



Ultragenic Research & Technologies

## User Manual

UAN-UG-UM-001

04.00

	Document ID:	UAN-UM-UG-001
	Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date:	28-Jul-2023

## Table of Contents

<b>DOCUMENT HISTORY .....</b>	<b>3</b>
<b>APPROVAL STATEMENT .....</b>	<b>4</b>
<b>1. INTRODUCTION .....</b>	<b>5</b>
1.1 PURPOSE .....	5
1.2 OBJECTIVES .....	5
<b>2. ROLES AND DEFINITIONS.....</b>	<b>6</b>
<b>3. LOGIN INSTRUCTIONS.....</b>	<b>7</b>
3.1 MY PROFILE .....	9
3.2 HELP – USER MANUAL .....	11
3.3 LOGOUT .....	11
<b>4. DASHBOARD .....</b>	<b>12</b>
<b>5. REPORTS.....</b>	<b>12</b>
5.1 CREATE A WEB REPORT.....	12
5.2 EDIT A WEB REPORT .....	15
5.3 SAVE A WEB REPORT.....	16
5.4 APPLYING QUERY FILTER ON A WEB REPORT .....	17
5.5 APPLYING PARAMETERS / PROMPTS IN QUERY FILTER ON A WEB REPORT .....	19
5.6 CREATE A CROSSTAB IN A WEB REPORT .....	20
5.7 CREATE A BAR CHART IN A WEB REPORT .....	21
5.8 CONVERT A CROSSTAB TO A BAR CHART.....	23
5.9 SCHEDULING A WEB REPORT .....	23
<b>6. REFERENCE DOCUMENT .....</b>	<b>26</b>

## Document History

Version	Modification Date	Author	Summary of Changes
01.00	09-May-2022	Anmol Agarwal	Initial Document
02.00	10-Feb-2023	Shubh	<ol style="list-style-type: none"><li>1. In Section 1.2, updated objectives.</li><li>2. In Section 2- Removed admin role.</li><li>3. In Section 3.1, updated the flow of navigation.</li><li>4. Updated all the screenshots as per v1.1.</li><li>5. Removed System Management section: -<ul style="list-style-type: none"><li>• Site Management</li><li>• Clients Management</li><li>• Client Admins Management</li><li>• Roles Management</li><li>• User Management</li><li>• Audit Logs</li><li>• Settings</li></ul></li></ol>
03.00	28-Jul-2023	Achin Shahi	<ol style="list-style-type: none"><li>1. As per the CCR-23-010, the Section 5.1 Creation of Web Report has been updated with Web Report Wizard.</li></ol>



Document ID:	UAN-UM-UG-001
Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date: 28-Jul-2023

## Approval Statement

PREPARED BY:			
Role	Title Department	Name	Signature
Technical Writer	Ulragenic	Achin Shahi	Check signatures at the end

APPROVED BY:			
Role	Company	Name	Signature
Validation Lead	Ulragenic	Rohit Verma	Check signatures at the end
Product Owner	Ulragenic	Nitin Aggarwal	Check signatures at the end



	Document ID:	UAN-UM-UG-001
	Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date:	28-Jul-2023

## 1. Introduction

### 1.1 Purpose

The purpose of this User Manual (UM) is to describe the features of the UltraAnalytics system.

### 1.2 Objectives

The objective of this user manual is to provide instructions to a user for using the following features.

- Dashboard
- Reports
- Profile
- Help – User Manual
- Logout

	Document ID:	UAN-UM-UG-001
	Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date:	28-Jul-2023

## 2. Roles and Definitions

### Types of Roles:

#### Managed reports access:

Managed report access is assigned to users to get access to the Managed reports folder on reporting server.

#### Self Service reports access:

Self Service report access is assigned to users to get access on Self-service reports folder on reporting server.

#### OOB reports access:

OOB report access is assigned to users to get access on OOB reports folder on reporting server.

#### Support access:

Support access is assigned to users to get access on Managed reports, Self Service reports & OOB reports folder on

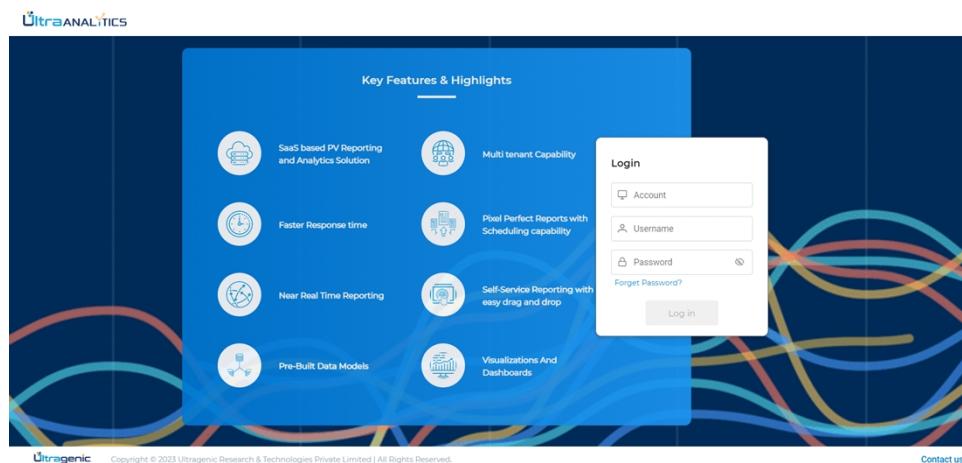
### 3. Login Instructions

1. Open any compatible browser and in app stream URL and press enter.
  2. Open the UAN web application which will redirect you to the login page of application.
- Following are the compatible browsers-

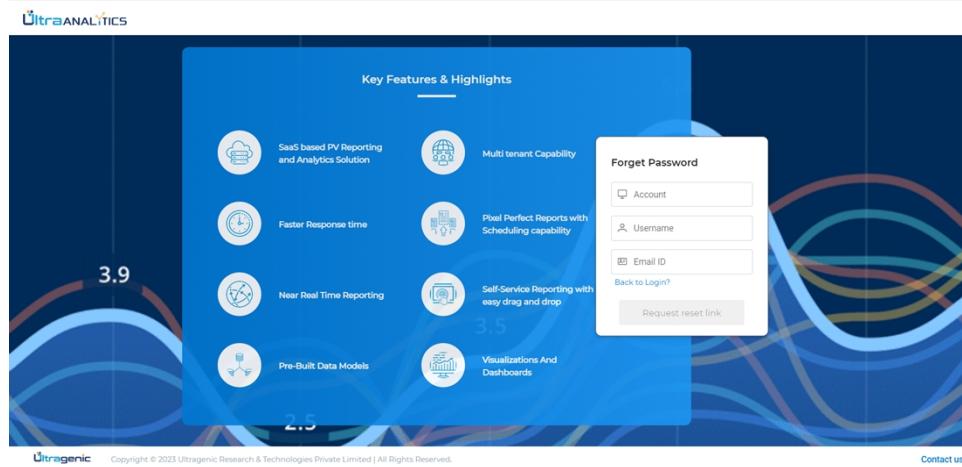
- Google Chrome (Version 98 or later)
- Internet Explorer (Version 11 or later)
- Mozilla (Version 91 and later)

3. User will enter **Account**, **Username** and **Password**.

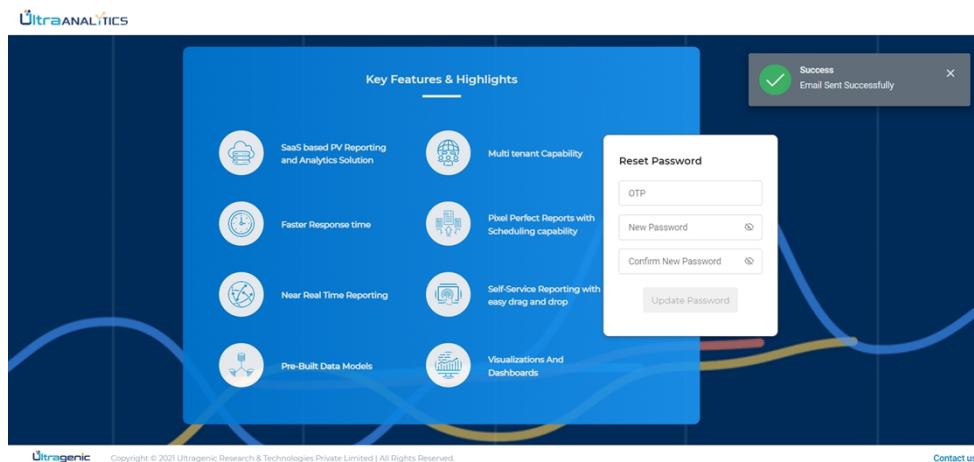
Account Name is the client's name that the user belongs to. For internal users, Account name is "Client Name".



4. Click on **Log in**.
5. To reset the password, click on **Forgot password**. The following screen will appear.



- Enter the account name, username and registered email ID of the user and click on the Request reset link button. The following message will appear.

