

# Create and Update Report

## ✓ User Story: Creating a File Report

As a user,

I want to create a Notebook report by selecting the notebook type,  
providing a Name, Description, Product

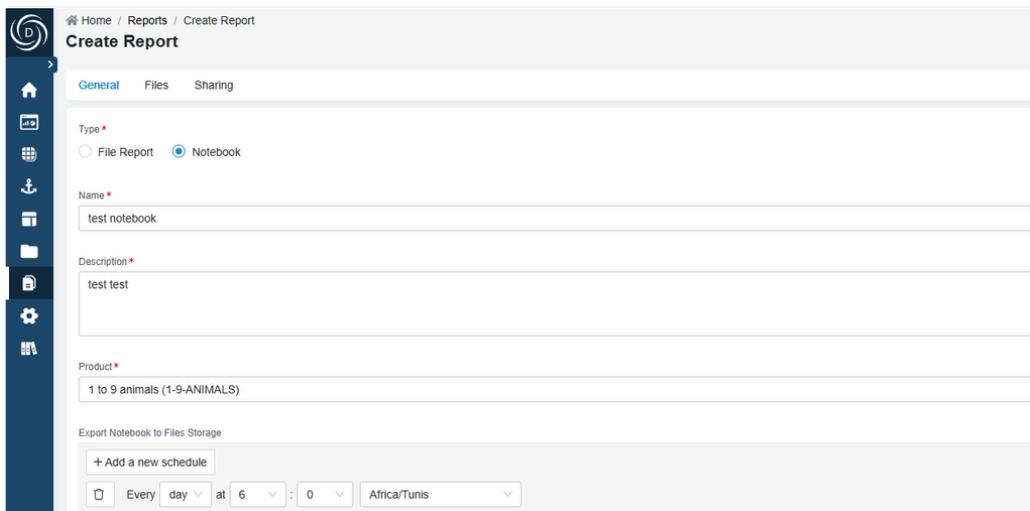


The screenshot shows the 'Create Report' page for a 'File Report'. The interface includes a sidebar with various icons and a header with navigation links. The main form has tabs for 'General', 'Files', and 'Sharing'. The 'Type' field is set to 'File Report'. The 'Name' field contains 'Name'. The 'Description' field contains 'Description'. The 'Product' field contains 'Select a product and group'.

## ✓ User Story: Creating a Notebook Report

As a user,

I want to create a Notebook report by selecting the notebook type,  
providing a Name, Description, Product and scheduling an execution date,  
so that the notebook can be saved in the storage system.



The screenshot shows the 'Create Report' page for a 'Notebook'. The 'Type' field is set to 'Notebook'. The 'Name' field contains 'test notebook'. The 'Description' field contains 'test test'. The 'Product' field contains '1 to 9 animals (1-9-ANIMALS)'. Below the form, there is a section for scheduling the export of the notebook to file storage, with a button '+ Add a new schedule' and a dropdown menu for setting a daily execution at 6:00 UTC.

## ✓ User Story: Editing and Publishing a Notebook Report

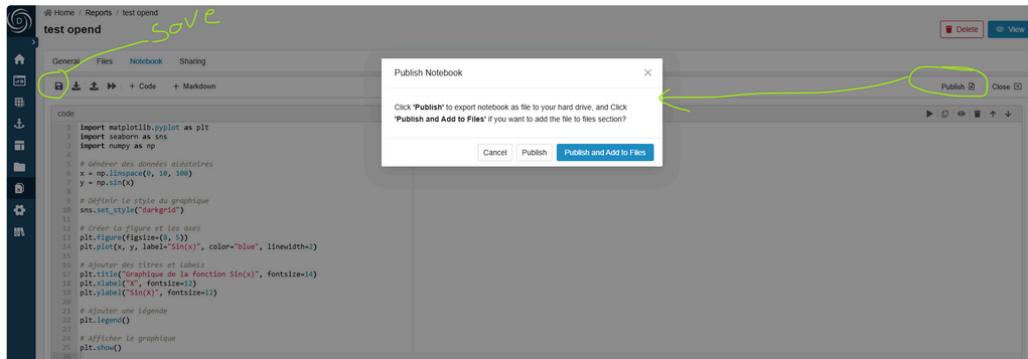
As a user,

Once the notebook report is created,  
I want to go to the update screen to edit its content by writing **Code** or a **Markdown**,  
so that I can execute it, save the changes, and optionally publish it.

