Reports

The QAD GTTE Reports module, powered by Logi Analytics, enables you to generate and export detailed reports about your shipping activity. It is also possible to schedule reports and send the results to specific email addresses.

This help content details how to configure the Reports module to generate reports.

Each report is built using a catalog and a business view. A catalog describes the tables in the database that are needed to run the report. A business view describes the query used to build the report, and how the entities in the catalog are related. Queries and global formulas can aggregate, calculate, or condition output on the reports.

Note Logi Report includes Web Report Studio, Page Report Studio, JDashboard, and Visual Analysis. QAD GTTE uses a subset of the functionality available in the Web Report Studio. It does not include Page Report Studio, JDashboard, or Visual Analysis. This section of the QAD GTTE online help describes the Report Console user interface and the options relevant to QAD GTTE users.

Reports Fundamentals

This help content describes the fundamental building blocks used to generate reports.

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Note Logi Report includes Web Report Studio, Page Report Studio, JDashboard, and Visual Analysis. QAD GTTE uses a subset of the functionality available in the Web Report Studio. It does not include Page Report Studio, JDashboard, or Visual Analysis. This section of the QAD GTTE online help describes the Report Console user interface and the options relevant to QAD GTTE users.

Report Components

Web Report Studio uses a set of components to present and control the report data and presentation. These components include:

- Labels
- Images
- Database fields (DBFields)
- Formulas
- Summary formulas
- Parameters
- Special fields containing system information such as the date or time
- Web controls for parameter, filter, and navigation control
- Lines
- Pages breaks
- Tabular layouts
- Geographic maps
- KPIs, which include values and charts
- Tables
- Crosstabs
- Banded objects, which present grouped data and detailed data in a precise layout
- 2D charts such as bar, line, and pie charts

You can bind tables, crosstabs, charts, banded objects, KPIs, and geographical maps with a data source. Those components are also data components.

Note QAD GTTE uses labels, images, database formulas, summary formulas, parameters, and tables to create reports. The other components are outside the scope of the online help, but there are some references to them.

Business View Elements

A business view contains database connections and relationships between view elements. A business view shields report end users from having to understand the underlying structure of a data source, and enables them to create complex reports containing multiple components and analyze data based on a set of view elements that are easily understood. A business view can contain the following elements, which appear in the Resources panel when viewing report results in Edit Mode:

- Categories. Category objects contain a collection of view elements. A business view may contain more than one category. The Category Object icon indicates that an object is a category. Categories are only for categorizing view elements, and you cannot insert categories into reports. Categories often indicate the names of the underlying Database Management System (DBMS) tables.
- Group objects. Group objects are view elements that become the basis for analysis in a report. They characteristically return text or date values. The Group Object icon indicates that an object is a group object. You can insert a group object as a column or row field in a crosstab, as a group field or detail field in a table or banded object, or as a category/series field in a chart.
- Detail objects. Detail objects provide additional information. The Detail Object icon indicates that an object is a detail object. You can insert a detail object into a table or banded object as a detail field.
- Aggregation objects (including custom aggregations). Aggregation objects are numeric view elements that are calculated dynamically at runtime. The Aggregation Object icon indicates that an object is an aggregation object. You can insert an aggregation object into the group header or footer in a table or banded object, or into a crosstab as an aggregate field. You can also use an aggregation object as a detail field in a table. Web Report Studio calculates the summary values based on the group level that the aggregation object is at. An aggregation object is the only object that can provide the value on a chart.

Report Console

The Reports page (option LRC) displays the Report Console, where you can generate web reports that provide insights into current operations within a number of QAD GTTE modules.

Note In some parts of the user interface, you may see references to the Report Server. The terms Report Console and Report Server are interchangeable. Similarly, there are references to Logi Report, Logi Report Designer, and Logi Report Engine in PDF documents linked to from this section of the online help. Logi Report and Logi Report Engine are other terms for the Report Console. Logi Report Designer is another tool used internally by QAD GTTE development to produce the predefined reports and the catalog.

Predefined QAD GTTE Reports

QAD GTTE provides a number of predefined reports that you can use as a starting point to create reports that are customized to your organization. It is recommended that you do not change these predefined reports. Instead, if you have the appropriate permissions, you can create new reports using the Save As option available when you edit a report.

The table below lists the reports available in QAD GTTE. QAD GTTE updates these reports on an ongoing basis, adding new reports as needed. The report updates are published and shared with customers by the QAD Services team.

Note Publishing an updated collection of predefined reports automatically overwrites any existing reports with the same name in your Report Console. If you wish to preserve old versions of reports, you must back up these reports in a separate folder to prevent them from being overwritten during later publications.

Predefined Reports Provided by QAD GTTE

QAD GTTE Module	Report Name	Description	Catalog
Core Information	Partner Report	Details parties set up as partners in the solution. You can extract all partners for a given client. Additional report parameters allow you to further categorize the results by address book and partner role.	QAD-GTTE.cat.xml
	Product Report	Details goods set up as products in the solution. You can extract all products for a given client. Additional report parameters allow you to categorize the results by the product's country of origin and classification. You can also include product commodity codes for EU, US, and Singapore customs.	
	User Listing Report	The User Listing section of the report provides the last login date, within	

QAD GTTE Module	Report Name	Description	Catalog
		a specified date range, for each user in the system. If a user has not logged in within the specified date range, the last login date for that user is shown as None. The information is listed by user ID. The Users by Date section of the report provides the list of users, within a specified date range, who logged into the system on a particular date. The information is listed by date. This report replaces the legacy User Count Assessment (UCA) report.	
	User Report	Lists all of the users that are configured from the menu option US in the GTTE application.	
Transportation Execution	Shipment Cost Report	Details shipment transaction costs for a specified date range. You can generate the report based on carrier and customer.	
	Shipment Item Report	Summarizes shipment item data for a specified date range.	
	Shipment Pack Summary Report	Details shipment package information for shipments within a given despatch date range.	
	Shipment Summary Report	Summarizes transaction data for a specified date range. By default,	

QAD GTTE Module	Report Name	Description	Catalog
		the report gathers information on shipment transactions but you can run the report on multiple transaction types.	
	Workflow Task Status Report	Details the status of workflow tasks for shipments within a given despatch date range.	
	Shipment Summary with Delivery Status Report	Summarizes shipments and includes DEM tracking status information. **Note** The tracking information is at the shipment level. For a multi-piece shipment, where the deliveries have different tracking numbers, the report shows information based on one of the undelivered packages. If all packages are delivered then the overall tracking status is reported as delivered.	
Delivery Exception Management	Late Deliveries Report	Details the delayed deliveries that occurred within a specified time period. The SupplierId parameter in the selection criteria for the report shows supplier IDs based on your user view configuration.	
	Pending Deliveries Report	Details pending deliveries for a specified supplier or all suppliers. The SupplierId parameter in the selection criteria for the	

QAD GTTE Module	Report Name	Description	Catalog
		report shows supplier IDs based on your user view configuration.	
Export Management	Shipment Item Export Classification Report	Details US/EU/SG ECCN information for shipments within a given despatch date range.	
Import Trade Compliance	Custom Tab - Hierarchy Data Report	Details the Custom Tabs and all descendant entities for a specific client.	QAD-GTTE-ITC.cat.xml
	Flex Domain - Hierarchy Data Report	Details the Flex Domains and all descendant entities for a specific client.	
	HS Country Group - Hierarchy Data Report	Lists the Harmonized System country groups and all descendant entities for a specific client.	
	Partner Master Report	Details each partner in the system. The report includes a CSV list of the partner roles that each partner is a member of.	
	Partner Role Report	Details the partner or partners that are allocated to each role in the system. One row is allocated to each partner role. If a partner has multiple roles, a row is included for each partner role for that partner. Partners without assigned roles do not appear in the report.	

QAD GTTE Module	Report Name	Description	Catalog
	PGA Flag - Hierarchy Data Report	Returns the PGA flags and all descendant entities for a specific client.	
	PGA Flag Report	Returns the PGA flags for a specific client. The report has one row for each PGA flag record. It includes a CSV list of countries, where overrides are configured for each PGA flag.	
	Product Classification Invalid Commodity Report	Provides an overview of the product classifications with an invalid commodity code. The report has one row for each product classification. It includes Product Master details.	
	Product Classification Invalid Secondary Commodity Report	Provides an overview of the product classifications with an invalid secondary commodity code. The report has one row for each invalid secondary commodity code in a product classification. It includes Product Master and product classification details.	
	Product Classification Report	Summarizes classifications for each product. The report includes Product Master details and a summary of data from certain child entities.	

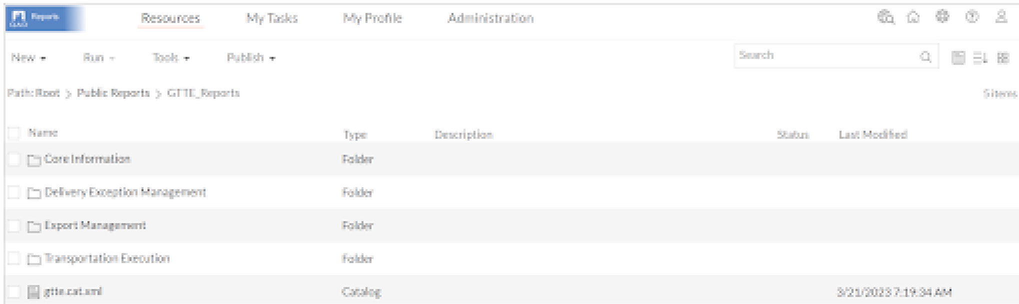
QAD GTTE Module	Report Name	Description	Catalog
	Product Commodity Report	Details the product commodities. The report has one row for each product classification and includes Product Master details.	
	Product Custom Attribute Report	Details custom attributes that are assigned to a product classification. The report has one row for each product classification custom attribute. The report includes the Product Master details and product classification details.	
	Product Export Control Report	Summarizes Product Export Control details. The report has one row for each Product Export Control record. The report includes the Product Master details.	
	Product Master Report	Summarizes the Product Master records.	
	Purchase Order Header Report	Provides an overview of the header-level attributes for purchase orders. The report has one row for each purchase order.	
	Purchase Order Import Header Report	Provides an overview of the header-level attributes for import purchase orders. The report has one row for each import purchase order. It includes the header-	

QAD GTTE Module	Report Name	Description	Catalog
		level attributes for the import purchase orders.	
	Purchase Order Import Item Report	Provides an overview of the import item-level attributes in a purchase order. The report has one row for each import item in the purchase order. It includes header-level, import header-level, and item-level attributes for the purchase order.	
	Shipment Charge Report	Summarizes the shipment header and charge level attributes. The report includes the shipment header-level attributes.	
	Shipment Header Report	Summarizes the shipment header-level attributes.	
	Shipment Import Header Report	Summarizes the shipment import header-level attributes. The report includes the shipment header-level attributes.	
	Shipment Import Header EU Report	Summarizes the shipment import header-level attributes for the EU. The report includes the shipment header-level and shipment import header-level attributes.	
	Shipment Import Header US Report	Summarizes the shipment import header-level attributes for the US. The report includes the shipment header-level and shipment	

QAD GTTE Module	Report Name	Description	Catalog
		import header-level attributes.	
	Shipment Import Item Report	Summarizes the shipment import item-level attributes. The report includes the shipment header-level, shipment import header-level, and shipment item-level attributes.	
	Shipment Item Report	Summarizes the shipment item-level attributes.	
	Shipment Payment Report	Summarizes the shipment header-level and payment-level attributes.	
	Shipment Party Override Report	Provides an overview of the shipment header and partner override-level attributes. The report has one row for each shipment partner override. The report includes the shipment header-level attributes.	
	Supplier Status Tracker Report	Details the supplier status trackers in the system. The report includes the associated Partner Master details for each supplier status tracker.	

You can view the available predefined reports by navigating to the Resources page and selecting the Root > Public Reports > GTTE_Reports folder. This page contains a folder for each module. (Single left) click the module name to open the folder with the related reports.

Report Module Categories



All of the predefined reports are based on two catalog files, gtte.cat.xml and QAD-GTTE-ITC.cat.xml. The gtte.cat.xml file is located in the Root > Public Reports > GTTE_Reports folder. The QAD-GTTE-ITC.cat.xml is located in the Root > Public Reports > GTTE_Reports > Import Trade Compliance folder. The files are only visible to administrators. Do not make any changes to these files.

Report Console User Interface

This section describes the Report Console user interface and the options relevant to QAD GTTE users. When you access the Reports page (option LRC), the Report Console opens on the Root folder of the Resources area.

System Toolbar

The system toolbar appears at the top of the Report Console pages and, depending on your permissions, contains a number of menus and options.