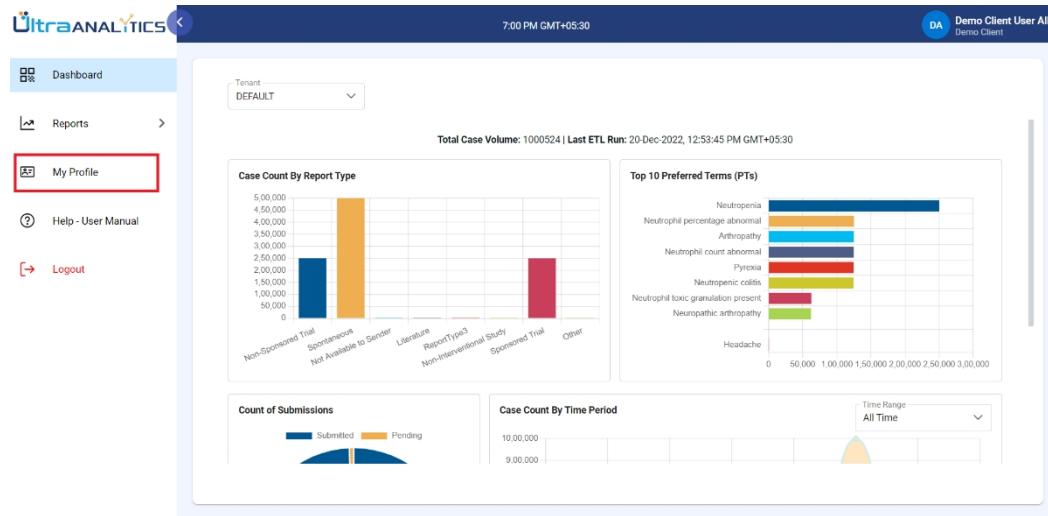


- Enter the OTP you received in the email with the new password to update your password.
- Enter the new password & confirm password. click on **Update password** button.

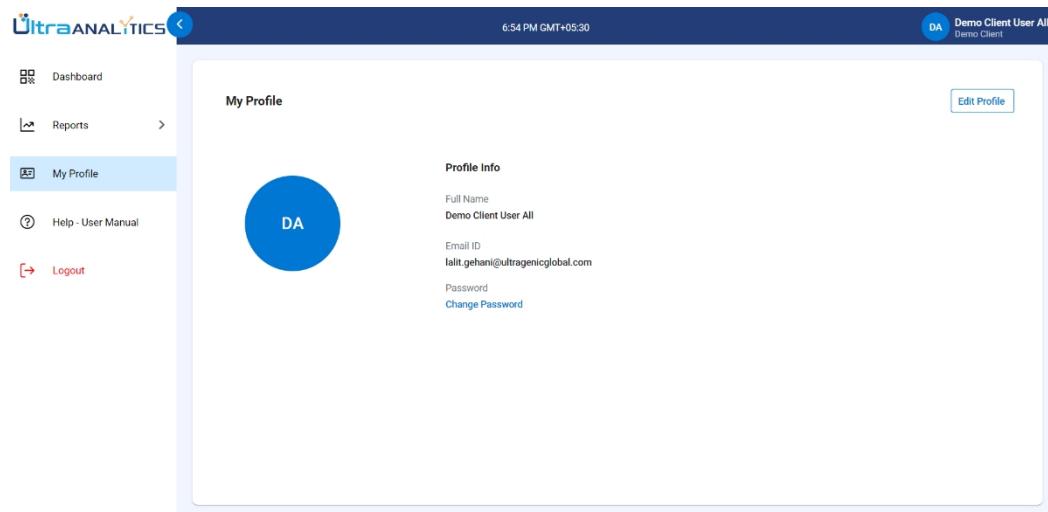
	Document ID:	UAN-UM-UG-001
	Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date:	28-Jul-2023

### 3.1 My Profile

- Logged-in User (My Profile):** The name of the logged-in user will be displayed along with their client's name. The user's initial will also be displayed, in the right corner of the header.
- In the navigation pane, **My Profile** tab will appear. Users can manage their profile information using the **My Profile** tab.

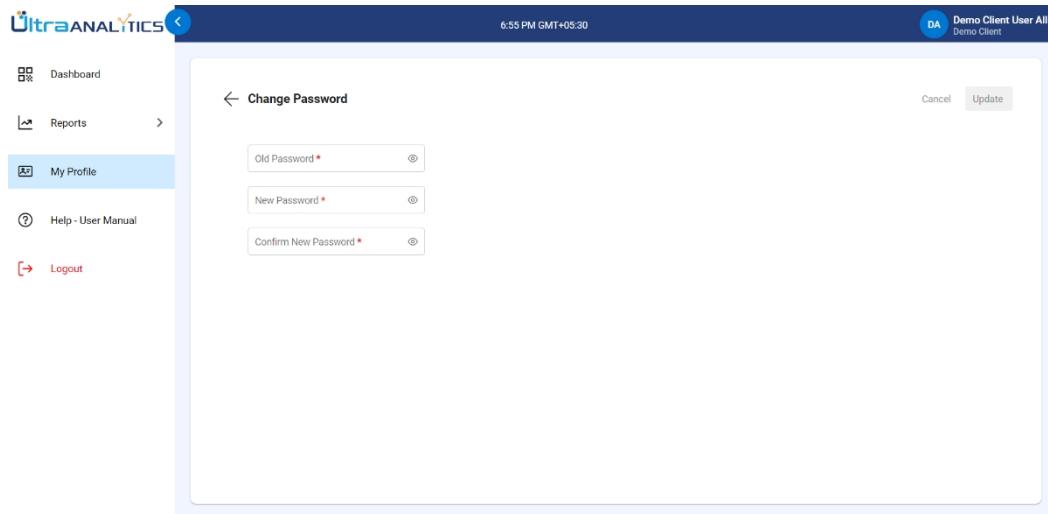


If user clicks on **My Profile**, the following screen will appear with the users' profile information.



If user wants to change the password, click on **Change password**. The following page will appear.

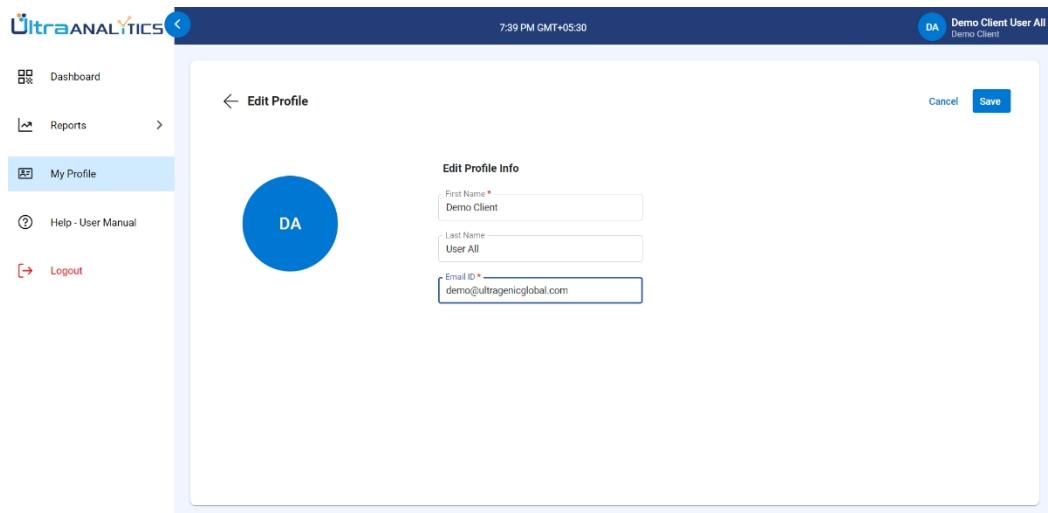
	Document ID: UAN-UM-UG-001
	Revision No.: 03.00
UltraAnalyticsv1.1 User Manual	Effective Date: 28-Jul-2023



The screenshot shows the 'Change Password' page of the UltraAnalytics application. The page has a header with the time '6:55 PM GMT+05:30' and a user icon 'DA Demo Client User All'. On the left is a sidebar with links for 'Dashboard', 'Reports', 'My Profile' (which is selected and highlighted in blue), 'Help - User Manual', and 'Logout'. The main content area is titled 'Change Password' and contains three input fields: 'Old Password \*', 'New Password \*', and 'Confirm New Password \*'. At the top right of this area are 'Cancel' and 'Update' buttons.

Enter the old password, new password, and confirm the password. Click on the **Update** button. The password change success message will appear.

If a user wants to update their name, or email ID, click on the Edit Profile button. The following page will appear.



The screenshot shows the 'Edit Profile' page of the UltraAnalytics application. The page has a header with the time '7:39 PM GMT+05:30' and a user icon 'DA Demo Client User All'. On the left is a sidebar with links for 'Dashboard', 'Reports', 'My Profile' (selected), 'Help - User Manual', and 'Logout'. The main content area is titled 'Edit Profile' and contains a section for 'Edit Profile Info' with three input fields: 'First Name \*' (Demo Client), 'Last Name' (User All), and 'Email ID \*' (demo@ultragenicglobal.com). A large circular placeholder for a profile picture is visible. At the top right are 'Cancel' and 'Save' buttons.

Enter the profile info and click on the **Save** button.

	Document ID:	UAN-UM-UG-001
	Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date:	28-Jul-2023

### 3.2 Help – User Manual

In the navigation pane, **Help - User Manual** tab will appear. Users can get detailed description about the features of the UltraAnalytics web application, by clicking on this tab.



The screenshot shows the UltraAnalytics web application interface. The navigation pane on the left has several tabs: Dashboard, Reports, My Profile, Help - User Manual (which is highlighted with a red box), and Logout. The main content area displays various dashboards and reports. At the top right, there is a user profile icon labeled 'DA Demo Client User All' and 'Demo Client'. The central part of the screen shows a 'Case Count By Report Type' bar chart, a 'Top 10 Preferred Terms (PTs)' bar chart, a 'Count of Submissions' chart, and a 'Case Count By Time Period' chart. The bottom left corner of the dashboard area contains the text 'UltraAnalytics v1.1 Powered By Ultragenic'.

