



**TIBCO JasperReports® Server  
User Guide**

*Software Release 7.8*

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# CHAPTER 1 INTRODUCTION TO JASPERREPORTS SERVER

TIBCO JasperReports® Server builds on TIBCO JasperReports® Library as a comprehensive family of Business Intelligence (BI) products, providing robust static and interactive reporting, report server, and data analysis capabilities. These capabilities are available as either stand-alone products, or as part of an integrated end-to-end BI suite utilizing common metadata and provide shared services, such as security, a repository, and scheduling. The server exposes comprehensive public interfaces enabling seamless integration with other applications and the capability to easily add custom functionality.



This section describes functionality that can be restricted by the software license for JasperReports Server. If you don't see some of the options described in this section, your license may prohibit you from using them. To find out what you're licensed to use, or to upgrade your license, contact Jaspersoft.

The heart of the TIBCO Jaspersoft® BI Suite is the server, which provides the ability to:

- Easily create new reports based on views designed in an intuitive, web-based, drag and drop Ad Hoc Editor.
- Efficiently and securely manage many reports.
- Interact with reports, including sorting, changing formatting, entering parameters, and drilling on data.
- Schedule reports for distribution through email and storage in the repository.
- Arrange reports and web content to create appealing, data-rich Jaspersoft Dashboards that quickly convey business trends.

For users interested in multi-dimensional modeling, we offer Jaspersoft® OLAP, which runs as part of the server.

While the Ad Hoc Editor lets users create simple reports, more complex reports can be created outside of the server. You can either use Jaspersoft® Studio or manually write JRXML code to create a report that can be run in the server. We recommend that you use Jaspersoft Studio unless you have a thorough understanding of the JasperReports file structure. See “[Adding Reports Directly to the Repository](#)” on page 175 and the *TIBCO Jaspersoft Studio User Guide* for more information.

You can use the following sources of information to learn about JasperReports Server:

- Our core documentation describes how to install, administer, and use JasperReports Server and Jaspersoft Studio. Core documentation is available as PDFs in the doc subdirectory of your JasperReports Server installation. You can also access PDF and HTML versions of these guides online from the [Documentation section](#) of the Jaspersoft Community website.
- Our Ultimate Guides document advanced features and configuration. They also include best practice recommendations and numerous examples. You can access PDF and HTML versions of these guides online from the [Documentation section](#) of the Jaspersoft Community website.

- Our [Online Learning Portal](#) lets you learn at your own pace, and covers topics for developers, system administrators, business users, and data integration users. The Portal is available online from the Professional Services section of our [website](#).
- Our free samples, which are installed with JasperReports Library, Jaspersoft Studio, and JasperReports Server, are available and documented online. Please visit our [GitHub repository](#). See “[Adding Reports Directly to the Repository](#)” on page 175 and *TIBCO Jaspersoft Studio User Guide* for more information.
- If you have a subscription to our professional support offerings, please contact our Technical Support team when you have questions or run into difficulties. They're available on the web at and through email at <http://support.tibco.com> and [js-support@tibco.com](mailto:js-support@tibco.com).

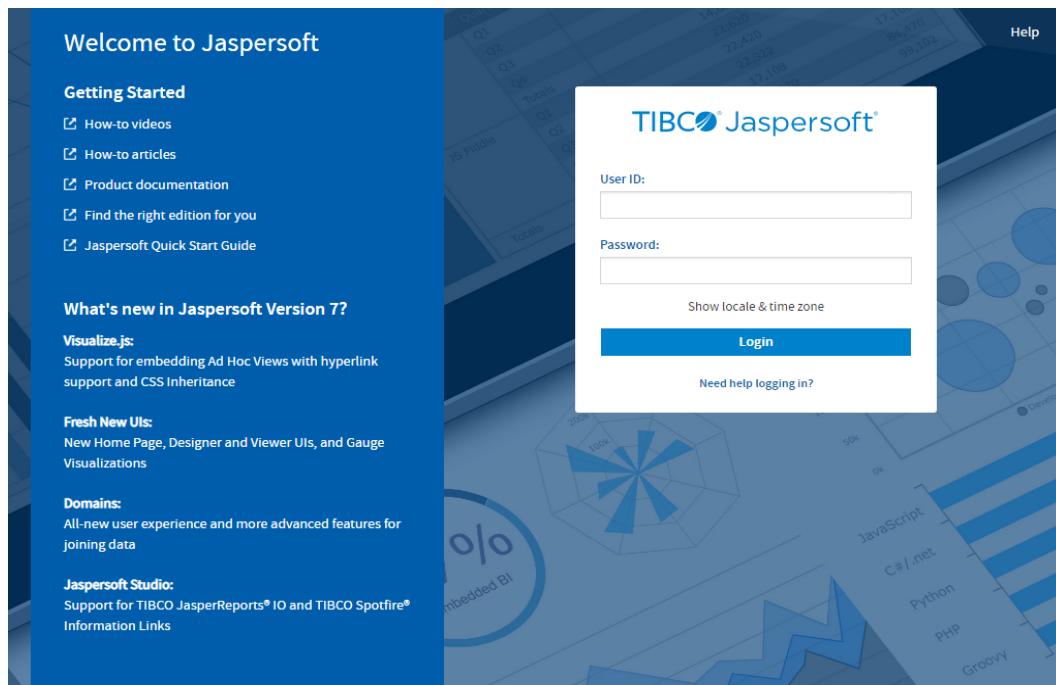
JasperReports Server is a component of both a community project and commercial offerings. Each integrates the standard features such as security, scheduling, a web services interface, and much more for running and sharing reports. Commercial editions provide additional features, including Ad Hoc views and reports, advanced charts, dashboards, Domains, auditing, and a multi-organization architecture for hosting large BI deployments.

This chapter contains the following sections:

- [Logging In](#)
- [The Getting Started Page](#)
- [The Library Page](#)
- [Browsing the Repository](#)
- [Searching the Repository](#)
- [Using Repository Resources](#)
- [Sorting the Repository List](#)

## 1.1 Logging In

Launch JasperReports Server by entering `http://<hostname>:8080/jasperserver-pro` in a web browser, where <hostname> is the name of the computer that hosts JasperReports Server. The Login page appears.



**Figure 1-1 Jaspersoft Login Page**



To log in to the server, JavaScript and cookies must be enabled in your browser.

Before logging in, review the information on the login page. There are links to the online help and additional resources.

You can log in as the following users:

- **superuser/superuser** to manage configuration and organizations
- **jasperadmin/jasperadmin** to manage a single organization
- **joeuser/joeuser** to see an end user's view
- **demo/demo** to view the demo dashboard, if samples were installed



For security reasons, administrators should always change the default passwords immediately after installing JasperReports Server, as described in the *TIBCO JasperReports Server Administrator Guide*.

#### To log in to the server:

1. Enter your user ID and password.



If you installed an evaluation server with the sample data, you can log in with the sample user IDs and passwords. For more information, click **Need help logging in?**

If the Organization field appears in the Login panel, enter the ID or alias of your organization. If you don't know it, contact your administrator. For more information, see “[Logging into a Server with Multiple Organizations](#)” on page 10.

The default administrator login credentials are superuser/superuser and jasperadmin/jasperadmin.

2. If you want to use a different locale and time zone than the server uses, click **Show locale & time zone**. The Locale and Time Zone fields appear in the Login panel. Select your locale and time zone from the drop-down menus.
3. Click **Login**. If you entered a valid user ID and password, the server displays the Getting Started page, as shown in [Figure 1-3](#).

### 1.1.1 Logging into a Server with Multiple Organizations

If the administrator has configured your server to use the multi-tenancy feature, it supports multiple organizations. Each organization has its own private area for storing files and resources. The default Login dialog for a multi-tenant server has an additional field: **Organization**. The left side of [Figure 1-2](#) shows this field. Enter the ID or alias of your organization. For example, enter the ID of the default organization: `organization_1`.

You don't have to enter the organization ID each time you log in. The first time you log in, include the organization ID in your login URL, as shown on the right side of [Figure 1-2](#). Bookmark the URL and use it for subsequent log ins. The **Organization** field does not appear in the dialog when you specify it in the URL.

`http://<hostname>:8080/jasperserver-pro/login.html`

 <b>Organization:</b> <input type="text" value="organization_1"/> <b>User ID:</b> <input type="text"/> <b>Password:</b> <input type="password"/> <a href="#">Show locale &amp; time zone</a> <input type="button" value="Login"/> <a href="#">Need help logging in?</a>	 <code>http://&lt;hostname&gt;:8080/jasperserver-pro/login.html?</code> <code>orgID=organization_1</code> <b>User ID:</b> <input type="text"/> <b>Password:</b> <input type="password"/> <a href="#">Show locale &amp; time zone</a> <input type="button" value="Login"/> <a href="#">Need help logging in?</a>
--	--

**Figure 1-2 Login Methods for Multiple Organizations**

The superuser account does not specify an organization because it is the system-wide administrator. If the **Organization** field appears in the Login dialog when you log in as superuser, leave it blank. If you try to log in as superuser with an orgID in the URL, the server returns an error.

## 1.2 The Getting Started Page

From the Getting Started page, you can quickly access the most frequently used features of the server.

The screenshot shows the JasperReports Server 'Getting Started' page. It is organized into several sections:

- Recent Items:** A list of recently used items, each with a small icon, a name, and a timestamp. Examples include '3.1 Sales Metrics' (Last Thursday at 1:11 PM), '5. Top Performers' (Last Thursday at 1:11 PM), and '09. Customer Detail Report' (Last Thursday at 1:11 PM).
- Visualizations:** A section containing three main items:
  - Ad Hoc Views:** Create visualizations for basic reporting and analysis. Includes a large blue icon of a chart, a brief description, and a '+ Create' button.
  - Reports:** View and format interactive multi-page reports. Includes a large green icon of a bar chart, a brief description, and a '+ Create' button.
  - Dashboards:** Combine visualizations into single-page dashboard layouts. Includes a large purple icon of a gear, a brief description, and a '+ Create' button.
- Data:** A section containing two items:
  - Data Sources:** Connect to a database or other data source. Includes a large orange icon of a database, a brief description, and a '+ Create' button.
  - Domains:** Define business views on Data Sources for use in visualizations. Includes a large teal icon of a network, a brief description, and a '+ Create' button.
- Admin:** A section containing one item:
  - Users and Settings:** Manage users and configure your server instance. Includes a large dark blue icon of a gear, a brief description, and an 'Admin Menu' button.
- Popular Resources:** A section containing two items:
  - Quick Start Guide:** Step-by-step instructions for getting started with JasperReports Server. Includes a large blue icon of a person, a brief description, and a link.
  - Documentation:** All documentation for JasperReports Server is right here. Includes a large teal icon of a book, a brief description, and a link.

Figure 1-3 Getting Started Page

### 1.2.1 Core Workflows

The Getting Started page for standard users has multiple blocks that link to the core workflows of JasperReports Server, that may include some or all of the following options:

- **Ad Hoc Views** – Select or create a visualization for basic reporting and analysis.
- **Reports** – Create an interactive report from an Ad Hoc view, or select an existing report.
- **Dashboards** – Combine related visualizations into a single-page layout, or select from existing layouts.
- **Data Sources** – Select or define a connection to a database or other data source.
- **Domains** – Add structure to your data source for use in a visualization.
- **Users and Settings** – Configure your server instance and manage user settings. This block is visible only to users with administrator privileges.

Each workflow block on the Getting Started page may contain buttons linking to pages or wizards to create related elements. The large icon in each workflow block is a button linking to a filtered repository list containing relevant items. Click these buttons, rather than the blocks themselves, to access these resources. Users with administrator access may have more of these options available to them.

## 1.2.2 The Getting Started Column

On the left side of the page, there are two lists to help you locate and access relevant information and assets.

- **Recent Items** – Includes links to up to 10 recently viewed repository items, such as reports, Ad Hoc views, and dashboards.
- **Video Tutorials** - Includes links to video tutorials for various JasperReports Server features.
- **Popular Resources** – Includes links to educational and support resources.

## 1.2.3 Menu Items

The menu items along the top of the Getting Started page are available from every page on JasperReports Server.  and the Library, View, Manage, and Create menus offer the options described in the table below.

Menu	Description
	Returns to the Getting Started page.
<b>Library</b>	Displays a pared-down repository page that contains the Ad Hoc views, reports, and dashboards the currently logged-in user has rights to
<b>View</b>	<ul style="list-style-type: none"><li>• <b>Search Results</b> – Displays the repository of resources filtered by criteria selected in the Filters panel.</li><li>• <b>Repository</b> – Displays the repository of files and folders containing resources, such as reports, report output, data sources, and images.</li><li>• <b>Schedules</b> – Lists the reports that you have scheduled.</li><li>• <b>Messages</b> – Lists system messages, such as an error in a scheduled report.</li></ul>
<b>Manage</b>	<ul style="list-style-type: none"><li>• <b>Organizations</b> – Opens the Manage Organizations page.</li><li>• <b>Users</b> – Opens the Manage Users page.</li><li>• <b>Roles</b> – Opens the Manage Roles page.</li><li>• <b>Server Settings</b> – Opens the Server Settings   Log Settings page.</li></ul>
<b>Create</b>	<ul style="list-style-type: none"><li>• <b>Ad Hoc View</b> – Launches the Ad Hoc Editor for designing views interactively.</li><li>• <b>Report</b> – Launches the Create Report dialog for creating a report based on an Ad Hoc view and a report template.</li><li>• <b>Dashboard</b> – Launches the Dashboard Designer for laying out multiple reports with input controls, labels, and images.</li><li>• <b>Domain</b> – Launches the Domain Designer for setting up a Domain.</li><li>• <b>Data Source</b> – Launches the New Data Source page for specifying the attributes of the new data source.</li></ul>

If you log in as an administrator, the Home page has additional options and menu items for managing users, roles, organizations, and settings, such as repository folder names. Administrator functions are documented in the *TIBCO JasperReports Server Administrator Guide*. The links to the **Online Help**, **Log Out**, and a search field appear on all JasperReports Server pages. For more information about searching, see “[Filtering Search Results](#)” on page 17.

### 1.2.4 JasperReports Server Keyboard Shortcuts

JasperReports Server provides keyboard shortcuts to help you navigate its web UI without the use of a mouse or other pointing device. These shortcuts are available on the Login page, the Home page, the Library Page, the Repository page, the Search Results page, and the interactive report viewer, allowing you to log in, move between major navigational elements of these pages, select and open reports, and navigate tabular reports.

Shortcuts include:

Key	Action
Left Arrow	Navigate left one column, cell, or item.
Right Arrow	Navigate right one column, cell, or item.
Up Arrow	Navigate up one row, cell, or item.
Down Arrow	Navigate down one row, cell, or item.
Enter	Select an item or navigate into an inner control.
Escape	Cancel an action or navigate out to an outer control.
Tab	Navigate to the next major region or form field. Focus moves from left to right.

Note that, on some pages, the Shift key can also be used in conjunction with the arrow keys or Tab:

- When used with the arrow keys, Shift multi-selects items, such as reports listed in the Library page.
- When used with Tab, Shift changes the direction that focus moves from left to right to right to left.

In addition, the web UI has improved compatibility with screen readers, which assist visually impaired users in using computers. The implementation follows the WAI-ARIA (Web Accessibility Initiative Accessible Rich Internet Applications Suite) technical specification, and has been certified for certain versions of JAWS (Job Access With Speech) with certain browsers:

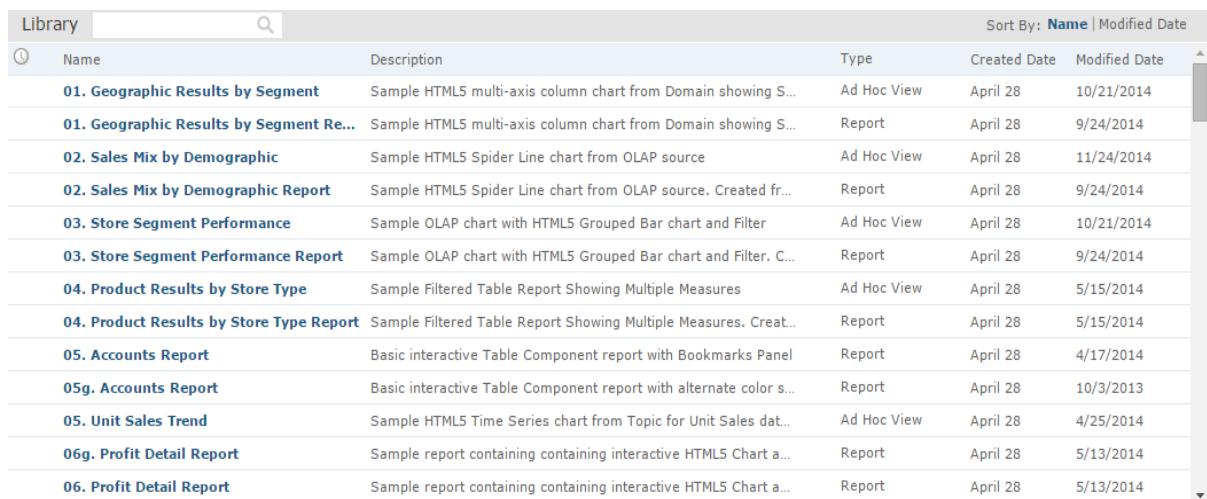
- Internet Explorer 8 with JAWS 14
- Internet Explorer 11 with JAWS 16

To further increase JasperReports Server's accessibility, we recommend that you enable the Easy Access theme, which increases color contrast and highlighting in the web UI. It can improve the user experience of those with visual impairment. For more information on themes, see the *TIBCO JasperReports Server Administrator Guide*.

## 1.3 The Library Page

The Library page offers a more focused view of the repository objects. It contains only the Ad Hoc views, reports, and Dashboards that the currently logged-in user has rights to view and work with.

Click **Library** to view your Library list.



The screenshot shows a table titled 'Library' with a search bar at the top. The columns are 'Name', 'Description', 'Type', 'Created Date', and 'Modified Date'. The table lists various reports and views, such as '01. Geographic Results by Segment', '02. Sales Mix by Demographic', and '06. Profit Detail Report'. The 'Modified Date' column shows dates ranging from April 28, 2014, to May 13, 2014.

Library					Sort By: Name   Modified Date
	Name	Description	Type	Created Date	Modified Date
01.	Geographic Results by Segment	Sample HTML5 multi-axis column chart from Domain showing S...	Ad Hoc View	April 28	10/21/2014
01.	Geographic Results by Segment Re...	Sample HTML5 multi-axis column chart from Domain showing S...	Report	April 28	9/24/2014
02.	Sales Mix by Demographic	Sample HTML5 Spider Line chart from OLAP source	Ad Hoc View	April 28	11/24/2014
02.	Sales Mix by Demographic Report	Sample HTML5 Spider Line chart from OLAP source. Created fr...	Report	April 28	9/24/2014
03.	Store Segment Performance	Sample OLAP chart with HTML5 Grouped Bar chart and Filter	Ad Hoc View	April 28	10/21/2014
03.	Store Segment Performance Report	Sample OLAP chart with HTML5 Grouped Bar chart and Filter. C...	Report	April 28	9/24/2014
04.	Product Results by Store Type	Sample Filtered Table Report Showing Multiple Measures	Ad Hoc View	April 28	5/15/2014
04.	Product Results by Store Type Report	Sample Filtered Table Report Showing Multiple Measures. Creat...	Report	April 28	5/15/2014
05.	Accounts Report	Basic interactive Table Component report with Bookmarks Panel	Report	April 28	4/17/2014
05g.	Accounts Report	Basic interactive Table Component report with alternate color s...	Report	April 28	10/3/2013
05.	Unit Sales Trend	Sample HTML5 Time Series chart from Topic for Unit Sales dat...	Ad Hoc View	April 28	4/25/2014
06g.	Profit Detail Report	Sample report containing containing interactive HTML5 Chart a...	Report	April 28	5/13/2014
06.	Profit Detail Report	Sample report containing containing interactive HTML5 Chart a...	Report	April 28	5/13/2014

**Figure 1-4 Library Panel**

From the Library page, you can:

- Run and schedule reports
- Open Ad Hoc views and generate reports from them
- Run and edit dashboards
- Run OLAP views

All of these functions are available by right-clicking the item you want to work with and selecting an action from the context menu.