System Toolbar

- The QAD GTTE Reports icon or your company logo is located at the left of the system toolbar. Clicking the icon takes you to your Web UI home page.
- Resources: Provides access to the User Directory, which contains the report folders and catalog. When you click this option, the Resources screen opens, and the Resources menu appears below the system toolbar. Below the Resources menu, you can view the path to your current location in the user directory. The three main folders below the Root folder are Public Reports, My Reports, and My Shared. Public Reports contains the predefined QAD GTTE reports in the GTTE_Reports folder. You can use My Reports to store reports that you have edited and saved for your own use. My Shared stores any reports shared with you by other QAD GTTE Reports users. Sharing of reports is beyond the scope of this online help.
- My Tasks: Shows your tasks–reports you have scheduled to run. When you click this option, the My Tasks screen opens, and the Tasks menu appears below the system toolbar. Below the My Tasks menu, you can view the path to your current location in the My Tasks area.
- My Profile: Allows you to modify your profile. When you select one of the options in this menu, the relevant page opens, and the My Profile menu appears below the system toolbar. Below the My Profile menu, you can view the path to your current location in the My Profile area. Do not use the Change Password option in this menu. QAD GTTE manages Report Console passwords and user accounts.
- Administration: Allows you to view and modify certain administrative settings. When you select one of the options in this menu, the relevant page opens, and a related menu appears below the system toolbar. Below the menu, you can view the path to your current location in the Administration area.
- Search: Offers a Report Console search feature.
- Home: Provides access to the Start page, or home page, of the Report Console. The Start page contains links to various menu options. The Create Web Report option allows you to create a web report using the Report Wizard. When creating the report, select the catalog file and then specify the fields from the business views that you want to include in the report. Ignore the Create Page Report

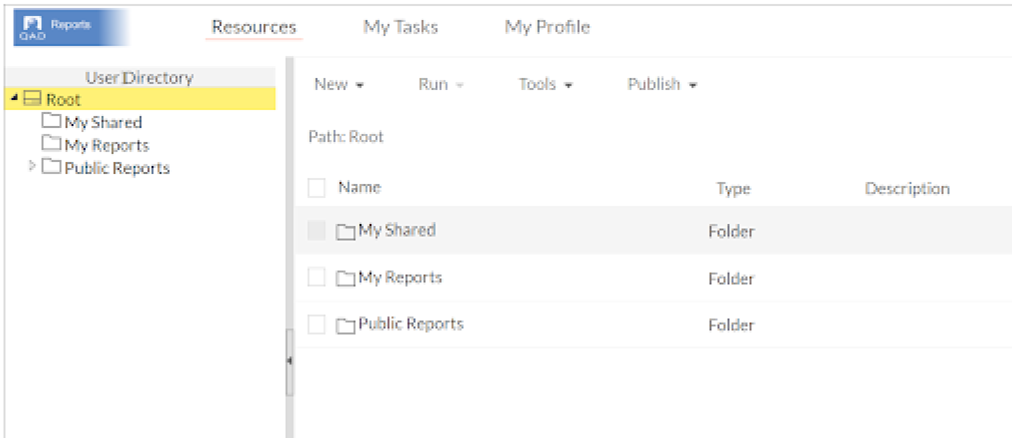
option because it does not apply to the QAD GTTE Reports module. Similarly, ignore the Contact Support link and the logout icon.

- Settings: Do not use the options in this menu. QAD GTTE manages garbage collection and restarting of the server, and these menu options are not in use.
- Help: Provides access to learning materials from Logi. You can access Logi’s Feature Guide, User’s Guide, and the Logi Report Home Page. Demos and tutorials are also available. Not all of this information applies to QAD GTTE Reports. Ignore the Contact Support link and direct any questions to QAD Services.
- User Profile: Displays your login information and a link to change your password. Important: Do not use the Change Password option. QAD GTTE manages the password for each Report Console user account to ensure that it corresponds with the password for the related QAD GTTE user account. For more information, see Managing Users, Roles, Privileges, and Permissions on page 1947.

User Directory

On the left of all pages apart from the Start page, there is an arrow that you can click to open and close the User Directory view. This view allows you to quickly navigate the report folders.

User Directory



Report Actions

When you mouse over a report in the Resources area, a number of action icons appear to the right of the report name.

Report Action Icons

- Run. Run the report and open the results in View Mode. For more information, see Manually Running Reports on page 1918.
- Advanced Run. Run the report with additional options to produce the result in a different file format. For more information, see Manually Running Reports on page 1918.
- Edit. Run the report and open the results in Edit Mode. For more information, see Configuring Report Contents in Edit Mode on page 1926.
- Schedule. Schedule the report to run at a particular time. For more information, see Scheduling a Report to Run on page 1939.
- Version. This option is not currently utilized by QAD GTTE Reports.
- Properties. View the report properties, including permissions and available business views.

  Note Do not modify permissions at the report level. In QAD GTTE, permissions are set at the folder level. For more information, see Managing Permissions on page 1958.
- Parameter Settings. Customize the default parameter values for a report. Settings include the Re-enable Parameter Screen option. When this option is unselected, the next time the report runs through operation in the Report Console, it will use the default parameter values directly without popping up the Enter Parameter Values dialog box.
- Share. Share a report. Sharing of reports is beyond the scope of the online help.
- Delete. Delete the report.

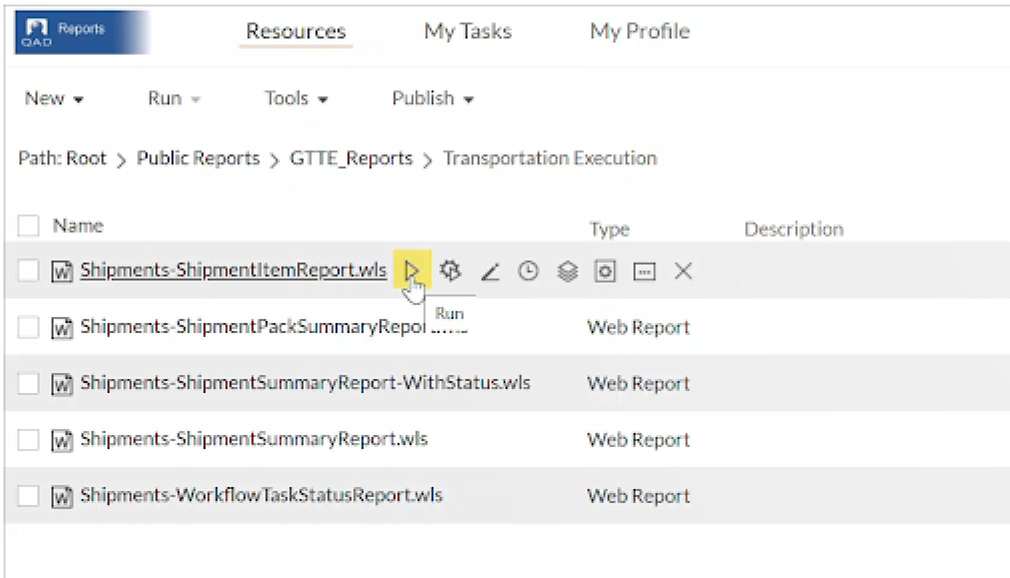
Working with Reports

This section describes how to run reports manually or automatically, and how to create your own reports from the predefined reports provided by QAD GTTE. Depending on your permissions, you may be able to create and run reports. You may also be able to edit existing reports to show fields that are more suited to your needs.

Manually Running Reports

1. From the Root folder, navigate to the relevant folder and locate the report that you want to run. Hover over the report name to see a list of icons. Each icon represents an action that you can perform, and a tooltip identifies the action. Click the Run icon for the chosen report.

   Running a Report

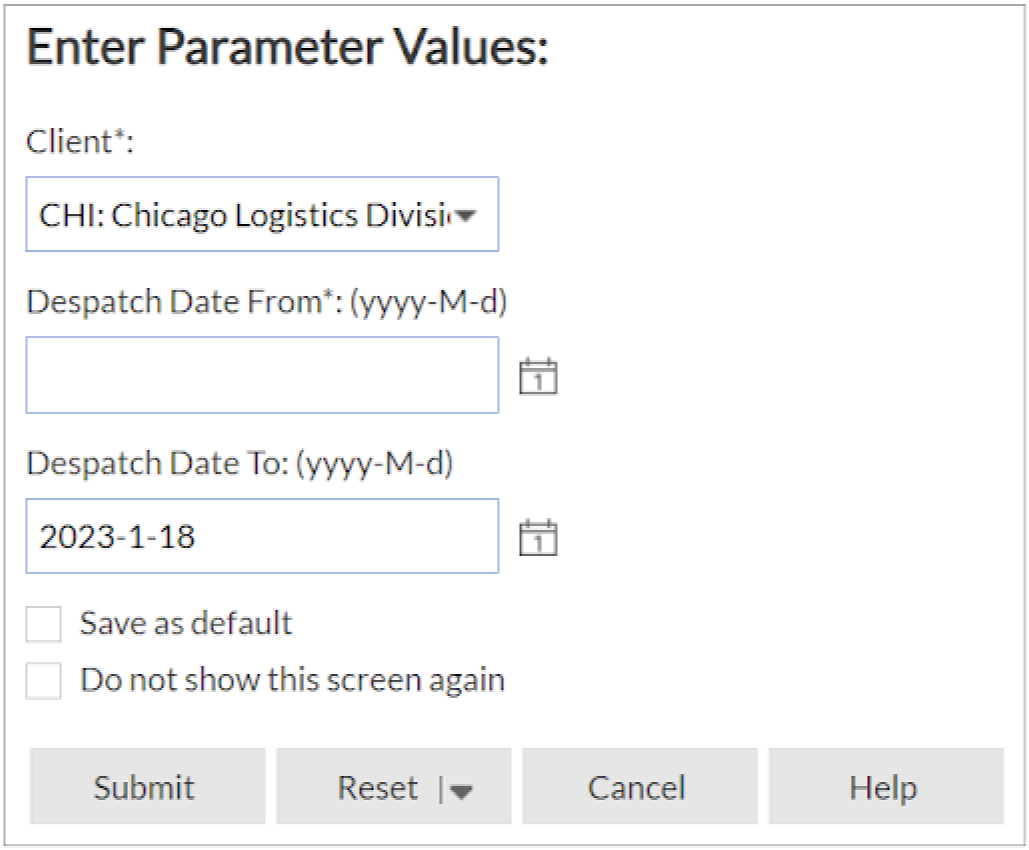
   

   Note The Report Console also offers an Advanced Run action

   . You can use this command to run the report immediately after specifying additional specifications, including what output format to use (HTML, PDF, Text, Excel, Postscript, Rich Text Format (RTF), or XML), which style group to apply, and any encoding options.

2. In the Enter Parameter Values pop-up window, complete the required fields (identified by an asterisk). You can choose to save the parameters that you enter as default parameters for this report.

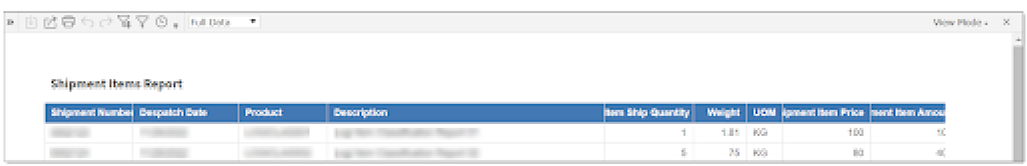
Report Parameter Values



3. To generate the report, click Submit.

The report result displays in a new browser window in View Mode.

Report Result



Analyzing Report Results in View Mode

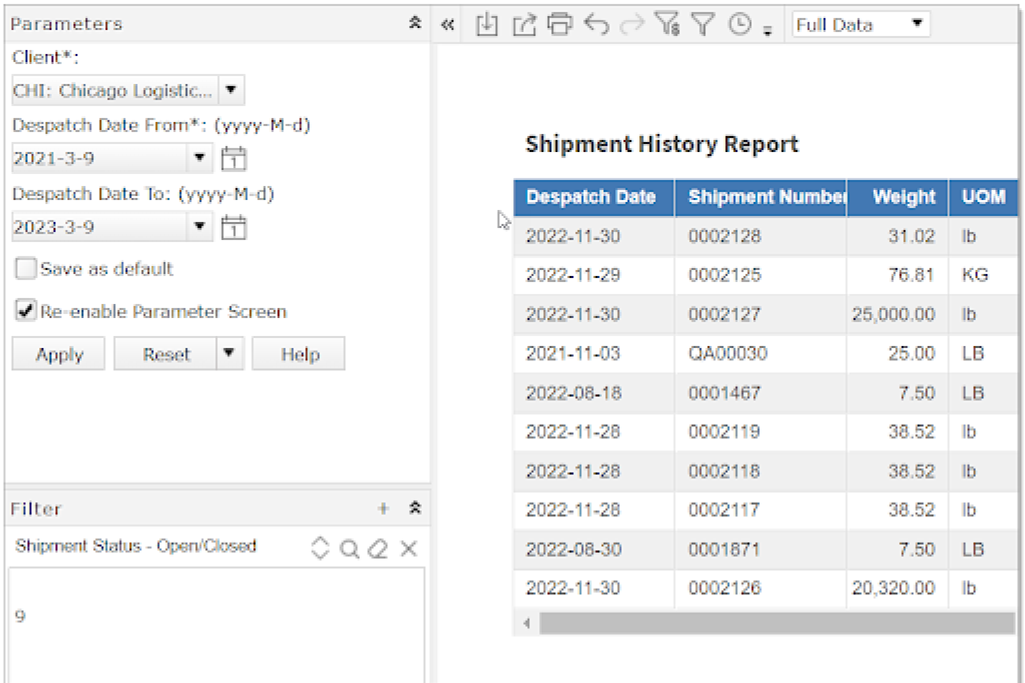
After you manually run a report, the report opens in the Web Report Studio in View Mode. The report is shown as a table. You can scroll through the report pages using the arrows below the table. The toolbar above the table can include the following options:

- New (available in Edit Mode only)
- Open (available in Edit Mode only)
- Save
- Save As
- Export
- Page Setup
- Print
- Share (available in Edit Mode only)
- Refresh
- Undo (available in Edit Mode only)
- Redo (available in Edit Mode only)
- Query Filter
- Filter
- Close Responsive Mode
- Quick Schedule (not available in Edit Mode)
- Delete (available in Edit Mode only)

To customize the toolbar, click the Customize Toolbar Items icon and adjust the selected options as required.

