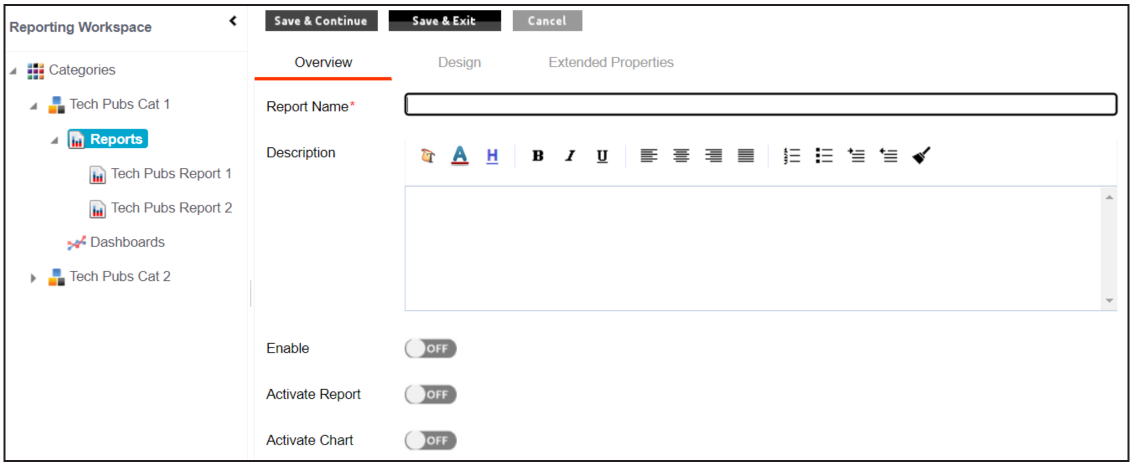
> To create a new report, you must create a new category. You can create reports under a new or an existing category.

To create a report, follow these steps:

1. In the **Reporting Workspace** pane, expand a category node.
2. Right-click the **Reports** node.



3. Click **New Report**.



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

   For example:

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

5. Use the following options to enable and activate the report:

   Enable

   Switch this option **ON** to enable the report.

   Activate Report

   Switch this option **ON** to enable this report.

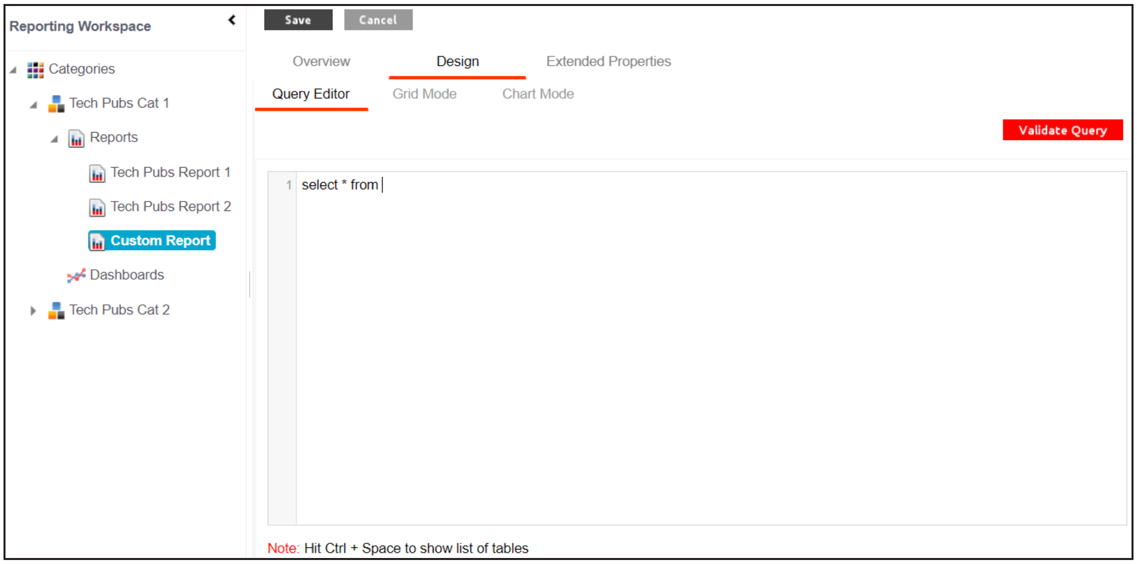
   You can add only active reports to dashboards.