### 1.3.1 Created vs. Modified Dates

The Library table has two columns that refer to when the repository items were created and last modified.

Generally, the created date will be earlier than the modified date. In some situations, however, the created date may be after the modified date. This can happen for one of two reasons:

- When an existing report (A) is modified, then subsequently copied into a new report (B). In the Library list, report B's created date is the day it was created, but its modified date reflects the last time report A was changed.
- An existing report is exported from one system and imported into another. In the Library list, the reports created date is the date it was imported into the new system, and the modified date is the date it was last modified in the original system.

## 1.4 Browsing the Repository

The repository is the server's internal storage for reports, analysis views, and related files. The repository is organized as a structure of folders containing resources, much like a file system. However, unlike a file system, the repository is stored as a private database that only JasperReports Server can access directly.

To browse the repository, select **View > Repository**. From the repository page, you access the reports, themes, and other files stored on the server. You can browse the repository contents that you have permission to view

by expanding icons in **Folders**. Click a folder name to view its contents. In **Figure 1-5**, you'll see the Repository page.

Repository					Sort By: Name   Modified Date			
	Run	Edit	Open	Copy	Cut	Paste	Delete	
	Name			Description			Type	Created ...
	All Accounts Report			All Accounts Report			Report	April 28
	Cascading multi select topic			Shows cascading input controls. Multi-select and ...			Report	April 28
	Customers Report			Parameterized Report with no default values for ...			Report	April 28
	demo for adhoc			Topic containing shipping costs for orders			Report	April 28
	Employees			Employee List topic based on Employee List repo...			Report	April 28
	foodmart data for crosstab			foodmart data for crosstab			Report	April 28
	i18n columns			Columns are Internationalizable. Default su...			Report	April 28
	MDX example			Example of topic with MDX query			Report	April 28
	Parameterized Report			Parameterized Report			Report	April 28
	Simple Domain Topic			Simple example of Domain saved as Topic			Domain Topic	April 28
	SuperMart Products			Information about all of the products sold by Su...			Report	April 28
	SuperMart Stores			Simple Topic. Good for trying calculations (sales...			Report	April 28

**Figure 1-5 Repository Folders Panel**

## 1.5 Searching the Repository

You can search the entire repository, subject to permissions, or narrow the search using filters. **Filters** restrict a search by name, who changed the resource, type of resource, date of the resource, and schedule.

### 1.5.1 Searching the Entire Repository

To search the repository, select **View > Search Results**. The search results page appears. Instead of only viewing resources by folder, use intuitive search criteria, such as who modified the resource and when, to find pinpoint resources.

On the search results page, use either the **Filters** panel or **Search** field to find resources. The search results page displays results of searches and filters.

Filters		Sort By: <u>Name</u> Modified Date			
		Name	Description	Type	Created...
Access Status	<input checked="" type="radio"/> All available	<a href="#">01. Geographic Results by Segment</a>	Sample Multi-axis column chart from Domain sh...	Ad Hoc View	July 15
	Modified by me	<a href="#">01. Geographic Results by Segme...</a>	Sample Report containing hyperlinks and a map	Report	July 15
	Viewed by me	<a href="#">02. Sales Mix by City</a>	Sample Spider chart from Domain data source a...	Ad Hoc View	July 15
File Type	<input checked="" type="radio"/> All types	<a href="#">02. Sales Mix by City Report</a>	Sample Spider Line Report created from an Ad H...	Report	July 15
	Reports	<a href="#">03. Store Segment Performance</a>	Sample Gauge Chart with multi-select filter fro...	Ad Hoc View	July 15
	Content resources	<a href="#">03. Store Segment Performance ...</a>	Sample Gauge Report Created from an Ad Hoc V...	Report	July 15
	Ad Hoc views	<a href="#">04. Product Results by Store Type</a>	Sample Filtered Table Report Showing Multiple ...	Ad Hoc View	July 15
	Dashboards	<a href="#">04. Product Results by Store Typ...</a>	Sample Filtered Table Report Showing Multiple ...	Report	July 15
	OLAP views	<a href="#">05. Accounts Report</a>	Basic interactive Table Component report with ...	Report	July 15
	Domains	<a href="#">05. Unit Sales Trend</a>	Sample HTML5 Time Series chart from Topic for ...	Ad Hoc View	July 15
	Data sources	<a href="#">06. Profit Detail Report</a>	Sample report containing containing interactive...	Report	July 15
	Deprecated reports	<a href="#">06. Sales Mix by Gender</a>	Sample HTML5 percent bar chart from a Topic s...	Ad Hoc View	July 15
	Accessed Date	<a href="#">07. Brand Sales Analysis</a>	Sample HTML5 Scatter Chart providing multi-lev...	Ad Hoc View	July 15
Accessed Date	<input checked="" type="radio"/> Any time	<a href="#">07. Revenue Detail Report</a>	Sample report containing containing interactive...	Report	July 15
	Today	<a href="#">08. Key Performance Metric Trend</a>	Sample HTML5 Dual-axis column-line chart sho...	Ad Hoc View	July 15
	Yesterday	<a href="#">08. Unit Sales Detail Report</a>	Sample report containing containing interactive...	Report	July 15
	Past week	<a href="#">09. Customer Detail Report</a>	Sample report with multiple charts, interactive t...	Report	July 15
	Past month	<a href="#">09. Store Segment Performance</a>	Sample HTML5 Bubble Chart with basic user def...	Ad Hoc View	July 15
	Schedule Status	<a href="#">1. Supermart Dashboard</a>	Sample Dashboard containing filter pop-up, Das...	Dashboard	July 15
Schedule Status	<input checked="" type="radio"/> Any schedule	<a href="#">10. Calculated Fields and Measures</a>	18 Sample Calculations	Ad Hoc View	July 15
	Scheduled	<a href="#">10. Performance By Store Type</a>	Sample report with Donut Pie Charts and crosst...	Report	July 15
	Scheduled by me	<a href="#">11. Sales By Month Report</a>	Sample multi-panel report	Report	July 15
	Not scheduled	<a href="#">11. Top 5 Products by City</a>	Sample from Domain data source with nested to...	Ad Hoc View	July 15

**Figure 1-6 Search Results Page****To search all resources in the repository:**

1. Select one of these filters: **All available**, **Modified by me**, or **Viewed by me**.
2. Click the  icon in the search field to clear the search term if there is one.
3. Select **All types**, as shown in **Figure 1-6**.
4. Click .

The search results appear listing files that your user account has permission to view. Click a resource in the list to view it or right-click a resource to see what functions are available from the context menu.

The server remembers your settings on the Search Results page, so the most commonly needed resources remain visible when you return to the page.

## 1.5.2 Filtering Search Results

If you enter a search term and click  at the top of any server page, the server doesn't use filters. The search uses these default settings:

- Include subfolders
- Start at the top-most folder visible to the user
- Search for reports, report outputs, OLAP views, or other resources
- Sort alphabetically by name

If you click **View > Search Results** and click  on the search results page, the server uses the filters you set in the **Filters** panel.

In **Figure 1-7**, you can see the results of a search for the term “account” using the filters All available and All types.

Repository						
Filters	account	X 	Sort By: <u>Name</u> Modified Date			
Access Status	⌚ Name	Description	Type	Created ...	Modifie...	
All available	<b>05_Accounts Report</b>	Basic interactive Table Component report with B...	Report	July 15	8/28/2019	
Modified by me	20.1 Account List	Sample Report used for basic Visualize.js demo	Report	July 15	5/16/2014	
Viewed by me	All Accounts Report	All Accounts Report	Report	July 15	July 14	
File Type	Employee Accounts	List of Accounts per Employee	Report	July 15	July 14	
All types	SugarCRM Sample Analysis View	Sample SugarCRM Analysis View: Sales Performa...	OLAP View	July 15	July 14	
Reports	SugarCRM Sample XMLA Analysis ...	Sample SugarCRM Analysis View (XMLA): Sales Pe...	OLAP View	July 15	July 14	
Content resources						

**Figure 1-7 Search Field and Search Results**



The search term you enter in the search field isn't cleared automatically. To clear the search term, click the  icon in the search field.

You refine a search using filters. For example, filters can help you find your most recently viewed reports. You can set each filter independently. You can set the following types of filters:

- User
- Resource
- Access time
- Scheduled report

The user filter has the following settings:

Filter Setting	Description
All Available (default)	All resources.
Modified by me	Selects only resources that were last modified by the user who's logged in.

Filter Setting	Description
Viewed by me	Selects only resources that were run and viewed by the user who's logged in. This filter not only applies to visualization types, but also to resources that are included in reports such as images.

The resource type filter has the following settings:

Filter Setting	Description
All types (default)	All resources.
Reports	Displays only reports, both JRXML reports and Ad Hoc reports.
Report outputs	Displays only the output from reports that were scheduled or run in the background. Report output can be any of the supported export types, such as HTML and PDF.
Dashboards	Displays only dashboards.
OLAP views	Displays only analysis views (if you implement Jaspersoft OLAP).
Domains	Displays only Domains.
Data sources	Displays only data sources.

The access time filter has the following settings. All times are relative to the user's effective time zone:

Filter Setting	Description
Any time (default)	All resources.
Today	Resources viewed or modified since the previous midnight.
Yesterday	Resources viewed or modified during the previous day ending at midnight.
Past week	Resources viewed or modified during the past 7 days, including today.
Past month	Resources viewed or modified during the past 30 days, including today.

The scheduled report filter has the following settings:

Filter Setting	Description
Any schedule (default)	All resources.
Scheduled	Only reports that have scheduled jobs.
Scheduled by me	Only reports that have jobs scheduled by the currently logged in user.
Not scheduled	Only reports that don't have scheduled jobs and all other resource types.

Remember these do's and don'ts when searching for resources:

- Do use word fragments.
- Do search for the display name or part of the display name of a resource.
- Do search for words or fragments in the description of a resource.
- Do use multiple words.
- Don't search for folder names.
- Don't enter quotes around terms or symbols between terms.
- Don't worry about using upper- or lower-case letters in search terms.

## 1.6 Using Repository Resources

After finding a resource in the repository, naturally you want to do something with it. Options are:

- Click the name of a report to run and view it.
- Right-click the name of a resource to access other operations on the context menu, for example **Edit** or **Open in Designer**. Items appear on the context menu according to your permissions.
- Click anywhere in the row except the resource name to select a resource. Ctrl-click anywhere in the rows to select multiple resources. Use the context menu or buttons above the results list: **Run**, **Edit**, **Open**, **Copy**, **Cut** (move), or **Delete**. If the button is unavailable, the resource doesn't support the operation or you don't have permission for the operation. For example, the Open button is available when you select a dashboard or an Ad Hoc report if you have permission to write to it.

You might also need permission to access the folder or dependent file, such as an image, of a resource. For example, to schedule a report, you need to have read/write/delete permission on the folder where server saves the report output. For more information about permissions, see the TIBCO JasperReports Server Administrator Guide.

These two icons may appear in the **Repository** panel:

- indicates that the report has saved options for its input controls. Click the icon to list the saved options. For more information, see “[Running a Report with Input Controls or Filters](#)” on page 71.
- indicates that the report is scheduled to run or is running in the background. Click this icon to view the list of jobs scheduled for the report. For more information, see “[Scheduling Reports and Dashboards](#)” on page 77.

## 1.7 Moving Folders

If you have read permission on folders and resources, you can copy and cut them from one folder and paste them to another if you have write permission on the destination folder. The server pastes all contents of the folder into the new location.

You can drag-and-drop the objects instead of using the paste menu item. Move folders one at a time. You can move other resources in batches.



Relocated objects inherit permissions from the destination folder, losing the permissions in place before the move. To change permissions on an object, set the permissions explicitly.

### To move folders and resources by cutting and pasting:

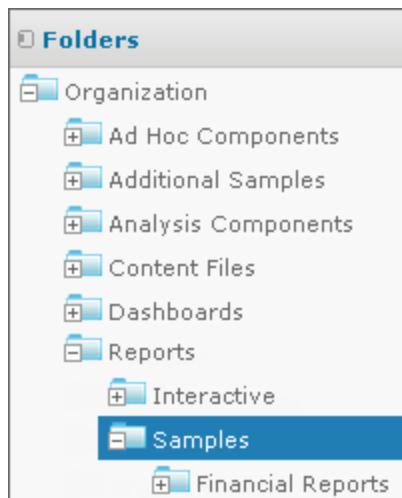
1. Log into the server as a user who has these permissions:
  - Read permission on the folder or resource to move

- Write permission on the destination folder

For example, log in as joeuser (use the password, joeuser).

2. Click **View > Repository**.
3. In the **Folders** panel, right-click **Reports > Samples** and select **Add Folder**.
4. In the **Add Folder** dialog, enter a name, such as Financial Reports, and click **Add**.

The Financial Reports folder appears as a subfolder of Samples and inherits Joe User's default permissions (read-write-delete) on the parent folder.



**Figure 1-8 New Financial Reports Folder**

5. The Financial Reports folder deserves a more prominent location. Move it up one level:

- a. In **Folders**, right-click Financial Reports, and select **Cut**.
- b. Right-click **Reports**, and select **Paste**.

The Financial Reports folder now appears in **Reports** at the same level as **Samples**.



You can relocate a folder, subject to permissions, anywhere in the repository with one exception: The server doesn't support copying and pasting a folder to the same location. If the Paste command is disabled when you right-click a destination folder, you don't have write permission on the folder.

## 1.8 Sorting the Repository List

To change the order of the list of reports and other resources, use the **Sort By** controls:

- Click **Name** to sort alphabetically (A at the top). This is the default sort order.
- Click **Modified Date** to sort by the latest modified time and date (most recent at the top).

## CHAPTER 2 WORKING WITH DASHBOARDS



This section describes functionality that can be restricted by the software license for JasperReports Server. If you don't see some of the options described in this section, your license may prohibit you from using them. To find out what you're licensed to use, or to upgrade your license, contact Jaspersoft.

A Jaspersoft dashboard displays several reports in a single, integrated view. A dashboard can include input controls for choosing the data displayed in one or more dashlets, and custom dashlets that point to URLs for other content. By combining different types of related content, you can create appealing, data-rich dashboards that quickly convey trends.



**Figure 2-1 Sample dashboard**

This chapter contains the following sections:

- [Overview of the Dashboard Designer](#)
- [Viewing a Dashboard](#)
- [Creating a Dashboard](#)
- [Editing a Dashboard](#)

- **Tips for Designing Dashboards**

## 2.1 Viewing a Dashboard

You can view a dashboard if you have the proper permissions. The following procedure walks you through opening one of JasperReports Server's samples, the Supermart dashboard.

### To view the Supermart dashboard:

1. Log in as user `demo`, using the password `demo`.



Passwords are case-sensitive. You must use lowercase when you type `demo`.

The Supermart Top View dashboard opens in the dashboard viewer.



**Figure 2-2 Supermart Dashboard Example**

2. Click one of the **USA** gauges.
3. Select **USA**, then click **Close** to change the data displayed.

The two dashlets with Country data update to display data for USA only.



You can click on the funnel icon to select one or more countries from a filter panel.

4. Click on **Sales Metrics Dashboard**.

A new dashboard opens. The Sales Metrics Dashboard includes reports on sales by region, state, and city.

5. Click on the **Back** button to return to the Supermart Dashboard.
6. When done, click **View > Repository** to go to the repository page.



If a dashboard does not appear when you click on its name in the repository, it may already be open in another window or tab of your browser.

If you have the proper permissions, you can easily switch from viewing a dashboard to editing it.

**To edit the Supermart dashboard:**

1. Open the Supermart dashboard in the dashboard viewer.
2. Click the **Viewing** button on the title bar and select **Editing** from the drop-down list.
3. Edit the dashboard by adding, removing, resizing, or dragging content.  
For more information about working with dashboard content, see “[Creating a Dashboard](#)” on page 37.
4. When you are satisfied with the dashboard, hover your cursor over  and select **Save Dashboard**. To create a new version of the dashboard, select **Save Dashboard As** and specify a new name.

## 2.2 Overview of the Dashboard Designer

The Dashboard Designer is a web-based UI for embedding reports, Ad Hoc views, and other BI objects into a single, interactive space. You can compile dashboards that include pre-existing elements, such as reports and views, and create new charts, tables, and crosstabs from your data sources directly from the designer.

Each element on your dashboard is called a **Dashlet**. Dashlets have unique names and resource IDs, and editable properties that vary depending on the Dashlet type.

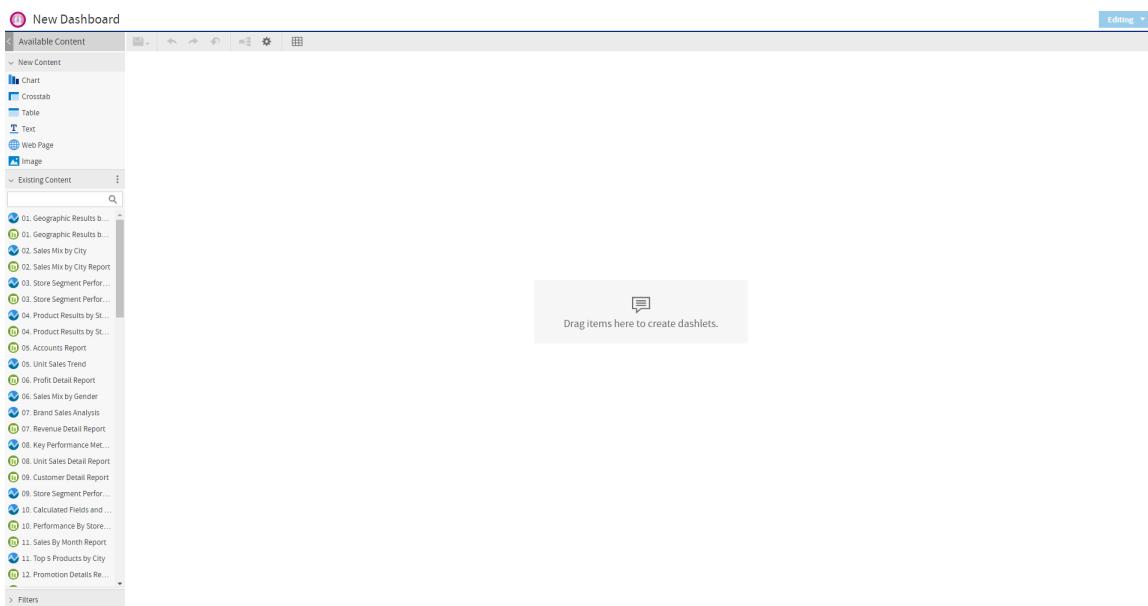
Your permissions to access the repository may limit the content you can add and the location where you can save the dashboard.

This section includes:

- [The Dashboard Designer Interface](#)
- [Dashlets and Dashboard Elements](#)
- [Previewing a Dashboard](#)
- [Dashboard Properties](#)
- [Dashlet Properties](#)
- [Parameter Mapping](#)

### 2.2.1 The Dashboard Designer Interface

The following figure shows the basic layout of the Dashboard Designer.