The toolbar also includes a double chevron icon on the left, which allows you to expand or collapse the Parameters and Filter panels.

Parameter and Filter Panels



To the right of the toolbar icons, use the drop-down menus to choose between:

- Viewing all of the data in the report, or a subset of the data, using the Full Data or Partial Data options. The Partial Data feature enables you to set the number of records that can be retrieved by all data components in a report. When running a report that contains a large amount of data, it can be helpful to retrieve only a specific number of records for better performance. For example, if you are making a lot of changes to the report, it may be faster to limit the number of records to one page.
- Viewing the report in View Mode or Edit Mode.

Switching to Edit Mode

Applying Filters to a Report

You can apply filters to business views and data components, such as tables, in a web report to narrow down the data in the web report.

You can apply filters to report results in either View Mode or Edit Mode.

Applying a Filter to a Report Using the Filter Panel

You can apply a filter to each data component in a report individually, or use the Filter panel and filter controls to filter multiple data components at a time.

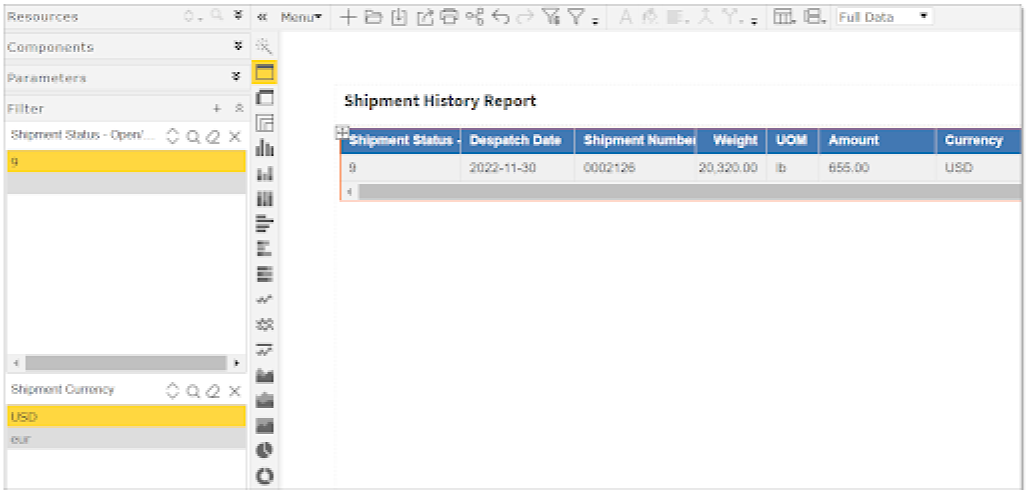
To filter from the Filter panel:

1. On the title bar of the Filter panel, click the + icon.
2. The Select Fields dialog box lists all the group and detail objects in the business views that the current report uses. Navigate through the fields and select a field to filter the data on.
3. The Apply To drop-down menu allows you to select the data components in the report to apply the filter to. Keep the default Apply To setting.
4. Click OK.
5. The Filter panel should now include a filter box with all values of the selected field.
6. In the Filter panel, click the field value that you want to filter the report on. You can use the Ctrl or Shift key to select multiple values. If the values themselves have a relationship, after you make the selection, the Report Console deals with the rest of the values to put the related ones on the top and gray the ones that have no relationship with the selected values. The grayed values are still selectable.

   Note Filtering is case-sensitive; for example, filtering a currency field based on a value of EUR produces different results than filtering on a value of eur.

7. You can add multiple filters in the filter panel; for example, you can use two filters to see all of the closed USD shipments. To add another filter to the filter panel, repeat the previous steps.

Filter Panel with Multiple Filters



Applying a Filter to a Report Using the Query Filter

You can use the Query Filter option to apply a filter to the business view that a data component, such as a table, uses:

1. Do any of the following to open the Query Filter dialog box:
   - Select Menu > Edit > Query Filter.
   - Select the Query Filter button  on the toolbar above the report results.
   - Right-click a data component (table column) and select Query Filter from the shortcut menu.
   - For a table, chart, crosstab, or banded object, while creating or editing it with the report wizard, select the Filter button next to the Data Source drop-down list.
2. If you accessed the dialog box from the menu or toolbar, select a data component from the Apply To drop-down list to filter the business view it uses.
3. Specify the filter to apply to the business view.

   The Query Filter drop-down list includes all the predefined filters of the business view that the specified data component uses. Choose the one you want to apply to the report. If you want to further edit the filter, select the Edit button and then redefine the filter. The system saves the edited filter as a user-defined filter to the business view.

   If you prefer to define a filter on your own, select User Defined from the Query Filter drop-down list, then define the filter according to your requirements.

   The dialog box has basic and advanced modes for you to define a filter using either simple expressions or complex expressions.

To define a filter using simple expressions:

a. Ensure that the dialog box is in the basic mode.
b. Select the field on which the filter will be based from the field drop-down list.
c. From the operator drop-down list, select the operator with which to compose the filter expression.
d. Type the values to filter the field in the value text box, or select one or more values from the drop-down list.

   When you see More... at the end of the value list, you can select it to open the Select Values dialog box, which lists more values, and select the values you want.

   When you type multiple values manually, you should separate them with ",", and if "," or "\" is contained in the values, write it as "\," or "\\". To specify an empty string as the value for a field of String type, simply leave the text box blank (value length=0).

   You can also select the Enter Parameter Values button and then select a parameter from the list to specify the value dynamically. When the available parameters cannot meet your requirement, you can create a local parameter for the filter.
e. If you want to add another condition line, from the logic operator drop-down list:
   - To add a condition line of the AND relationship with the current line, select And, then define the expression as required.
   - To add a condition line of the OR relationship with the current line, select Or, then define the expression as required.

   You can repeat this to add more condition lines. To delete a condition line, select the Delete button on its left.

   To define a filter using complex expressions:

a. Select Advanced to switch the dialog box to the advanced mode.
b. Select Add Condition to add a condition line.
c. From the field drop-down list, select the field on which the filter will be based.
d. From the operator drop-down list, select the operator with which to compose the filter expression.
e. Type the values to filter the field in the value text box, or select one or more values from the drop-down list.

   When you see More... at the end of the value list, you can select it to open the Select Values dialog box, which lists more values, and select the values you want.

When you type multiple values manually, you should separate them with ",", and if "," or "\" is contained in the values, write it as "\," or "\\". To specify an empty string as the value for a field of String type, simply leave the text box blank (value length=0).

You can also select the parameter button  and then select a parameter from the drop-down list to specify the value dynamically. When the available parameters cannot meet your requirement, you can create a local parameter for the filter.

f. To add another condition line, select Add Condition and define the expression.

g. Select the logic button until you get the required logic to specify the relationship between the two filter expressions. The logic can be AND, OR, AND NOT, or OR NOT.

h. You can repeat the preceding steps to add more condition lines.

i. To group some conditions, select them and then select Group. The system adds the selected conditions in one group and they work as one line of the filter expression. You can further group conditions and groups together.

j. To take any condition or group in a group out, select it, and then select Ungroup. It is the equivalent of adding parentheses in a logic expression.

k. To adjust the priority of a condition line or a group, select it and select Up or Down.

l. To delete a condition line or a group, select it, and then select Delete.

Note When the dialog box is in the basic mode and you select a predefined filter from the Query Filter drop-down list which is a complex one, the system switches the dialog box to the advanced mode automatically.

4. Select OK to apply the filter. If you open the Query Filter dialog box from the report wizard, the system applies the specified filter to the business view after you finish the wizard.

   If the filter conditions use parameters, the system lists the parameters in the Parameters panel. You can then specify the parameter values in the panel to dynamically define the filter conditions.

Configuring Report Contents in Edit Mode

After you manually run a report, the report opens in the Web Report Studio in View Mode. You can switch to Edit Mode and configure the report by adding or removing columns (data components). In Edit Mode, there are additional icons and a menu in the toolbar above the report result that are not available in View Mode:

- A new drop-down Menu allows you to open 5 submenus:
  - File. This menu includes options to create a new report and to copy the existing report by saving it under a new name in a new location.
  - Edit. This menu allows you to access the table wizard to modify the report table.
  - View
  - Format
  - Help
- New icon
- Open icon
- Share icon
- Font icon
- Background Color icon
- Align icon
- Merge icon
- Split icon

As with the toolbar in View Mode, you can customize the toolbar to show or hide the icons listed above.

There are additional icons to show or hide details of the table and to add or remove groups of data from the table.

Edit Mode also includes a vertical Visualization toolbar to the left of the report table. The first icon in this toolbar relates to the Table Wizard. The other toolbar icons allow you to convert the report results from table format to a crosstab, banded object, or one of a number of different chart types including a bar chart and pie chart.

Modifying a Report in Edit Mode

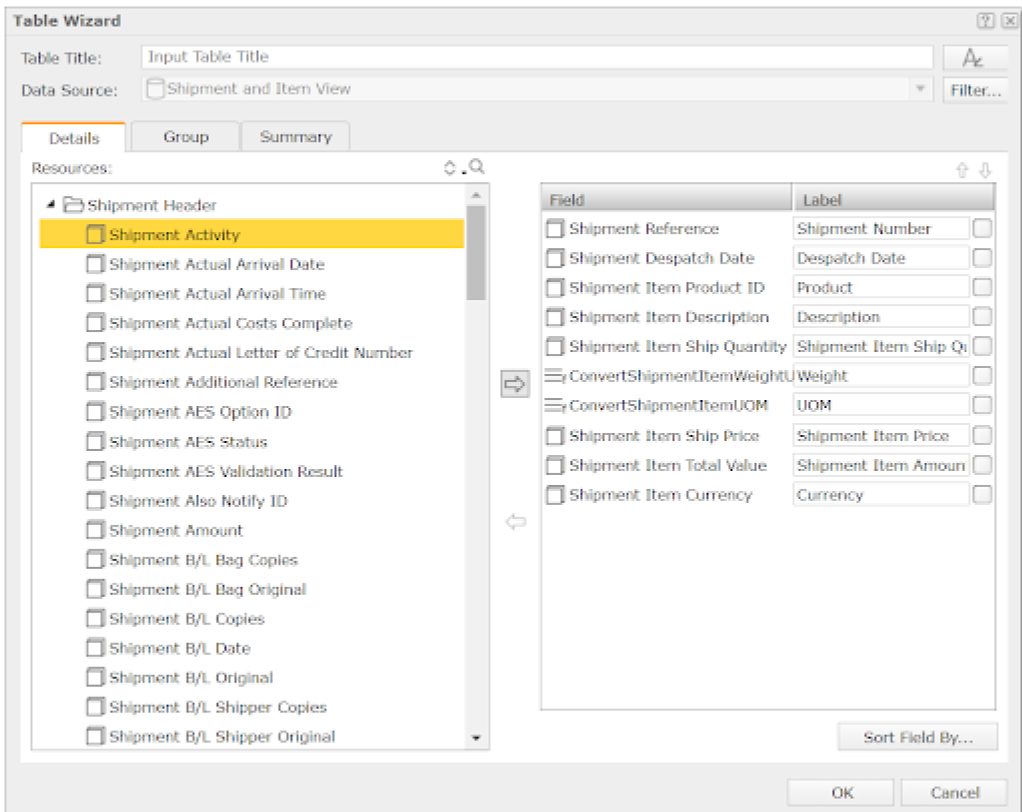
To modify the report in Edit Mode:

1. On the report result toolbar, use the drop-down menu on the right to switch from View Mode to Edit Mode.

2. In Edit Mode, on the Visualization toolbar, click the Table Wizard  icon.
3. In the Table Wizard window, in the Details tab, review the contents of the Resources box and select a field that you want to add as a column (data component) in the report table. When a field is selected, click the right arrow  to move the field into the box on the right.

   Note The fields available depend on the catalog and business view used to create the original report.

   Table Wizard

4. When a field is selected, click the right arrow  to move the field into the box on the right.
5. When the field appears in the right box, use the up and down arrows above the box to move the field up or down in the list. This position determines the location of the new column in the report result table.

   Note Do not drag fields up and down in the right box–ensure that you use the up and down arrows to change the position of fields.
6. Review the label listed for the field, and update it if necessary.
7. Click OK to save the changes.

