Configuring Report Center

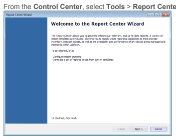
Overview

Once the Report Center solution has been installed and enabled, configuration is required. The Report Center Wizard will run the first time you open the Report Center and will allow you to change the branding and generate an initial set of reports using the included report templates.

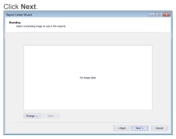
Initial Configuration

Note: The Report Center Wizard will only appear the first time you run the Report Center.

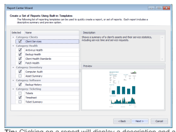
1. From the **Control Center**, select **Tools** > **Report Center**.



2. Click **Next**.

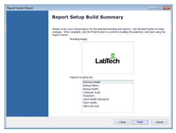


3. Click **Change** and browse to the selected image (e.g., company logo) that will be used in the reports. If one is not selected, the default Automate logo will be used.
4. Click **Next**.



Tip: Clicking on a report will display a description and a preview of the report.

5. A list of the available report templates will display. Select the desired report(s) to build, and click **Next**.
Note: Reports can be built at any time using the **New Report from Template** option if they were not built during the configuration process. Refer to the Create a Report from a Template section for more information.



6. A summary will appear displaying the branding image and the report template(s) selected. Click **Finish** to close the wizard or click **Back** to make additional changes.
7. Your reports are now available for use in the **Report Center**. For more information on using the **Report Center**, please refer to Managing Reports in the Report Center.

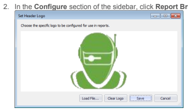
Brand Reports

Reports can be branded to display your logo in place of the default Automate logo. Branding is configured during the initial configuration, but the logo can be changed at any time.

Media, iframe, embed and object tags are not supported inside of a PDF.

To set a branding image:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Configure** section of the sidebar, click **Report Branding**.



3. Click **Load File**.
4. Navigate to the desired logo and click **Save**.

Report Administration

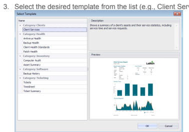
Create a Report from a Template

The New Report from Template option opens a list of existing reporting templates that can be used to create a new report. Templates serve as a base report exclusively created by Automate and are the standard reporting mechanisms, updated by the Solution Center.

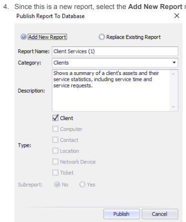
Media, iframe, embed and object tags are not supported inside of a PDF.

To create a new report from a report template:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Reports** section of the sidebar, click **New Report from Template**.
3. Select the desired template from the list (e.g., Client Services) and click **OK**.



4. Since this is a new report, select the **Add New Report** radio button.



5. The title will default to the title of the report that you selected. Change the title, if desired, in the **Report Name** field. For example, if you are creating the Client Services report, you may want to name it by client (e.g., Client Services - XYZ Computers or XYZ Computers - Client Services depending on how you want to sort the report list).
6. Change the default **Category**, if desired e.g., Inventory, Ticketing, etc.).
7. Change the default **Description**, if desired.
8. Subreports are reports that are utilized within another report (e.g., a report header that always contains the same information). Select or deselect the **Subreport** checkbox to indicate if the report is being utilized by another report.
9. Click **Publish** to create the report, or **Cancel** to discard changes, and return to the Reporting Dashboard.
10. Once the report opens in the Report Designer, you can make additional changes to the design, or you can close the **Report Designer** tab, and return to the Reporting Dashboard. After returning to the Reporting Dashboard, you can find your report using the **Report List** option.
11. Once you have generated a report from one of the provided templates, the report will be added to the Report List. Once generated, it can then be scheduled to run automatically. Refer to Schedule Reports for more information.

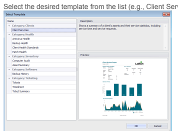
Replace a Report from Template

Once you have created your own report from the provided report templates, that 'copy' will not get updated when you download an updated report template from the Solution Center. When your 'copy' needs to be updated with a newer report template, it can simply be replaced using the same option used to add a new report from a template.

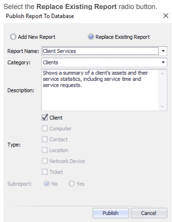
Important: Once overwritten, the previous report design will be permanently lost.

To replace an existing report using a template:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Reports** section of the sidebar, click **New Report from Template**.
3. Select the desired template from the list (e.g., Client Services) and click **OK**.