**Figure 2-3 The Dashboard Designer UI**

The Dashboard Designer UI includes the following panels:

- **Available Content.** From here, you can drag content onto the Dashboard Canvas. This panel includes the following sections:
  - **New Content**, which lists the content elements you can create for your dashboard.
  - **Existing Content**, which lists the Ad Hoc views and reports you can access from the Repository.
  - **Filters**, which lists all filters associated with any resource added to the dashboard.
- **Toolbar Buttons.** See table below for details.

Icon	Name	Description
	Save/Save As	Hover cursor over icon to open a menu of save options.
	Undo	Click to undo the most recent action.
	Redo	Click to redo the most recent undone action.
	Undo All	Click to revert the dashboard to the most recently saved state.
	Parameter Mapping	Click to open the Parameter Mapping dialog. See <a href="#">Parameter Mapping</a> for more information.
	Dashboard Properties	Click to open the Dashboard Properties box. See <a href="#">Dashboard Properties</a> for more information.
	Show/Hide Grid	Click to display or hide a grid.

Icon	Name	Description
	Show/Hide Filter Dashlet Pop-up	Click to display or hide a filter pop-up window. This button only appears when you enable filter dashlet pop-ups in Dashboard Properties.

- **Dashboard Canvas.** This is where you create and edit your dashboard. It includes the following sections:
  - **Title Bar**, which displays the name of the dashboard (in the figure above, the name is "New Dashboard"). It also includes the **Editing/Viewing** button, which allows you to switch between editing the dashboard and displaying it as viewed by the end user.
  - **Main Creation Area**, where you build your dashboard. Drag elements from the Available Content panel here to get started.

## 2.2.2 Dashlets and Dashboard Elements

Each element added to your dashboard is called a Dashlet.

To add a Dashlet to your dashboard, simply select a content element and drag it onto the dashboard canvas. Certain content, such as charts and crosstabs, open an embedded Ad Hoc editor, which is the same editor used to create Ad Hoc views. See “[Overview of the Ad Hoc Editor](#)” on page 91 for more information.

Dashlets can include the following elements, which you can access from the **Available Content** panel:

- **New Content:**
  - **Chart:** Allows you to create a chart using an embedded Ad Hoc editor.
  - **Crosstab:** Allows you to create a crosstab using an embedded Ad Hoc editor.
  - **Table:** Allows you to create a table using an embedded Ad Hoc editor.
  - **Text:** A free-form text entry field. Use free text items to add titles and instructional text to the dashboard.
  - **Web Page:** Any URL-addressable web content. The dashboard can point to web content.
  - **Image:** An image from the repository or that is accessible by a web address URL. For example, you might include a dashlet that displays your corporate logo. The logo's image file can either be in your repository or on the server of your corporate website.
- **Existing Content:** Reports and Ad Hoc views accessible to you.
- **Filters:** If a dashlet you include on the dashboard is designed to use input controls or filters, you can add that capability to the dashboard. The server maps input controls to one or more dashlets.
- **Title Bar:** You can enable a title bar in the Dashlet Properties dialog box. The title bar includes the following elements:
  - The Dashlet name, as entered in the Dashlet properties.
  - Dashlet toolbar, which can contain the following:

Icon	Name	Description
	Maximize	Click to open the dashlet as a larger view.
	Refresh	Click to refresh the dashlet.

Icon	Name	Description
	Export	Click to export the dashlet and save the output to your computer. See “ <a href="#">Exporting Dashboards and Dashlets</a> ” on page 51 for more information.

For more advanced functionality, you can access dialog boxes that let you edit the overall appearance of your dashboard, modify the functionality of your dashlets, and create mappings between your dashboard input controls and your dashlets.

### 2.2.3 Previewing a Dashboard

You can preview your dashboard in display mode to see how it will appear when an end-user views it.

**To preview a dashboard:**

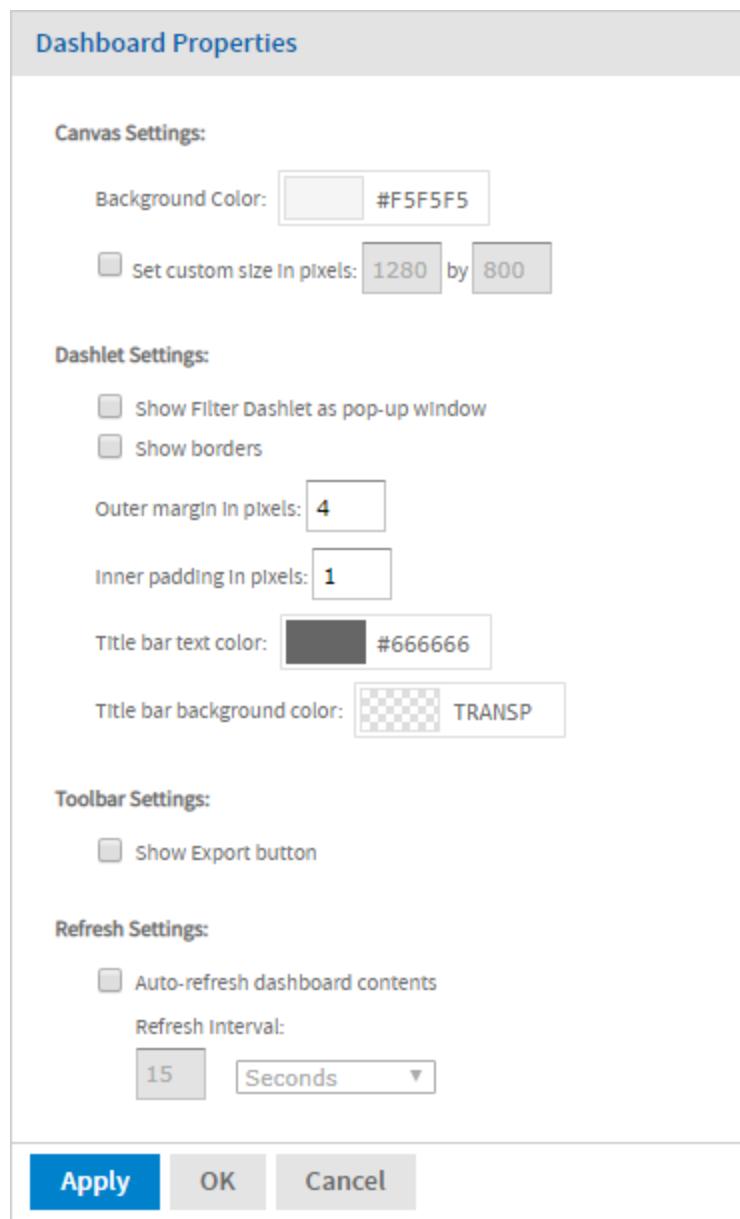
1. Click the **Editing** button and select **Viewing** from the drop-down list. The dashboard opens in display mode.
2. To close the preview and return to the Dashboard Designer, click the **Viewing** button and select **Editing** from the drop-down list.

### 2.2.4 Dashboard Properties

You can view and edit the basic appearance of all dashlets on your dashboard, and determine the refresh settings, through the Dashboard Properties.

**To view and edit the Dashboard Properties:**

1. On the dashboard toolbar, click  to open the Dashboard Properties window.



**Figure 2-4 Dashboard Properties**

2. Edit the Canvas Settings, if needed:
  - **Background Color:** Select the color of the dashboard's background.
  - **Set custom size in pixels:** Select when you want the dashboard to be displayed at a specific width and height instead of dynamically resizing based on the browser window. Enter the desired width and height of the dashboard.
3. Edit the **Dashlet Settings**, if needed:
  - **Show filter dashlet as pop-up:** Select when you want the filter dashlet to appear as a pop-up window instead of a dashlet pinned on the dashboard.
  - **Show dashlet borders:** Select or deselect this to show or hide the thin lines around each dashlet.

- **Dashlet outer margin in pixels:** Enter the desired width, in pixels, of the margins between dashlets.
  - **Dashlet inner padding in pixels:** Enter the desired width, in pixels, of the padding inside each dashlet.
  - **Title bar text color:** Select the text color for the title bars of all of the dashboard's dashlets.
  - **Title bar background color:** Select the background color for the title bars of all of the dashboard's dashlets.
4. Edit the **Toolbar Settings**, if needed:
    - **Show Export Button:** Select or deselect to show or hide the Export button in the dashboard viewer.
  5. Edit the **Refresh Settings**, if needed:
    - **Auto-refresh dashboard contents:** Select or deselect this to enable or disable automatic refresh for your content.
    - **Refresh Interval:** Enter the number of minutes or seconds between each content refresh, using the text entry and drop-down menu.

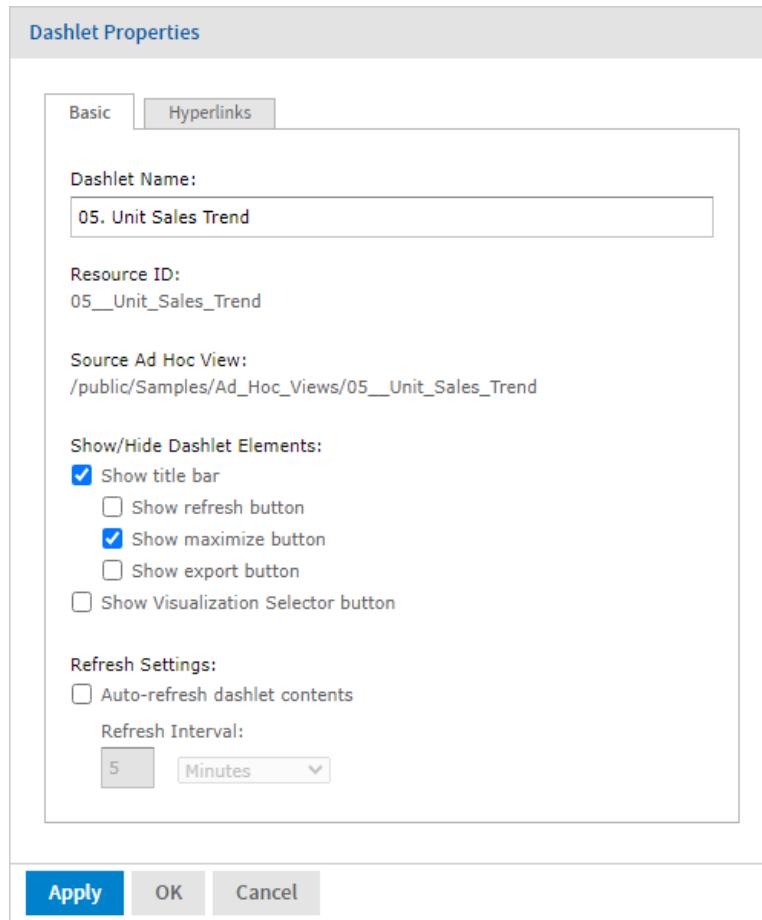
## 2.2.5 Dashlet Properties

You can view and edit basic information and appearance for each dashlet on your dashboard using the Dashlet properties. For some dashlets, you can also create parameters which you can then map to in Parameter Mapping. The available properties vary based on the type of dashlet you are working with.

### To view and edit the Dashlet properties:

1. Right-click on the dashlet and select **Properties** to open the Dashlet Properties window. The **Hyperlinks** tab is available for Ad Hoc-based charts and charts created inside the dashboard, as well as text and image dashlets. A **Formatting** tab is available for text dashlets.
2. Click **Apply** to view the changes, **OK** to accept the changes, and **Cancel** to discard the changes.

### 2.2.5.1 Basic Properties for Charts, Crosstabs, Tables, Reports, and Ad Hoc Views Dashlet



**Figure 2-5 Basic Tab Properties**

- **Dashlet Name:** Editable field for the displayed dashlet name.
- **Resource ID:** Non-editable ID taken from the original dashlet name.
- **Source Data:** Non-editable path of the source data.
- **Show/Hide Dashlet Elements:** Select or deselect to show or hide the title bar, which includes the dashlet name, refresh button, export button, and maximize button. You can also choose to show or hide the Visualization Selector button.
- **Scale to Fit:** Use the drop-down menu to determine how the element is scaled in the dashlet. Scale to Fit is available for dashlets for tables, crosstabs, reports, and existing Ad Hoc view tables and crosstabs. Scale to Fit is not available for charts or existing Ad Hoc view charts.
- **Refresh Settings:** Select or deselect to enable or disable auto-refresh, and use the text entry and drop-down menu to set the time between each content refresh.

### 2.2.5.2 Properties on the Hyperlink tab

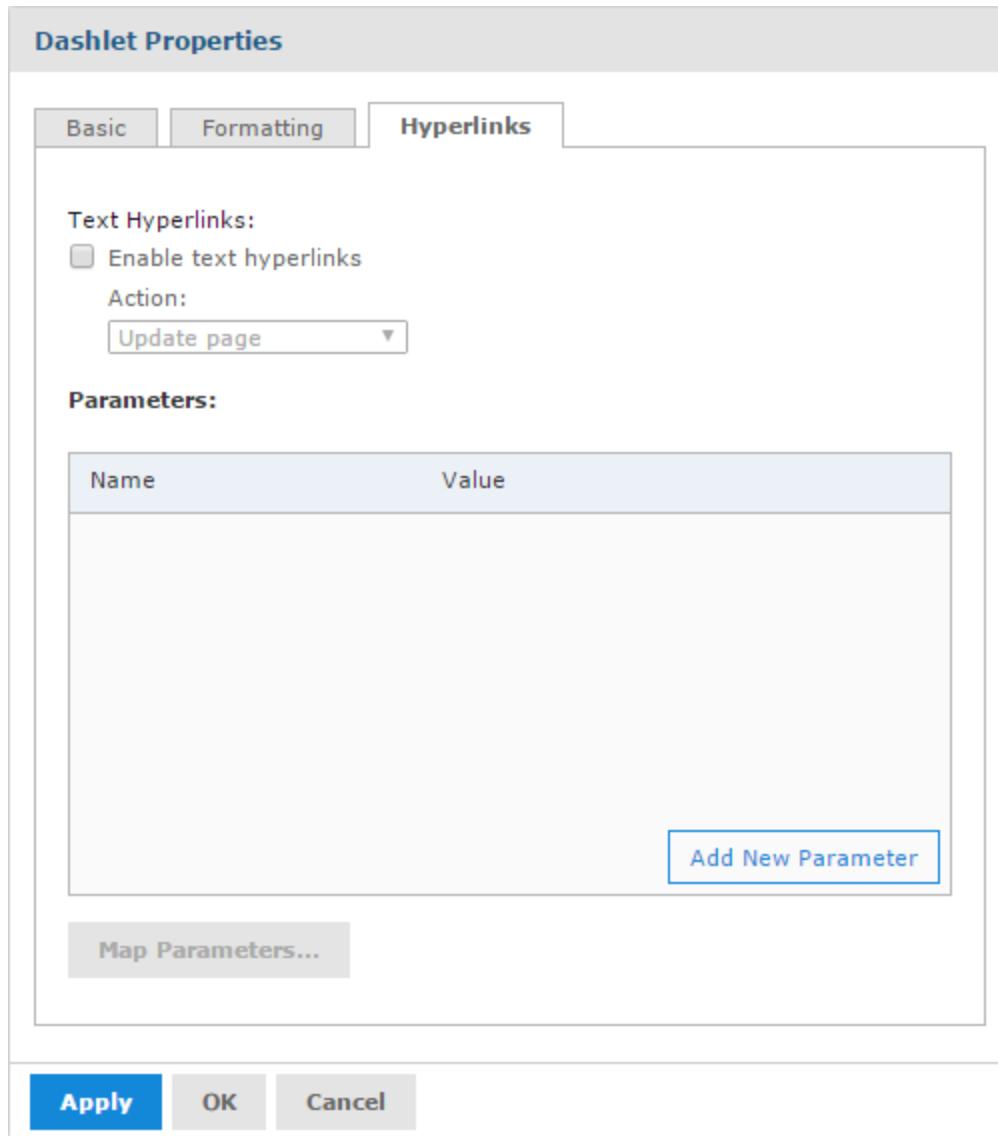


Figure 2-6 Hyperlinks Tab Properties



The **Hyperlinks** tab is available for Ad Hoc-based charts and charts created inside the dashboard, as well as text and image dashlets.

- **Enable hyperlinks:** Select or deselect to enable a hyperlink for the dashlet.
- **Action:** Select link behavior for this dashlet:
  - **Update page:** Select this option to update the dashboard's contents when a user clicks on a link in the dashlet.
  - **Open new page:** Select this to have the dashlet open a web page or report, dashboard, or an Ad Hoc view in the repository in a new browser tab or window when a user clicks on the dashlet. Click **Browse** to select a resource from the repository.

You can link directly to a web page using http: syntax:

```
http://en.wikipedia.org/wiki/$P{Customer_Country}
```

A repository URL must begin with repo:, for example,

```
repo:/public/Samples/Ad_Hoc_Views/05._Unit_Sales_Trend
```

You can add a parameter to a hyperlink for a web page, dashboard, or report. Parameters are not available for Ad Hoc views. See [2.4, “Specifying Parameters in Dashlets,” on page 44](#) for more information about adding parameters to hyperlinks.

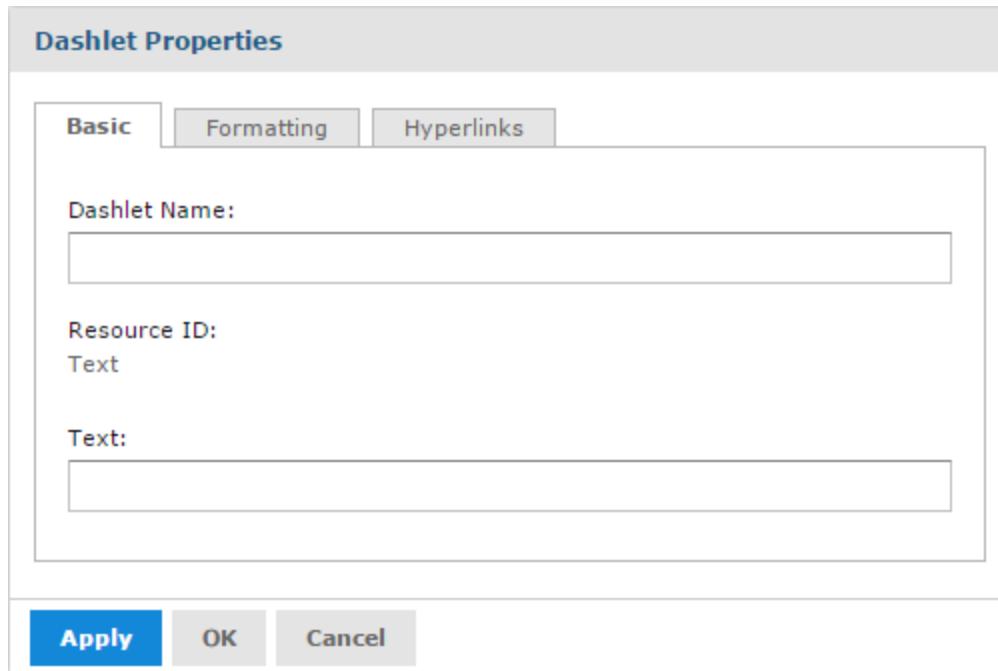
- **Replace page:** Select this option to replace the current dashboard page with a web page or report, dashboard, or an Ad Hoc view in the repository when a user clicks on the dashlet. Click **Browse** to select a resource from the repository. The syntax for links and parameters is the same as the **Open new page** option.  
If the dashlet replaces the page with an Ad Hoc view, it will open in the Ad Hoc View Designer. A **Back** button appears on the toolbar after the dashlet opens a report or dashboard that will take you back to the previous dashboard.
- **Available parameters:** If you want to add a parameter in the hyperlink, use a name in this list to have Parameter Mapping create the link to the parameter automatically.
- **Add New Parameter:** For text and image dashlets, you can define a parameter to include in the hyperlink. Click the **Add New Parameter** button and enter the parameter's name and value in the new table row. Click to save the new parameter.