Creating Dynamic Resources and Local Parameters in Edit Mode

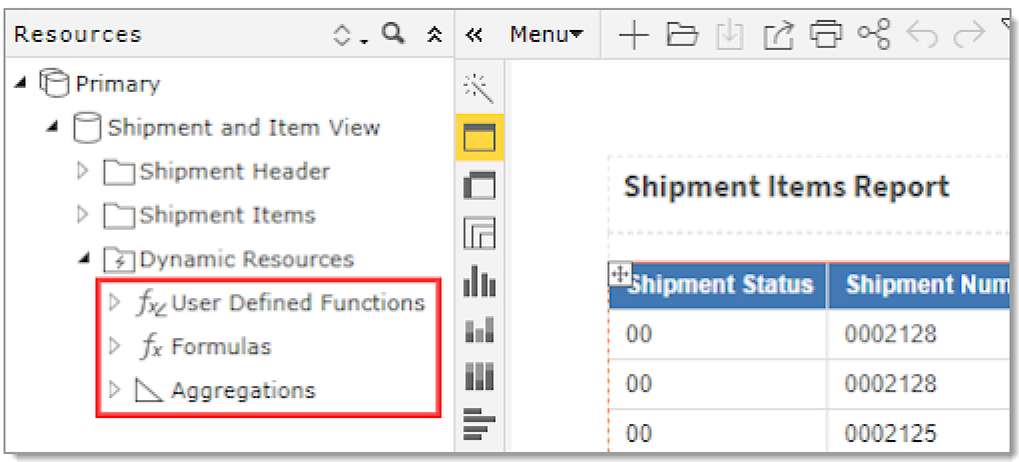
In Edit Mode, you can create dynamic formulas, user defined-functions, dynamic aggregations, and local parameters in your reports.

When you add fields to a report or use parameters to define filter conditions in a report, sometimes you may find that the predefined view elements in the business view or the given parameters in the current catalog cannot meet your requirements. In those cases, you can create dynamic resources (including formulas and aggregations) and local parameters in the report and use them to get the desired data. Then, when you save the report, the Report Console saves the dynamic resources and local parameters along with the report as its resources.

In addition, when there are changes in a business view, users with the administrators role can recompile the dynamic resources in reports that use the business view as the data source so that the dynamic resources can work normally.

Dynamic resources are accessible from the Resources panel.

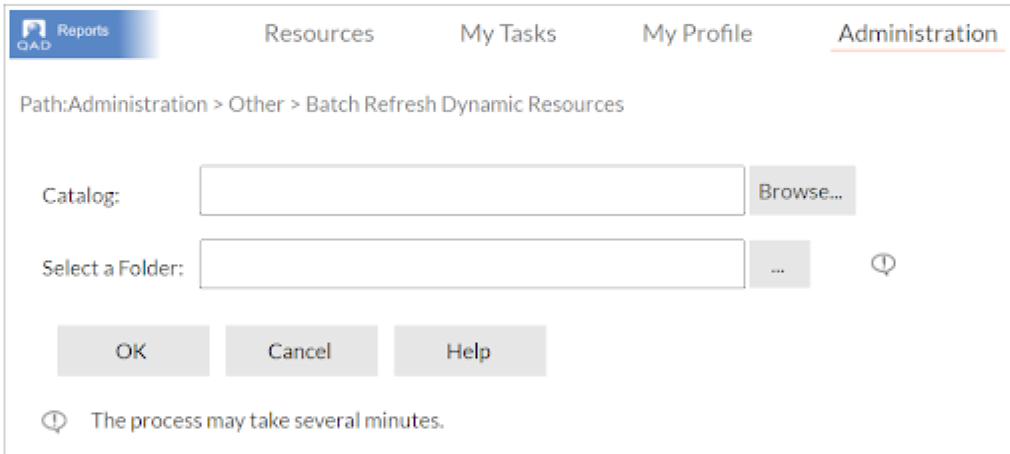
Dynamic Resources in Resources Panel



To recompile the dynamic resources in reports upon changes in business views:

1. On the system toolbar of the Report Console, select Administration > Other > Batch Refresh Dynamic Resources.
2. In the Batch Refresh Dynamic Resources page, click Browse to choose the catalog where the changed business views reside, from the server resource tree. All business views are currently based on the gtte.cat.xml catalog file located in the Root > Public Reports > GTTE_Reports folder.

Batch Refresh Dynamic Resources Page



3. Click the ellipsis button to choose a folder in which there are reports that run with the preceding catalog from the server resource tree. You can recompile dynamic resources based on one catalog and one folder at a time. If your server's workload and performance allow, and you have enough time, you can choose a parent folder that contains all such folders, or simply choose the root directory of the server resource tree if you are not quite clear about where the reports are. Otherwise, start from a folder without a subfolder in it and do the work multiple times.
4. Select OK to start recompiling the dynamic resources in the reports that run with the specified catalog, in the specified folder (including its subfolders). The process might take a long time depending on the quantity of the dynamic resources to recompile and the reports to refresh.

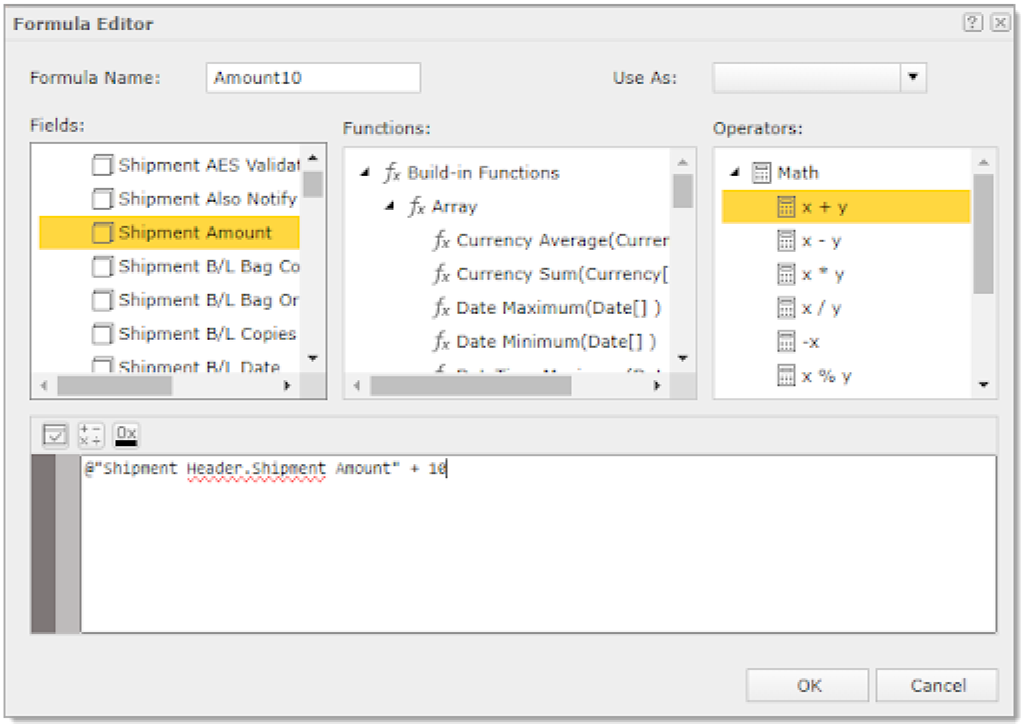
Creating and Using Dynamic Formulas

Note You should have some knowledge of the formula syntax before you can successfully compose a formula without errors. To learn about the syntax, see the Formula Syntax section of the Logi Report Designer v18 documentation, which is accessible from the Help menu in the system toolbar on page 1913.

To create a dynamic formula:

1. In the Resources panel, expand the Dynamic Resources > Formulas node, then select <Add Formula…>. The Report Console displays the Formula Editor.

Formula Editor



2. Type a name for the formula in the Formula Name text box.
3. By default, the system determines whether it can use the formula as an aggregation object, and if not, uses it as a detail object. You can specify to use the formula as a detail, group, or aggregation object, by selecting the corresponding view element type from the Use As drop-down list on the toolbar.

   Whether you can use a dynamic formula as a certain type depends on the following rules:

   - You can use any formula as Detail.
   - You can use any formula that references a DBField excluding an aggregation as Group.
   - You can use a formula that refers only to aggregations as Aggregation. For example, there are two aggregations Sum_Total and Sum_Quantity, and you can create a formula @"Sum_Total" / @"Sum_Quantity" and use it as an aggregation.
   - You can use a formula that follows the custom aggregation expression as Aggregation. For more information, see the Custom Aggregation section of the Logi Report Designer v18 documentation, which is accessible from the Help menu in the system toolbar on page 1913.
4. Compose the formula by selecting the required fields, functions including built-in functions and user-defined functions, and operators

from the Fields, Functions, and Operators boxes respectively. You can also enter the formula in the editing box. For more information, see Formula Functions and Formula Operators sections of the Logi Report Designer v18 documentation, which is accessible from the Help menu in the system toolbar on page 1913.

5. Click the Check button to check whether the syntax of your formula is correct.
6. Click OK to create the formula.

After you create a dynamic formula, you can then drag it from the Resources panel to the desired position in the report for data analysis, add it as a report field when working with the report wizard, or use it to create expressions in the Formula Editor.

If you want to further edit an existing dynamic formula, remove a formula that you do not want any longer, or change the formula type to Group, Detail, or Aggregation, right-click the formula in the Resources panel and then select the corresponding command on the shortcut menu. You cannot delete dynamic formulas when you have used them in the report.

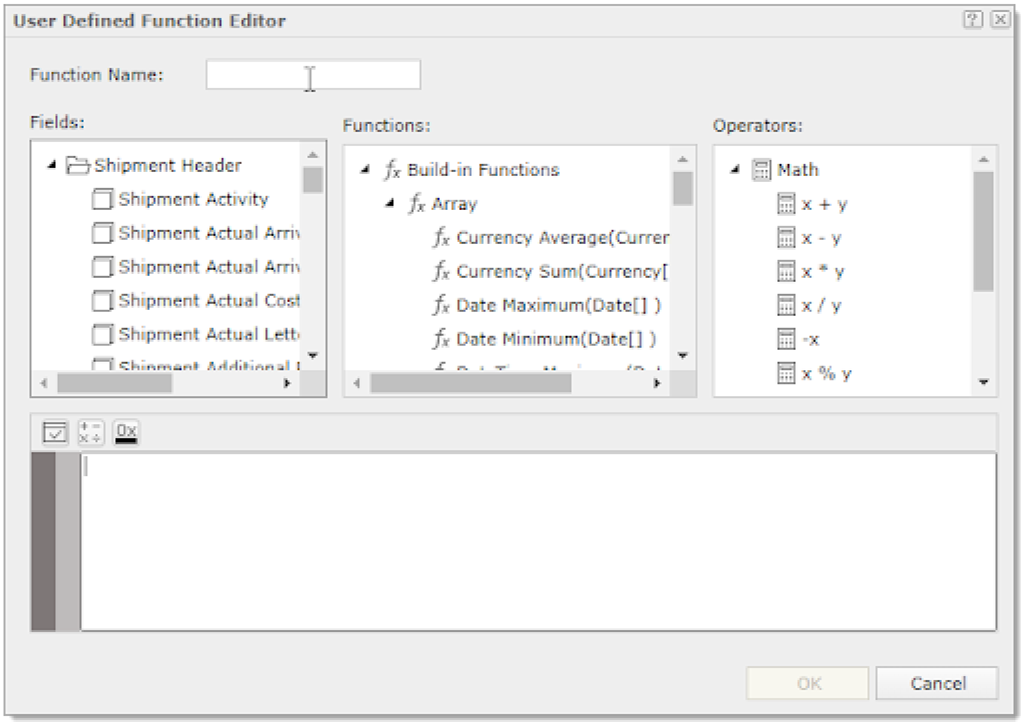
Using User-Defined Functions

When you create dynamic formulas to use in a report, if the built-in functions do not satisfy your requirements, you can make use of the User Defined Function feature to create any functions that you want. When you save the report, GTTE Reports saves the functions into the report as its resources in the same way that it saves dynamic formulas. User-defined functions can also call other user-defined functions.

To create a user-defined function:

1. In the Resources panel of Web Report Studio or the Resources box in the Web Report Wizard, expand the Dynamic Resources > User Defined Functions node, then select <Add Function…>. The system displays the User Defined Function Editor.

User Defined Function Editor



2. Enter a name for the function in the Function Name field.
3. Compose the function by double-clicking the required fields, functions including built-in functions and other user-defined functions, and operators from the Fields, Functions, and Operators boxes. You can also enter the function manually in the editing box.

   The function syntax is:

   arguments: VariableType1 VariableName1, VariableType2 VariableName2, ...;

   For example, arguments: integer age, string name;

   An argument works the same as a local variable except that you cannot assign any value to it, like arguments: integer age=10.
4. Select the Check button  to check whether the syntax of your function is correct.
5. Select OK to create the function.

The Report Console displays the function under the User Defined Functions node in the Functions box of the Formula Editor and User Defined Function Editor. You can call it in a dynamic formula or another user-defined function by double-clicking it.

For example, a user-defined function named function1 is: arguments: integer age, string name; and you can call it as follows:

- @function1(25, "John Smith");
- @'function1'(25, "John Smith");
- @"function1"(25, "John Smith");

If you want to further edit an existing user-defined function or remove a function that you no longer want, right-click the function in the Resources panel and then select the corresponding command on the shortcut menu. You cannot delete functions when you have used them in the report.