4. Select the **Replace Existing Report** radio button.



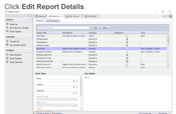
5. Select the report that will be replaced from the **Report Name** drop-down.

6. If needed, change the category from the **Category** drop-down.
7. If needed, update the contents of the **Description** field.
8. Click **Publish** to replace the report or **Cancel** to discard changes and return to the Reporting Dashboard.
9. Once the report opens in the Report Designer, you can make additional changes to the design, or you can close the **Report Designer** tab, and return to the Reporting Dashboard. After returning to the Reporting Dashboard, you can find your report using the **Report List** option.

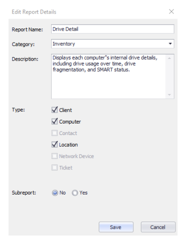
Edit a Report

To quickly edit report details:

1. Click the **Report Title** in the list view.
2. Click **Edit Report Details**.



3. Make any necessary changes. Checkboxes that are not relevant to the report will be grayed out.



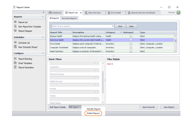
4. Click **Save**.

Delete a Report

When a report is no longer needed, it can be deleted using the Delete Report option in the Edit Report menu on the Report List.

To delete a report:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Reports** section of the sidebar, click **Report List**.
3. Select the desired report from the list.
4. Select **Edit Report** > **Delete Report**.



5. Click **OK** when prompted to confirm or click **Cancel** to return to the **Report List**.

Create a Favorite Report

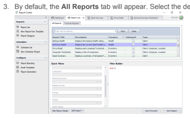
Favorite reports are a filtered version of the master report and not the actual report. By default, a master report will contain all data that meets the criteria of the report. In some cases, a report is needed that limits the data to a specific client, location, etc. This can be accomplished by using report filters. After filters have been selected, the configuration can be saved in what is known as a favorite report. They can be accessed by clicking on the Report List option and then the Favorite Reports tab.

Media, iframe, embed and object tags are not supported inside of a PDF.

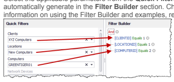
Note: Access to **Favorite Reports** is restricted to the user that created the filter.
Filters can be configured for any report by using the Quick Filters or Filter Builder option. Changes made to any filter can be saved as a favorite report. The selections available for each filter are determined by data in the database, and can be edited by changing the selection and updating the favorite report. For more information regarding changes to a favorite report, please refer to Modify a Favorite Report.

To set the filter:

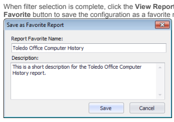
1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Reports** section of the sidebar, click **Report List**.
3. By default, the **All Reports** tab will appear. Select the desired report.



4. Select the applicable parameters from the **Quick Filters**. As each filter option is selected, the filters will automatically generate in the **Filter Builder** section. Changes can be made from either interface. For more information on using the Filter Builder and examples, refer to Use the Filter Builder.



5. When filter selection is complete, click the **View Report** button to preview the report, or click the **Save As Favorite** button to save the configuration as a favorite report.



6. Enter the name of the favorite report in the **Report Favorite Name** field.
7. Enter a brief description in the **Description** field.
8. Click **Save** to save the favorite report, or **Cancel** to return to the parameters.
9. Click **OK** when prompted to confirm.
10. Click the **Refresh** button on the **All Reports** tab to update the view with the recent changes.

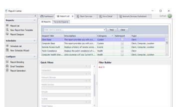
Modify a Favorite Report

Favorite reports can be replaced by making changes to the filter. Changes made to the filter of a favorite report will overwrite an existing favorite report. Once overwritten, the previous report design will be permanently lost.

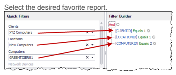
Media, iframe, embed and object tags are not supported inside of a PDF.

To change the parameters of a favorite report:

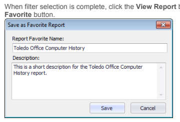
1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Reports** section of the sidebar, click **Report List** on the sidebar.



3. By default the **All Reports** tab will appear. Click on the **Favorite Reports** tab.
4. Select the desired favorite report.



5. Change the applicable filter options. As each filter option is selected, the filters will automatically generate in the **Filter Builder** section. Changes can be made from either interface. For more information on using the Filter Builder and examples, refer to Use the Filter Builder.
6. When filter selection is complete, click the **View Report** button to preview the report, or click the **Update Favorite** button.