### 3.3 Logout

In the navigation pane, **Logout** tab will appear. If the user wants to **logout**, click on the **Logout** tab.



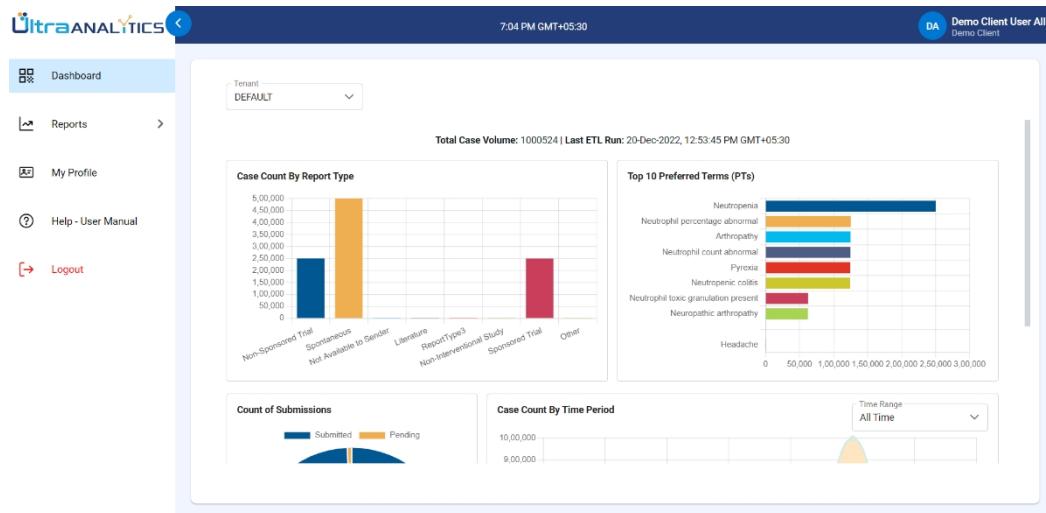
This screenshot is identical to the one above, showing the UltraAnalytics dashboard. The difference is in the navigation pane, where the 'Logout' tab is now highlighted with a red box. The rest of the interface, including the charts and the footer text 'UltraAnalytics v1.1 Powered By Ultragenic', remains the same.

	Document ID:	UAN-UM-UG-001
	Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date:	28-Jul-2023

## 4. Dashboard

Dashboard will have the following information on the page.

- Total case volume
- Last ETL run
- Case Count by report type
- Top 10 preferred terms (PTs)
- Count of submissions
- Case count by time-period



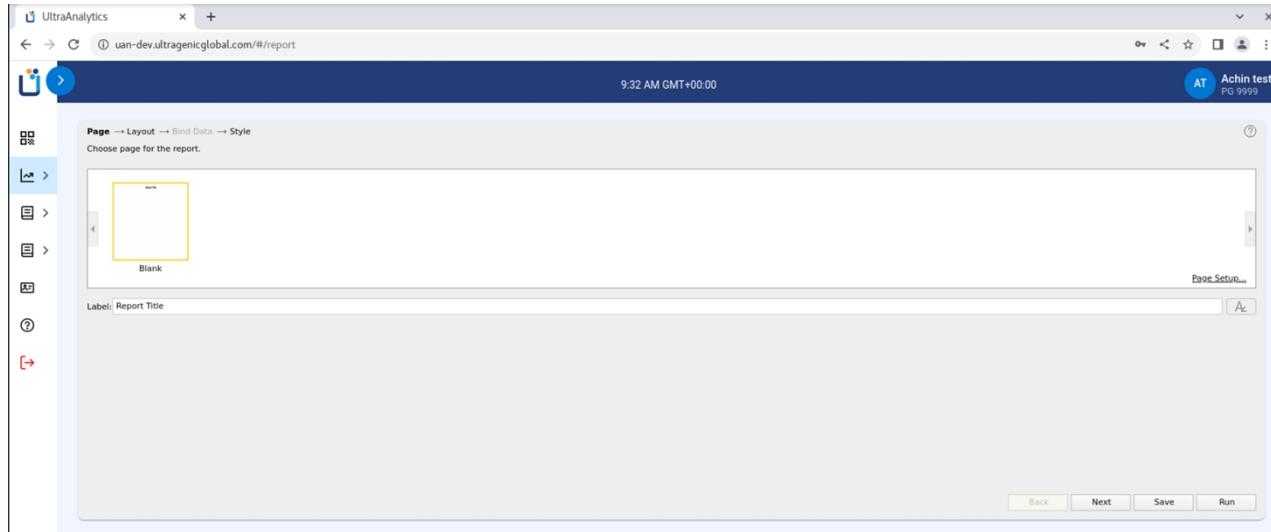
- Users can see consolidated information on the dashboard based on user role.
- Users can filter information based on tenants assigned.

## 5. Reports

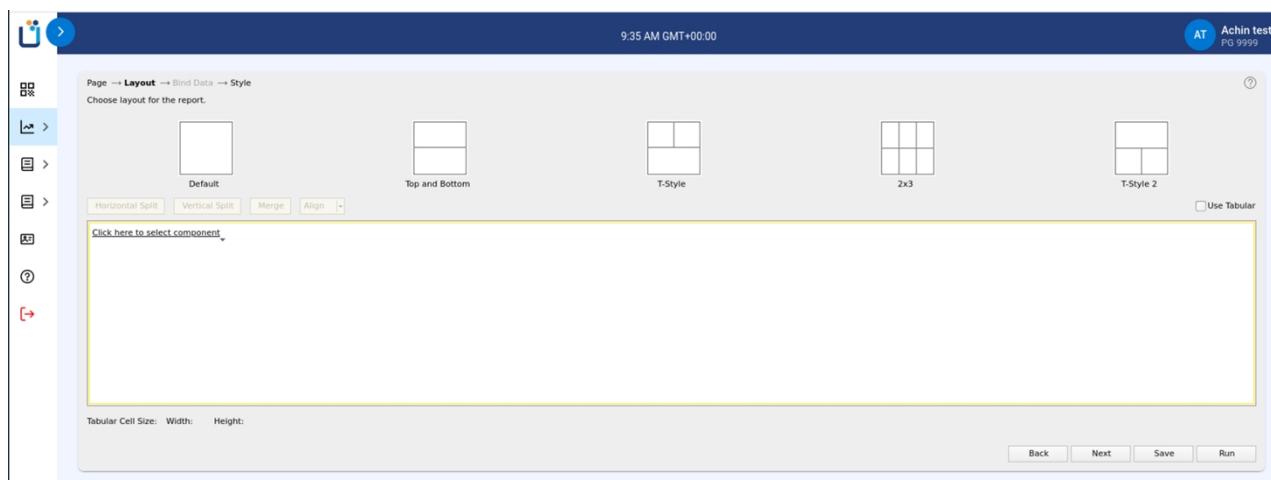
### 5.1 Create a Web Report

1. Select Web Report under Reporting Tab.

	Document ID: UAN-UM-UG-001
Revision No.: 03.00	
UltraAnalyticsv1.1 User Manual	Effective Date: 28-Jul-2023



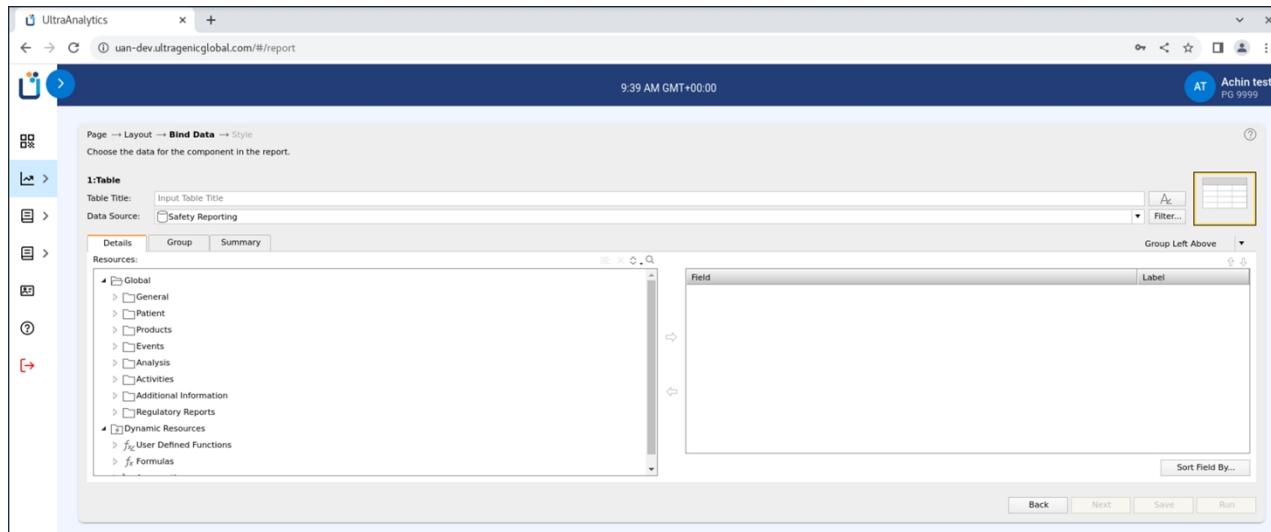
2. Select the Blank Page and mention the Report Label, also with  option you can specify the font for your label. You can also specify the report size through the 'Page Setup...' option. Click on Next.