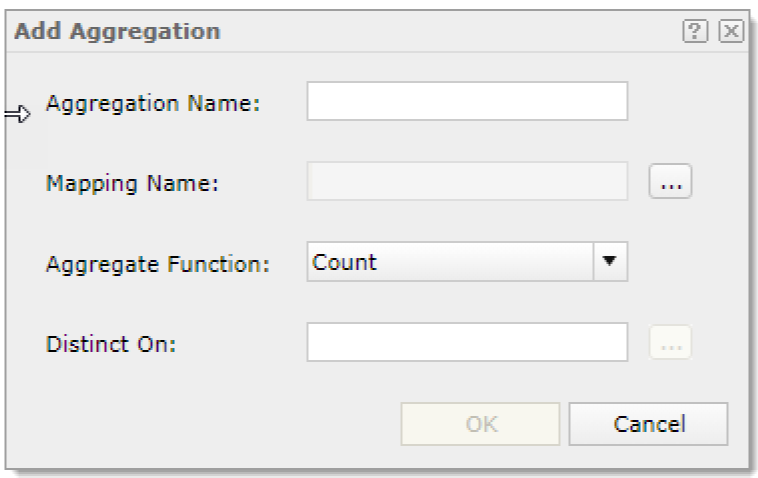
Creating and Using Dynamic Aggregations

In the Report Console, you can also create dynamic aggregations by mapping them to the available resources such as group objects, detail objects in the current business view, and the dynamic formulas that you have created in the report.

To create a dynamic aggregation:

1. In the Resources panel of the Report Console, expand the Dynamic Resource > Aggregations node, then select <Add Aggregation…>. The Report Console displays the Add Aggregation dialog box.

   Add Aggregation Dialog Box

2. In the Aggregation Name field, enter the display name of the dynamic aggregation. Or you can leave the name blank. Then, when you finish selecting the mapping name and the aggregate function, the system automatically provides a name here.
3. Select the ellipsis button ... next to the Mapping Name text box. The system displays the Select Resource dialog box.
4. Select the field on which the dynamic aggregation is based.
5. From the Aggregate Function drop-down list, select the aggregate function. When you select DistinctSum, you should select the ellipsis button ... next to the Distinct On text box. The system displays the

Select Fields dialog box. Select one or more group and detail objects according to which unique values to calculate DistinctSum from. For more information, see the Aggregate Functions section of the Logi Report Designer v18 documentation, which is accessible from the Help menu in the system toolbar on page 1913.

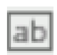
6. Click OK to create the dynamic aggregation.

The Report Console adds the dynamic aggregation in the Resources panel. You can then drag it to the desired position in the report for data analysis, add it as a report field when working with the report wizard, or use it to create expressions in the Formula Editor. If you want to edit any dynamic aggregation or delete it, right-click the aggregation and select Edit or Delete on the shortcut menu.

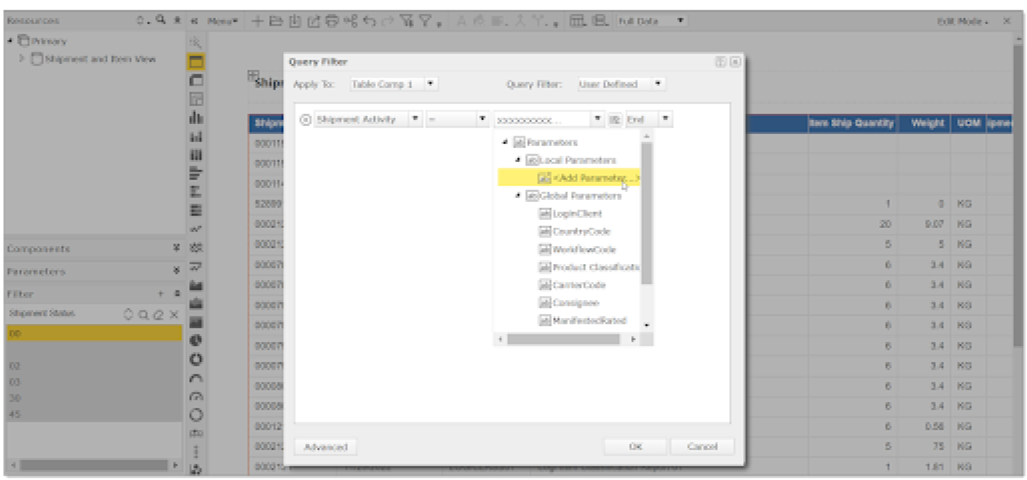
Creating and Using Local Parameters

When you use parameters to compose the filter conditions to apply to a report, if the given parameters in the current catalog cannot meet your requirements, you can create local parameters to use in the report.

To create a local parameter and use it in a filter:

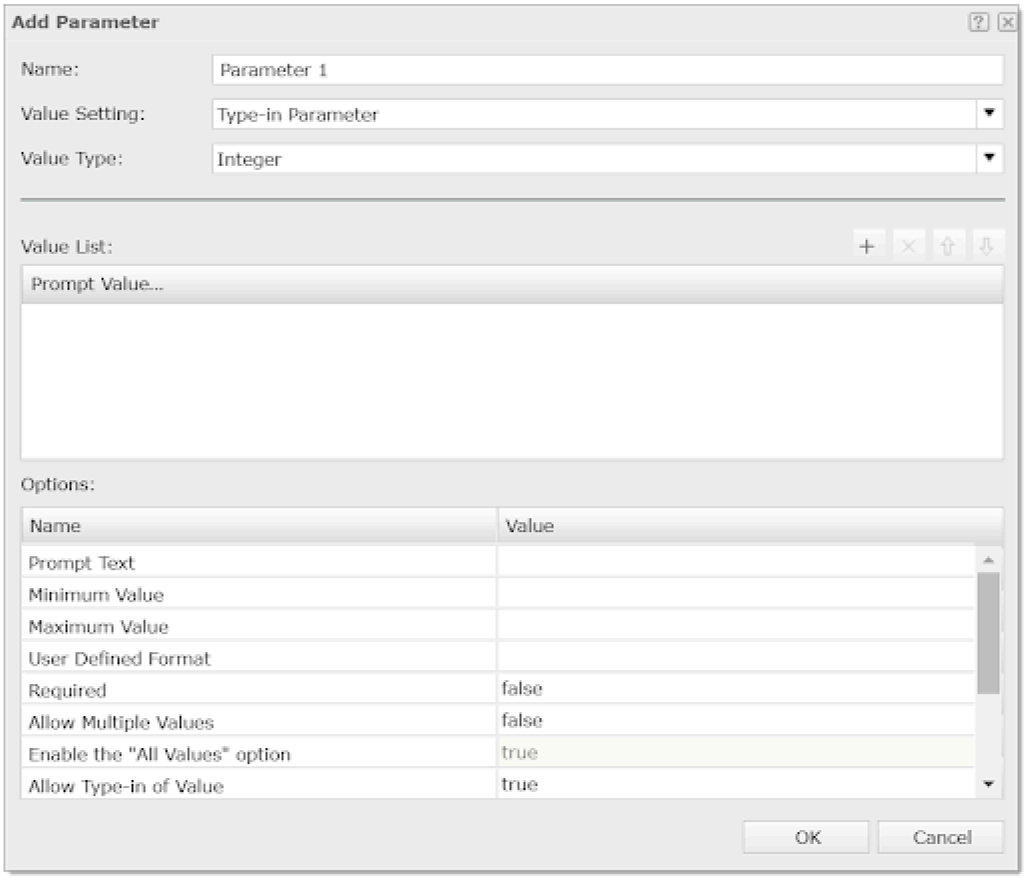
1. When you filter a business view in the Query Filter dialog box, or a data component using the Filter dialog box, select the Enter Parameter Values  button and then select <Add Parameter…> from the Local Parameters node of the value drop-down list.

   Add Parameter Option

   The system displays the Add Parameter dialog box.

Add Parameter Dialog Box



2. In the Name field, type a name for the parameter.
3. Select a parameter type from the Value Setting drop-down list.
4. In the value section, specify the parameter values as required. The section varies with the type you select from the Value Setting drop-down list.

   For Type-in Parameter:

   a. Select the data type of the parameter values from the Value Type drop-down list.
   b. Select the Add button + to add a value line, double-click in it and then type a value of the specified data type.

      If the parameter is of Date, DateTime, or Time type, you can also select the Calendar icon to set a date and time value using the calendar.
   c. Repeat the preceding step to add more values.

d. To adjust the order of the values, select the Up button ⇧ or the Down button ⇩.
e. To remove any unwanted value, select it in the list and then select the Remove button ×.
f. To make a value the default selected value for the parameter, select it from the list.

For Bind with Single Column:

The system provides a mechanism that links each value of the display field with the exact value of the bound field for a parameter. When you select a value of the display field, the system actually sends the value of the bound field to the query and filters the query result. This can help you bind the parameter to a data field in order to provide a list of values for report users to select, which probably makes more sense. The system uses the selected value of the bound field as the parameter value. For example, it might be confusing if you provide a list of customer ID numbers for the report users to select at runtime, since the ID numbers would probably mean nothing to them. In cases like this, it is better for you to display values of other fields, which would make more sense. For this case, you might prefer to display customer names instead of ID numbers. When the report user selects a customer name from the list, the system passes its ID number to the query as the parameter value so that the search criteria can be fulfilled.

a. From the Source drop-down list, select the required business view in the current data source from which to get data for the parameter. All the group and detail objects in the specified business view will be available for retrieving values for the parameter.
b. Select a field from the Bind Column drop-down list, to filter the query when running a report with the parameter.
c. If you want the values of another field to display for the report users to choose from, select that field from the Display Column drop-down list.

For Bind with Cascading Columns:

a. From the Data Source drop-down list, select the required business view in the current data source from which to get data for the parameter. All the group and detail objects in the specified business view will be available for retrieving values for the parameter.
b. Select the Add button + to add a parameter row.

   c. Select the arrow button in the Bind Column cell and then select a field from the drop-down list.
   d. If you want the values of another field to display for the report users to choose from, select the arrow button in the Display Column cell and select that field from the drop-down list.
   e. Select in the Parameter cell to create the parameter. The system automatically adds a name for the parameter.
   f. Repeat steps b to e to create more parameters. Make sure that the selected Bind Column fields are of cascading relationship one level by one level down. In this way, you can create a group of cascading parameters.
   g. To adjust the order of the parameters, select the Move Up button or the Move Down button .
   h. To remove any unwanted parameter from the cascading group, select it, and then select the Remove button .
5. In the Options box, set the properties of the parameter.
6. Select OK to create the parameter. The system adds the parameter to the Local Parameters node in the Parameters list.
7. To further edit the parameter, right-click it in the list and select Edit from the shortcut menu. Then, in the Edit Parameter dialog box, edit the parameter as you want.
8. To remove the parameter, right-click it in the list and select Delete on the shortcut menu.
9. Finish defining the filter condition using the parameter.
10. Select OK to apply the settings. Server lists the parameter in the Parameters panel. You can specify the parameter value in the panel to dynamically set the filter condition.

Important

- You can only use JDK (not JRE) to compile formulas and user-defined functions that you created in Web Report Studio and save them with no errors into a web report.
- Currently, you cannot use global variables in dynamic formulas and user-defined functions.
- If you refer to any field in a formula or user-defined function, add a prefix @ before the reference name for that field. If the field name contains spaces, quote the reference name with double quotation marks (""). For example, if the field name is Customer Name, then the reference name will be @"Customer Name".
- When formulas and user-defined functions reference display names or mapping names, the names should not contain any of the following

characters if you do not quote the names by double-quotation marks "":

"~", "`", "!", "@", "#", "$", "%", "^", "&", "*", "(", ")", "-", "+", "=", "{", "}", "[", "]", "|", "\\", ":", ";", "\", " ' ", "<", ",", ">", ".", "?", "/"

Examples:

- Expression @Customer#; will cause a syntax error. But @"Customer#" is OK.
- If a field has the display name Category.Aggregation, quote it as "Category.Aggregation" or "Category"."Aggregation".

Creating Reports For Your Own Use

You can use existing predefined QAD GTTE reports to create reports that are customized to your own needs. To do this, run a predefined report in Root > Public Reports > GTTE_Reports and then view it in Edit Mode to adjust it to your needs. After you have made the adjustments, in Edit Mode, select File > Save As to save the new report with a new name in a folder of your choice; for example, in Root > My Reports. This approach keeps the predefined reports unchanged so that they are available for other users. It also ensures that your adjusted report is not overwritten when the predefined reports in Root > Public Reports > GTTE_Reports are updated through the publication process.

An important point to note is that the predefined reports and any reports that you create based on these reports are dependent on the catalog and business views related to the original predefined report. If the catalog and business views are updated in a future publication, these updates will apply to the original predefined report but not to any reports that you created from it. The publication process overwrites any existing reports in the target folder that share a name with an updated report for publication.

Scheduling a Report to Run

You can use the Report Console to schedule reports to automatically run at one or more designated dates and times. Scheduled reports can greatly improve the performance of the reporting service in an organization. For example, you can run reports during low network traffic times. Scheduled reports can also capture a time period exactly; for example, the last day of the quarter.