   Activate Chart

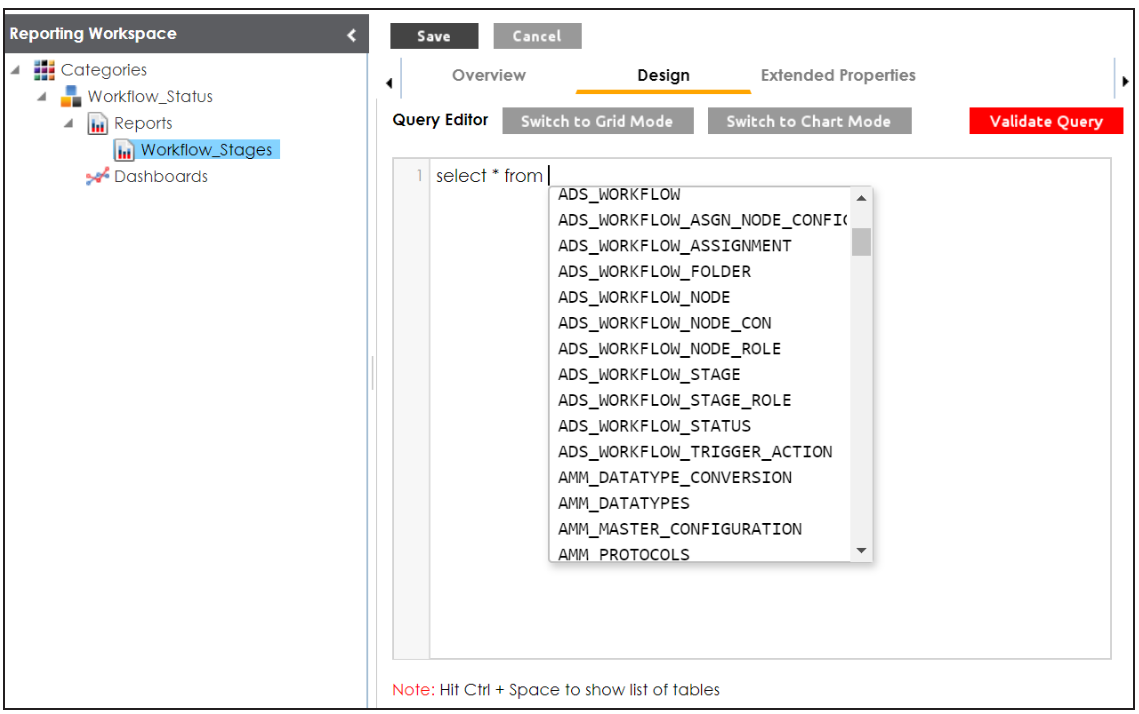
   Switch this option **ON** to enable the report.

6. Click **Save and Continue**.

   The report is created and saved in the Reports tree.



7. Enter a SQL query based on your requirements and use Ctrl + Space to get the list of tables.



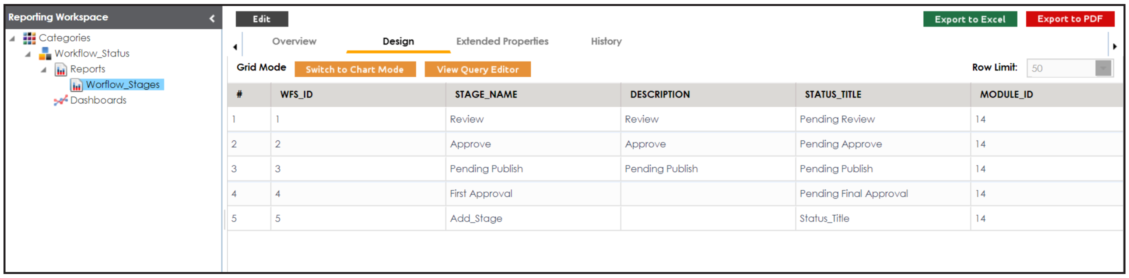
8. Click **Validate Query**.

9. Click **Save**.

After you create a report, use the following options on the Design tab:

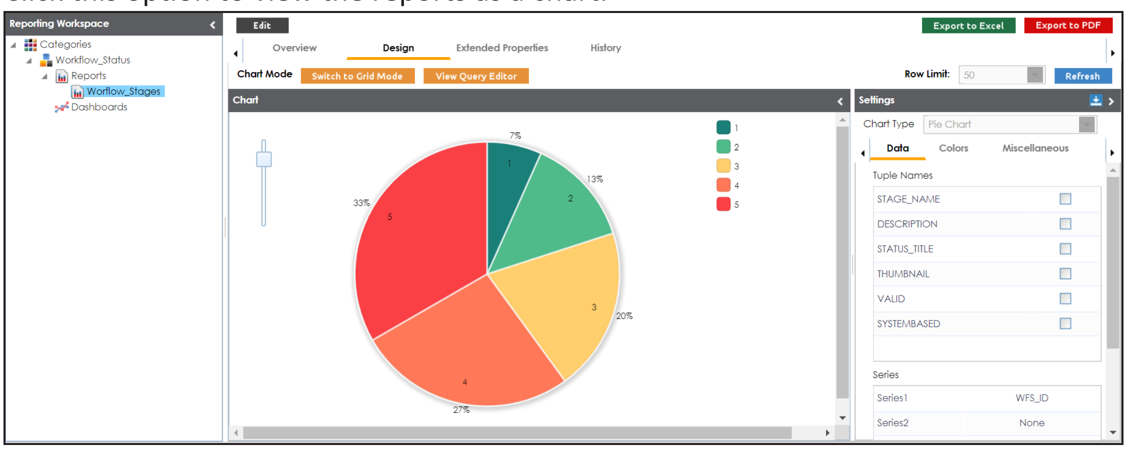
Switch to Grid Mode

Click this option to view the report in a grid.