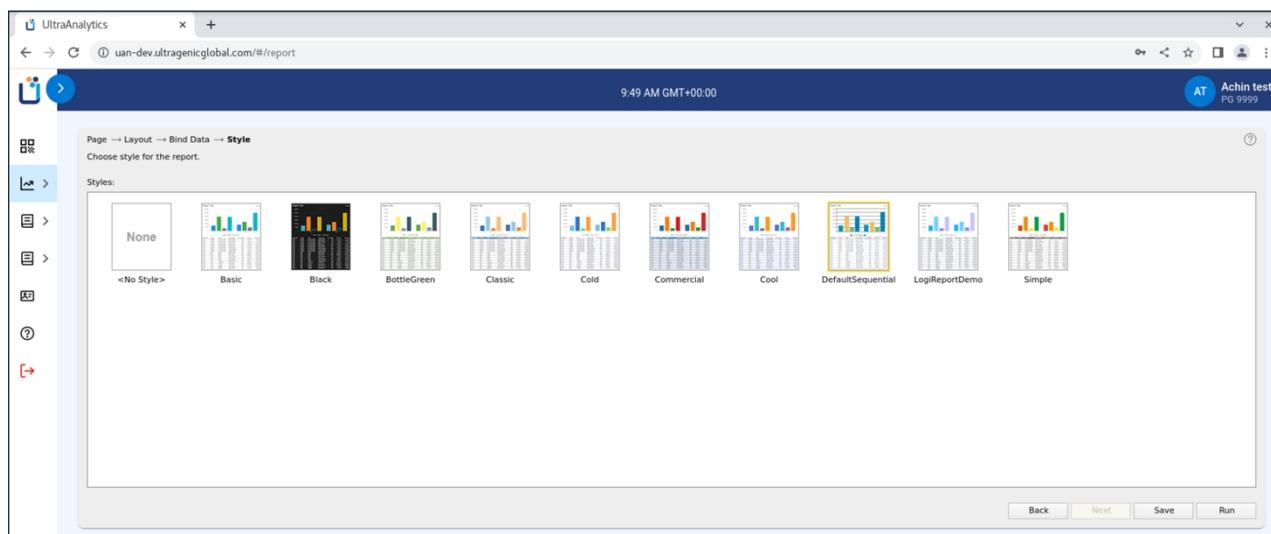
3. In the Layout tab we have several options of specifying the partition of the report page. Select the appropriate partition among the given options. You can also specify manual partition through Horizontal split and Vertical split options which are activated as soon as we select a component. For a report body we need to select at least one component to bind data. We can select Table, Crosstab, etc. options. We also have 'Use Tabular' checkbox which when checked enables the user to provide precise positioning of the components in a section.

	Document ID: UAN-UM-UG-001
UltraAnalyticsv1.1 User Manual	Revision No.: 03.00
	Effective Date: 28-Jul-2023

Click on Next when you are finished selecting the choices.

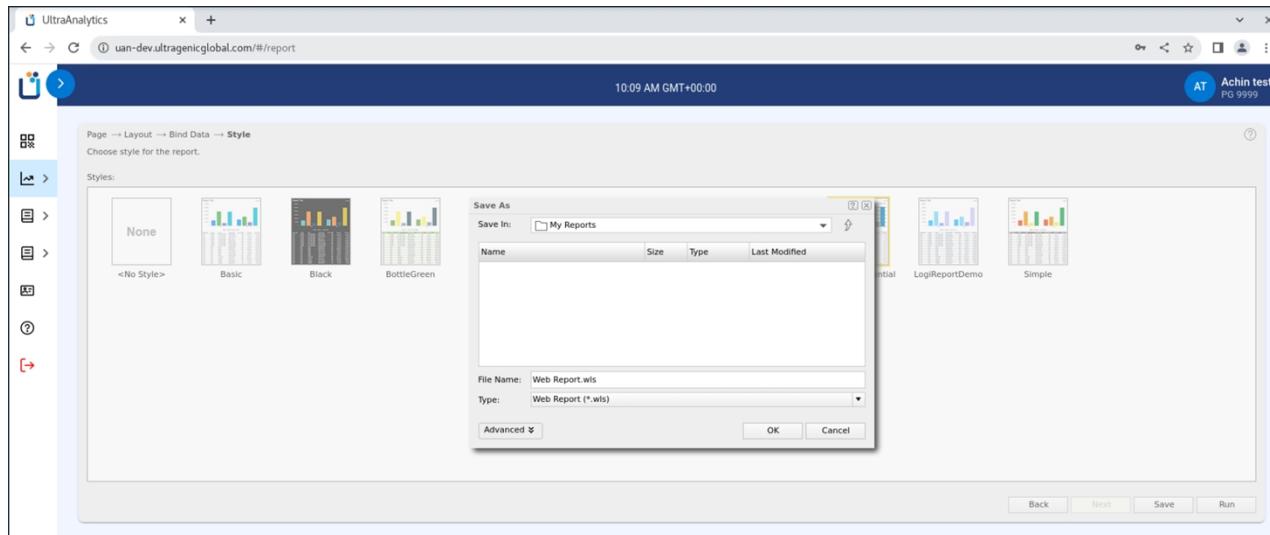


- The Bind Data tab is where we connect our components with the fields in the data source. The number of components in our report, the same number of Bind Data tabs will be there. In the Bind Data tab, we can choose the fields from the appropriate Data Source which can be selected in the Data Source: option. We can also provide title to our components and can provide the appropriate font to our title. We can also provide any filter to our report component data through the 'Filter...' option. Also, we can provide sorting on the fields through the 'Sort Fields by...' option on the bottom right. After we are done selecting the values Click Next.



	Document ID:	UAN-UM-UG-001
	Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date:	28-Jul-2023

5. Now we move to the Style tab where we get multiple style options to choose from, for your report body. By default, the application chooses the DefaultSequential style.
6. After we are done choosing the style we can either **Run** the report or directly **Save** it. When we click on Run the report gets opened on the screen. But if we click on **Save** option a popup with Directory opens. We can choose the location in the popup and click on **OK** to save the report.



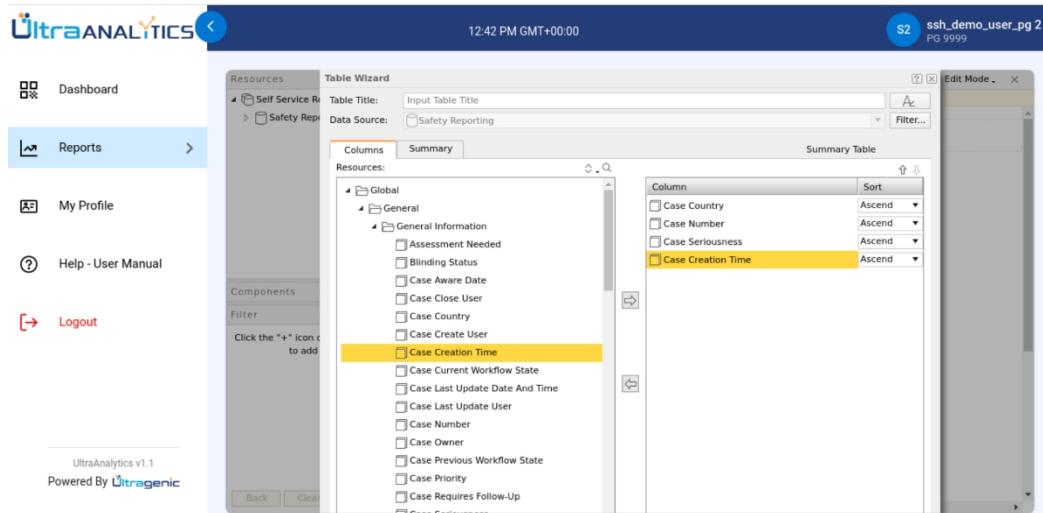
## 5.2 Edit a Web Report

1. Once a web report is created, change the **View Mode** to **Edit mode** from the tool bar.

The screenshot shows the UltraAnalytics software interface with a report titled 'Report Title' displaying a table of data. The table has columns: Case Country, Case Number, and Case Seriousness. The data consists of 20 rows of Canadian case information. A context menu is open over the table, with 'Edit Mode' highlighted. The top navigation bar includes the logo, a search bar with the URL 'uan-dev.ultragenicglobal.com/#/report', and a user profile 'ssh\_demo\_user\_pg 2 PG 9999'. The left sidebar contains links for Dashboard, Reports (which is selected), My Profile, Help - User Manual, and Logout. The bottom footer includes the text 'UltraAnalytics v1.1 Powered By Ultragenic'.

	Document ID:	UAN-UM-UG-001
	Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date:	28-Jul-2023

2. Select the table in web report.
3. Click on  **Table wizard** Icon in the visualization toolbar.
4. Select the desired fields under the **Resources** section on the left.
5. Click on  icon to add the column to the report.