You can monitor the status of scheduled reports by viewing the My Tasks page, which is accessible from the system toolbar. The Running table lists the reports that are currently running. The Completed table lists the scheduled reports that have completed running. The Scheduled table lists the reports that are scheduled but have not yet run.

In this example, we set up a schedule to output a weekly report to an email address.

1. In the Resources page of the Report Console, navigate to the Public Reports > GTTE_Reports folder.
2. In the GTTE_Reports folder, click the folder for the module that you want to run a report on.

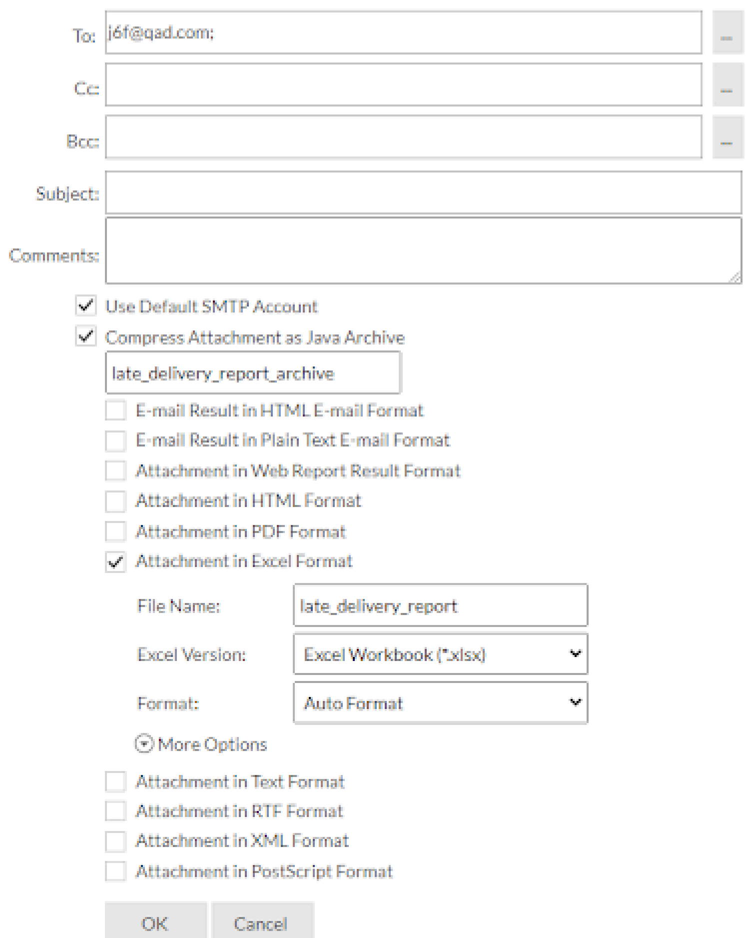
   Note A Search field at the top left of the page allows you to search for a specific report name.

3. In the module folder, mouse over the specific report row and click the Schedule icon that appears to the right of the report name in the floating toolbar.
4. In the <Report Name> [Schedule] page’s General tab, in the Schedule Name field, enter ScheduledReportToEmail.

5. Click Next.
6. In the Parameter tab, specify the report parameters and then click Next.
7. In the Publish tab, click the To E-mail tab.
8. Click New and add an email recipient in the To field.

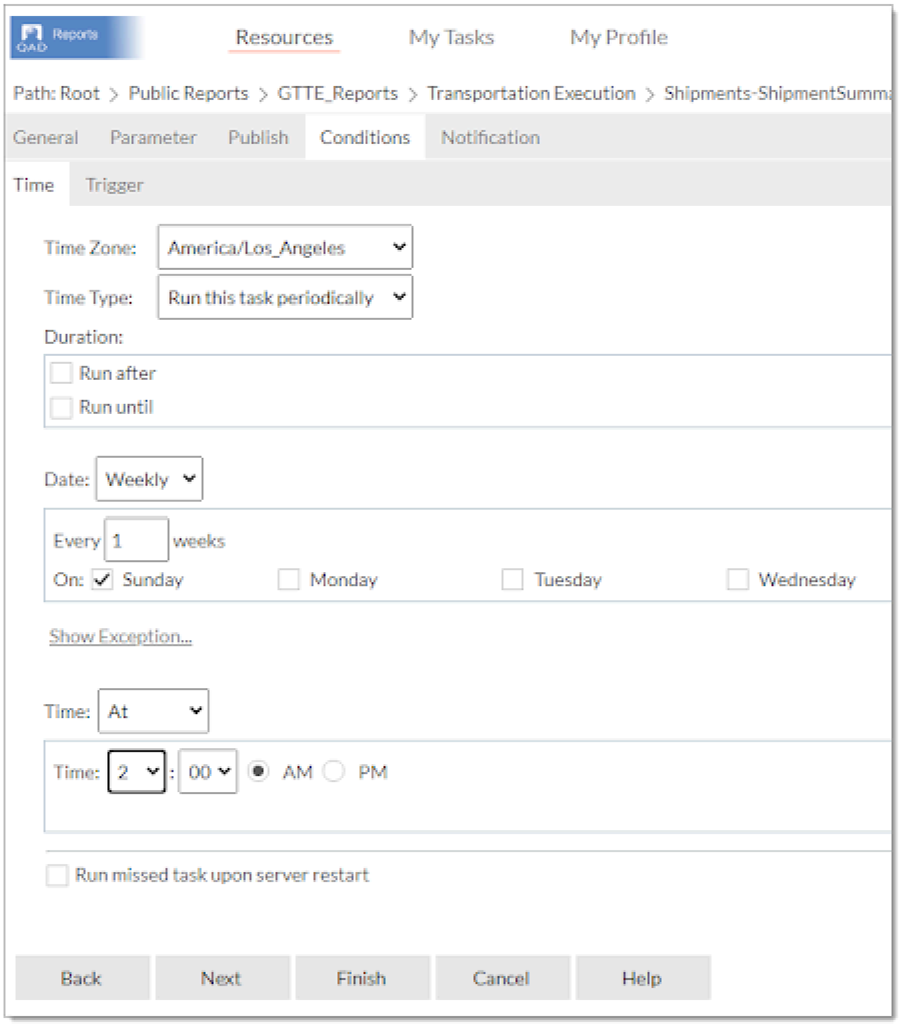
   Note Ensure the correct report format–for example, Excel–is selected at this stage. If you want to compress the mail attachment as a ZIP archive, select Compress Attachment as Java Archive.

   Configuring the Email Contents



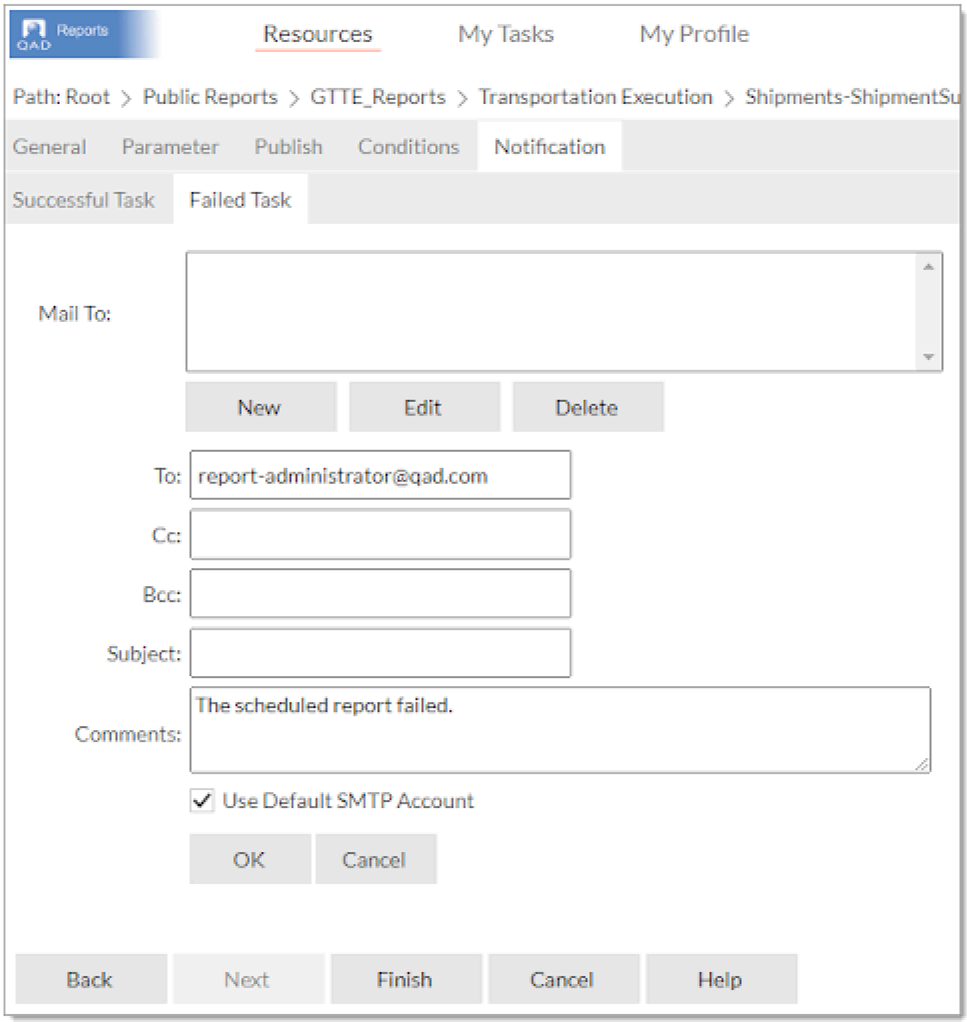
9. Click OK to confirm the email address and attachment details.
10. Click Next.
11. In the Conditions tab, specify the time at which you want to perform the scheduled report task to run.
12. In the Time tab, choose Run this task periodically from the Time Type drop-down list. Select Weekly from the Date drop-down list and define it to repeat every week on Sunday. Select At from the Time drop-down menu and specify the time as 2:00 AM.

Configuring the Email Time



13. Click Next.
14. It is best practice to configure a notification in the Notification > Failed Task tab so that, if the scheduled report run fails, the nominated person gets a notification by email. You can also configure a notification for the case when the report is successful.

Configuring Failed Task Notification



15. To create this scheduled report, Click Finish.
16. Click OK on the Task Submitted Successfully message that appears on the screen. This message includes a task ID.

The status of a scheduled task can be seen on the My Tasks page.

Running a Scheduled Report Manually

Sometimes it's not practical to wait until a particular time to view the result of a scheduled report. To run the report and view the result immediately:

1. In the My Tasks page of the Report Console, click the Scheduled tab.
2. In the Scheduled tab, review the listed tasks to locate the scheduled report that you want to run manually. Mouse over the Schedule Name for the report and click the Run icon that appears to the right of the report name in the floating toolbar.

Note Before running the task, you can click the Properties icon to edit any settings, such as the email address. After running the task, ensure that you revert the settings for the scheduled task.

3. In the pop-up message that appears on the screen, click OK.
4. Check your email inbox for the report.

Deleting Resources

Resources, including folders, that are no longer needed can be removed from the server resource tree in the Resources page of the Report Console. You can delete one or more resources at a time. To delete a resource:

1. Browse to the folder where the resources are located.
2. Select the checkboxes of the required resources. To delete all the resources, select the top checkbox.
3. Right-click in any selected resource row and select Delete from the shortcut menu.

   If you just want to delete a single resource, hover over the resource row and select the Delete button on the floating toolbar to delete it.

Note Shared web reports can only be deleted by their owners from the My Shared folder.

Note The built-in resource folders cannot be deleted.

Note Deleting a resource or folder removes the resource or folder from disk. The deleted resources and folders cannot be retrieved. Any relevant versions belonging to the resource will also be deleted.

Reports Administration

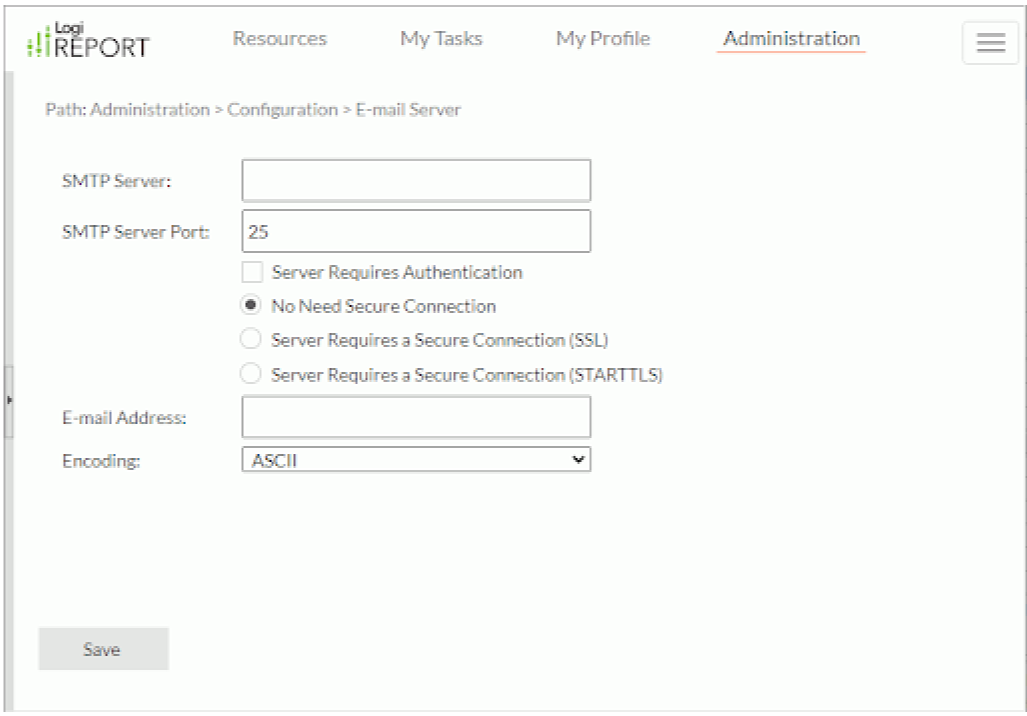
The Administration menu allows you, as the report administrator, to manage the Report Console resources, databases, configuration, and security. If you have the requisite permissions, you can configure the Report Console so that users can run reports and receive email notifications of report results. The Administration menu is accessible from the system toolbar.