7. Enter the updated name of the favorite report in the **Report Favorite Name** field.
Note: Changes made to the **Report Favorite Name** and **Description** parameters will overwrite the existing favorite report. Changing the **Report Favorite Name** will not create a new copy of the report favorite. Updates are permanent.
8. Update the description in the **Description** field.
9. Click **Update** to save the favorite report, or **Cancel** to return to the parameters.
10. Click **OK** when prompted by the report confirmation.
11. Click the **Refresh** button on the **Favorite Reports** tab to update the view with the recent changes.

Email Templates

Create an Email Template

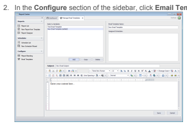
Email templates allow you to significantly speed up the process of sending reports by email. When a schedule is created that delivers reports by email, the email template is used to populate the subject and body of the email and then the report is attached to the template for sending. These templates can be customized to suit the needs of every schedule and recipient.

Media, iframe, embed and object tags are not supported inside of a PDF.

To create an email template:

Note: When creating email templates in the Report Center, the following variables can be used in the subject and body of the email: %RECIPIENT_NAME%, %RECIPIENT_TYPE%, %CLIENT_NAME%, %SCHEDULE_NAME% and %SCHEDULE_DESCRIPTION%.Refer to Replacements (Variables) for more information on using replacements in Automate.
Important: It is important to remember that when using the %CLIENT_NAME% variable, the variable is intended to be used only for reports scheduled for a client, and will return the client name associated with the contact for which the report is scheduled. When scheduling a report for a user (technician), the %CLIENT_NAME% variable will return blank because users do not have specific clients assigned to them.

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Configure** section of the sidebar, click **Email Templates**.

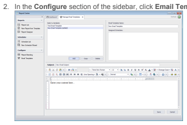


3. Click **Add**.
4. Enter the name for the template in the **Email Template Name** field.
5. Enter the description used in the email subject line in the **Subject** field.
6. Use the controls to construct the body of the email message in the **Email Template Editor**.
7. Click **Save**. The email template can then be assigned to a schedule. Refer to Edit the Schedule Details for instructions on how to assign the email template to an existing schedule.
Note: The email template will appear in the **Select a template** section with the status in parenthesis (e.g., added, edited, etc.) until you click the **Refresh** button to update the view with the recent changes.

Edit an Email Template

To edit an email template:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Configure** section of the sidebar, click **Email Templates**.



3. Select the desired email template in the **Select a template** section.
4. Update the name of the template in the **Email Template Name** field.
5. Update the description used in the email subject line in the **Subject** field.
6. Use the controls to update the body of the email message in the **Email Template Editor**.
7. Click **Save**.
Note: After work has been saved, the selected email template's status will indicate that it has been edited until the screen has been refreshed. Click the **Refresh** button to update the view with the recent changes.

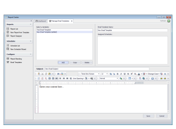
Duplicate an Email Template

To save time, you can replicate email templates with similar configurations quickly by copying an existing email template and saving it as a new template.

Media, iframe, embed and object tags are not supported inside of a PDF.

To copy an email template:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Configure** section of the sidebar, click **Email Templates**.



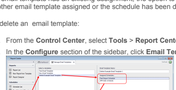
3. Select the desired email template to copy from the **Select a template** section and click **Copy**.
4. Enter the name for the template in the **Email Template Name** field.
5. Enter the description used in the email subject line in the **Subject** field.
6. Use the controls to construct the body of the email message in the **Email Template Editor**.
7. Click **Save**. The copied email template can then be assigned to a different schedule, if desired. Refer to Edit Schedule Details for instructions on how to assign the email template to an existing schedule.
Note: After work as been saved, the selected email template's status will indicate that it has been edited until the screen has been refreshed. Click the **Refresh** button to update the view with the recent changes.

Delete an Email Template

When an email template is no longer needed, it can be deleted; however, there are certain conditions that apply. If the email template has an existing assignment, the option to delete will be disabled until the schedules have another email template assigned or the schedule has been deleted.

To delete an email template:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Configure** section of the sidebar, click **Email Templates**.



3. If there are schedules assigned to the selected email template (as shown in the above example), the **Delete** button will be disabled. You will not be able to delete the template until you assign the schedule a new email template or delete the schedule. Refer to Edit Schedule Details for instructions on how to assign the email template to a different schedule or Delete Schedule to delete the schedule.
4. Select the desired email template and click **Delete**. The email template will be immediately removed from the list of email templates.