Switch to Chart Mode

Click this option to view the reports as a chart.



Export to Excel

Click this option to to download the report in .xlsx format.

Export to PDF

Click this option to to download the report in .pdf format.

Edit

Click this option to update the report, and choose a chart type from Settings tab.

Y[illegible]ng and importing reports, refer to the Exporting and Importing Reports topic.

You can also manage the custom reports. Managing reports involves:

- Editing reports
- Copying reports
- Exporting reports
- Deleting reports

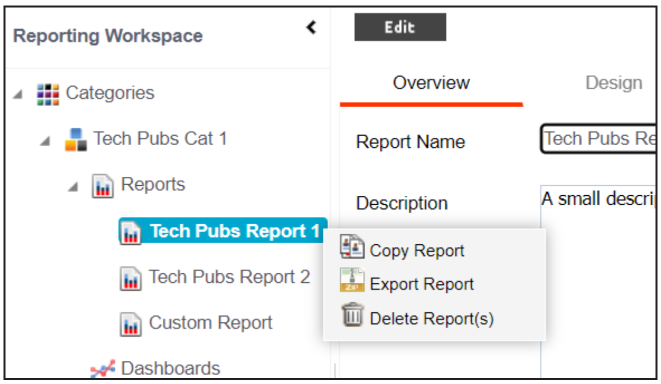
Managing Custom Reports

Managing custom reports involves:

- Editing reports
- Copying reports
- Exporting reports
- Deleting reports

To manage reports, follow these steps:

1. In the **Reporting Workspace** pane, expand a category.
2. Expand the **Reports** node, select and right-click a report.



3. Use the following options:

Copy Report

Use this option to copy a report and past it in another category.

Export Report

Use this option export the report into XLSX file.

Delete Report(s)

Use this option to delete a report under a category.

Edit Report

Use this option to update report details. To edit a report, select a report from a category and click **Edit**.

Exporting and Importing Reports

From the Reporting Manager you can:

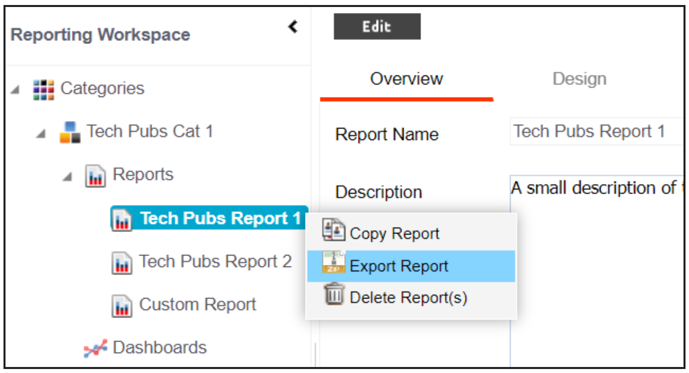
- Export reports
- Import reports

You can also import reports from a different category.

Export Reports

To export reports, follow these steps:

1. In the **Reporting Workspace** pane, expand the **Reports** node, and right-click a report.



2. Click **Export Report**.

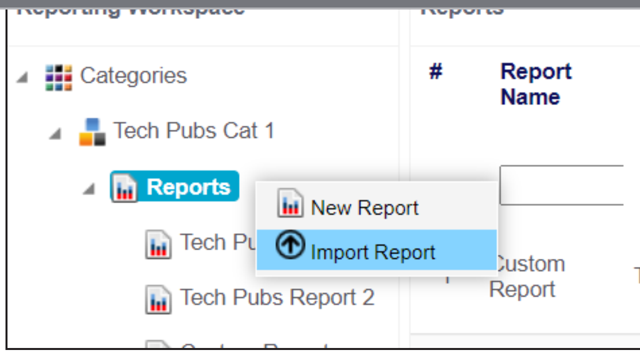
   The report is downloaded in .ARP format.

   You can extract the report in .XML format from the .ARP file.