Configuring the Email Server

In order for users to publish reports to email and to notify the task status by email when scheduling tasks to run reports, administrators need to configure an email server in advance. These steps describe how you can configure an email server on the Report Console.

1. On the system toolbar of the Report Console, navigate to Administration > Configuration > E-mail Server.

   E-mail Server Configuration

2. In the E-Mail Server page, complete the available fields:
   - *SMTP Server, SMTP Server Port, Encoding.* These fields are configured by QAD GTTE and you do not need to make any changes to them.
   - *E-mail Address.* Specify the address of the email sender. Ensure that the format of the specified address is valid; for example, noreply-logireports@qad.com.
3. To apply the settings, click Save.

Managing Users, Roles, Privileges, and Permissions

To use the Report Console, you must have a user account with a role assigned to that user.

Note In QAD v20, 20.1, and v20.2, QAD GTTE users do not automatically have user accounts or roles in the Report Console. Report administrators must add users to the Report Console before users can access it. The roles in the Report Console are separate from the roles in the QAD GTTE Web UI. For more information about Report Console roles, see Report Console Roles, Privileges, and Permissions on page 1948.

Note From QAD GTTE v20.3, QAD GTTE users with access to menu option LRC are synchronized to the Report Console and given the "everyone" role in the Report Console by default. A background process performs this synchronization. It is not necessary to manually create the user in the Report Console.

Report Console Roles, Privileges, and Permissions

The actions you can perform in the Report Console depend on the Report Console role assigned to your user account. There are in-built roles provided with the Report Console:

- Administrators. This role allows you to access and perform the administrative tasks listed in the Administration menu of the Report Console. Administrators also have full access–Visible, Read, Write, Delete, Execute, Edit, Schedule, Grant, and Update Status permission–to the report resources. This role cannot be deleted.
- Everyone. This role provides restricted access to report resources and, by default, does not allow you to delete, add, or copy reports. This role cannot be deleted.

Administrators can assign a role to a user using the Administration > Security > Role menu option. Administrators can also use this option to create new roles. For each role, you can select the privileges associated with that role. For each role, at the folder level, you can define the permissions that the role has.

Report Console Users

To run reports and perform other tasks in the Report Console, you need a user account. Each user must have at least one role. At the resource level, you can define what the role can do.

Users of the Reports module fall into one of three categories:

- Report Administrator. These users have the administrators role, which provides them with access to all of the functionality in the Report Console, including:
  - Creating and publishing reports for use by other users.
  - Creating users in the Report Console and assigning appropriate permissions to these users through roles.
  - Configuring user settings to enable scheduled reports to be sent to specified email addresses.
- Report User. These users have the everyone role, which provides them with access to a subset of the functionality in the Report Console, including:
  - Running existing predefined QAD GTTE reports manually.
  - Scheduling existing predefined reports to run at a specified time or time interval.
  - Editing existing report results.
  - Copying predefined reports to create new reports that are more suited to users' individual needs.
- Report Consumer. This role is not defined within the Report Console as these users do not have access to the console. These users receive the results of scheduled report runs by email.

Managing Users

The system allows you to create a user, edit the roles that a user has, and delete a user.

Creating A User Account

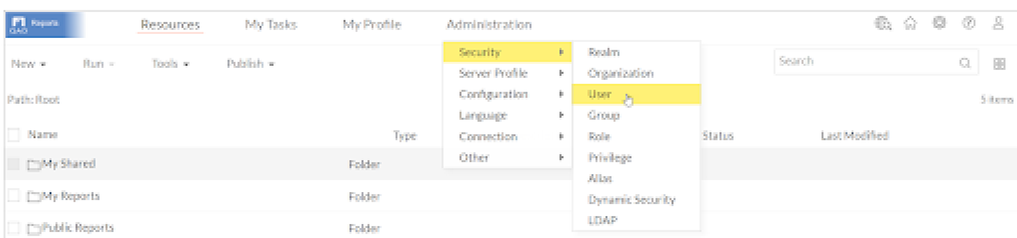
To use the Report Console, you must have a user account. The Report Console has two built-in user accounts, admin and guest. You cannot delete the built-in user accounts. The admin user account cannot be deleted or disabled.

Note Report Console users are not automatically created for QAD GTTE user accounts. You must explicitly create a Report Console user account for a QAD GTTE user who needs this access. Ensure that you choose a Report Console user name that matches the QAD GTTE user name but with any letters in uppercase. You do not need to specify a password. The password from your QAD GTTE user account carries over to the Report Console user account, provided you use the same user name.

To create a user account:

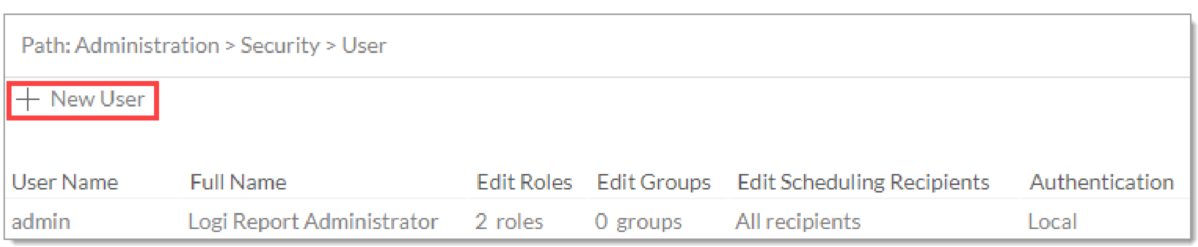
1. On the system toolbar of the Report Console, click the Administration drop-down menu and select Security > User.

   User Option in the Administration Menu

2. In the User page, select New User from the taskbar.
3. In the New User pop-up window, complete the fields with any user information you would like to use and click OK to create the user.

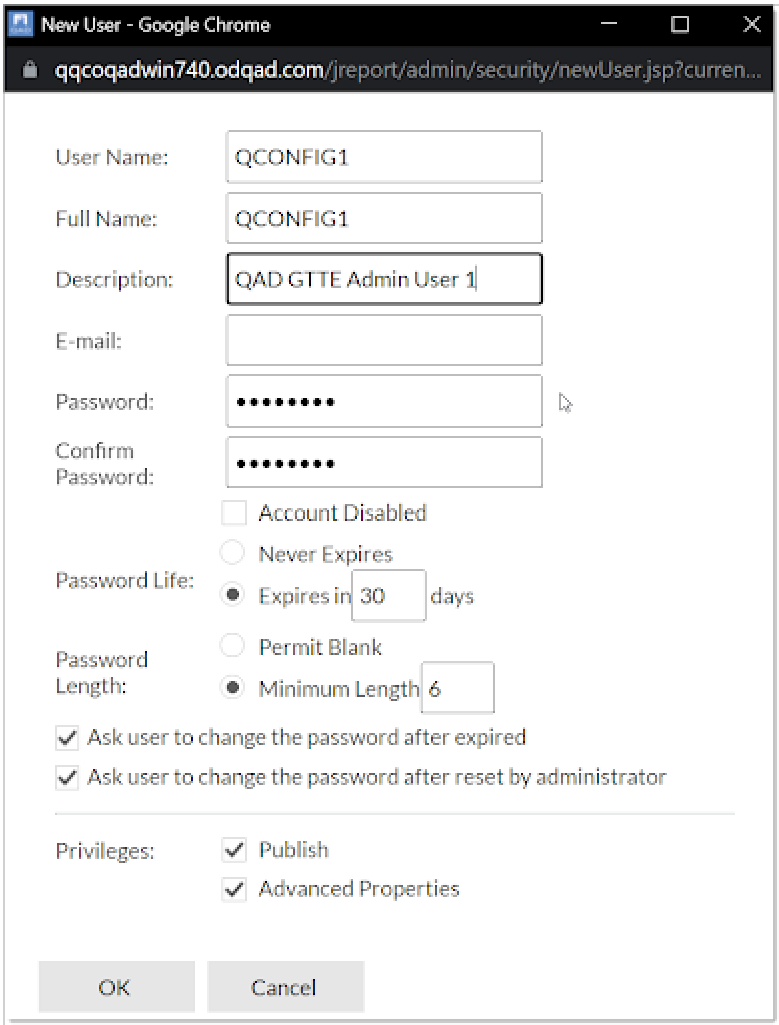
   New User Button

   If you want to disable the user for now, select the Account Disabled checkbox.

   Note The Publish privilege is an important aspect of user definition. You can either grant or deny users the ability to publish resources to the Report console using this checkbox. QAD Services handle the publishing of updated reports to customer environments; do not grant this permission to any other users. The Advanced Properties privilege allows you to view advanced resource properties information. For more information on privileges, see the Managing Privileges section.

New User Pop-Up Window



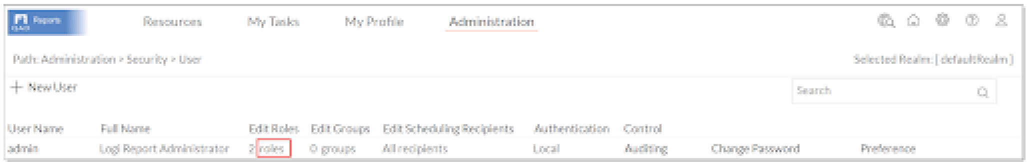
The new user is listed in the user table.

Editing the Roles a User Holds

You can assign more than one role to a user. A user that holds multiple roles has all the privileges that these roles have.

1. On the system toolbar of the Report Console, click the Administration drop-down menu and select Security > User.
2. In the User page, locate the relevant user in the table and, in the Edit Roles column, click the roles link for that user.

Editing a Role



3. To add a role to the user, select Add Roles, select the new role, and then select Add. To remove a role from the user, select the role and then select Remove. After you remove a role from a user, the user no longer has the privileges that the role owns.

Editing the Scheduling Recipients for a User

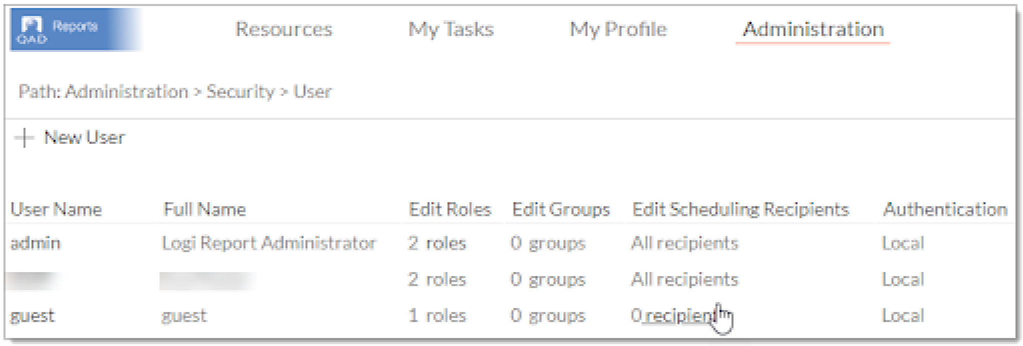
GTTE Reports adopts permission control on the scheduling recipients that a user can access. This approach means that when a user schedules a report task to publish reports to email, if the user has the required permission, the user can send the reports to email addresses of particular users, groups (QAD GTTE does not use the Groups feature), and roles. These are the basic rules on which users, groups, and roles are available as the scheduling recipients of a user by default:

- An administrator (the user with the administrators role) who does not belong to any organization can see all the users, groups, and roles in the GTTE Reports security settings. The permission is unchangeable.
- A normal user (the user without the administrators role) can see themselves only.
- An administrator in an organization can see all the users, groups, and roles in the organization. The permission is unchangeable.
- A normal user in an organization cannot see users, groups, and roles outside of the organization.
- A user, group, or role inherits the permissions from its parent users, groups, and roles.

An administrator can customize the scheduling recipients that are available to a normal user:

1. In the user table, select the recipients link for the user. The Report Console displays the recipient list for the user.