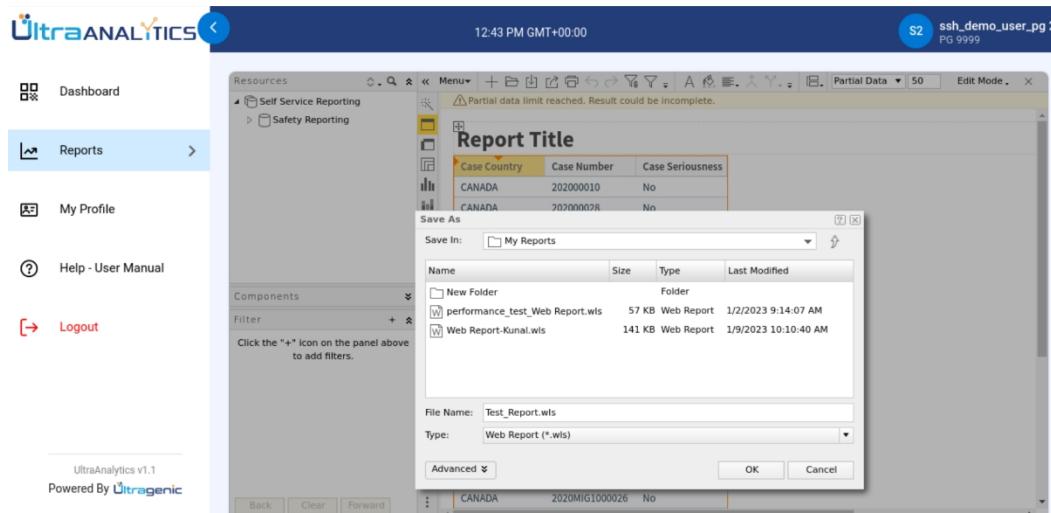


The screenshot shows the UltraAnalytics Table Wizard interface. On the left, there's a sidebar with 'Reports' selected. In the center, the 'Table Wizard' dialog is open with 'Input Table Title' set to 'Safety Reporting'. The 'Resources' panel on the left lists various categories like Global, General, and Case. Under Case, several fields are listed, including 'Case Creation Time'. This field is highlighted with a yellow selection bar. To the right, the 'Summary Table' is shown with columns for 'Column' and 'Sort'. The 'Case Creation Time' field is also present here, also highlighted with a yellow selection bar. The 'Edit Mode' tab is visible on the far right.

6. Click **ok**.

### 5.3 Save a Web Report

1. Click on Save  Icon to save a web report.
2. Select **My Reports** folder in 'Save in' option.



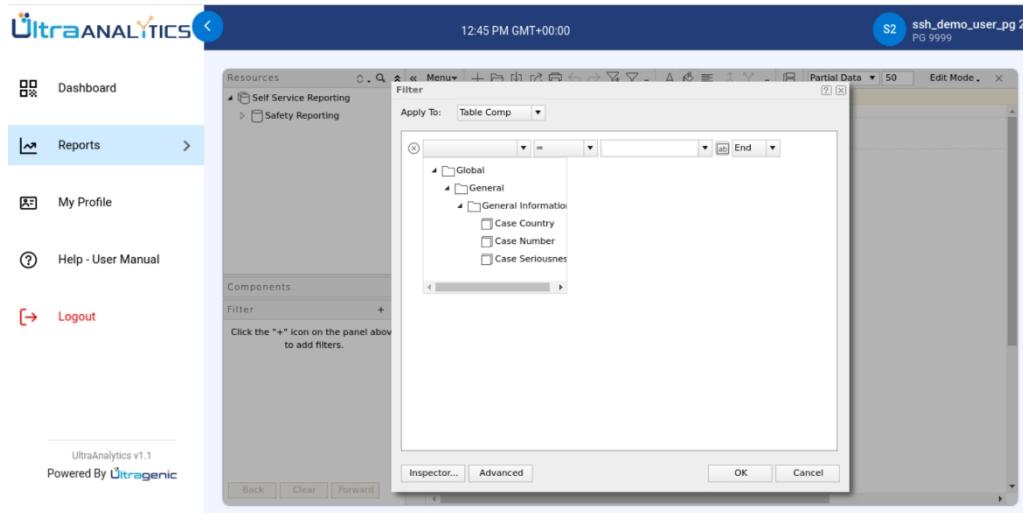
The screenshot shows the UltraAnalytics Report Title interface. The main area displays a table with three rows of data: 'Case Country', 'Case Number', and 'Case Seriousness'. Below this, a 'Save As' dialog is open. In the 'Save in' dropdown, 'My Reports' is selected. The dialog shows a list of existing reports: 'performance\_test\_Web\_Report.wls' and 'Web Report-Kunal.wls'. A new entry 'Test\_Report.wls' is being typed into the 'File Name' field. The 'Type' dropdown is set to 'Web Report (\*.wls)'. At the bottom right, there are 'OK' and 'Cancel' buttons.

	Document ID:	UAN-UM-UG-001
	Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date:	28-Jul-2023

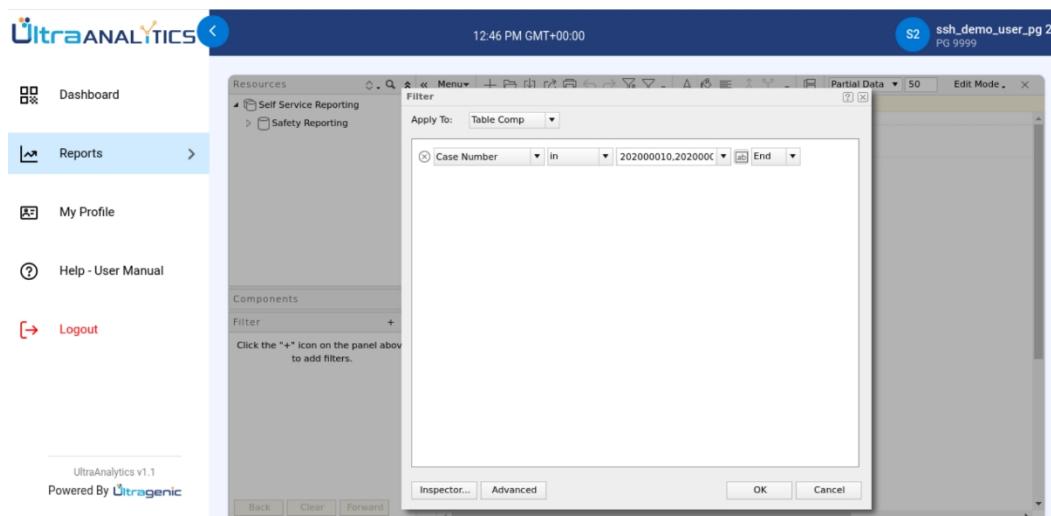
3. Enter the name of the report in **File Name** option.
4. Click **Ok** to save the report.

## 5.4 Applying Query Filter on a Web Report

1. Click on  **Query Filter** Icon from the tool bar.
2. Choose the appropriate field on which filter is to be applied.

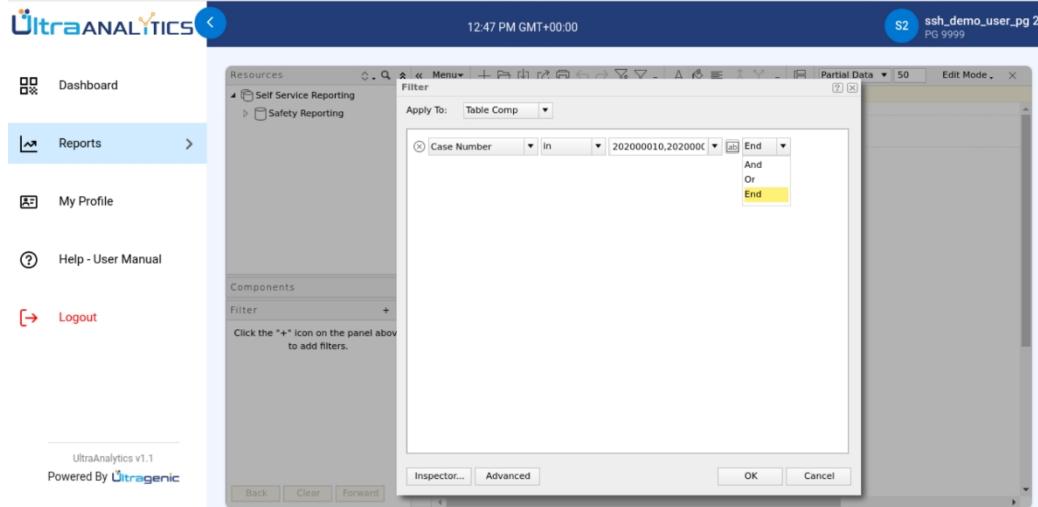


3. Select the desired operator.
4. Enter the value to be filtered  
If there are multiple values, enter the values separated by comma.

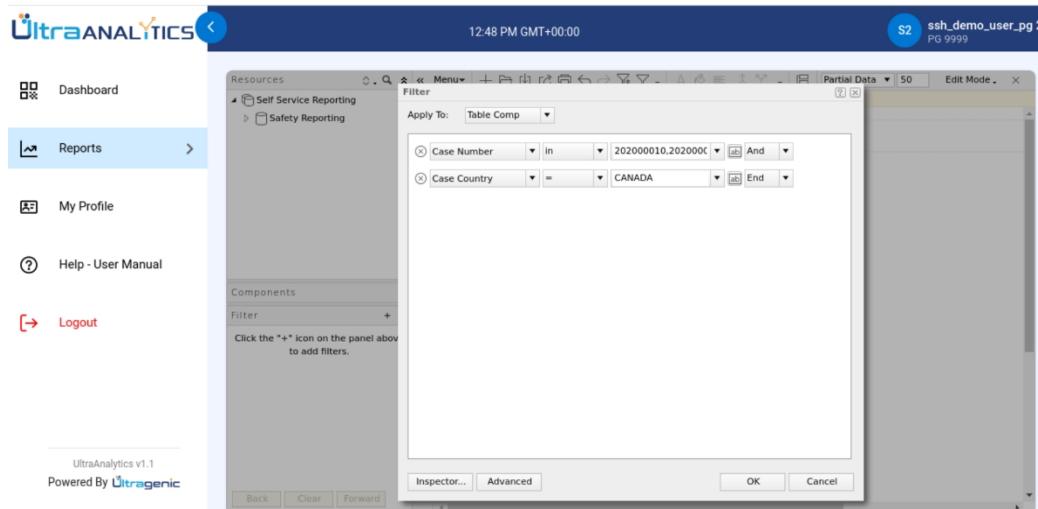


	Document ID:	UAN-UM-UG-001
	Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date:	28-Jul-2023