Import Reports

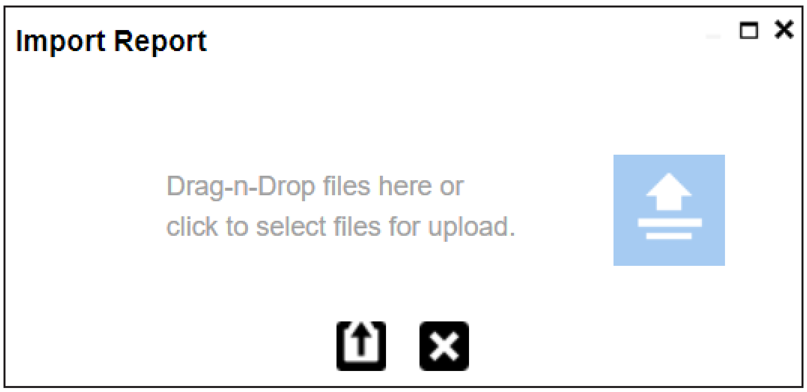
To import reports, follow these steps:

1. In the **Reporting Workspace** pane, expand a category node, and right-click the **Reports** node.



2. Click **Import Report**.

   The Import Report page appears.



3. Drag and drop the report (.ARP format) or use to browse the report.
4. Click .

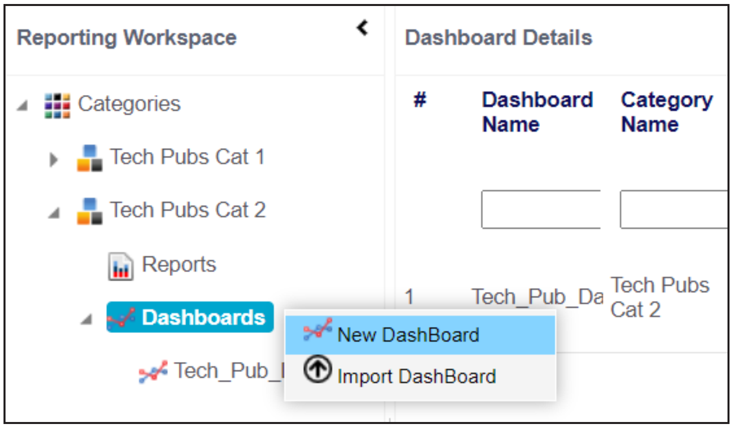
   The report is imported to the category.

Creating Dashboard

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

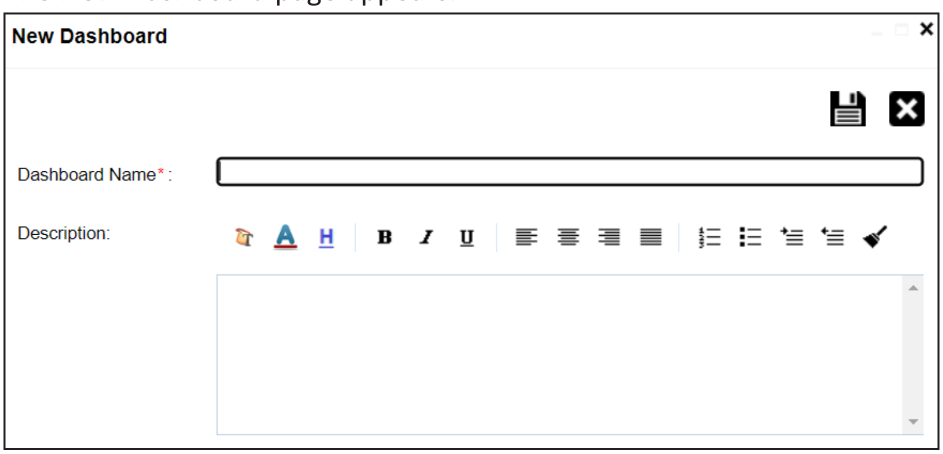
To create a dashboard, follow these steps:

1. In the **Reporting Workspace** pane, expand a category, and right-click the **Dashboards** node.



2. Click **New Dashboard**.

   The New Dashboard page appears.



3. Enter **Dashboard Name** and **Description**.

   For example:

- **Description**: The dashboard is a collection of reports related to work flows.

4. Click .

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

Once a dashboard is created, you can add components to the dashboard and manage dashboards.