Parameters:	
Name	Value
<input type="text"/>	<input type="text"/>

**Figure 2-7 Adding a New Parameter to a Dashlet**

- **Map Parameters:** When you add a parameter, click this button to save and close the Dashlet Properties window and open Parameter Mapping. See [Parameter Mapping](#) for more information.

### 2.2.5.3 Basic Properties for Text Dashlets



**Figure 2-8 Basic Tab for Text Dashlets**

- **Dashlet Name:** Editable field or the displayed dashlet name.
- **Resource ID:** Non-editable ID taken from the original dashlet name.
- **Text:** Editable field for the text displayed in the dashlet.

### 2.2.5.4 Formatting Properties for Text Dashlets



The **Formatting** tab is only available on text dashlets.

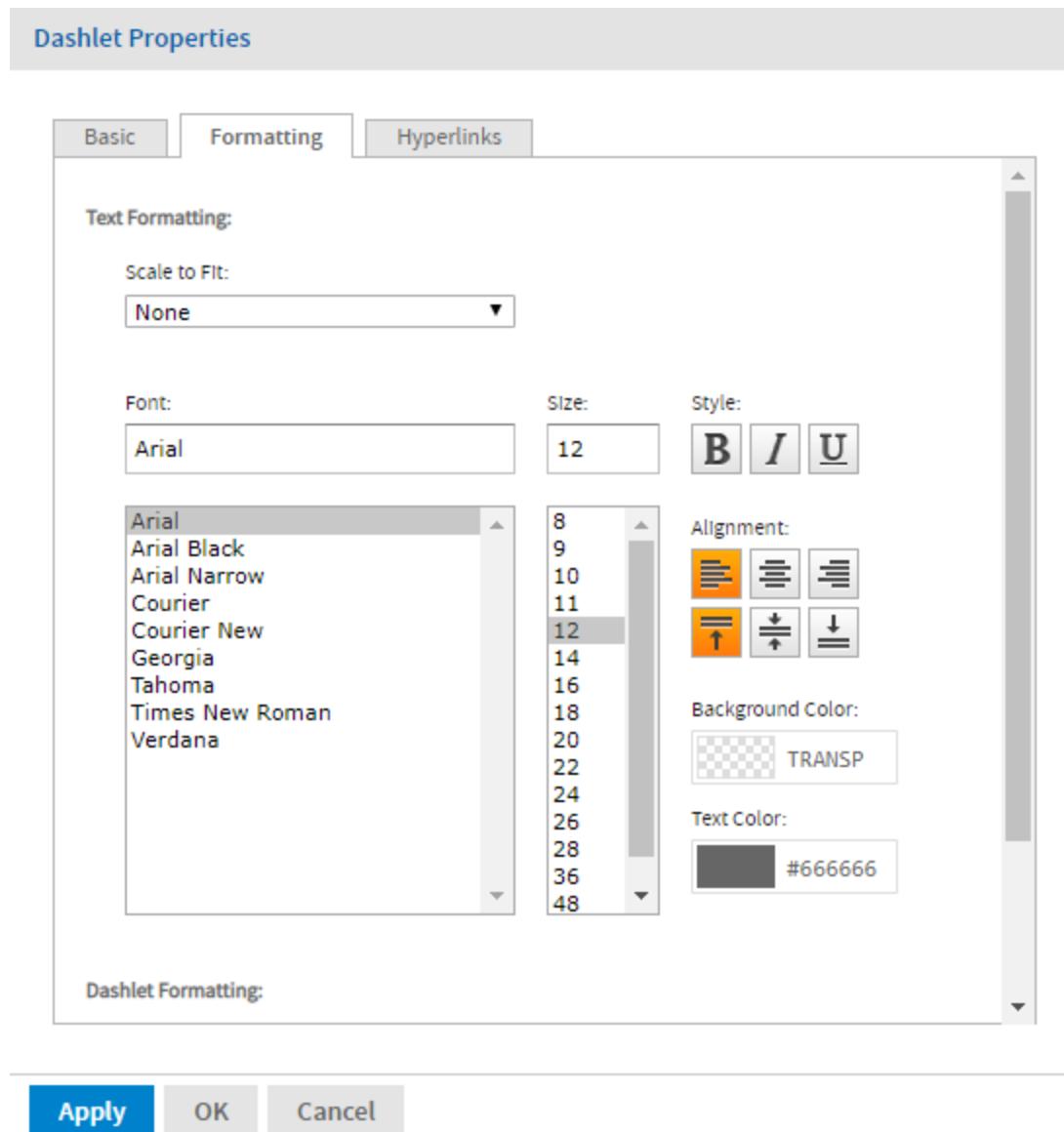


Figure 2-9 Formatting Tab for Text Dashlets

- **Scale to Fit:** Use the drop-down menu to determine how the text is scaled in the dashlet. This overrides the specified font size.
- **Font:** Use the selection lists and buttons to set the font, font size, font style, and alignment.
- **Background Color:** Select the color of the dashboard's background.
- **Text Color:** Select the color for the text displayed in the dashlet.
- **Show Borders:** Select or deselect to show or hide the dashlet's border. If you select to show the dashlet's border, you can choose the border's color.

### 2.2.5.5 Basic Properties for Web Page Dashlets

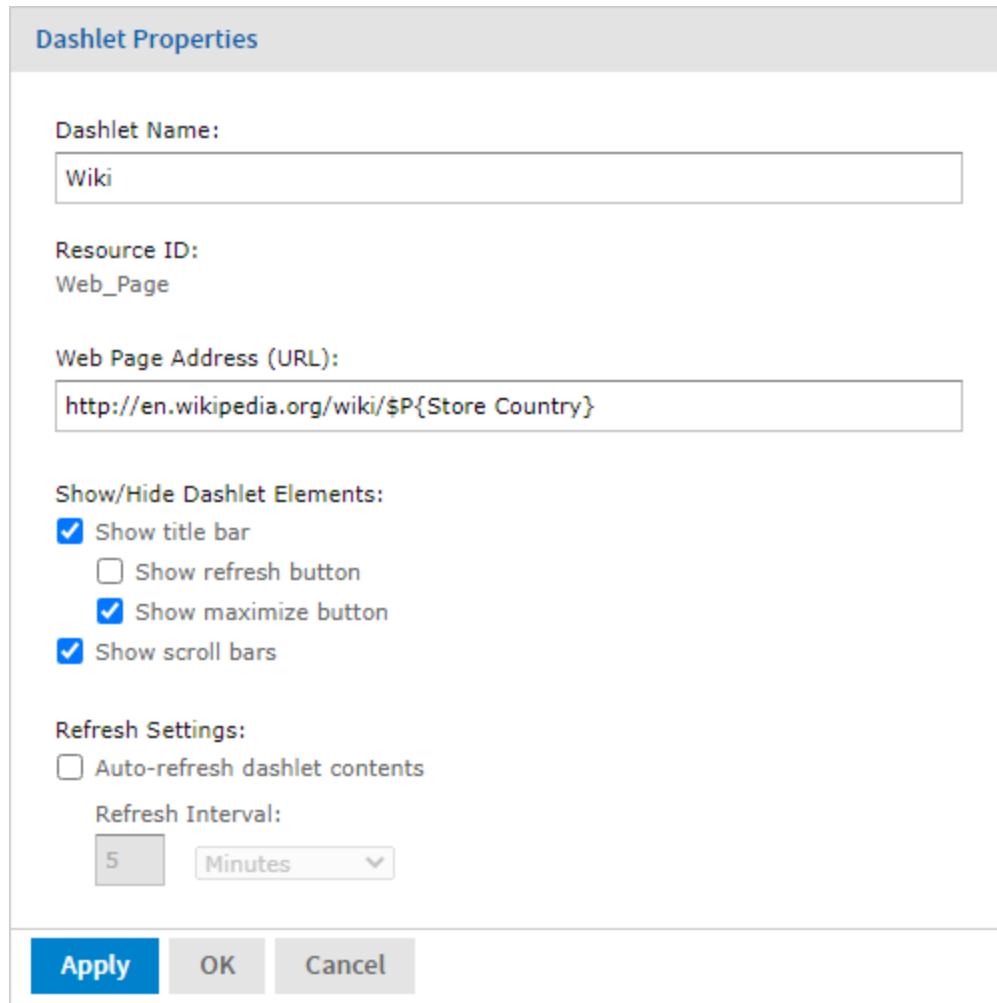


Figure 2-10 Basic Tab for Web Page Dashlets

- **Dashlet Name:** Editable field for the displayed dashlet name.
- **Resource ID:** Non-editable ID taken from the original dashlet name.
- **Web Page Address (URL):** Editable field for the URL displayed in the dashlet.
- **Show/Hide Dashlet elements:** Select or deselect to show or hide the title bar, which includes the dashlet name, refresh button, and maximize button.
- **Show scroll bars:** Select or deselect to show or hide scroll bars.
- **Refresh Settings:** Select or deselect to enable or disable auto-refresh, and use the text entry and drop-down menu to set the time between each content refresh. This setting overrides refresh properties set at the dashboard level.

### 2.2.5.6 Basic Properties for Image Dashlets

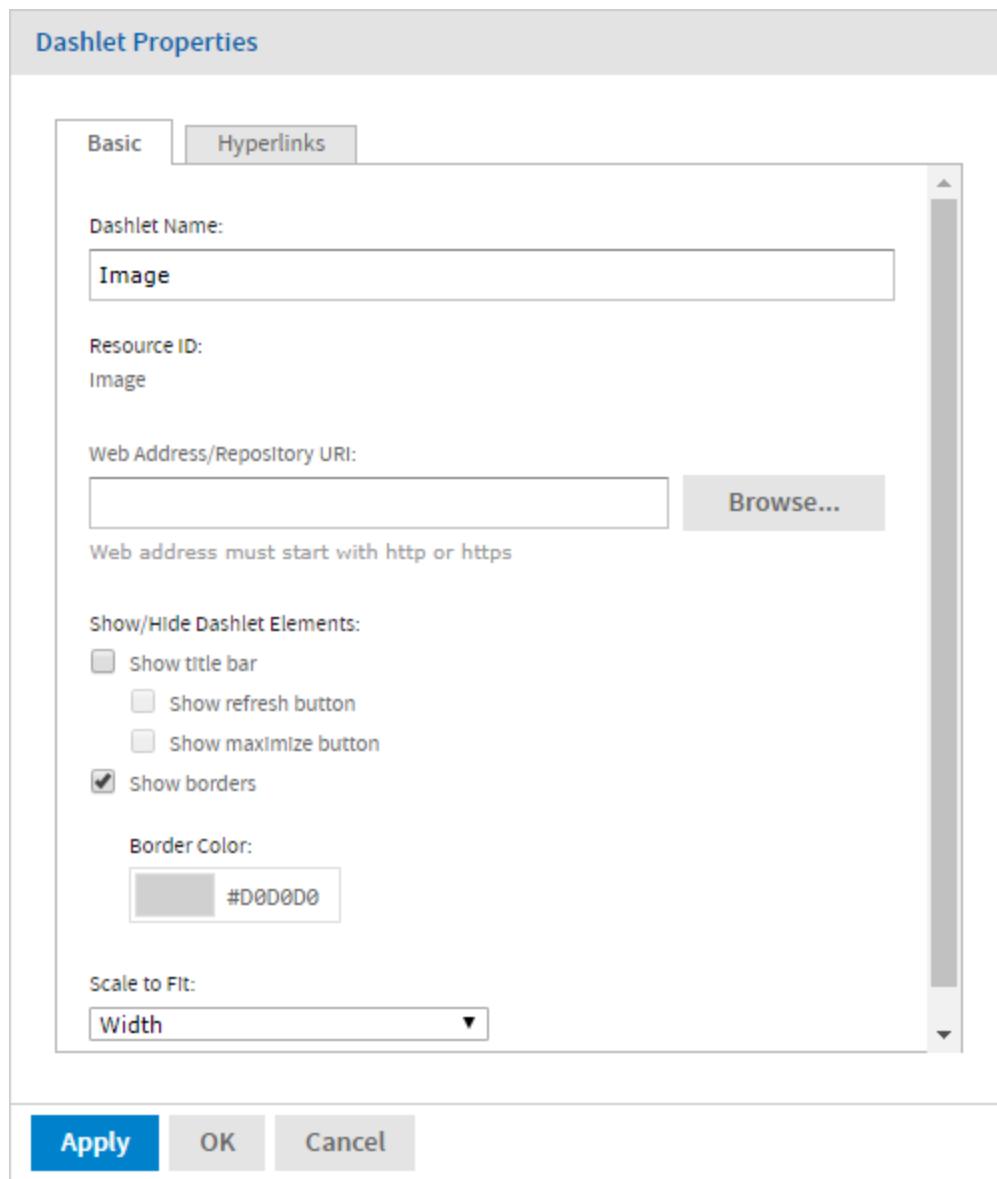
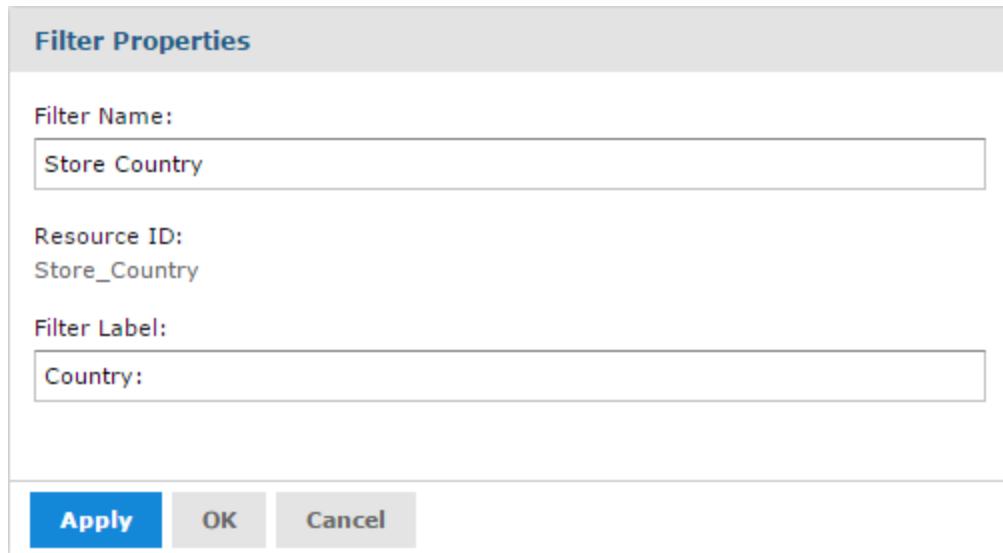


Figure 2-11 Basic Tab for Image Dashlets

- **Dashlet Name:** Editable field for the displayed dashlet name.
- **Resource ID:** Non-editable ID taken from the original dashlet name.
- **Web Address/Repository URI:** Editable field for the location of the image displayed in the dashlet. This can include parameters. Click **Browse** to select an image from the repository.
- **Show/Hide Dashlet elements:** Select or deselect to show or hide the title bar, which includes the dashlet name, refresh button, maximize button, and dashlet borders. If you select to show dashlet borders, you can choose the border color.
- **Scale to Fit:** Use the drop-down menu to determine how the image is scaled in the dashlet.

### 2.2.5.7 Properties for Input Control Dashlets



**Figure 2-12 Input Control Dashlet Properties**

- **Dashlet Name:** Editable field for the displayed dashlet name.
- **Resource ID:** Non-editable ID taken from the original dashlet name.
- **Show/Hide Dashlet buttons:** Select or deselect to show or hide the Apply button or Reset button.
- **Position of dashlet buttons:** Use the drop-down menu to select bottom or right.

### 2.2.6 Parameter Mapping

Parameter Mapping helps you refine your filters by letting you specify which dashlets and which parameters are affected by a filter.

#### To open Parameter Mapping:

1. Open a dashboard with filters, such as the Sales Dashboard created in [Creating a Dashboard](#), in the Dashboard Designer.
2. Click to open Parameter Mapping.

The screenshot shows the 'Parameter Mapping' dialog box. At the top is a title bar with the text 'Parameter Mapping'. Below it is a table with four columns: 'Source Dashlet', 'Filter/Parameter', 'Dashlet Affected', and 'Filter/Parameter Affected'. The table has three rows. The first row is for 'Country' under 'Filter Group', mapping it to '04. Product Results by Store' (Affected by 'Country') and '16. Interactive Sales Report' (Affected by 'Product\_Department'). The second row is for 'Department' under 'Filter Group', mapping it to '16. Interactive Sales Report' (Affected by 'Product\_Family'). The third row is for 'Type' under 'Filter Group', also mapping it to '16. Interactive Sales Report' (Affected by 'Product\_Family'). At the bottom of the dialog are two buttons: 'OK' (highlighted in blue) and 'Cancel'.

Source Dashlet	Filter/Parameter	Dashlet Affected	Filter/Parameter Affected
	Country	04. Product Results by Store	Country
Filter Group	Department	16. Interactive Sales Report	Product_Department
	Type	16. Interactive Sales Report	Product_Family

Create New Filter

OK Cancel

### Figure 2-13 Parameter Mapping for the Sales Dashboard

Parameter Mapping displays the filter-to-dashlet mapping, and includes the following columns and buttons:

- **Source Dashlet**, the name of the dashlet where the filter originates. Can also display Filter Group (multiple filters in a single dashlet) or Manually Created Filter (filter created using Parameter Mapping, as described below).
- **Filter/Parameter**, the name of the filter.
- **Dashlet Affected**, with a dropdown menu including all dashlets that can be affected by that filter.
- **Filter/Parameter Affected**, with a dropdown menu including all parameters associated with the selected dashlet in the Dashlet Affected column.
- **Add** button , used to add additional dashlet/parameter combinations to a filter.
- **Delete** button , used to delete a dashlet/parameter combination.

From Parameter Mapping, you can add, delete, or edit an existing dashlet/parameter combination, and create a new filter to add to the dashboard.

#### To add a filter using Parameter Mapping:

1. Open a dashboard with filters, and open Parameter Mapping as described above.
2. In the filter row you want to add the new filter to, click  . A row containing new affected dashlet and filter/parameter dropdown menus appears.
3. Using these new line-items, select the dashlet and parameter combination you want to apply to the dashboard.
4. Click **OK** to apply and save or **Cancel** to discard your changes.

#### To delete a filter using Parameter Mapping:

1. Open Parameter Mapping.
2. In the filter row you want to delete, click  . The filter row disappears from Parameter Mapping.

#### To create a new filter via Parameter Mapping:

1. Open Parameter Mapping.
2. Click **Create New Filter**. A new row is added to the manager.
3. In the **Filter** column, enter a name for the new filter. Click outside the text box to apply the name.
4. Click  and select the dashlet and parameter combination you want to apply to the new filter.
5. Click **OK** to apply and save, or **Cancel** to discard the new filter.

#### To delete a newly-created filter:

1. In Parameter Mapping, click  in the filter row you want to delete. The Dashlet Affected and Filter/Parameter affected dropdown menus disappear.
2. Click  again in the row you want to delete. The Filter row disappears.
3. Click **OK** to apply and save, or **Cancel** to discard the new filter.