Scheduling Reports

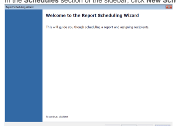
Media, iframe, embed and object tags are not supported inside of a PDF.

Schedule a Report

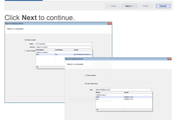
Once a report has been generated from one of the built-in templates or custom created, the schedule and recipients can be set up. The New Schedule Wizard option guides you through scheduling and assigning recipients.

To schedule a new report:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Schedules** section of the sidebar, click **New Schedule Wizard**.

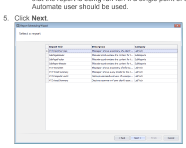


3. Click **Next** to continue.

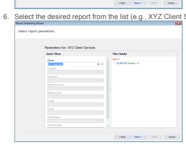


4. Select the **Client Contact** or **User (Technician)** radio button.
   a. If **Client Contact** is selected:
      i. Select the name of the client from the **Select a Client** drop-down (e.g., XYZ Computers).

      ii. Select the name of the contact from the **Select a Contact** drop-down (e.g., Jane Doe).
   b. If **User (Technician)** is selected, select the user(technician) from the **Select a User** drop-down (e.g., Admin).
   Note: If a contact is selected, as opposed to a user, the contact needs to be associated with the client that the report is being run for. If a single point of contact is being created for all reports, a specific Automate user should be used.
5. Click **Next**.

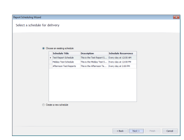


6. Select the desired report from the list (e.g., XYZ Client Services) and click **Next**.

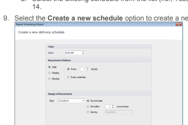


Note: If you choose ComputerContactName or ComputerContactID in the advanced filters, it will automatically link that contact to the associated ClientID and filter the report based on that client.

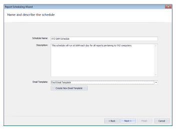
7. Select the desired report parameters using the Quick Filters and the Filter Builder (e.g., [CLIENTID] Equals 1) and click Next. For more information on the Filter Builder and some examples, please refer to Use the Filter Builder.



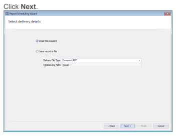
8. Select the **Choose an existing schedule** option to use an existing schedule that was previously created; otherwise, to create a new schedule, proceed to step 9.
   a. Select the existing schedule from the list (i.e., Test Report Schedule) and click **Next**. Proceed to step 14.
9. Select the **Create a new schedule** option to create a new schedule, and click **Next**.



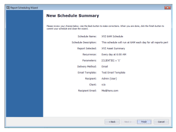
10. The **Delivery Schedule** screen allows you to set the start time, recurrence pattern and the duration.
    a. Set the start time for the schedule in the **Start** field (e.g., 6:00 AM).
    b. Select the interval the schedule will run from the **Recurrence Pattern** section (e.g., Daily, Weekly, Every day, etc.).
    c. Select the duration the schedule will recur from the **Range of Recurrence** section (e.g., starting 12/8/2014, with no end date).
11. Click **Next**.



12. The **Schedule Description** screen allows you to name the schedule, enter a description and select or create an email template for delivery.
    a. Enter the name of the schedule in the **Schedule Name** field (i.e., XYZ 6 AM Schedule).
    b. Enter a helpful summary of the schedule in the **Description** field (i.e., This schedule will run at 6 AM each day for all reports pertaining to XYZ Computers).
    c. Select the email template to be used for deliveries scheduled to be sent to a recipient using email from the **Email Template** drop-down. For more information about creating a new email template, please refer to Create an Email Template. If an email template is not selected, the report will be sent but the email will not contain any additional information (e.g., it will not have a subject line, body, etc.).
13. Click **Next**.



14. Select your preferred delivery method.
    - Select **Email the recipient** to email the report.
    - Select **Save report to file** to save the report to the L-drive in a subdirectory sorted by client.
      Note: The **File Delivery Path** is not an editable field. It uses the email address from the **Client Contact** or **User (Technician)** settings.
15. Click **Next**.



16. The **New Schedule Summary** screen will display the settings for the schedule configuration as confirmation before creating the schedule. Click **Finish** to create the schedule. Click **Back** to make changes to the schedule or **Cancel** to discard the changes.
17. Click the **Schedule List** option to view schedules that have been created. If the schedule does not display, click the **Refresh** button to update the view.