5. If multiple filters need to be applied, Click on the drop-down arrow after **End** and choose the required operator.



6. Then repeat step 2 to 4 to apply the filter on required field

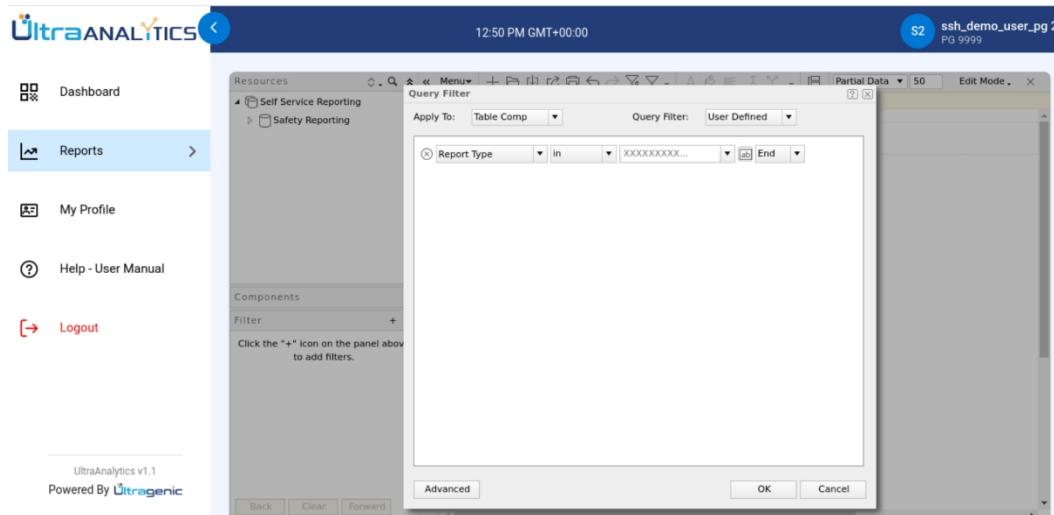


7. To remove any filter use  delete icon.  
8. Click **Ok**

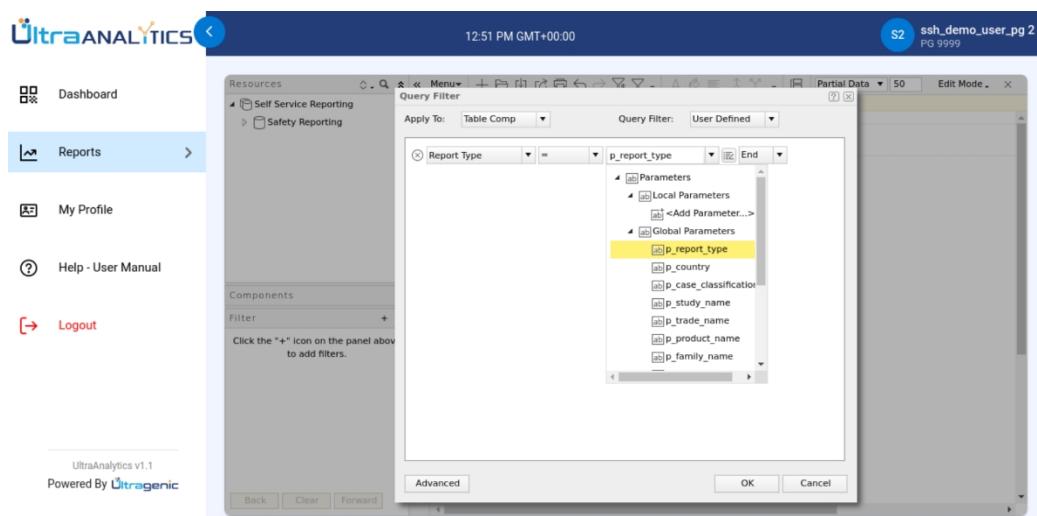
	Document ID:	UAN-UM-UG-001
	Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date:	28-Jul-2023

## 5.5 Applying Parameters / Prompts in Query Filter on a Web Report

1. Click on  **Query Filter** icon from the tool bar
2. Choose the appropriate field on which filter is to be applied
3. Select the desired operator



4. Click on **Toggle to Parameter**  icon and to select the parameter / prompt.  
Click on the drop-down arrow and select the required parameter/prompt.

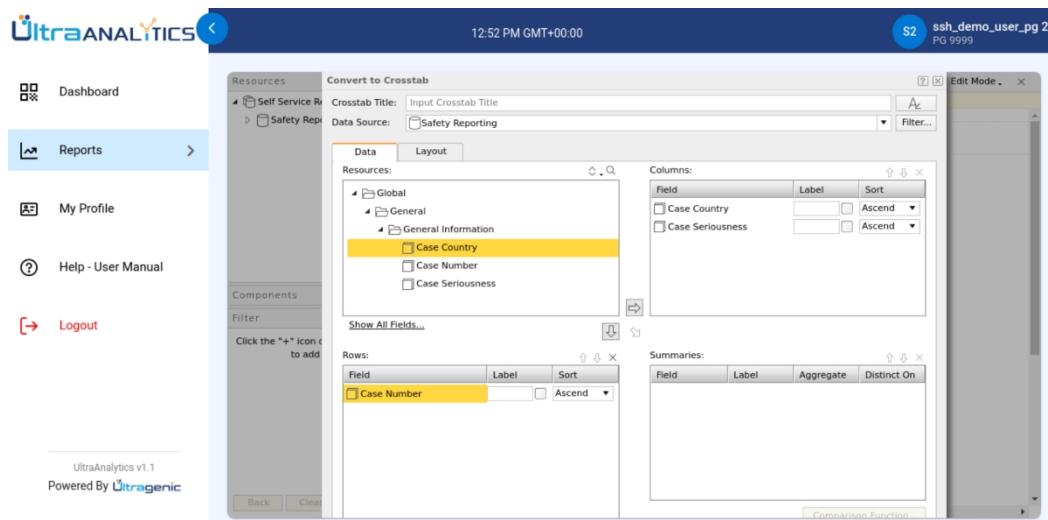


5. Click **Ok**

	Document ID:	UAN-UM-UG-001
	Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date:	28-Jul-2023

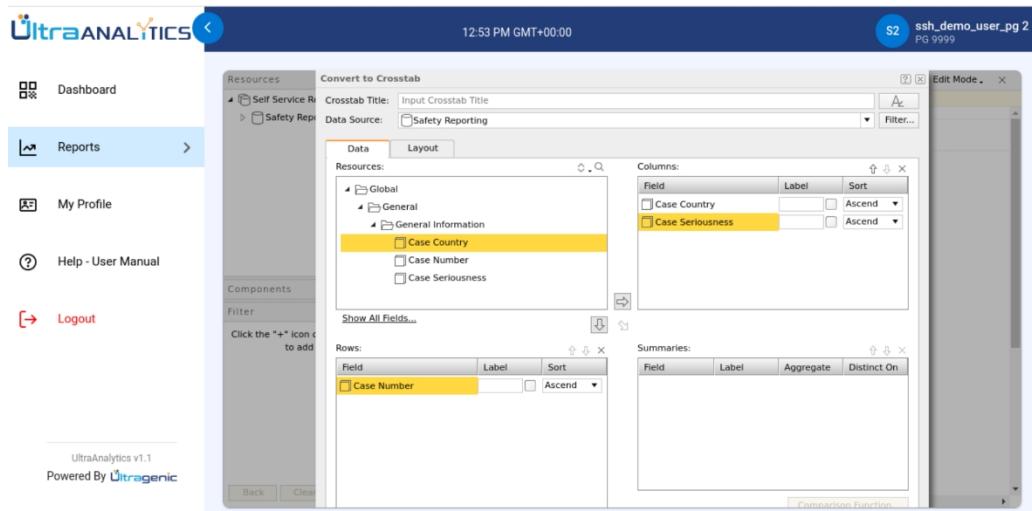
## 5.6 Create a crosstab in a web report

1. Click on  Add Crosstab Icon in the visualization toolbar and drag this icon in the blank area of the web report
2. Select the desired field from the **Resources** section to the **Rows** section by using  icon.



The screenshot shows the UltraAnalytics interface with the 'Convert to Crosstab' dialog open. The 'Rows' section has 'Case Number' selected. The 'Columns' section has 'Case Country' and 'Case Seriousness' selected. All three fields are highlighted in yellow.