## 2.3 Creating a Dashboard

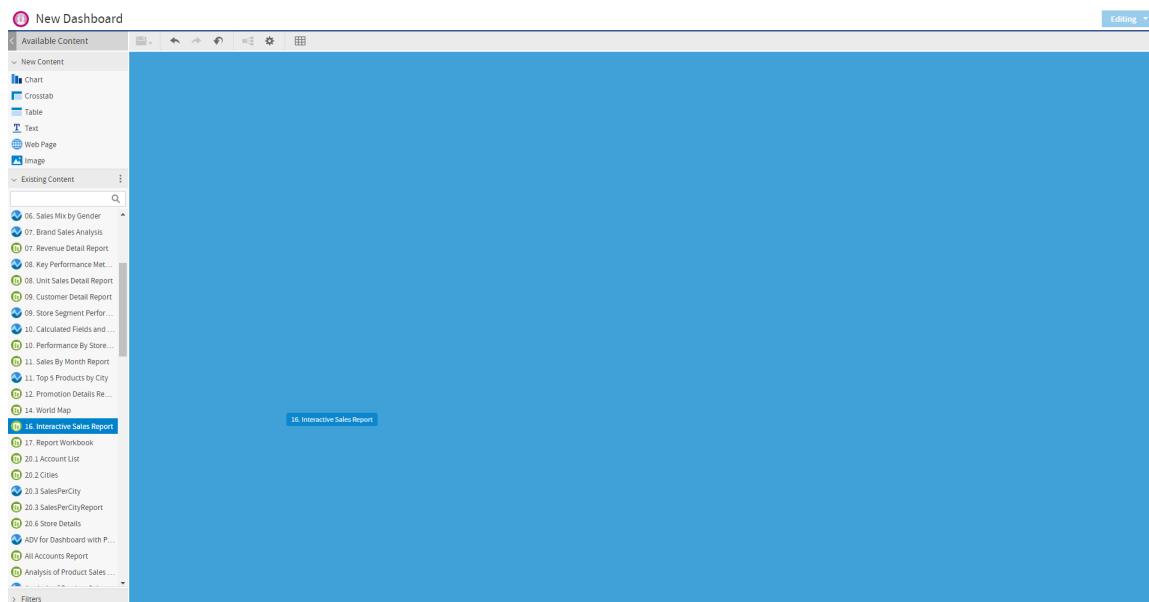
This section describes the creation of a simple dashboard.



To add a report or Ad Hoc view to a dashboard, you must have permission to view those elements.

### To create a simple dashboard:

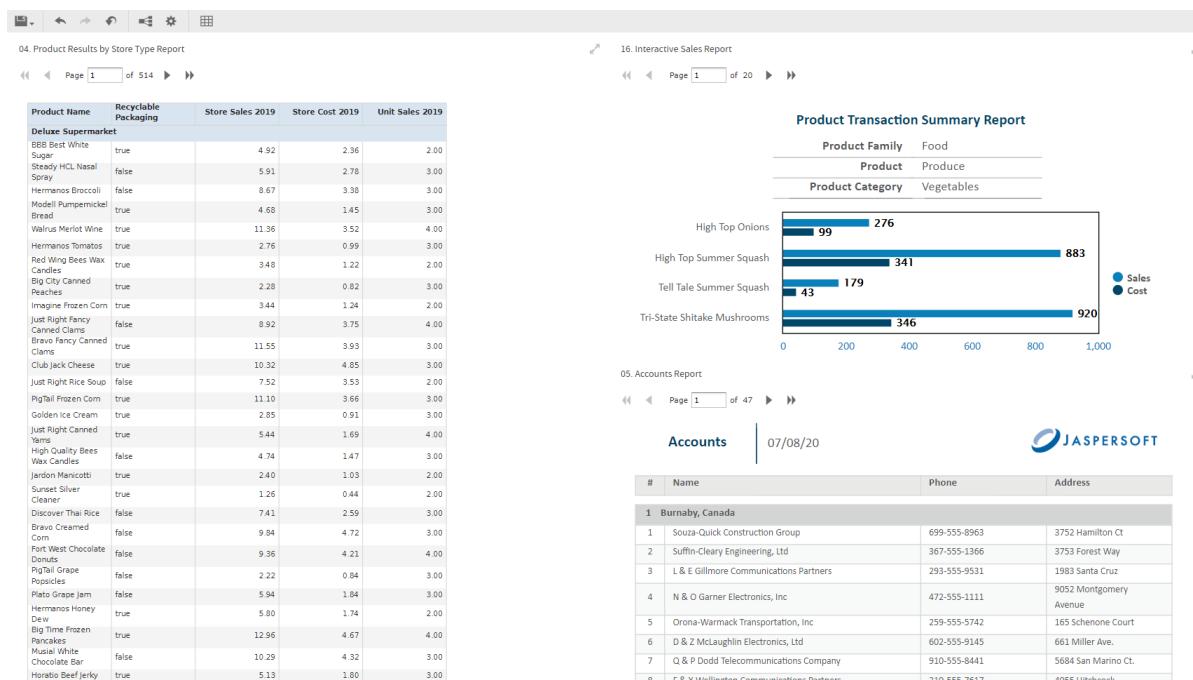
1. Click **Create > Dashboard**. The Dashboard Designer appears, displaying the list of available content and the canvas.
2. In the **Existing Content** section of the **Available Content** panel, find report 16. Interactive Sales Report.
3. Click and drag the report onto the Dashboard Canvas.



**Figure 2-14 Dragging report onto Dashboard Canvas**

4. In **Available Content**, find 04. Product Results by Store Type Report.
5. Click and drag the report onto the canvas, until the left half of the Interactive Sales Report turns blue. The Product Results by Store Type Report appears on the canvas, next to the Interactive Sales Report. Both report dashlets are sized to fit side-by-side on the canvas.
6. Right-click the Product Results by Store Type Report and click **Properties**.
7. Use the **Scale to Fit** dropdown to select **Dashlet**.
8. Click **OK**. The resized Product Results by Store Type Report now displays the entire crosstab in the dashlet.
9. Click and drag the report 05. Accounts Report onto the canvas, until the lower half of the Interactive Sales Report turns blue. The Accounts Report is placed under the Interactive Sales Report, and both dashlets are resized to fit on the right half of the canvas.
10. In the Dashboard Designer toolbar, click to open the Dashboard Properties dialog.
11. Deselect **Show borders** under **Dashlet Settings** and click **OK**.

In [Figure 2-15](#) you can see how the dashboard canvas looks at this point.



**Figure 2-15 Simple Dashboard Canvas with three reports**

12. Click the **Editing** button and select **Viewing** to preview the dashboard.  
The end user view of the dashboard appears.
13. Click the **Viewing** button and select **Editing** to return to the designer
14. Click , then select **Save Dashboard**.
15. In the Save As window, change the default name, New Dashboard to **Sales Dashboard** and locate a folder, such as the **/Dashboards** folder.
16. Click **Save**.

### 2.3.1 Adding New Content

In addition to pre-existing reports and Ad Hoc views, you can create content for your dashboard directly from the Dashboard Designer, including:

- Charts
- Crosstabs
- Tables
- Text
- Web page links
- Images

#### 2.3.1.1 Adding Charts, Crosstabs, and Tables

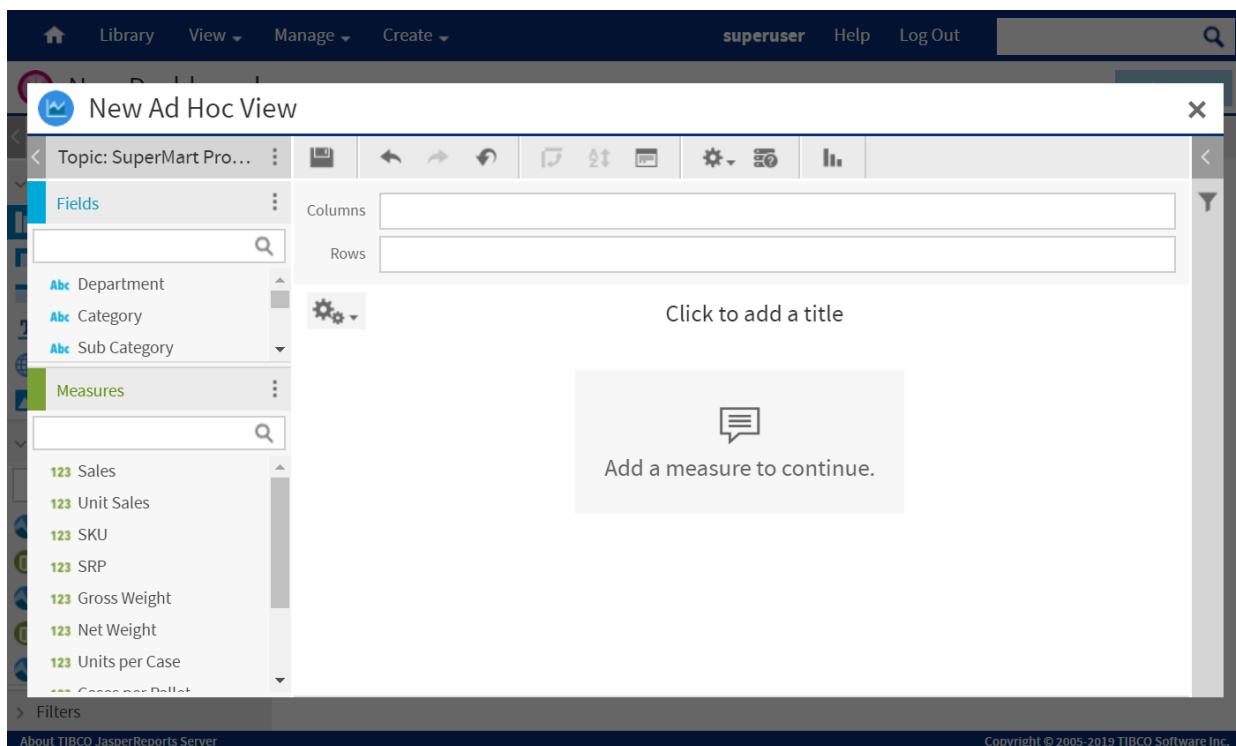
The Dashboard Designer includes an embedded Ad Hoc Editor, which allows you to create charts, crosstabs, and tables for your dashboard without leaving the designer environment.

Any chart, crosstab, or table you create within the Dashboard Designer is available only on the current dashboard; otherwise, they function like standard Ad Hoc Editor-created versions of these elements. They are saved as an Ad Hoc view and placed in a dashlet on your dashboard.

#### To add a new chart, crosstab, or table to your dashboard:

1. In the **New Content** section of the **Available Content** panel, click and drag the type of element you want to add to your dashboard (Chart, Crosstab, or Table) onto the dashboard canvas.
- The Ad Hoc Editor opens, and the **Select Data** dialog appears.
2. Browse to or search for the data source you want to use.
    - Click  for a tree view of the files.
    - Click  for a list view of the files.
    - Use the text search field to locate a specific data source.
  3. Depending on your selected data source, the remaining steps may vary. Follow the displayed instructions. For more information about this process, see [5.1.1, “Ad Hoc Sources: Topics, Domains, and OLAP Connections,” on page 93](#).
  4. When you complete the data source selection process, click **OK**. The Ad Hoc Editor opens.

The embedded Ad Hoc Editor works just like the standard editor. For information on working with the editor, see [Chapter 5, “Working with the Ad Hoc Editor,” on page 91](#).



**Figure 2-16 Embedded Ad Hoc Editor**

5. When you finish creating your view, click  to save.

6. In the **Save to Dashboard** dialog, enter a dashlet name and click **Save**. The dashlet is added to your dashboard.

### 2.3.1.2 Adding Text

You can add a text field dashlet for titles and instructional text.

#### To add a text dashlet:

1. In the **New Content** section of the **Available Content** panel, click and drag the **Text** item onto your dashboard. The Dashlet Text window opens.
2. Enter the text you want to appear on your dashboard.
3. Click **OK**. The dashlet is added to your dashboard.  
Edit the dashlet name and font appearance by opening the Properties dialog. See “[Dashlet Properties” on page 28](#) for more information.

### 2.3.1.3 Adding a Web Page

You can add a dashlet to display a web page on your dashboard.

#### To add a web page dashlet:

1. In the **New Content** section of the **Available Content** panel, click and drag the **Web Page** item onto your dashboard. The Dashlet URL window opens.
2. Enter the URL you want to appear on your dashboard.
3. Click **OK**. The dashlet is added to your dashboard.  
Edit the dashlet name by opening the Properties dialog. See “[Dashlet Properties” on page 28](#) for more information.

### 2.3.1.4 Adding an Image

You can add a dashlet to display an image, such as a corporate logo, on your dashboard.

#### To add an image dashlet:

1. In the **New Content** section of the **Available Content** panel, click and drag the **Image** item onto your dashboard. The Dashlet URI window opens.
2. Enter the URI for the image you want to appear on your dashboard. Use the `repo:` syntax for images in your repository.
3. Click **OK**. The dashlet is added to your dashboard.  
Edit the dashlet name by opening the Properties dialog. See “[Dashlet Properties” on page 28](#) for more information.

## 2.3.2 Adding Controls to a Dashboard

The Interactive Sales Report was designed to be run with input controls. When you add a report that has input controls to a dashboard, the controls don’t appear until you explicitly add them, one-by-one. The controls can either be added directly to the dashboard as a dashlet or accessed from the toolbar as a pop-up window. When the report runs, dashboard users provide input using the control. Data based on the user input appears in the dashboard. For example, using the input control, you select Mexico. The report on the dashboard shows orders from Mexican companies.

Keep these points in mind when viewing a dashboard that has input controls:

- An input control may appear as a text field, a drop-down, a check box, a multi-select list box, or a calendar icon.
- If one of the dashlets in a dashboard does not refer to an input control, that dashlet does not update when you change that input control's value. Only dashlets that use the input control reflect the change.
- The buttons on the toolbar allow you to undo and redo recent changes made to the dashboard, including changes using an input control.
- If the button appears on the toolbar, then the dashboard was set up to display input controls as a pop-up window instead of a dashlet. Click the button to view the controls.

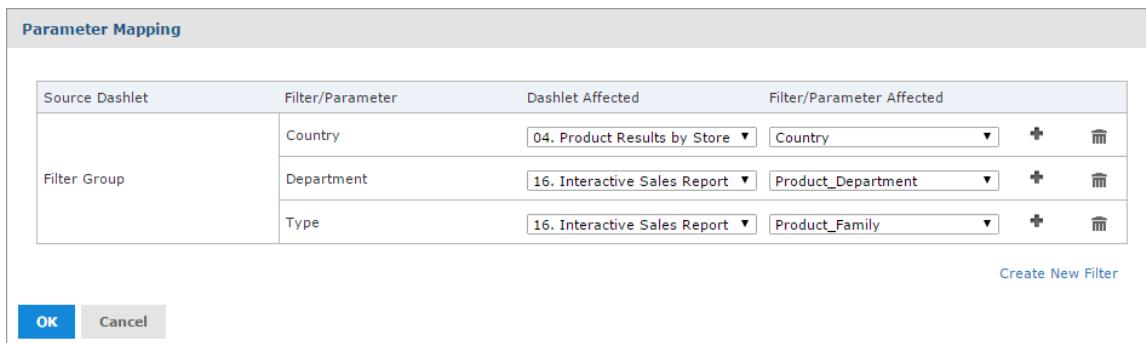
#### To add controls as a dashlet:

1. If the Sales Dashboard created in [Creating a Dashboard](#) is not open, locate the /Dashboards folder in the repository. Right-click the dashboard name and select **Open in Designer** from the context menu.  
The Sales Dashboard appears in the designer, as shown in [“Simple Dashboard Canvas with three reports”](#), and the input controls available appear in the **Filters** section of the **Available Content** panel.
2. In the **Filters** section, expand the 16. Interactive Sales Report folder.  
The input controls associated with the Interactive Sales Report appear.
3. Drag the Country input control onto the canvas, and place it above the Product Results by Store Type dashlet.  
The Country input control and its label appear above the Product Results by Store type report on the canvas.
4. Drag the Product Family and Product Department controls onto the Country input control dashlet. These input controls are added to the same dashlet. Resize the dashlets as needed to view all of the input controls.
5. Click and select **Save Dashboard**, then click the **Editing** button and select **Viewing** to preview the dashboard.
6. Click in the **Country** text box to display the available countries. In this input control, you have the following options:
  - The three countries: **Canada**, **Mexico**, and **USA**.
  - **All**, which selects all available values in the input control.
  - **None**, which deselects all available values in the input control.
  - **Invert**, which deselects any selected values, and selects the unselected values.
7. Use the options to select **Mexico** from the values list, and click **Apply** at the bottom of the dashlet. The data displayed in the Interactive Sales Report changes, but is not updated in the other reports, as they do not have an input control named Country.
8. Click the **Viewing** button and select **Editing** to return to the Dashboard Designer.

You can also change the labels, or display names, of individual input controls and filters within a dashlet.

#### To rename an input control or filter:

1. With the Sales Dashboard open in the Dashboard Designer, right-click Product Family in the input control dashlet, and select **Properties**. The **Filter Properties** dialog opens.
2. Change the **Filter Label** from **Product Family** to **Type**, and click **OK**.
3. Right-click the Product Department input control and select **Properties**. Change the **Product Department** filter label to **Department**, and click **OK**. The input control labels are updated.



**Figure 2-17 Parameter Mapping for the Sales Dashboard**

**To add controls as a pop-up window:**

1. With the Sales Dashboard open in the Dashboard Designer, click to open Dashboard Properties.
2. Select **Show filter dashlet as pop-up** and click **OK**.

The input controls dashlet disappears from the dashboard and appears on the toolbar. This button is also displayed when you're viewing the dashboard.

3. Click and select **Save Dashboard**, then click the **Editing** button and select **Viewing** to preview the dashboard.
4. Click to view the filter pop-up window.  
Like the dashlet, selecting the options in the pop-up changes the data displayed in the Interactive Sales Report.
5. Click to close the filter pop-up window.
6. Click **Viewing** button and select **Editing** to return to the Dashboard Designer.

### 2.3.3 Refining a Dashboard's Layout

After completing the layout, refine the look and feel of the dashboard.

**To refine the dashboard's layout:**

1. If it isn't open, locate the Sales Dashboard you created in **Creating a Dashboard**, typically in the /Dashboards folder.
2. Right-click the dashboard name, select **Open in Designer** from the context menu.
3. When the dashboard opens in the designer, click **Preview**.  
The end user's view of the dashboard appears.
4. In the **Country** field, select a new value.  
The reports do not update because the dashboard includes the **Apply** button.
5. Return to the Dashboard Designer and on the Country filter dashlet, right-click and select **Properties**.
6. Deselect **Show Apply button**, and select **Show Reset button**.
7. Click **Apply**.

- The dashlet's **Apply** button disappears, and the **Reset** button appears.
8. Reposition the **Reset** button to the right side of the dashlet using the Position of dashlet buttons drop-down menu. Click **OK**.
  9. Click **Preview**. The end user view of the dashboard appears.
  10. Change the value in the Country input control. The dashboard reflects the change immediately.
  11. Return to the Dashboard Designer and click **Save > Save Dashboard**. The dashboard is saved to the repository.

## 2.4

## Specifying Parameters in Dashlets

You can add parameters to dashlet names, text dashlets, web page dashlets, image dashlets, and hyperlinks in chart dashlets. When you add a parameter, you must map a filter in the dashboard to the parameter. See [Mapping parameters in Parameter Mapping](#) for more information.

### Simple parameters:

For text dashlets, web links, and dashboard names, use the syntax `$P{parameter_name}` to directly pass the parameter value to the web page. Examples:

- In a text dashlet, enter the parameter in the Text box:  
`Product Family: $P{Product Family}`
- In a web page dashlet or a web link in a chart dashlet hyperlink, enter the parameter in the **Web Page Address (URL)** text box:  
`http://en.wikipedia.org/wiki/$P{Store Country}`
- In a repository or web URI for an image dashlet, enter the parameter, enter the parameter in the **Web Address/Repository URI** text box:  
`repo:/public/Samples/Reports/$P{Store Country}/flag.png`
- Dashlet name: Enter the parameter in the **Dashlet Name** box:  
`Unit Sales for $P{Product Family}`

For repository hyperlinks in a chart dashlet, use the syntax `?filter_in_target=$P{dashlet_param}`. For example, the following link sets the `c_country_1` input control in the 05. Unit Sales Trend report to the value of a Store Country parameter in the dashlet.

```
repo:/public/Samples/Reports/05._Unit_Sales_Trend?c_country_1=$P{Store Country}
```



To find the correct name for a filter in a target resource, open the Dashboard Designer in a new window, and add the resource to the canvas. Then expand the resource's folder in the Filters panel and hover over the filter whose name you want to see.