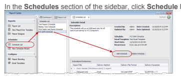
Edit Schedule Details

The Schedule Detail of the Schedule List consists of the start time, recurrence pattern, range of recurrence and the selected email template. While it is a significant part of a report schedule, it should not be confused with the scheduled deliveries configured for a schedule. In the event changes for the schedule detail are required, the schedule can be edited from the Schedule List.

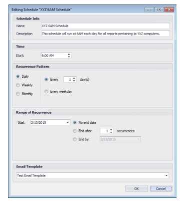
Media, iframe, embed and object tags are not supported inside of a PDF.

To edit the schedule details:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Schedules** section of the sidebar, click **Schedule List**.



3. Select the desired schedule (e.g., XYZ 6AM Schedule) and click the **Edit Schedule** button.



The **Editing Schedule** screen allows you to modify the schedule name, description, start time, recurrence pattern, range of recurrence and the selected email template.

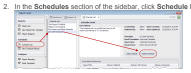
4. Make the required changes and click **OK** to save the changes. Otherwise, click **Cancel** to discard your work and return to the **Schedule List**.
5. Click the **Refresh** button on the **Schedule List** to update the view with the recent changes.

Delete Schedule

When a schedule is no longer needed, it can be removed from the Schedule List screen.

To delete a schedule:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Schedules** section of the sidebar, click **Schedule List**.



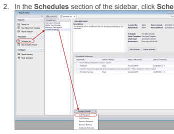
3. Select the desired schedule (e.g., XYZ 6 AM Schedule), and click the **Delete Schedule** button.
4. You will be prompted to confirm removal. Click **Yes** to remove or **No** to cancel the removal and return to the **Schedule List** screen.

Add a Recipient

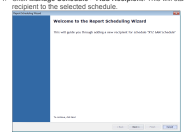
The Add New Recipient option will add a recipient to the schedule currently selected in the Schedule List.

To add a recipient:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Schedules** section of the sidebar, click **Schedule List**.



3. Select the desired schedule (e.g., XYZ 6 AM Schedule) from the **Schedule List**.
4. Click **Manage Schedule** > **Add Recipient**. This will start the Report Scheduling Wizard to add a new recipient to the selected schedule.



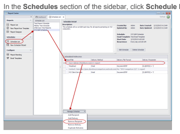
5. Click **Next** and follow the on-screen prompts. If you need assistance with each of the screens, refer back to the Schedule Reports section of this document. Once the new recipient has been added, the report will appear under their name in the **Scheduled Deliveries** section of the **Schedule List** screen.

Remove a Recipient

When a recipient is no longer needed, it can be removed from the Schedule List, even if the recipient has deliveries assigned.

To delete a recipient:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Schedules** section of the sidebar, click **Schedule List**.



3. Select the desired schedule (i.e., XYZ 6 AM Schedule) from the **Schedule List**.
4. Select the desired recipient (i.e., Admin)
5. Click **Manage Schedule** > **Remove Recipient**.
6. Click **Yes** when prompted to confirm removal, or **No** to cancel removal, and return to the **Schedule List** screen.

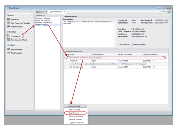
Add Report Delivery

When a recipient needs a report and is not on the Scheduled Deliveries list for a report, the delivery can be added from the Schedule List.

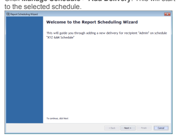
Media, iframe, embed and object tags are not supported inside of a PDF.

To add a report delivery to a recipient:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Schedules** section of the sidebar, click **Schedule List**.



3. Select the desired schedule (i.e., XYZ 6 AM Schedule) from the **Schedule List**.
4. Select the desired recipient (i.e., Admin)
5. Click **Manage Schedule** > **Add Delivery**. This will start the Report Scheduling Wizard to add a new recipient to the selected schedule.



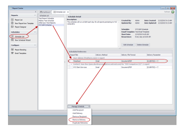
6. Click **Next** and follow the on-screen prompts.If you need assistance with each of the screens, refer back to the Schedule Reports section of this document. Once the new delivery has been added to the selected recipient, the report will appear under their name in the **Scheduled Deliveries** section of the **Schedule List** screen.

Remove Report Delivery

The Remove Delivery option will remove the selected delivery from a recipient.