Recipients Link in the User Table



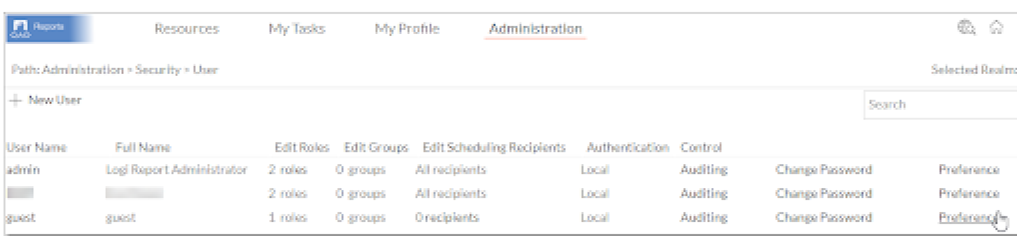
2. Select Add Recipients. The Report Console displays the recipients that you can choose.
3. Select the recipients that you would like to be accessible to the user.
4. Select Add. The Report Console displays a confirmation message.
5. After you confirm the update, the recipients you selected appear on the recipient list.
6. To remove a recipient from the user, select it in the recipient list and then select Remove.
7. When the user schedules reports to run and be sent by email, the user will be able to select the recipients from the Select Role, Group and User dialog box to use their addresses to send the email.

Setting User Preferences

An administrator can configure the preferences of a user:

1. In the user table, select the Preference link for the user. The Report Console displays the preference settings for the user in a pop-up window.

   Preferences Link in the User Table

2. Specify the server preferences for the user, and the Default and Advanced properties you want the user to use in Web Report Studio.
   - *Default Format for Viewing Report.* The default format for viewing reports. By default, Web/Page Studio is selected, which means that web reports open in Web Report Studio (GTTE Reports does not support page reports).

- *Open All Reports in New Window.* By default, the Report Console displays Web Report Studio in a new window. Clear this property if you want to embed them in the current window.
- *Use Wizard for Web Report Studio.* You can create web reports using two methods: the quick start method to create a table report, which is the default method when you clear Yes, and the traditional method using a wizard when you select Yes.
- *Only Display CSS Styles in Style List.* By default, the Report Console displays only the CSS styles in the style list.
- *Keep Completed Tasks for.* The number of days the Report Console keeps the completed tasks in the Completed list. The default value 0 means the Report Console keeps the completed tasks until you delete them from the Completed page.
- *Columns Shown in _ List.* Select the columns you want to display as default in the following list when you sign in to the Report Console: Report Tabs, Scheduled, Running, Completed, Background Tasks, Report Result Versions, Report Versions, Catalog Versions, and Result Versions.

3. Select OK to accept the changes.

Deleting a User

You can delete a user account if it is no longer required. However, you cannot delete the built-in user accounts such as admin and guest, users that hold roles other than the everyone role, or users that belong to any group (QAD GTTE does not use the Groups feature). You cannot delete your own user account from the user table.

1. On the system toolbar of the Report Console, click the Administration drop-down menu and select Security > User.
2. In the User page, locate the relevant user in the table and, in the last column, click the Delete link for that user.

Managing Roles

Managing roles includes many functions and they are available to administrators only. This section describes how you can create roles, add members to roles, customize the scheduling recipients for roles, and perform other role functions.

Creating a Role

To create a role:

1. On the system toolbar of the Report Console, click the Administration drop-down menu and select Security > Role.
2. In the Role page, select New Role from the taskbar.
3. In the New Role pop-up window, complete the fields with any user information you would like to use and click OK to create the user.
    - *Role Name* Specify the name of the role.
    - *Parent Role Name* Specify the name of the role.
    - *Description* Parent role name.
    - *Privileges*

      Select Advanced Properties to give the role the privilege of viewing advanced resource properties information. QAD Services handle the publishing of updated reports to customer environments; do not grant this privilege to any other users. For more information on privileges, see Managing Privileges on page 1957.
4. Click OK to create the new role. The role appears in the role table.

Editing a Role

To edit a role:

1. On the system toolbar of the Report Console, click the Administration drop-down menu and select Security > Role.
2. In the Role page, click the relevant role name in the table and, in the Edit Roles column, click the roles link for that user.
3. In the New User pop-up window, add or remove the Advanced Properties privilege for the role and click OK.

   Note For more information on privileges, see the Managing Privileges section.

Editing the Members of a Role

To edit the members of a role:

1. On the system toolbar of the Report Console, click the Administration drop-down menu and select Security > Role.

2. In the Role page, locate the relevant role in the table and, in the Members column, click the members link for that role.
3. In the Edit Members page, review the member list of the role. To add a member to the role, click Add Members, select the new member, and click Add.

   Note A role can have more than one child group, child role, and parent role. You cannot add a parent role to a role as its child. You cannot remove some members from the role they belong to, such as admin in the administrators role and guest in the everyone role. You cannot remove your own user from the administrators role.

Managing Privileges

The Privileges page allows you, as an administrator, to grant and revoke privileges for users and roles. QAD GTTE Reports does not allocate privileges on a user or group basis. The available privileges are:

- Publish. When you have the Publish privilege and Write permission on a folder in the user directory, you are able to publish resources to the folder.
- Advanced Properties. This privilege allows you to view advanced information about version properties such as catalog connections and report-related resources.

Note By default, only the administrators role and the admin user account have the Publish and Advanced Properties privileges. QAD Services handle the publishing of updated reports to customer environments; do not grant this privilege to any other users.

To manage privileges:

1. On the system toolbar of the Report Console, click the Administration drop-down menu and select Security > Privilege.
2. Select a role in the Selected box, then select or clear the required privileges.

   If a role or user is not listed in the Selected box, select it in the Available box and select the Add button to add it to the Selected box first, then grant it the privileges accordingly.

   You can make use of the Search box to search for the required roles in the Available or Selected box. After typing text in the Search box, you can select the Search Option arrow in the box to specify the following search options: Highlight All, Match Case, and Match Whole Word. To cancel the search operation, clear the text or select .
3. To remove all privileges from a role, user, or group, first select it in the Selected table, then select the Remove button . Server adds the role back to the Available box with no privileges.
4. Click OK to apply the changes.

   Note You can also grant privileges to users and roles while creating or editing the users and roles.

Managing Permissions

The Permissions page allows you, as an administrator, to grant and revoke permissions for roles. QAD GTTE Reports does not allocate privileges on a user or group basis.

The permissions a role has are resource-specific. To view or modify the role permissions for a given resource, select the checkbox next to the resource; for example, Public Reports, and then select Properties. From the Permissions page, you can edit the permissions for the role–assuming you have the Grant permission.

Note It is possible to grant permissions at a more granular level. For example, you can define permissions at the report level or the data level. However, QAD GTTE defines reports at the Public Reports level, as indicated by the Enable Setting Permissions option.

The available permissions are:

- Visible. This permission allows you to view object names in the resource tree or version table, such as folders, resources, and archive versions. QAD GTTE does not use the versions capability of the Report Console.
- Read. This permission allows you to view object properties, versions, and, if it is a folder, folder contents.
- Write. This permission allows you to change the properties (excluding permission settings) of the objects in the resource tree or version table, such as folders, resources, and archive versions, and modify version table settings.
- Delete. This permission allows you to delete objects from the resource tree or version table, such as folders, resources, and archive versions.
- Execute. This permission allows you to access View Mode of the Web Report Studio.
- Edit. This permission allows you to access Edit Mode of the Web Report Studio.
- Schedule. This permission allows you to submit resources to schedules.
- Grant. This permission allows you to grant permissions to other users, groups, or roles. You need to be an administrator to assign the Grant permission to other users, groups, or roles. Users, groups, or roles that have obtained the Grant permission are also endowed with the other permissions, and users can then grant these permissions–except the Grant permission itself–to other users in the same group.

  Note In QAD GTTE, permissions are granted at the role level only.
- Update Status. This permission allows you to update a report status and, if it is a folder, the status of reports in the folder.

To run reports in public folders in the resource tree, you must have the Execute and/or Edit permissions on the reports, and the Visible/Read permissions on the catalogs that the reports use.

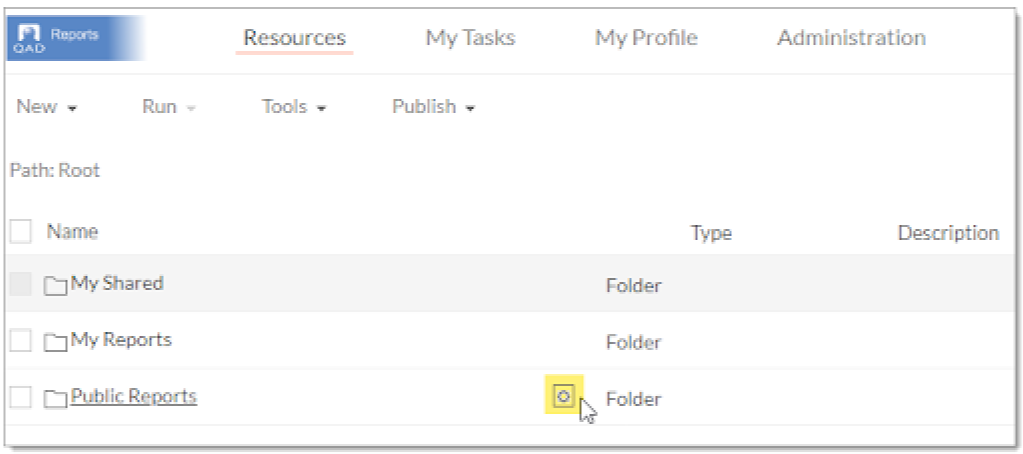
You may need more than one permission to complete a task. For example, you must have both the Visible and Read permissions to view the properties of a report.

Some permissions depend on other permissions, such as Write, Execute, Edit, and Schedule. Allowing any one of these will also allow the Read permission.

To manage permissions:

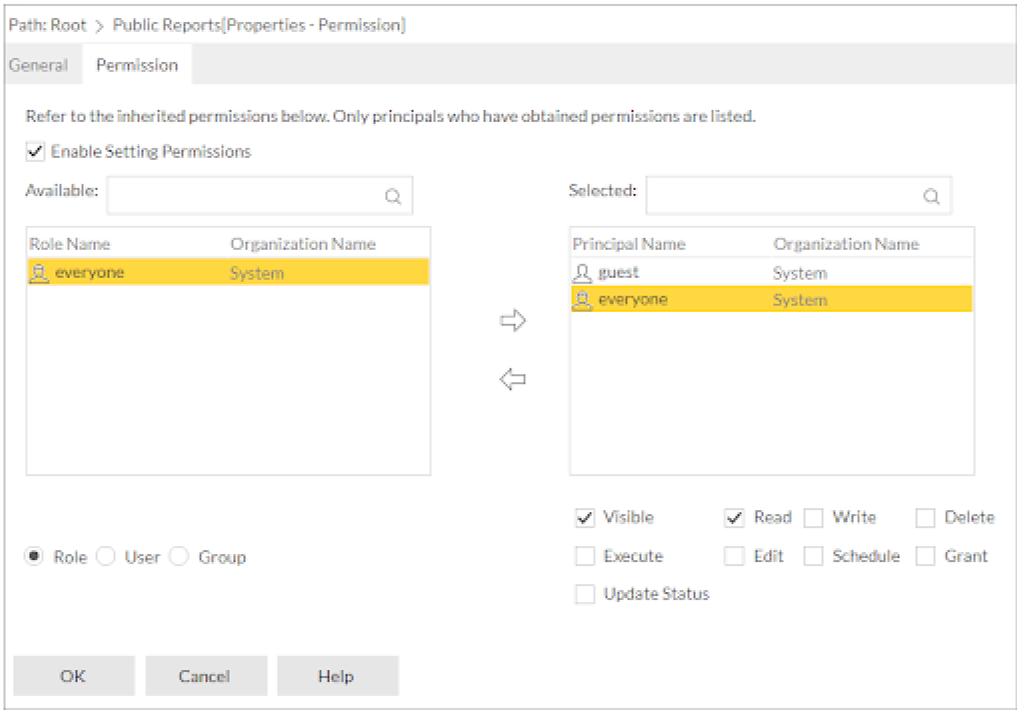
1. On the Root folder, in the Public Reports row, click the Permissions icon.

   Permissions Icon

2. On the Resources page, click the Permissions tab.
3. In the Permissions tab, ensure that the Enable Setting Permissions checkbox is selected.

Permissions Tab in the Resources Page



4. Select Role.
5. Select a role in the Selected box, then select or clear the required permissions.

   If a role is not listed in the Selected box, select it in the Available box and select the Add button to add it to the Selected box first, then grant it the privileges accordingly.

   You can make use of the Search box to search for the required roles in the Available or Selected box. After typing text in the Search box, you can select the Search Option arrow in the box to specify the following search options: Highlight All, Match Case, and Match Whole Word. To cancel the search operation, clear the text or select .
6. To remove all the enabled permissions from a role, first select it in the Selected table, then select the Remove button . The system adds the role back to the Available box with no permissions.

   To remove permissions for all roles on the resource, clear Enable Setting Permissions.
7. Click OK to apply the changes.

   Note After you have set permissions for a parent folder, any new resources and subfolders in that folder will inherit the same permissions. If you do not want them to inherit these permissions, you can enable their user permissions and set their permissions separately. Resources and folders will inherit permissions from their parent folder if you don't enable their user permissions.