### Parameters in multi-valued input controls:

For multi-valued input controls, you can define a separator for the input control values:

- For text dashlets, web links, and dashboard names, use the syntax `$P{parameter_name} ? "separator"`. The following example in a text box displays results like **Product Family: Drink + Food**:  
`Product Family: $P{Product Family} ? " + "`
- For repository links in a chart or image dashlet, use the syntax `?$P{"filter_in_target=", dashlet_param, ? "&"}`. For example, the following link allows multi-select with the `c_country_1` input control in the 05. Unit Sales Trend report:

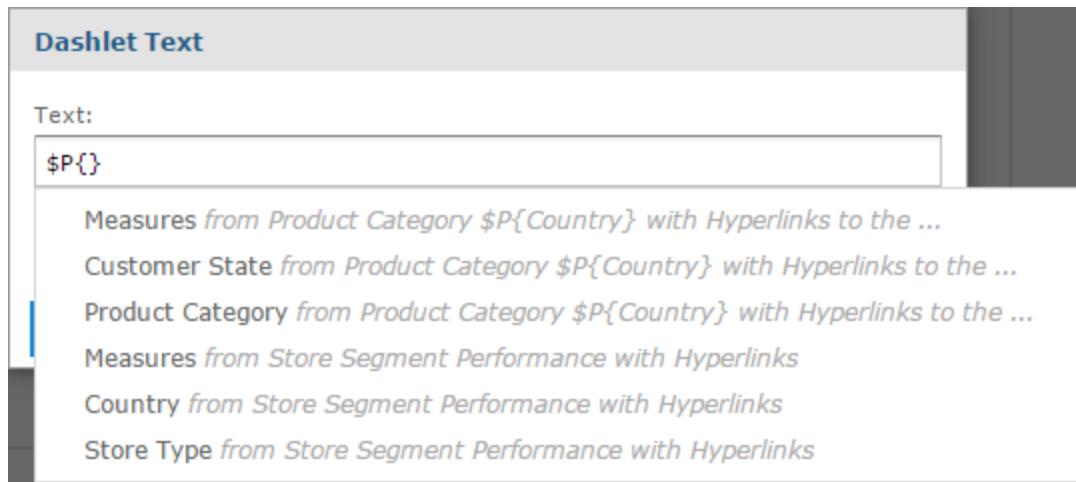
```
repo:/public/Samples/Reports/05._Unit_Sales_Trend?$P{"c_country_1=", Store
Country, "&"}
```

When Mexico and USA are selected, this expands to the following link:

```
repo:/public/Samples/Reports/05._Unit_Sales_Trend?c_country_1=Mexico&c_country_1=USA
```

### Auto-complete parameters

When you type the \$ symbol into a dashlet's text box, a drop-down list of available parameters is displayed. Select a parameter from the list or continue typing to narrow down the list of parameters. The auto-complete parameters feature is available for text fields, image link, and web links, but it is not available for the dashlet name field.



**Figure 2-18 Text dashlet showing available parameters**

### Mapping parameters in Parameter Mapping

After you have created a parameter, create a mapping for it as follows:

#### Mapping parameters in dashboard names and text, image, or web page dashlets:

1. In the Dashboard Designer, click to open Parameter Mapping.
2. In the filter row where you want to add the new filter, click . A row containing new affected dashlet and filter/parameter dropdown menus appears.
3. Using these new line-items, select the dashlet where you added a parameter, then select the parameter.
4. Click **OK** to apply and save or **Cancel** to discard your changes.

#### Mapping parameters in chart hyperlinks:

To have JasperReports Server create a parameter mapping automatically:

1. In the Dashlet Properties dialog box for your chart, use one of the names in the Available parameters list as the name of your parameter.
2. Click **OK** to close the dialog box and create the mapping.

To create a mapping in Parameter Mapping:

1. In the Dashlet Properties dialog box for your chart, click **Create Links in Parameter Mapping...** to open Parameter Mapping.
2. In the filter row where you want to add the new filter, click . A row containing new affected dashlet and filter/parameter dropdown menus appears.
3. Using these new line-items, select the dashlet where you added a parameter, then select the parameter.
4. Click **OK** to apply and save or **Cancel** to discard your changes.

## 2.4.1 Creating a Web Page Dashlet

When working with Web Page dashlets in the Dashboard Designer, you can include a parameter reference in the dashlet's URL. The parameter references an existing filter in another dashlet, and uses that filter to display a specific web page relevant to the filtered information.

The following example takes you through the steps for creating a simple dashboard in the Dashboard Designer, adding a sample chart with geographic filters, and creating a Web Page dashlet that displays a Wikipedia page for the country the sample chart is filtered on.

### First, create the simple dashboard:

1. Log in to JasperReports Server as superuser.
2. Click **Create > Dashboard**.  
The Dashboard Designer appears, displaying the list of available content and the canvas.
3. In the **Existing Content** section of the Available Content panel, find report 08. Key Performance Metric Trend.
4. Click and drag the report onto the Dashboard Canvas. Note that the **Filters** section now includes the 08. Key Performance Metric Trend folder.

### Next, add the filter input control to the dashboard:

1. In the **Filters** section, expand the 08. Key Performance Metric Trend folder.  
The input controls associated with the 08. Key Performance Metric Trend report appear.
2. Drag the Store Country input control onto the canvas.

### Now, add the Web Page dashlet with the parameter reference and add it to the filter:

1. In the **New Content** section of the Available Content panel, click and drag the **Web Page** item onto your dashboard.  
The Dashlet URL window opens.
2. Enter the following URL:  
`http://en.wikipedia.org/wiki/$P{Store_Country}`
3. Click **OK**.
4. Right-click the dashlet and select **Properties**.
5. Change the Dashlet Name to **Wiki**.
6. Click **OK**.
7. Click on the Ad Hoc menu to open Parameter Mapping.
8. In the **Store Country** filter group, click .  
A row containing the new affected dashlet and filter/parameter dropdown menus appears.
9. In the Dashlet Affected column, select **Wiki** from the new Select dashlet... dropdown menu.

10. In the Filter/Parameter Affected column, select **Store Country** from the new Select parameter... dropdown menu.
11. Click **OK**.

**Finally, preview the new dashboard functionality:**

1. Click the **Editing** button and select **Viewing** to preview the dashboard.
2. Click in the **Store Country** text box to display the available countries.
3. Select **Canada** from the values list in the Store Country input controls, and click **Apply** at the bottom of the dashlet. The data in the Key Performance Metric Trend report is updated to display only information about Canada, and the wiki dashlet displays the Wikipedia page for Canada.

In **Figure 2-19** you can see how the dashboard preview looks at this point:



**Figure 2-19** Dashboard with web page parameters

4. Click the **Viewing** button and select **Editing** to return to the Dashboard Designer.
5. Click , then select **Save Dashboard**.

6. In the Save As window, change the default name, New Dashboard to Key Performance Metric Trend Dashboard and locate a folder, such as the /Dashboards folder.
7. Click **Save**.

## 2.4.2 Adding a Hyperlink to a Chart Dashlet

When working with chart dashlets in the Dashboard Designer, you can specify a link that opens when a user clicks the dashlet. You can optionally include a parameter which references an existing filter in another dashlet, and uses that filter to display a specific web page relevant to the filtered information.

The following example takes you through adding a hyperlink to the chart dashlet created in [2.4.1, “Creating a Web Page Dashlet,” on page 46](#). The example also shows how to add a parameter to a hyperlink.

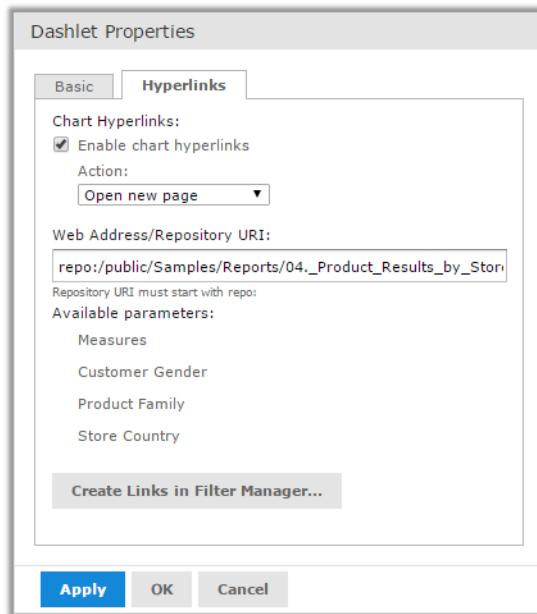
**First, open the dashboard:**

1. If the Key Performance Metric Trend dashboard created in [2.4.1, “Creating a Web Page Dashlet,” on page 46](#) (above) is not open, locate the /Dashboards folder in the repository. Right-click the dashboard name and select **Open in Designer** from the context menu.

The Key Performance Metric Trend dashboard appears in the designer.

**Create a chart hyperlink:**

1. Right-click on the 08. Key Performance Metric Trend dashlet and select **Properties....**  
The Dashlet Properties dialog box opens.
2. Click the **Hyperlinks** tab.



**Figure 2-20** Hyperlinks tab in Dashlet Properties

3. Click **Enable chart hyperlinks** to select it.
4. Choose **Open new page** from the **Action** menu.

The Web Address/Repository URI entry bar is displayed.

5. Enter `repo:/public/Samples/Reports/04._Product_Results_by_Store_Type_Report` for the Web Address/Repository URI.



To see the report's path, hover over the report's name in the Existing Content pane.

6. Click OK.

#### Preview the new dashboard functionality:

1. Click **Editing** button and select **Viewing** to preview the dashboard.

2. Click the chart dashlet.

The 04. Product Results by Store Type Report opens in a new tab.

3. Return to the tab containing Key Performance Metric Trend dashboard and click **Viewing** button and select **Editing** to return to the Dashboard Designer.

#### Add a parameter:

1. Right-click on the Key Performance Metric Trend dashboard dashlet, select **Properties...**, and click the Hyperlinks tab.

The Available Parameters area shows the parameters available in the chart.

2. Modify the URL to add a parameter that provides a value for an input control in the target report:

- You need to know the correct name of the input control in your target report. In this case it is `sales_store_store_contact_store_country_1` in the 04. Product Results by Store Type Report.
- Create a parameter. If you create a parameter name, it is helpful to use a name that is not used in Parameter Mapping. In this example, use `LinkCountry`. For more information about parameters, see [2.4, “Specifying Parameters in Dashlets,” on page 44](#).

The link is as follows:

```
repo:/public/Samples/Reports/04._Product_Results_by_Store_Type_Report?sales_store_store_contact_store_country_1=$P{LinkCountry}
```

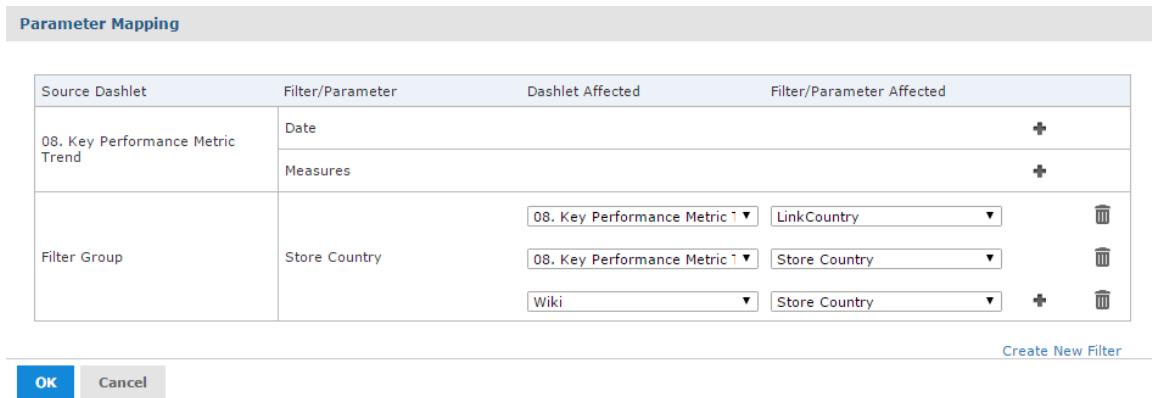


If you use one of the names in the Available Parameters list, the mapping to the parameter is created for you. In this example, if you use `Store_Country` instead of `LinkCountry`, you do not need to create links in Parameter Mapping.

This example does not show how to add support when more than one country is selected. For more information, see [2.4, “Specifying Parameters in Dashlets,” on page 44](#).

3. Click **Map Parameters**. Click **Yes** when prompted.

Parameter Mapping is displayed.

**Figure 2-21 Parameter Mapping**

4. In the **Store Country** filter group, click **+**.  
A new row with affected dashlet and filter/parameter drop-down menus appears.
5. In the Dashlet Affected column, select **06. Sales Mix by Gender** from the new Select dashlet... dropdown menu.
6. In the Filter/Parameter Affected column, select **LinkCountry** from the new Select parameter... dropdown menu.
7. Click **OK**.

#### Finally, preview the new dashboard functionality:

1. Click **Editing** button and select **Viewing** to preview the dashboard.
2. Click in the **Store Country** text box to display the available countries.
3. Select **Mexico** from the values list, and click **Apply** at the bottom of the dashlet.
4. Click the chart dashlet.  
The 04. Product Results by Store Type Report opens in a new tab.
5. To verify that the parameter has been passed correctly, click in the 04. Product Results by Store Type Report.  
The Input Controls dialog box opens, with Mexico set.
6. Return to the tab that contains your dashboard.
7. Click **Viewing** button and select **Editing** to return to the Dashboard Designer.
8. Click **▼**, then select **Save Dashboard**.

## 2.5 Editing a Dashboard

You can edit a dashboard if you have the proper permissions.

#### To edit a dashboard:

1. Select **View > Repository** and search or browse for the Dashboard you want to modify.  
By default, the repository includes the /Dashboards folder where you can store dashboards.

2. Right-click the dashboard and select **Open in Designer** from the context menu. The designer appears, displaying the dashboard.
3. Edit the dashboard by adding, removing, resizing, or dragging content.  
For more information about working with dashboard content, see “[Creating a Dashboard](#)” on page 37.
4. When you are satisfied with the dashboard, hover your cursor over  and select **Save Dashboard**. To create a new version of the dashboard, select **Save Dashboard As** and specify a new name.

## 2.6 Exporting Dashboards and Dashlets

You can create a snapshot of a dashboard or dashlet and save it on your computer. Exporting a dashboard or dashlet requires the following:

- The export button has been enabled for the dashboard or dashlet. See “[Dashboard Properties](#)” on page 26 and “[Dashlet Properties](#)” on page 28 for more information.
- Chrome/Chromium is installed on the computer hosting JasperReports Server. For information on configuring Chrome/Chromium for dashboards, see the System Configuration chapter in the TIBCO JasperReports Server Administrator Guide.

### To export a dashboard:

1. Select **View > Repository** and search or browse for the Dashboard you want to export.
2. Click the link to open the dashboard.
3. Hover your cursor over  for the dashboard or individual dashlet and select the export format from the drop-down list.  
The available formats are:
  - PNG (Dashboard only)
  - PDF
  - Excel (Paginated) (Dashlet only)
  - Excel (Dashlet only)
  - CSV (Dashlet only)
  - DOCX
  - RTF (Dashlet only)
  - ODT
  - ODS (Dashlet only)
  - XLSX (Paginated) (Dashlet only)
  - XLSX (Dashlet only)
  - PPTX
4. Save the dashboard or dashlet in the export file format, for example PDF, or open it in the application.



If you perform the export while a dashlet is reloading its content, the dashlet will appear as a grayed-out box in the exported file.

### 2.6.1 Localizing Controls

You can design dashboard controls to accommodate different languages. First, use the \$R syntax to define prompts and static lists of values. Next, attach resource bundles to the report that contain translations of the

prompts and lists of values. Finally, add the report to the dashboard. For more information about how to localize input controls, see “[Localizing Reports](#)” on page 204.

## 2.7 Tips for Designing Dashboards

Charts and small crosstabs are best suited to dashboards. However, you can design table reports that work well in the dashboard. Such reports tend to be very narrow and are typically used with input controls to limit the number of rows they return.

Keep reports small because dashboards typically contain more than one. In particular, reports shouldn’t be too wide, as horizontal room is always at a premium in a dashboard. The server strips margins from an Ad Hoc report when displaying the report on a dashboard.

### 2.7.1 Input Control Tips

When designing input controls for a dashboard, keep these guidelines in mind:

- To pass a value to an external URL, the **URL Parameter Name** you give to the input control must match the name of a parameter that the URL can accept. The value of the input control must also be a value the URL can accept. The target URL is likely to have additional requirements and limitations. For example, the name of the parameter may be case-sensitive; in this case, the value you enter in the **URL Parameter Name** field is also case-sensitive.

The input control must pass data that the URL can accept. Otherwise, the server may be unable to retrieve the correct data from the external URL.

### 2.7.2 Time-Date Wildcards

When creating dashlets, you can enter a wildcard into a text input field to display the current date or time:

- \$Date: Displays the current date in the Month Day, Year format. For example, January 15, 2016. You can also customize how the date is displayed using the following parameters:
  - \$Date{MM-DD-YYYY}. For example, January 15, 2016 is displayed as 01-15-2016.
  - \$Date{DD/MM/YYYY}. For example, January 15, 2016 is displayed as 15/01/2016.
  - \$Date{dddd MMMM DD, YYYY}. For example, January 15, 2016 is displayed as Friday January 15, 2016.
- \$Time: Displays the current time in the 12 hour format with am/pm, but without the leading 0 for hours. For example, 1:25 pm. You can customize how the time is displayed using the following parameters:
  - \$Time{HH:mm}. Displays the time in the 24 hour time format. For example, 1:25 pm is displayed as 13:25.
  - \$Time{hh:mm a}. Displays the current time in the 12 hour format with am/pm and the leading 0 for hours. For example, 01:25 pm.
  - \$Time{HH:mm:ss}. Displays the current time in the 24 hour time format with seconds. For example, 1:25:30 pm is displayed as 13:25:30.
  - \$Time{hh:mm:ss a}. Displays the current time in the 12 hour format with seconds, am/pm, and the leading 0 for hours. For example, 1:25:30 pm is displayed as 01:25:30 pm.
  - \$Time{HH:mm:ss z}. Displays the current time in the 24 hour time format with seconds and the time zone. The time zone is selected on the login page. For example, 1:25:30 pm in the Pacific Standard time zone is displayed as 13:25:30 PST.

- `$Time{hh:mm:ss a z}`. Displays the current time in the 12 hour format with seconds, am/pm, the time zone, and the leading 0 for hours. The time zone is selected on the login page. For example, 1:25:30 pm in the Pacific Standard time zone is displayed as 01:25:30 pm PST.

The wildcards are available for text fields, image link, and web links, but it is not available for the dashlet name field.

When you type the \$ symbol into a dashlet's text box, a drop-down list with the time-date wildcards and other available parameters is displayed. Select the wildcard you want from the list or continue typing to narrow down the list.



**Figure 2-22 Time-Date Wildcard Auto-complete**



# CHAPTER 3 RUNNING REPORTS AND THE REPORT VIEWER

JasperReports Server makes it easy to run reports. When you run a report, it opens in the interactive Report Viewer. With the Viewer, you can personalize and refine the displayed report data. If the report has input controls, you run the report with one set of data and then another.