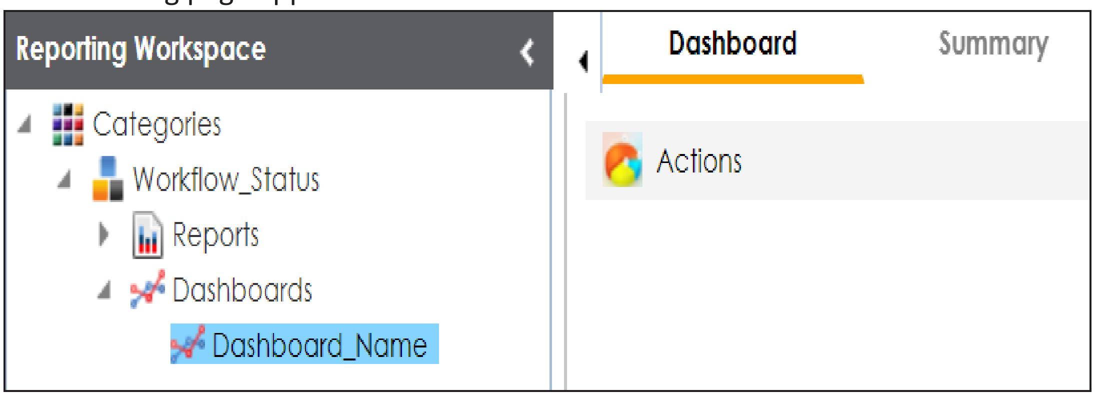
Adding Dashboard Components

You can add reports to the category's dashboard and it helps you accessing all the reports in one place.

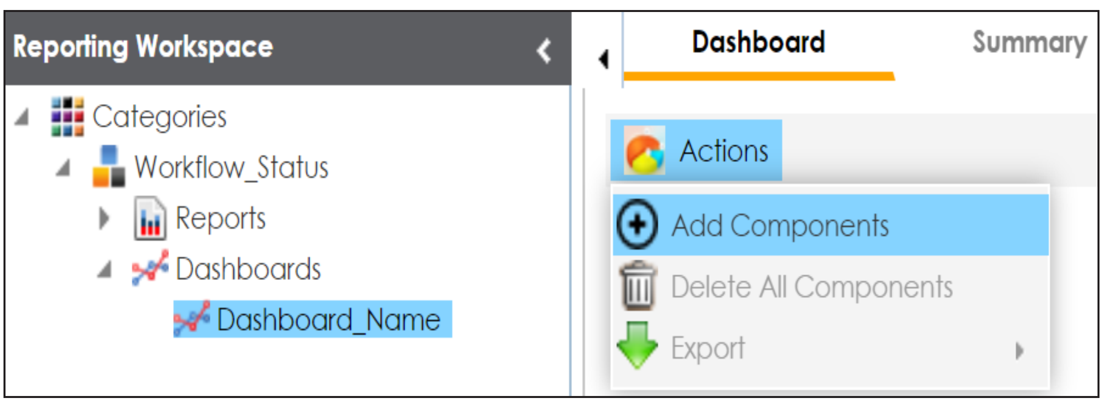
To add components to a dashboard, follow these steps:

1. In the **Reporting Workspace** pane, expand a category.
2. Expand the **Dashboards** node and click a dashboard name to add a component to it.

   The following page appears.