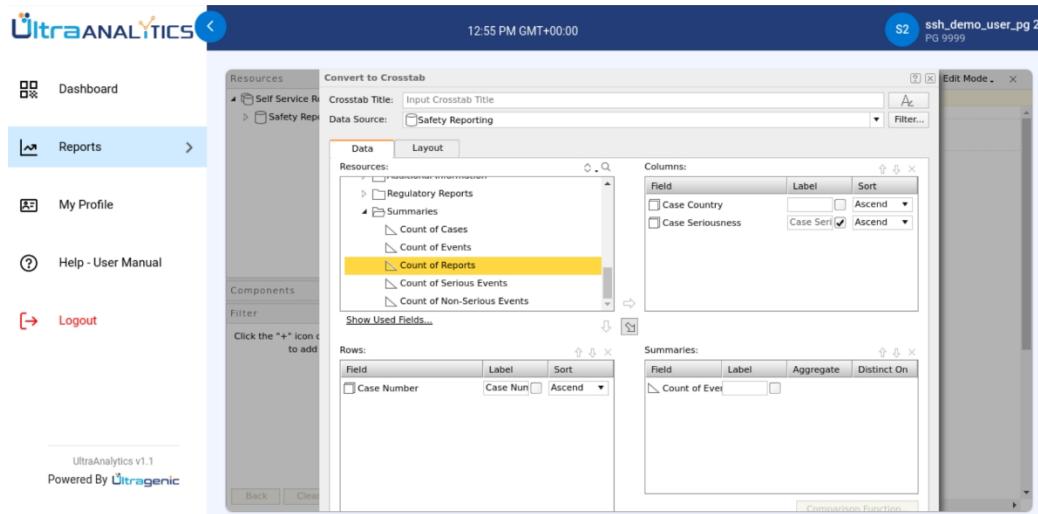
3. Select the desired field from the **Resources** section to the **Columns** section by using  icon.



The screenshot shows the UltraAnalytics interface with the 'Convert to Crosstab' dialog open. The 'Columns' section now has 'Case Seriousness' selected and highlighted in yellow, while 'Case Country' is no longer highlighted.

4. Select the desired summary from the **Summaries** folder in **Resources** section, to the **Summaries** section by using  icon.

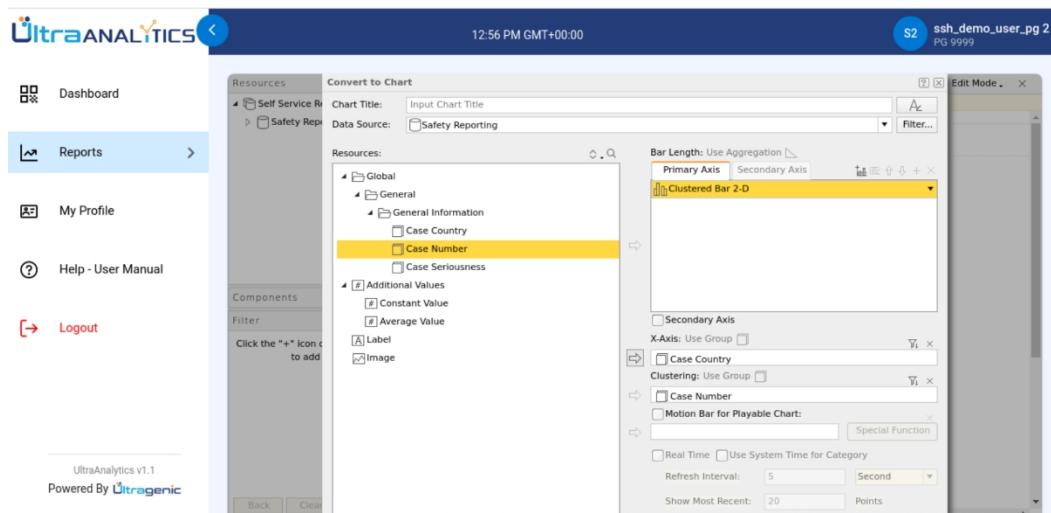
	Document ID: UAN-UM-UG-001
UltraAnalyticsv1.1 User Manual	Revision No.: 03.00
	Effective Date: 28-Jul-2023



5. Click Ok.

## 5.7 Create a Bar Chart in a web report

1. Click on  Add Bar Char icon in the visualization toolbar and drag this icon to the blank area of the web report
2. For the X-axis of the bar chart, select any desired field, and click on  icon near the X axis section.



3. For a clustered Bar Chart, select any desired field, and click on  icon near the Clustering section.

4. Select the desired summary from **Summaries** Folder under the **Resources** Section and click on Icon near the **Primary Axis** section.

5. Click **ok**.

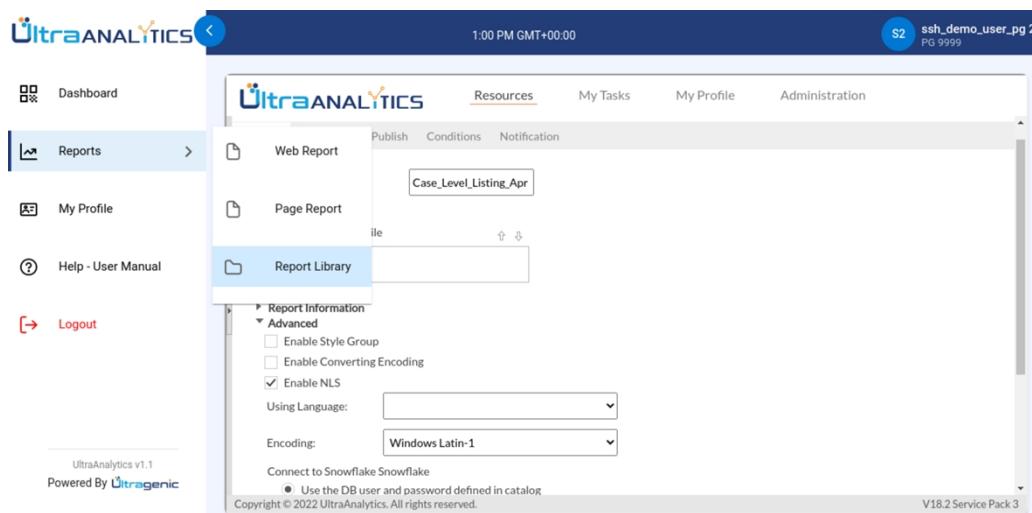
	Document ID:	UAN-UM-UG-001
	Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date:	28-Jul-2023

## 5.8 Convert a crosstab to a Bar Chart

1. Select Crosstab in the Web Report
2. Click on  **Bar Chart** Icon in the visualization toolbar to convert the crosstab to a bar chart.

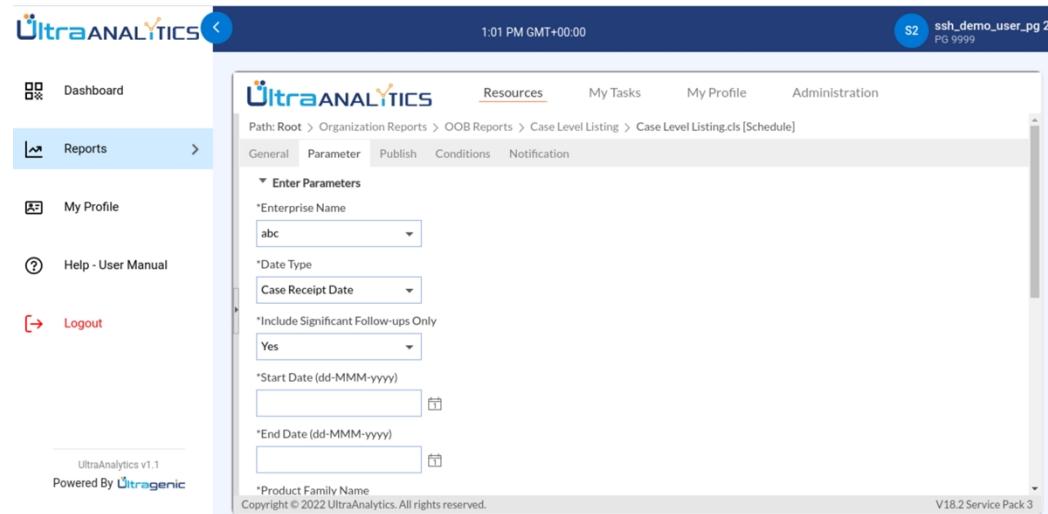
## 5.9 Scheduling a web report

1. Navigate to the folder where web report is saved.
  2. Click on **Schedule**  icon against the report which is to be scheduled.
  3. Enter any appropriate value in schedule name field.  
If there are multiple tabs in a report, select the checkbox **Export to One File** so that all tabs are exported in one file.
- Click **Next**



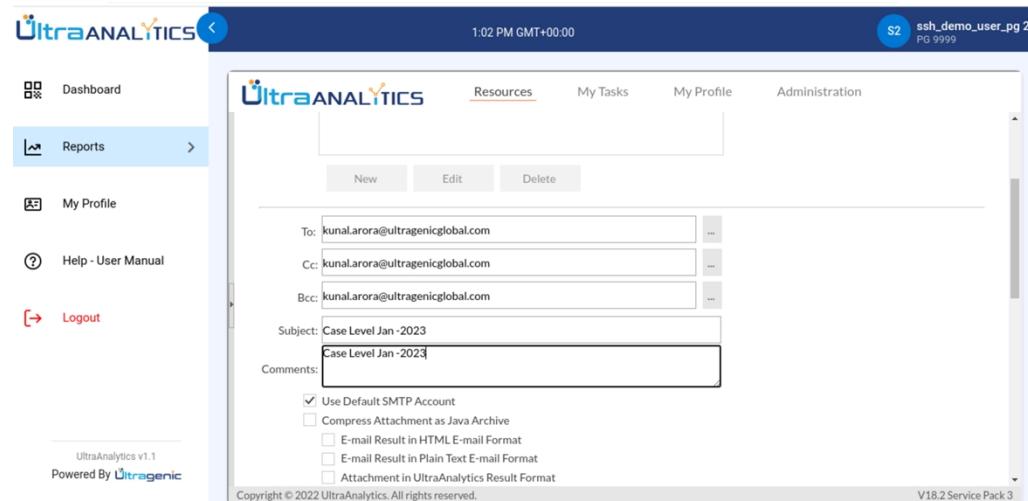
4. Enter the **Parameters** as required on the Parameter screen and Click **Next**.