I want to be able to:

- **Execute** the notebook and **save** my modifications,
- **Publish** the notebook, meaning I can either download it or save it to storage manually,
- Or, if a **schedule** was defined during creation, the notebook should be automatically executed and saved to storage at the scheduled time.

The file that is downloaded or saved in storage should use the **report name** as its filename.



**PS :** Once the notebook report is created, it is initially assigned the **status: closed**.

When the user fills in the notebook and saves the content, the **status** is updated to **opened**.

### User Story: Deleting a Notebook Report Based on Status

As a user,

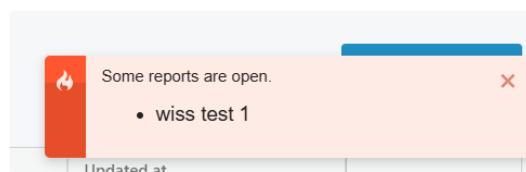
I want to be able to delete a notebook report only if its status is **closed**

so that I don't accidentally remove active or in-progress reports.

If the report has the status **opened**

I should **not** be allowed to delete it,

and a message should be displayed informing me that deletion is not possible in this state.



## Email Delivery Configuration for a Notebook or File:

When the toggle “**Deliveries & Emailing: Define deliveries and schedule emailing to distribute report files**” is set to **true**, a configuration form appears allowing you to set up the delivery of selected files to the desired recipients.

The setup includes the following steps:

- **Select one or more recipients** using either a direct *Delivery* or a *Distribution List*.
- **Choose the send date:**
  - Use *Send Date* to send the files immediately after report creation,
  - Or schedule the delivery using *Scheduling*.
- **Email Body** is required.
- **Files to be sent** must also be selected.

👉 To select the files for delivery:

- Navigate to the **Files** tab and import the necessary files.
- Files with the attribute `exported = false` will automatically appear in the **General** section.
- In the **General** tab:
  - You can **send all listed files**,
  - **Remove individual files** using the *Delete* button,
  - Or **reset the list** with the *Reset* button to display all available files again.

The screenshot shows the 'End to End' delivery interface. At the top, there are tabs: 'General', 'Files' (which is highlighted with a red circle), 'Notebook', and 'Sharing'. Below the tabs, there's a section for 'Emails' where an email is being composed to 'touati.wissems@gmail.com'. Under 'Send Data', the 'Send immediately' option is selected. In the 'Email Body' section, there's a rich text editor with a preview. At the bottom, there's a section for 'Files for the next email distribution' with checkboxes for 'Name' and '2024-08-04 - test.eml'. There are 'Delete' and 'View' buttons at the top right.

## Tab File 📄

In the **Files** tab, two types of files may appear:

1. **Manually imported files**, added via the "*Import File*" button, are labeled with the tag "**File Upload**".
2. **Files automatically generated** from a **Notebook** are labeled with the tag "**File generated via notebook**".

Additional columns provide useful information:

- **Uploaded At**: shows the date and time the file was sent by email.
- **Distributed**: indicates whether the file has already been sent by email (`true` or `false`).

### ⚠️ Important note:

If **Distributed** is set to `true`, the file will no longer appear in the **General** tab for resending.

👉 To resend such a file:

- Manually **re-import it** from the storage.
- It will then have the attribute `exported = false`, making it appear in the **General** tab again and eligible for a new delivery.

The screenshot shows the 'End to End' delivery interface with the 'Files' tab selected. A table titled 'Report Current Files' lists three files:
 

File Name	Uploaded At	Distributed	Source
End to End - 2025-05-07	May 7, 2025 4:04 PM 3 days ago	✓	File generated from notebook
End to End - 2025-05-06	May 6, 2025 4:04 PM 2 days ago	✓	File generated from notebook
2024-08-04 - FW DNext Data steward workflows summary.eml (1)	-	✗	File upload
2024-08-04 - test.eml	-	✗	File upload

 There are 'Import Files' and 'Delete' buttons at the top right.