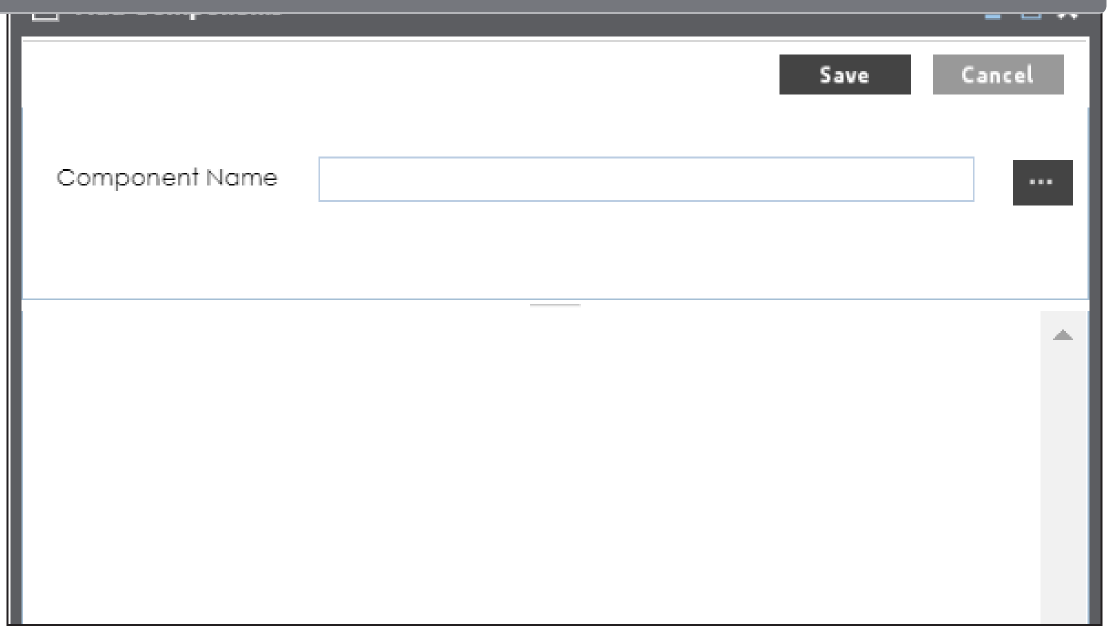
   

3. Click **Actions**.

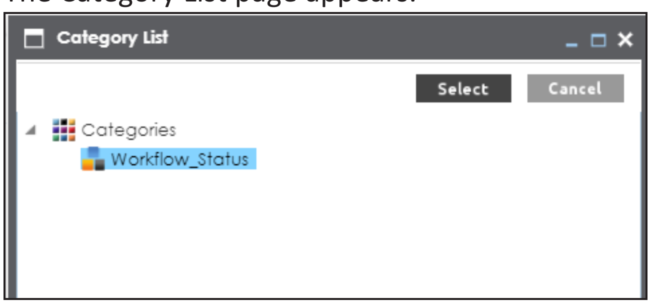
4. Click **Add Components**.

   The Add Components page appears.



5. Click ···.

   The Category List page appears.



6. Select a category and click **Select**.

   The reports in the category are added to the dashboard.

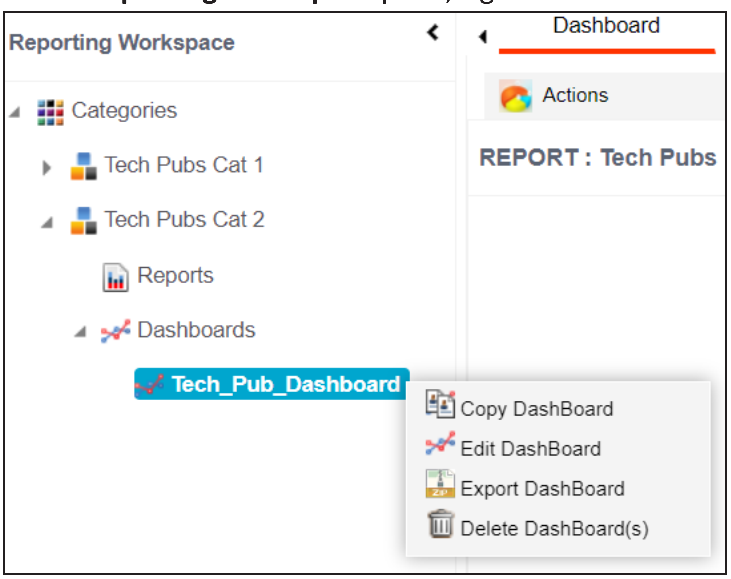
Managing Dashboards

Managing dashboard involves:

- Editing dashboard
- Copying dashboard
- Exporting dashboard
- Deleting dashboard(s)

To manage dashboards, follow these steps:

1. In the **Reporting Workspace** pane, right-click a dashboard.



2. Use the following options:

Copy Dashboard

Use this option to copy a dashboard and past it in another category.

Edit Dashboard

Use this option to update an existing dashboard.

Export Dashboard

Use this option export the dashboard into XLSX file.

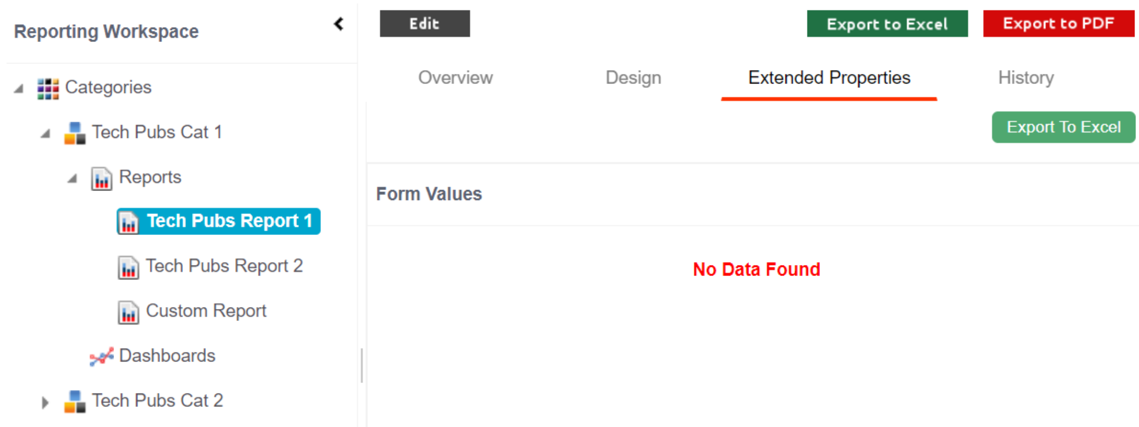
Use this option to delete a dashboard under a category.