This chapter contains the following sections:

- [Overview of The Report Viewer](#)
- [Running or Creating a Simple Report](#)
- [Running a Fusion Chart](#)
- [Running a Report with Input Controls or Filters](#)

The tutorials in this chapter and throughout this guide assume you've installed the sample data provided with the server.

## 3.1 Overview of The Report Viewer

The Report Viewer allows you to view a report, export content to various output formats, and apply formatting, sorting, and filters to control how the data is displayed.

This section describes the functions available in the Report Viewer. You can find more detailed information about using this functionality throughout this chapter.

### To open a report in the Report Viewer:

1. Locate your report in the library or repository.
2. Click the report name, or right-click the report name and select **Run**. In the repository, you can also click the report row and select **Run** from the tool bar. The report opens in the Report Viewer.

### 3.1.1 The Report Viewer Tool Bar

The Report Viewer tool bar contains a number of controls for working with your report. These controls are described in [Table 3-1](#).

**Table 3-1 Report Viewer Tool Bar Icons**

Icon	Name	Description
	Refresh report with latest data	Click to refresh the report data from the data source.
	First	Click to jump to the first page of the report.
	Previous	Click to go to the previous page in the report
	Current Page	Shows the number of the currently displayed report page.
	Next	Click to go to the next page in the report.
	Last	Click to jump to the last page of the report.
	Zoom Out	Click to zoom out on the report.
	Zoom In	Click to zoom in on the report
	Zoom Options	Click this icon to open the Zoom Options drop-down menu.
	Search	Enter your search term here to find a text string in your report. Click the drop-down menu to toggle search preference settings.
	Search Previous	Click to jump to the previous instance of the search term.
	Search Next	Click to jump to the next instance of the search term.
	Back	Exits the Report Viewer and takes you to the previous screen.
	Save	Place the cursor over this icon to open a menu of save options.

Icon	Name	Description
	Export	Click to export the View into one of the available formats.
	Undo	Click to undo the most recent action.
	Redo	Click to redo the most recently undone action.
	Undo All	Click to revert the report to its most recently saved state.
	Input Controls	Click to see the input controls applied to this report. For more information, refer to “ <a href="#">Simple Input Controls</a> ” on page 71.
	Bookmarks	Click to display the Table of Contents pane. This pane is available only on reports with enabled Bookmarks.

### 3.1.2 Column Menu

Reports that contain table components are enabled for user interactivity. Table components are defined in Jaspersoft Studio or from Ad Hoc Views. When a table is enabled for interactivity, column formatting, filtering, and sorting are managed from a menu displayed by clicking the column you want to apply changes to. These menu icons are described in [Table 3-6](#).

**Table 3-2 Column Formatting Icons**

Icon	Name	Description
	Formatting>Show column/Hide column	Select <b>Formatting</b> to open the Format Column box. Select <b>Show column</b> or <b>Hide column</b> .
	Column filters	Click to open the Filter column box.

Icon	Name	Description
	Sort ascending	Click to sort fields in the selected column in ascending order.
	Sort descending	Click to sort fields in the selected column in descending order.
	Column size	Click and drag this icon to make columns wider or narrower.

### 3.1.3 Data Snapshots

Some reports have an optional data snapshot feature enabled. A data snapshot is a cached copy of the data included in a specific report. Data snapshots allow you to access a report's data (including input control settings) without having to retrieve it from the data source, which in some cases can save a significant amount of time.

When a report is opened in the Report Viewer, data is retrieved from the data snapshot. If the snapshot does not exist, then a live query is made to the data source. A snapshot is created when a report is saved from the viewer, or via the scheduler. The Report Viewer UI displays a date and time stamp that indicates when the report data was last refreshed with live source data.



The system administrator can enable or disable the data snapshot feature.

It should be noted that a report can have only one snapshot. For instance, if you edit and save a report that already has a snapshot associated with it, a new snapshot overwrites the previously-created snapshot.

## 3.2 Running or Creating a Simple Report

You can view and work on a report in the Report Viewer in a number of ways:

- Running an instance of an existing report
- Creating a new report from an existing Ad Hoc view

### 3.2.1 Running a Simple Report

This section describes how to run a tabular report that lists account data.

#### To run a report:

1. Log into the server as an administrator, such as jasperadmin.
2. On the Home page, click the large icon in the **Reports** block.

The search results appear, listing your own files and other files that your user account has permission to view. If you log in as jasperadmin, 05. Accounts Report appears in the search results.

The screenshot shows the Jaspersoft Server Home page with a sidebar titled 'Filters' containing options like 'All available', 'Modified by me', 'Viewed by me', 'All types', and 'Reports'. The main area is titled 'Repository' with a search bar. A table lists reports with columns for Name, Description, Type, Created Date, and Modified Date. One report, '05. Accounts Report', is highlighted in blue.

Name	Description	Type	Created ...	Modified ...
03. Store Segment Performan...	Sample OLAP chart with HTML5 Grouped Bar ...	Report	May 7	4/25/2014
04. Product Results by Store ...	Sample Filtered Table Report Showing Multipl...	Report	May 7	5/15/2014
<b>05. Accounts Report</b>	Basic interactive Table Component report with...	Report	May 7	<b>4/17/2014</b>
05g. Accounts Report	Basic interactive Table Component report with...	Report	May 7	10/3/2013
06g. Profit Detail Report	Sample report containing containing interactiv...	Report	May 7	5/13/2014
06. Profit Detail Report	Sample report containing containing interactiv...	Report	May 7	5/13/2014
07g. Revenue Detail Report	Sample report containing containing interactiv...	Report	May 7	5/13/2014

**Figure 3-1 Search Results Listing**

- To run a report, click the name of a report in the repository. For example, click **05. Accounts Report**. The report appears, as shown in **Figure 3-2**.

The screenshot shows the Jaspersoft Report Viewer interface for the '05. Accounts Report'. The top navigation bar includes back, forward, search, and pagination controls. The main area displays a table titled 'Accounts' with a date filter set to '09/23/19'. The table has columns for '#', 'Name', 'Phone', and 'Address'. The data shows 10 entries of account information.

#	Name	Phone	Address
1	Burnaby, Canada		
1	Souza-Quick Construction Group	699-555-8963	3752 Hamilton Ct
2	Suffin-Cleary Engineering, Ltd	367-555-1366	3753 Forest Way
3	L & F Gilmore Communications Partners	283-555-9531	1983 Santa Cruz
4	N & O Garner Electronics, Inc	472-555-1111	9052 Montgomery Avenue
5	Orona-Warmack Transportation, Inc	259-555-5742	165 Schenone Court
6	D & Z McLaughlin Electronics, Ltd	602-555-9145	661 Miller Ave.
7	Q & P Dodd Telecommunications Company	910-555-8441	5684 San Marino Ct.
8	F & X Wellington Communications Partners	210-555-7617	4055 Hitchcock
9	Ratcliff-Moss Electronics, Ltd	721-555-7412	4776 Kentucky Drive
10	Rosemont-McMenama Engineering, Ltd	678-555-1134	6228 Meadowbrook Dr.

**Figure 3-2 Output of the Accounts Report**

If you are running a report with multiple pages, the first page of the report appears before the entire report is loaded. You can begin scrolling through report pages as they load, as indicated in the pagination controls in the upper left corner of the Report Viewer.

If you want to cancel loading the report before it is complete, click the **Cancel Loading** button that appears next to the pagination controls.

### 3.2.2 Creating a Report

You can create a report directly from the Jaspersoft Server Home page. This method allows you to select an existing Ad Hoc view and generate a report from it, without going through the Ad Hoc Editor.

#### To create a report from the Home page:

- On the Home page, click **Create** in the **Reports** block. The Create Report wizard opens.
- Select the Ad Hoc view you want to use as the basis for your report.
- Select a report template. To use a template other than the default, select Custom Report Template, click **Browse** and select the desired template. See **3.2.3, “Report Templates,” on page 60** for more information.

4. Click **OK**. If asked, enter the input controls needed. See “[Using Input Controls](#)” on page 161.

You can now begin working with your report.

### 3.2.3 Report Templates

When you create a report, the Create Report wizard displays layout options for generating and exporting the report:

- **Default Report Template** applies basic layout options to your report. This is usually the Actual Size template.
  - **Custom Report Template** allows you to browse to an existing template. JasperReports Server includes a number of templates are available by default, including:
    - A4 Landscape
    - A4 Portrait
    - Actual Size
    - Letter Landscape
    - Letter Portrait.
- Other report templates may be available. Report templates can be created in Jaspersoft Studio and uploaded to JasperReports Server.
- **Report Generator** allows you to create a highly customized report design. This option is not often enabled. See your JasperReports Server administrator for more information.

Most commonly, you will choose **Default Report Template**.

#### 3.2.3.1 Using Report Templates for PDF

If you are exporting your report to PDF, choose your option based on the size of the output.

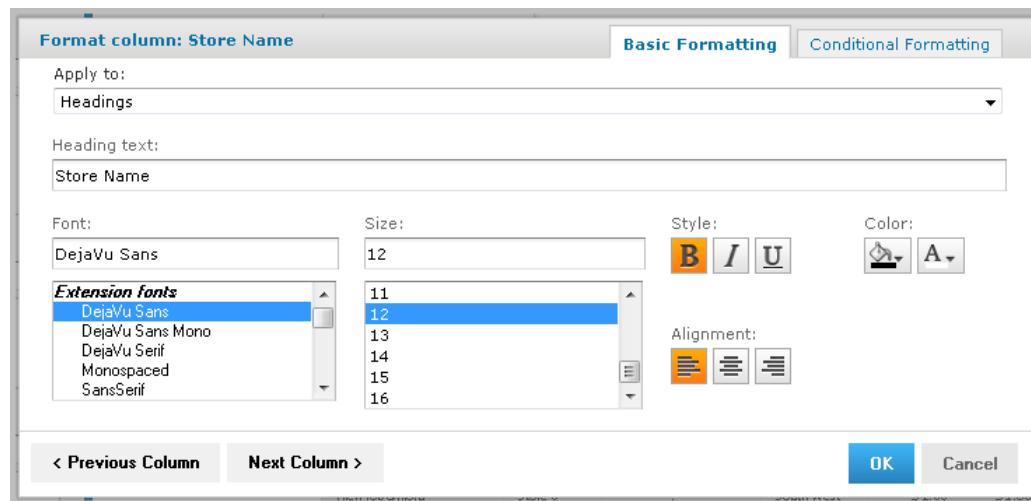
- For most PDF exports, you can use Actual Size, which supports a maximum size of 14400px by 14400px.
- For reports with an output height exceeding 14400 px, use a paginated report template that is wide enough for your report. For example, if you have a long report with width less than 842px, you can use the paginated A4 Landscape theme. A report designer can create additional custom templates in Jaspersoft Studio. contact your administrator for more information.
- Reports with output width exceeding 14400 px will be truncated in PDF. Redesign your report or use a different export format.

## 3.3 Getting New Perspectives on Data

The report shown in [Figure 3-2](#) was created using the Ad Hoc Editor. As this type of report runs, you can interact with it in the Report Viewer to visualize the data in different ways. Column formatting allows you to highlight certain columns and fields, and filtering and sorting report output on-the-fly can provide timely views of the data that answer your questions. For example, suppose you’re running the Accounts Report and want to know how many accounts have offices nearby. Highlighting the phone number column with red text and filtering it to show only accounts in your area code would reveal this data.

### 3.3.1 Column Formatting

You can customize the basic formatting of column headings and fields, using the Format Column dialog. Hover over  and click **Formatting...** The Format column dialog appears.



**Figure 3-3 Format Column Dialog**

You can alter a column's basic formatting or apply conditional formatting to a column.



In longer reports, columns have floating headers. If your report extends past your browser frame, use the vertical scroll bar to move up and down the list. If you do not see a vertical scroll bar, try increasing the width of your browser window.

This section discusses how to apply formatting to column headings and values. For information on conditional formatting, see “[Conditional Formatting](#)” on page 62.

Column formatting options include:

- Text
- Font type, size, and style
- Background color
- Font color
- Text alignment

#### To customize your column formatting:

1. Run your report, so it opens in the Report Viewer.
2. Click the column you want to format.
3. Hover over and click **Formatting...**
4. Click the **Basic Formatting** tab, and change the following options if needed:
  - **Apply to** – Select the part of the column you want to apply the formatting to.
  - **Heading text** – Type new heading text to replace the current text.
  - **Font** – Scroll through the menu to select a font.
  - **Size** – Scroll through the menu to select a font size.
  - **Style** – Click to select Bold, Italic, or Underlined text.
  - **Background Color** – Click to open the background color picker, then click to select the background color.
  - **Font Color** – Click to open the font color picker, then click to select the text color.
  - **Alignment** – Click to select Left, Center, or Right alignment.

5. If needed, click **Previous Column** or **Next Column** to change the formatting for an adjacent column.
6. Click **OK**.

### 3.3.2 Conditional Formatting

The Report Viewer allows you to format column headings and fields, to highlight data that meets specific criteria. For instance, if you want to call out fields for store sales above \$100,000, you can do so by applying text and background formatting to those stores that meet those numbers.

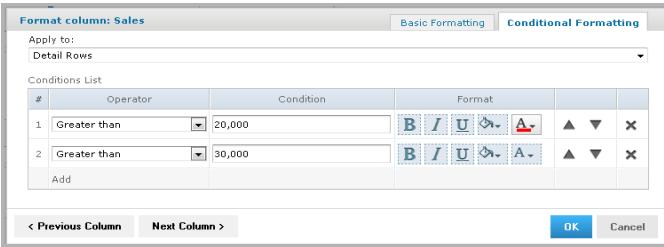
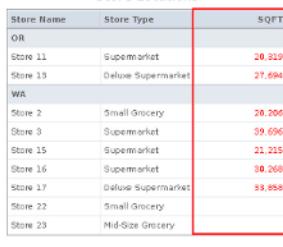
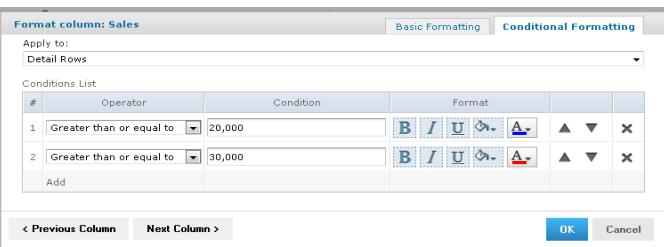
With conditional formatting, you can apply the formatting options listed in “[Column Formatting](#)” on page 60. However, it is a slightly more complex process than applying formatting options to entire columns. This section describes those complexities, including:

- Condition hierarchy
- Condition button states
- Applying conditional formatting

#### 3.3.2.1 Condition Hierarchy

If you have multiple conditions applied to a single field, their order will affect how they function. Conditions are read and applied from bottom to top, and the topmost condition overrides the one(s) below.

For example, imagine you have more than one condition applied to the same format element: red text for all stores over 20,000 square feet, and blue text for all stores over 30,000 square feet. As shown in “[Condition Hierarchy Example](#)” on page 62, placing the formatting rule for stores over 20,000 above the rule for stores over 30,000 causes the topmost rule to override the one below:

Hierarchy	Result
	
	

**Figure 3-4 Condition Hierarchy Example**

### 3.3.2.2 Condition Button States

Because conditions higher up in the hierarchy can affect those below, the font style selection buttons each have three states:

- **Unchanged**, which means it inherits the previous condition-based style, if any.
- **Set**, which means the style is applied to text that meets the condition.
- **Not Set**, which means the style is not applied to the text that meets the condition, and is removed if a conflicting condition lower in the conditional formatting hierarchy has marked that style as “Set”.

By default, the buttons are in the “Unchanged” state. Clicking the buttons toggles you through the three states.

See “[Style Button States](#)” for examples of the style button states.

**Table 3-3 Style Button States**

	Unchanged	Set	Not Set
Bold			
Italic			
Underline			

The background and font color pickers have buttons for similar states, but these states behave slightly differently:

- **Unchanged**, which means the field inherits the previous condition-based color, if any.
- **Set**, which means the color is applied to text or background of the field that meets the condition.
- **No Fill (background only)**, which means no color is applied to the background that meets the condition. Regardless of conditions lower in the hierarchy, the background inherits the table’s default color.

Both have two buttons at the top of the window, along with the color selection boxes.

You control these states through the background color picker and the font color picker windows, using the following buttons:

- **No Fill (background only)**, which applies the No Fill state described above.
- **Reset**, which returns the text or background to the Unchanged state.
- The **color selection boxes**, which apply the Set state.

See “[Color Picker Button States](#)” for examples of the color picker button states.

**Table 3-4 Color Picker Button States**

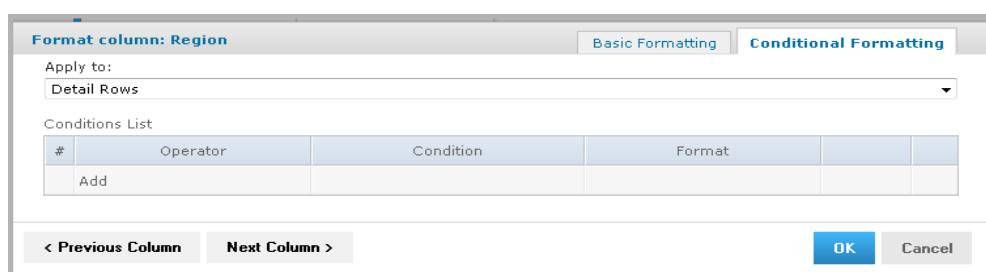
	Unchanged	Set	No Fill
Background Color			
Text Color			N/A

### 3.3.2.3 Applying Conditional Formatting

You apply conditional formatting much like you do standard column formatting, as described in “[Column Formatting” on page 60](#) with the extra step of creating the condition by which the formatting is applied.

#### To create a condition:

1. Run your report, so it opens in the Report Viewer.
2. Click the header or field of the column you want to format.
3. Move your mouse over and click **Formatting...**
4. Click the **Conditional Formatting** tab. The Conditional Formatting options appear:

**Figure 3-5 Conditional Formatting Tab**

5. In the **Apply to** box, select the part of the column you want to apply the formatting to.
  6. Click **Add**. This adds a line item in the Conditions List.
  7. Fill in the following information:
    - **Operator:** Use the drop down menu to define how the condition is compared to the column data.
    - **Condition:** Enter the condition criteria.
    - **Format:** Select the formatting applied to fields meeting the defined condition. Take care setting the button states, as described in “[Condition Button States” on page 63](#).
  8. Repeat if needed to add multiple conditions to a column.
- If you have multiple conditions, you may want to reorder them, to ensure they do not conflict with each other. Use the and to move conditions in the hierarchy.

9. If needed, click **Previous Column** or **Next Column** to change the conditional formatting for an adjacent column.
10. Click **OK**. The condition is applied to the column.

### 3.3.3 Interactively Filtering Report Output

If the report output contains more information than you want, interactively filter it to display just what you need. You conditionally filter report output by first selecting the column to use as a basis for filtering. Next, you enter a filter condition, then a value for comparison. The server compares each field of the column to the value that meets the condition. In **Table 3-5** you can see the conditions available for each type of column: numeric, date, and text.

**Table 3-5 Interactive Filtering Conditions**

Numeric	Date	Text
Equals	Equals	Equals
Does not equal	Is not equal to	Is not equal to
Greater than	Is between	Contains
Greater than or equal to	Is not between	Does not contain
Less than	Is on or before	Starts with
Less than or equal to	Is before	Does not start with
Is between	Is on or after	Ends with
Is not between	Is after	Does not end with

**To interactively filter report data:**

1. As you run the type of report shown in **Figure 3-2**, click the column you want to use for filtering the report. Continuing with the example in “[Running or Creating a Simple Report](#)” on page 58, click the **Phone** column in the Accounts report.
2. Click the  . The **Filter column** dialog appears, as shown in **Figure 3-6**. By default, **Show all rows** is selected.
3. To build your filter, click the radio button to select **Show only rows where**. the comparison operator drop-down and value entry box become active.
4. Select a comparison operator from the drop-down. For example, select **Starts with** to compare phone numbers starting with certain numbers.
5. Enter a value for comparison with the data in the column. For example, enter the area code: 408-

**Figure 3-6 Filter Column Dialog**

6. Click **OK**.

The view of the report changes to show the filtered output. For example, now the Accounts Report only shows accounts in the 408 area code.