	Document ID: UAN-UM-UG-001
UltraAnalyticsv1.1 User Manual	Revision No.: 03.00
	Effective Date: 28-Jul-2023



The screenshot shows the UltraAnalytics v1.1 user interface. The left sidebar has links for Dashboard, Reports (which is selected), My Profile, Help - User Manual, and Logout. The main content area shows a form titled 'Enter Parameters' for 'Case Level Listing'. It includes fields for 'Enterprise Name' (set to 'abc'), 'Date Type' (set to 'Case Receipt Date'), 'Include Significant Follow-ups Only' (set to 'Yes'), and date range fields for 'Start Date' and 'End Date'. Below the form are fields for 'Product Family Name' and copyright information. The top right shows a session ID 'S2 ssh\_demo\_user\_pg 2 PG 9999' and the time '1:01 PM GMT+00:00'. The bottom right shows 'V18.2 Service Pack 3'.

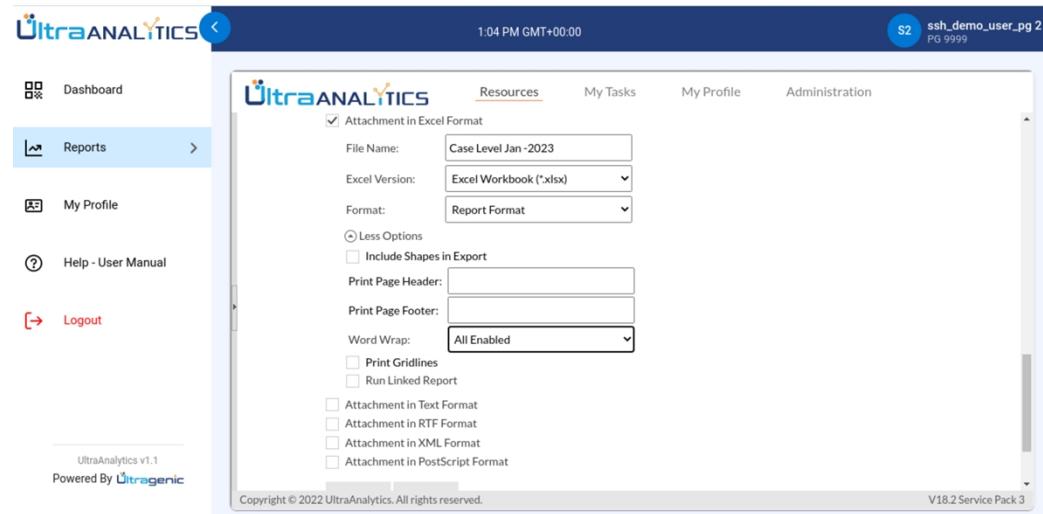
5. On the **Publish** tab, select **To E-mail** option and click on **New** button.
6. Enter the values **To:**, **Cc:**, **Bcc:**, **Subject:**, **Comments:**



The screenshot shows the UltraAnalytics interface with the 'Reports' section selected. The main content area displays a 'Publish' dialog. It shows fields for 'To:' (kunal.arora@ultragenicglobal.com), 'Cc:' (kunal.arora@ultragenicglobal.com), 'Bcc:' (kunal.arora@ultragenicglobal.com), 'Subject:' (Case Level Jan - 2023), and 'Comments:' (Case Level Jan - 2023). Below these fields are several checkboxes: 'Use Default SMTP Account' (checked), 'Compress Attachment as Java Archive', 'E-mail Result in HTML E-mail Format', 'E-mail Result in Plain Text E-mail Format', and 'Attachment in UltraAnalytics Result Format'. The top right shows a session ID 'S2 ssh\_demo\_user\_pg 2 PG 9999' and the time '1:02 PM GMT+00:00'. The bottom right shows 'V18.2 Service Pack 3'.

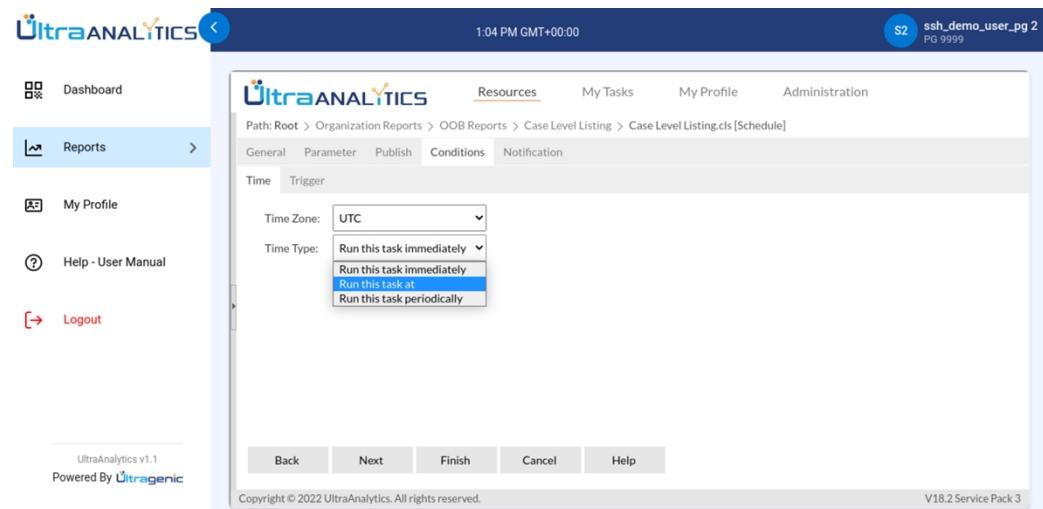
7. Then select the format in which report is to be exported and Click **Ok** and Click **Next**.

	Document ID: UAN-UM-UG-001
	Revision No.: 03.00
UltraAnalyticsv1.1 User Manual	Effective Date: 28-Jul-2023



The screenshot shows the UltraAnalytics v1.1 interface. On the left is a sidebar with links for Dashboard, Reports (which is selected), My Profile, Help - User Manual, and Logout. The main content area has a title bar with the UltraAnalytics logo, the time (1:04 PM GMT+00:00), and a session identifier (S2 ssh\_demo\_user\_pg 2 PG 9999). Below the title bar, there's a section titled 'Attachment In Excel Format' with various configuration options. The 'File Name' field is set to 'Case Level Jan -2023'. Under 'Format', 'Report Format' is selected. There are several checkboxes and dropdown menus for other options like 'Include Shapes in Export', 'Print Page Header', 'Print Page Footer', and 'Word Wrap'. At the bottom of this section, there are additional options for attachments in different formats. The footer of the page includes copyright information (Copyright © 2022 UltraAnalytics. All rights reserved.) and a service pack identifier (V18.2 Service Pack 3).

8. Then select the frequency at which the report is to be scheduled.



The screenshot shows the UltraAnalytics interface for scheduling a task. The sidebar is identical to the previous screenshot. The main content area shows a path: Root > Organization Reports > OOB Reports > Case Level Listing > Case Level Listing.cls [Schedule]. Below this, there are tabs for General, Parameter, Publish, Conditions, and Notification. The 'Conditions' tab is active. It contains sections for Time Zone (set to UTC) and Time Type. The 'Time Type' dropdown menu is open, showing options: 'Run this task immediately' (selected), 'Run this task immediately', 'Run this task at', and 'Run this task periodically'. At the bottom of the screen are buttons for Back, Next, Finish, Cancel, and Help. The footer includes the same copyright and service pack information as the previous screenshot.

9. Click Finish

	Document ID:	UAN-UM-UG-001
	Revision No.:	03.00
UltraAnalyticsv1.1 User Manual	Effective Date:	28-Jul-2023

## 6. Reference Document

Document number	Document name
UAN-SDS-UG-001-02.00	System Design Specification
UAN-SDS-UG-002-02.00	System Design Specification- OOB Reporting
UAN-URS-UG-001-01.00	User Requirement Specification
UAN-FRS-UG-001-02.00	Functional Requirement Specification
UAN-FRS-UG-002-02.00	Functional Requirement Specification- OOB Reporting
UAN-OM-UG-001-02.00	Operational Manual

	<b>Category:</b> UAN <b>Title:</b> UAN-UM-UG-001-03.00 User Manual		
<b>Version</b> 03	<b>State</b> Effective	<b>Effective Date</b> 31-JUL-2023	<b>Document ID</b> 844943

Printed by achin.shahi@ultragenicglobal.com from app.zenqms.com on 31-Jul-2023 at 3:10:09 PM UTC • Page 27 of 27

## REVISION HISTORY

**Version 02 Effective on 22-Feb-2023**

NA

**Version 03 Effective on 31-Jul-2023**

Third Version

## DOCUMENT ELECTRONIC SIGNATURES

### DOCUMENT APPROVAL WORKFLOW

#### Author Approval

Achin Shahi  
 Technical writer  
 achin.shahi@ultragenicglobal.com

I am the author of this document.  
*Signed 7:08:35 AM UTC 31-Jul-2023*

#### Additional Steps Added

Rohit Verma  
 Manager-Quality Assurance  
 rohit.verma@ultragenicglobal.com

I have reviewed and approve this document.  
*Signed 7:13:18 AM UTC 31-Jul-2023*

Nitin Aggarwal  
 Product Owner  
 nitin.aggarwal@ultragenicglobal.com

I have reviewed and approve this document.  
*Signed 7:51:56 AM UTC 31-Jul-2023*