Configuring Extended Properties

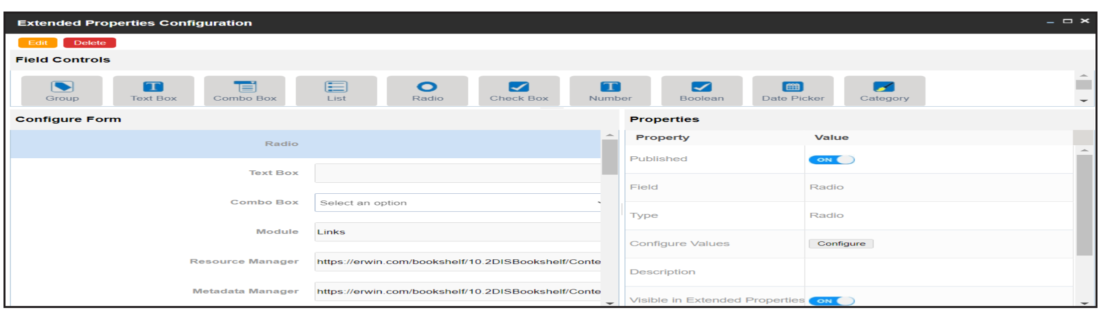
You can configure user-defined properties of a report by designing a form, and you can access that form under the **Extended Properties** tab. First, you need to set up a form and then use it to configure its properties.

To configure extended properties of reports, follow these steps:

1. In the **Reporting Workspace** pane, click a report.
2. In the right pane, click the **Extended Properties** tab.



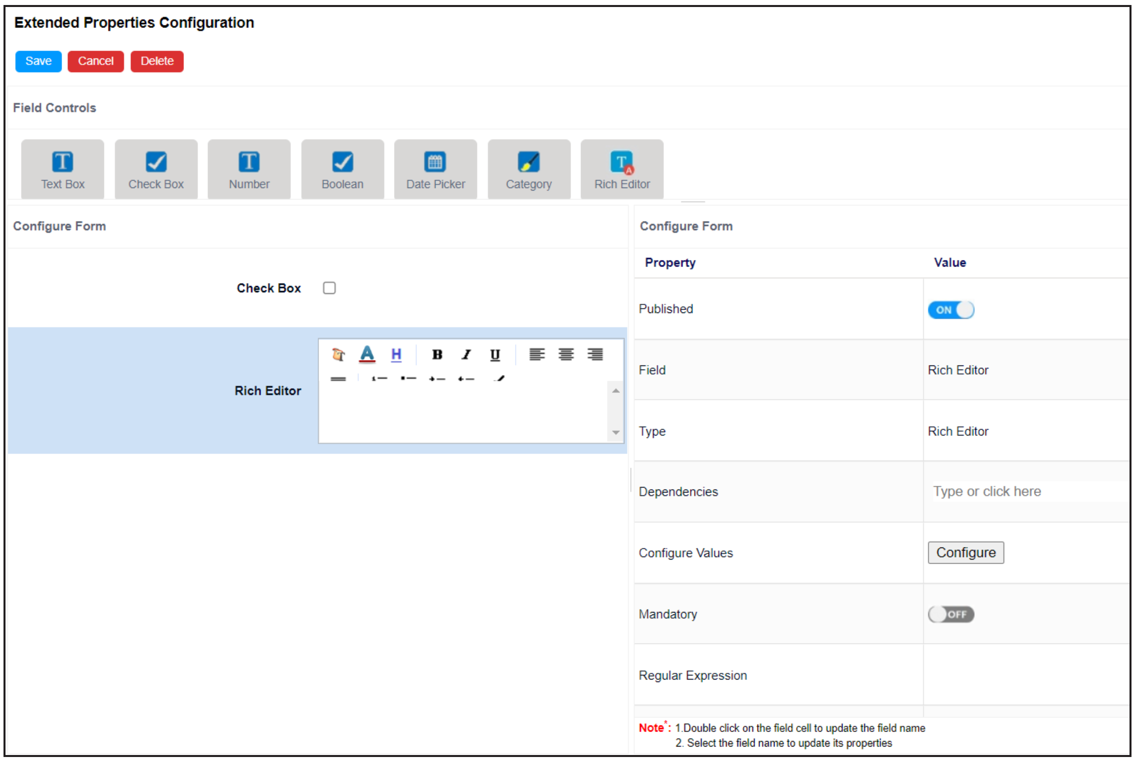
3. Click **Edit**.
4. Click **Configure**.
   Extended properties Configuration page appears.



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

- **Configure Form**: This pane enables you to design forms using the UI elements in the **Field Controls** pane.
- **Properties**: Displays the properties of the selected UI element in the **Configure Form** pane.

5. Click **Edit**.
6. Double-click the UI elements from the **Field Controls** pane or drag and drop it into the **Configure Form** pane.
7. Select a UI element in the **Configure Form** pane, one at a time, to configure their properties in the **Properties** pane.