Note: If the recipient only has a single delivery, the recipient will also be removed from the schedule.
To delete a delivery:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Schedules** section of the sidebar, click **Schedule List**.



3. Select the desired schedule (i.e., XYZ 6 AM Schedule) from the **Schedule List**.
4. Select the desired report(s) (i.e., Client Services - Document/PDF) from the **Scheduled Deliveries** section. Use the **[Ctrl]** or **[Shift]** key to select multiple deliveries.
5. Click **Manage Schedule** > **Remove Delivery**.
6. Click **Yes** when prompted to confirm removal or **No** to cancel removal and return to the **Schedule List** screen.

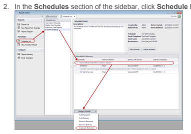
Duplicate Report Delivery

In some cases, you may want to duplicate deliveries from one recipient to another recipient. This can be done from the Manage Schedule option on the Schedule List screen.

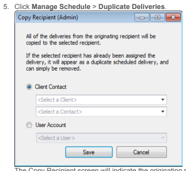
Media, iframe, embed and object tags are not supported inside of a PDF.

To copy deliveries to another recipient:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Schedules** section of the sidebar, click **Schedule List**.



3. Select the desired schedule (e.g., XYZ 6 AM Schedule) from the **Schedule List**.
4. Select the desired recipient (e.g., User: Admin) from the **Scheduled Deliveries** section.
5. Click **Manage Schedule** > **Duplicate Deliveries**.



The Copy Recipient screen will indicate the originating recipient in the title bar (e.g., Admin).

6. Select the **Client Contact** or **User Account** radio button.
    a. If **Client Contact** is selected:
        i. Select the name of the client from the **Select a Client** drop-down (e.g., XYZ Computers).
        ii. Select the name of the contact from the **Select a Contact** drop-down (e.g., Jane Doe).
    b. If **User Account** is selected, select the user(technician) from the **Select a User** drop-down (e.g., Admin).
7. Click **Save**.The collection of deliveries will be added to the selected client contact or user.

Report Generation

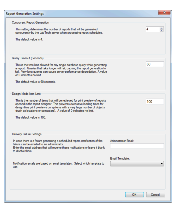
Limit Number of Scheduled Reports Running Concurrently

The Report Generation setting allows for limiting the number of scheduled reports that are run concurrently so that the Report Center does not overly use CPU and memory resources impacting overall performance. The default value is 4.

Media, iframe, embed and object tags are not supported inside of a PDF.

To change the report generation setting:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In **Configure** section of the sidebar, click **Report Generation**.



3. Use the up/down arrows in the **Concurrent Report Generation** section to change the value and click **OK**.

Change Query Timeout

The Query Timeout option allows you to change the default time before the query times out. A value of 0 indicates no limit and the default value is 60 seconds.

Media, iframe, embed and object tags are not supported inside of a PDF.

To change the query timeout setting:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Configure** section of the sidebar, click **Report Generation**.
3. In the **Query Timeout (Seconds)** field, enter the amount of time (in seconds) that you want the end the query.
4. Click **OK**.

Change Design Mode Item Limit

The Design Mode Item Limit is the number of items that will be retrieved during a print preview in the Report Designer. This limit prevents excessive loading time for design time print previews. A value of 0 indicates no limit and the default value is 100. The default value can be changed in the Report Designer, as needed.

Media, iframe, embed and object tags are not supported inside of a PDF.

To change the design mode item limit:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Configure** section of the sidebar, click **Report Generation**.
3. In the **Design Mode Item Limit** field, change to the desired number of items to be retrieved during a print preview. This can also be changed per report in the **Report Designer**.
   Note: When previewing the report, you can change the amount of data returned. This prevents excessive load times for design times when working with large datasets. The default count is set to 100 but can be changed by clicking on the **Smart Tag**
   in the upper left-hand corner of the workspace or from the **Printing** section of the **Property Grid** and entering the desired value in the **Detail Count at Design Time**.
4. Click **OK**.

Set Delivery Failure Settings

When there is a failure to generate a scheduled report, a notification email will be sent to the address in the Delivery Failure Settings.

Media, iframe, embed and object tags are not supported inside of a PDF.

To change the report generation setting:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Configure** section of the sidebar, click **Report Generation**.
3. Enter the email address of the administrator that should receive a notification in the event of a delivery failure in the **Administrator Email** field. To disable the notification, leave this field blank.
4. Select the **Email Template** to use for the delivery failure notification from the drop-down.
5. Click **OK**.