The properties of a UI element differ based on the selected element.

Refer to the following table for property descriptions:

Property	Description
Published	Switch **Published** to **ON** to publish the field.
Field	Double-click the corresponding **Value** cell to edit the field label.
Type	Double-click the corresponding **Value** cell to determine the field type.
Mandatory	Switch the **Mandatory** option to **ON** to make this field mandatory in a form.
Description	Double-click the corresponding **Value** cell to enter a field description.
Visible in Extended Properties	Switch **Visible in Extended Properties** to **ON** to make it visible.
Order	Displays the order of the field in a form. You can drag and drop the field in the **Configure Form** pane to change its order.

8. Click **Save**.

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

To use the form, follow these steps:

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

   You can download the extended properties in the XLSX format and use it as a template to import extended properties. To download extended properties, on the **Extended Properties** tab, click **Export To Excel**.
3. Click **Save**.

The form is updated.

Importing from Excel

You can import user-defined properties for reports from an XLSX file. You can either use an existing XLSX file or download an extended properties file from the Extended Properties tab. Ensure that the XLSX file follows the correct template.

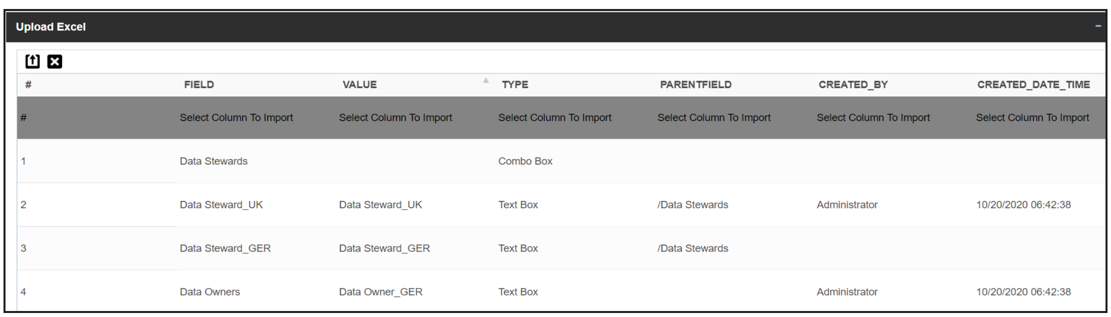
To import extended properties from XLSX files, follow these steps:

1. On the **Extended Properties** tab, click **Import From Excel**.

   The Upload Excel page appears.

2. Click **Choose File**.
3. Browse and select the XLSX file.
4. Click .

   The Upload Excel page appears. It displays the data in the XLSX file.

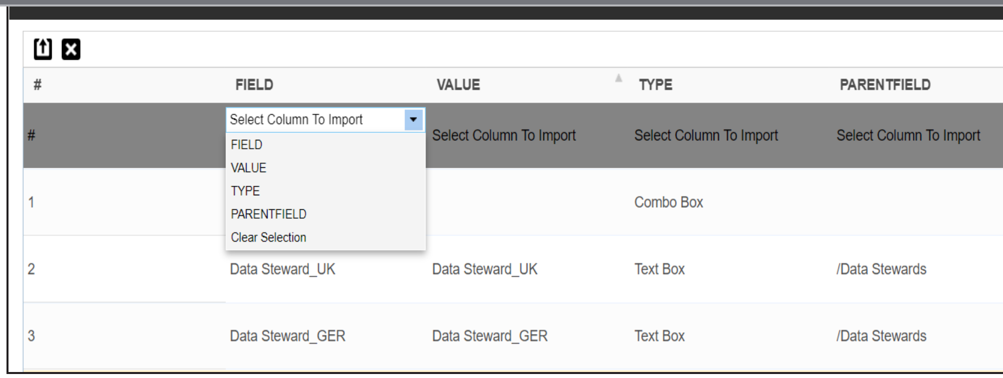


Upload Excel

#	FIELD	VALUE	TYPE	PARENTFIELD	CREATED_BY	CREATED_DATE_TIME
#	Select Column To Import	Select Column To Import	Select Column To Import	Select Column To Import	Select Column To Import	Select Column To Import
1	Data Stewards		Combo Box			
2	Data Steward_UK	Data Steward_UK	Text Box	/Data Stewards	Administrator	10/20/2020 06:42:38
3	Data Steward_GER	Data Steward_GER	Text Box	/Data Stewards		
4	Data Owners	Data Owner_GER	Text Box		Administrator	10/20/2020 06:42:38

5. Double-click the **Select Column To Import** cell in the required column.

   The available options appear.



6. Select an appropriate option.

   For example, if you select Field, then the selected column is imported as Field.

   Similarly, you can also select the Value, Type, and Parentfield columns. Ensure that you at least select a Field column.

7. Click .

   The extended properties are imported.