#	Name	Phone	Address
1	Colma, USA		
1	H & G Van Antwerp Machinery Corp	408-555-3003	4137 E St.
2	La Mesa, USA		
1	G & N Cramer Communications Group	408-555-5009	6696 Adria Drive
3	Marysville, USA		
1	R & Z Gilliat Communications, Inc	408-555-4801	177 Bancroft Road
4	Palo Alto, USA		
1	Mullins-Maes Construction Partners	408-555-6001	8722 East View Place

**Figure 3-7 Filtered Report Shows Only Accounts in Area Code 408**

A small star icon appears in the heading of the filtered column, to the right of the heading text.

7. To clear the filter indicator and once again display all the accounts, reopen the Filter column dialog and select **Show all rows**, then click **OK**.

### 3.3.4 Interactively Sorting a Report

You can also sort data in report output interactively. For example, you can sort the data alphabetically in ascending or descending order within each city listed in the Accounts Report.

#### To interactively sort report output:

1. As you run the type of report shown in [Figure 3-2](#), click the column you want to use for sorting the report. For example, click the **Name** column in the Accounts report.
2. Click (sort ascending) or (sort descending). The report refreshes, and data appears sorted by the selected column in the selected order. In this example, for instance, if you select , the grouped rows of data are sorted alphabetically in ascending order within each group. Row 1 of the Burnaby, Canada group is now D & Z McLaughlin Electronics, Ltd and row 1 of the Cliffside, Canada group is Abbott-Liff Electronics Holdings.

The heading text in the column used to sort report data appears red, and the up or down arrow icon in the column header indicates that report output now appears in ascending or descending order, respectively.

To change the sort order of the groups themselves, you have to modify the report query.

### 3.3.5 Moving, Resizing, and Hiding Columns

Columns are easily moved, resized, and hidden in your report.

- To move a column, click the column you want to move, then drag the column left or right into the new position. The  indicates where the column is placed.
- To resize a column, click the column you want to resize, then drag the  until the column is the size you want.
- To hide a column, click the column you want to hide, then move your mouse over the  and select **Hide column**.

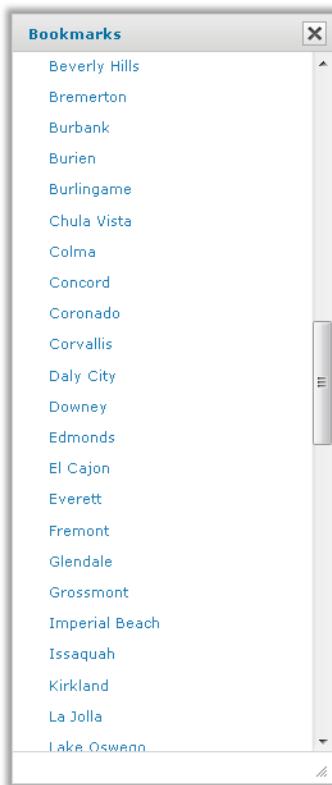
### 3.3.6 Setting Output Scale

You can determine the display size for any report by using the report scaling options, located in the Report Viewer tool bar.

- Click  to zoom in on the report.
- Click  to zoom out on the report.
- Click  to open the Zoom Options drop-down menu, and select the percentage by which you want to increase or decrease the size of the displayed report.

### 3.3.7 Using the Bookmarks Panel

When working with a report that contains bookmarks, they are displayed in a floating panel. Using this panel, you can jump to designated sections of the report.



**Figure 3-8 The Bookmarks Panel**

- To display the Bookmarks panel, click in the Report Viewer tool bar.
- To jump to a bookmarked section of the report, click the name of the section in the Bookmarks panel.

## 3.4 Navigating the Report

If your report has multiple pages, you can use the pagination controls to move through the report quickly.

### To navigate the published report:

- Use at the top of the Report Viewer to navigate to the previous page.
- Use to navigate to the next page.
- Use to go to the end of the report.
- Use to go to the beginning of the report.
- If you know the number of the page you want to view, enter the page number in the Current Page indicator box.

## 3.5 Exporting the Report

**To export the report:**

1. To view and save the report in other formats, click the **Export** button.
2. Select an export format from the drop-down. The export options are listed in **Table 3-6**.

**Table 3-6 Export File Types**

Option	Format Name	Usage
PDF	Adobe Acrobat	Choose a report template based on report size. Use the Actual Size report template for reports with dimensions less than or equal to 14400px by 14400px. See <a href="#">3.2.3, “Report Templates,” on page 60</a> for more information.
Excel (Paginated)	XLS	Not recommended for exporting most tables or crosstabs. Repeats headers and footers on each page.
Excel	XLS	Ignores page size and produces spreadsheet-like output.
CSV	Comma Separated Values	Characters outside the Latin 1 character set can cause the Excel spreadsheet to look unacceptable. Try saving the file and importing it using Excel's Import functionality.
DOCX	Word	Do not export reports having more than 63 columns. In Microsoft Word, you cannot create tables having more than 63 columns.
RTF	Rich Text Format	Creates a large output file and, therefore, takes longer to export than PDF, for example.
ODT	OpenDocument Text	For best results, minimize the number of rows and columns and make sure they don't overlap.
ODS	OpenDocument Spreadsheet	Same as ODT.
XLSX (Paginated)	Microsoft Open XML Format Spreadsheet	Not recommended for exporting most tables or crosstabs. Repeats headers and footers on each page.
XLSX	Microsoft Open XML Format Spreadsheet	Ignores page size and produces spreadsheet-like output.
PPTX	Microsoft PowerPoint Presentation	Each page of report becomes a slide in the PowerPoint presentation.

3. Save the report in the export file format, for example PDF, or open the report in the application.

## 3.6 Running a Fusion Chart

The JasperReports Server commercial editions support Fusion charting, and include the Maps Pro, Charts Pro, and Widgets Pro component libraries.

Using the libraries, you can create visually appealing, animated, and interactive reports:

- Maps Pro – Color-coded maps covering all countries and regions of the globe.
- Charts Pro – Standard and stacked charts with animation and interactivity.
- Widgets Pro – Non-standard charts such as gauges, funnels, spark lines, and Gantt charts.

These components are based on Fusion libraries and generate HTML5 output that is embedded in the HTML and PDF output. When a report containing a Maps, Charts, or Widgets Pro element is exported in a format other than HTML or PDF, the space used by the element remains blank.

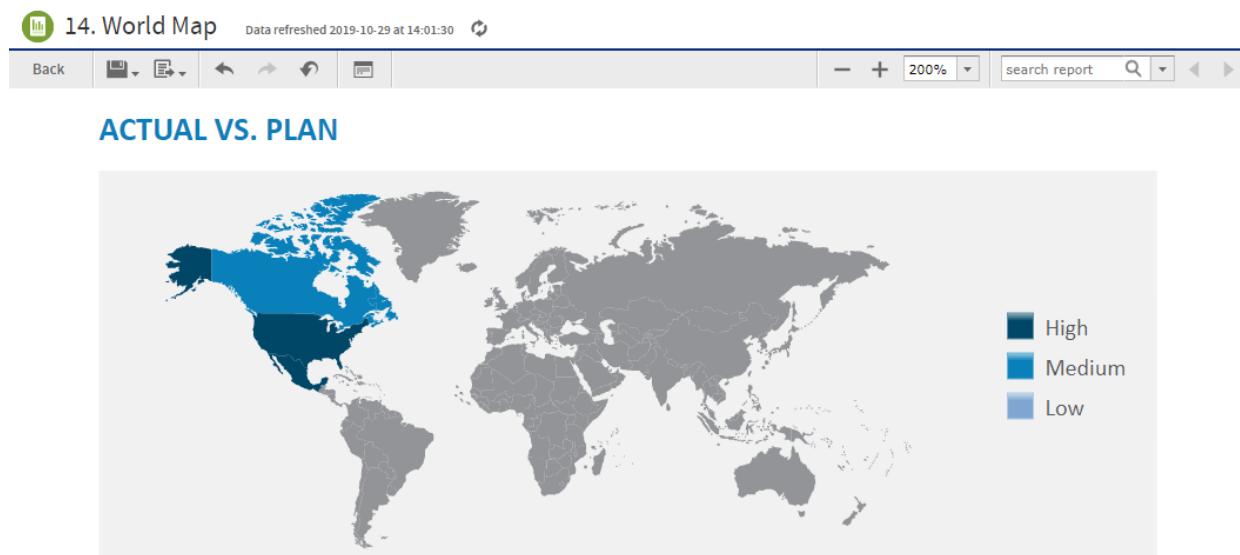
Flash is no longer recommended.

For configuration information, see the *TIBCO JasperReports Server Administrator Guide* for more information.

Fusion charts are created in Jaspersoft Studio Professional as JRXML reports and uploaded to the repository as a report unit.

### To find and run a chart example:

1. In the repository, locate the sample report **14. World Map**.
2. Click the report name to run the report.
3. In the **Input Controls** window, select **Food** as the product family you want to view sales trends for and click **OK**. The report appears, as shown in [Figure 3-9](#).



**Figure 3-9** World Map Report with Flash Map

4. To interact with the map, mouse-over any of the countries to see the full country name and, when it has data, the value for that country.

5. On the map, click **Canada** to launch the Interactive Sales Report, displaying the information for Canada only. From there, you can modify the underlying report as needed.

To upload JRXML reports, see “[Adding Reports Directly to the Repository](#)” on page 175.

## 3.7 Running a Report with Input Controls or Filters

An input control are graphical widgets that filter the data that appears in a report. The perfect input control limits the data to what you want to see—and nothing more. When you run a report based on a Domain Topic that defines a filter, the server can render the filter as an input control. The JasperReports Server interface uses "input controls," "filters," and "options" interchangeably.

If your system administrator has enabled the data snapshot feature (described in “[Data Snapshots](#)” on page 58), it is important to note that the default input controls - that is, the input controls as defined when the original Jaspersoft Studio- or Ad Hoc View-based report is run - will overwrite any changes made to them the next time you run a report. For instance, suppose you run a report, update the input controls, then save the report. At a later date, you run a report from the Jaspersoft Studio or Ad Hoc View source again. That new report will replace the report you ran earlier, and your input control changes will be lost.

To avoid this, save a version of the report with your selected data preloaded. That way, when subsequent reports are run from the same source, they will not overwrite your report. See “[Saving Input Control Values](#)” on page 73 for more information.

### 3.7.1 Simple Input Controls

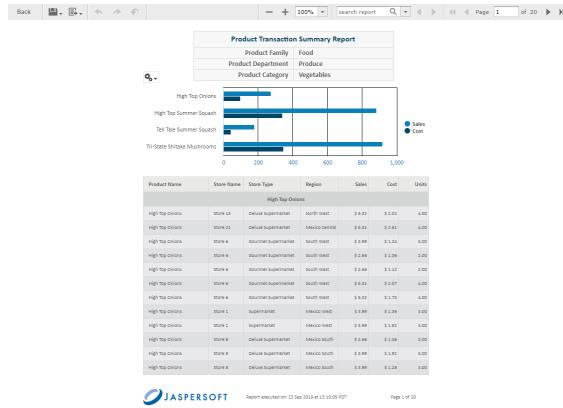
The 16. Interactive Sales Report example has several input controls:

- Product Family
- Product Department
- Product Category
- Product Name
- Country
- Gender

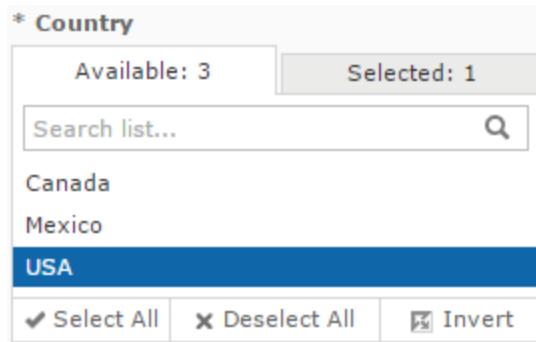
Using input controls, you run the report with one set of data and then another. When saved, an instance of the report with alternate input controls is called a **Report Version**, and is labeled as such in the repository.

#### To run a report with simple input controls:

1. In the repository, locate and run the report 16. Interactive Sales Report.

**Figure 3-10 Interactive Sales Report**

2. In the Filters panel, use the Country menu to select USA only.

**Figure 3-11 Input Control Selection - Country**

3. Click **Close**, then click **Apply** at the bottom of the panel. The report shows data for the USA only.
4. Click , then select **Save As**. You are prompted to name the new report.
5. Enter a new name, then click **Save**.

### 3.7.2 Multi-select Input Controls

The 16. Interactive Sales Report has an example of a multi-select input control for Product Name.

#### To run a report with a multi-select input control:

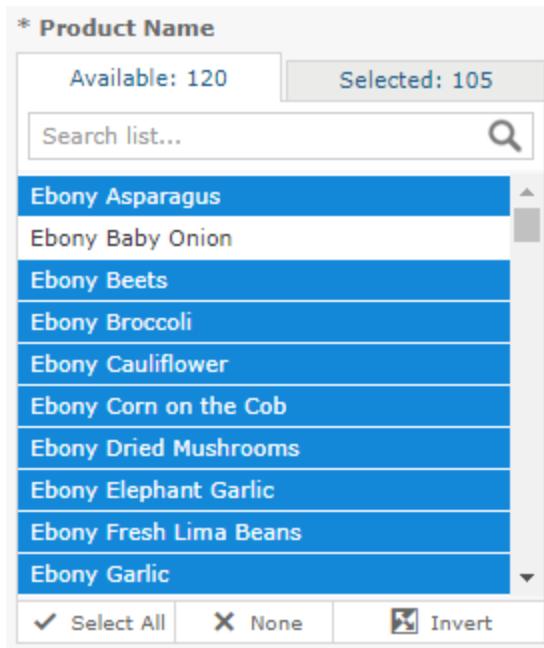
1. In the repository, locate and run the report 16. Interactive Sales Report.
2. In the Filters panel, enter **onion** in the Search list for the Product Name input control.

Only products containing "onion" are shown.

3. Click the first item in the list, then scroll down and Shift-click to select all the items with "onion".
4. Click in the Search list again and delete the word **onion**.

All items are displayed, with ones that include "onion" selected.

5. Click the **Selected** tab to see that only items that are selected are displayed. Then click the **Available** tab to view all the items.
  6. Click **Invert**  to invert the selection.
- Now all items are selected except those items that contain "onion".
7. Click **Apply** at the bottom of the panel. The report shows data only for products that do not contain the word "onion."



**Figure 3-12 Multi-Input Control Selection**

### 3.7.3 Saving Input Control Values

You can save your selected input control values to use at another time. You will have the original report and a copy of it. JasperReports Server saves a version of the report with the selected values as a child of the original report. This new version of the report appears as a child of the original report in the repository, as shown in [Figure 3-13](#). Click ► next to the original report to see all versions of it.

Your saved input control values also appear in a drop-down list when you open the input controls dialog.

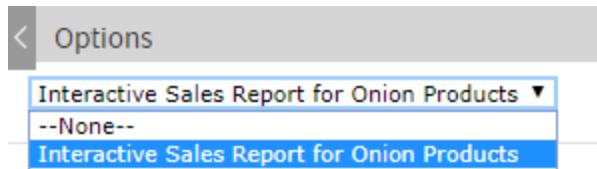
Repository						Sort By: <a href="#">Name</a>   <a href="#">Modified Date</a>
All + Reports						
	Name	Description	Type	Created Date	Modified Date	
01. Geographic Results by Segment Report	Sample HTML5 multi-axis column chart from Domain showing Sales, Units, and \$ Per ...	Report	May 26	June 1		
	Geographic Results Report Filtered for Chicken Prod...	Report Version	Today	Today		

**Figure 3-13 Filtered Version of Geographic Results Report in Repository**

#### To save the input control values:

1. In the repository, locate and run the report 1. Geographic Results by Segment Report.

2. On the tool bar, click .
3. Select all of the onion products, as described in “[Multi-select Input Controls](#)” on page 72.
4. Click save at the bottom of the dialog box.
5. Enter “Interactive Sales Report for Onion Products” as a name for the input control values and click **Save**. JasperReports Server saves the input control values as an option. A new drop-down box appears at the top of the Filters panel.



**Figure 3-14 Saved Input Controls Option**

6. Select Interactive Sales Report for Onion Products from the list of options and click **OK**. The report shows data for onion-related products only.

### 3.7.4 Cascading Input Controls

Cascading input controls in a report reduce a large number of choices to a manageable number. A single value chosen for a cascading input control determines which other values appear as choices for input. For example, the choice of a country determines which states or regions are listed as choices. For more information, see “[Selecting a Data Source for Running the Complex Report](#)” on page 200.

#### To run a report with cascading input controls:

1. In the repository, locate and run the report 16. Interactive Sales Report. The report runs, and appears with the **Options** panel open on the left side of the Report Viewer
2. In the Options panel’s **Country multi select** drop-down, select a different country, for example Canada. The other drop-downs in the Filters panel are automatically updated with Canadian data.



Cascading input controls are implemented as queries that access the database to retrieve the new values. The server displays an activity monitor while the query is running, and in the case of long queries, you can click Cancel and select different values.

3. In the Product Name section, select a product to display in the report.
4. Click **Apply** to run the report with the chosen values.

## 3.8 Running a Report Book

Report books are multiple reports bundled into a single object, created in Jaspersoft Studio. You can run and view report books from the Library page or the repository, much like you would a standard report. However, report books contain some elements that are not found in standard reports.

### To run a report book in the Report Viewer:

1. In the repository, click the name of the report book you want to run. For example, click the sample **17. Report Workbook**. The report appears, as shown below.

Report Category	Report Name	Page Number	
Customers List	Distribution by Country	4	
	Customer Education	5	
	Customers List	10	
1. Canada	Burnaby	10	
	Calgary	12	
	Haney	14	
	Ladner	17	
	Langford	20	
	Langley	23	
	Melchison	25	
	Vancouver	28	
	Newton	30	
	Oak Bay	33	
	Port Hammond	36	
	Richmond	38	
	Royal Oak	41	
	Shawnee	43	
	Sooke	46	
	West Vancouver	49	
	Victoria	51	
	Westminster	54	
	2. Mexico	Mexico	56
		Acapulco	57
		Camacho	59
		Guadalajara	62
Hidalgo		65	
La Cruz		67	
Merida		70	
Mexico City		72	
Oaxaca		75	
San Andres		77	
Santa Anita		80	
Santa Fe		83	
Tixapan		84	
Tlaxiaco		87	
3. USA			89

**Figure 3-15 Sample report book as seen in the Report Viewer.**

The sample report book contains three bundled reports:

- **Distribution by Country**, a chart-type report.
- **Customer Education**, a crosstab-type report.
- **Customers List**, a table-type report.

Each of these reports can be accessed by a tab, along with the Table of Contents page, located at the top of the Report Viewer.

2. Click the **Chart** tab to open the **Customer Distribution by Country** report. Note that you can interact with this report as you would with a standard chart-based report in the viewer.
3. Click the **TocReport** tab to return to the table of contents page.
4. Scroll down and click the **Acapulco** entry in the table of contents. The first page of the Acapulco table entries is displayed.
5. Click to open the bookmarks pane.
6. Click the **Customer Education** entry in the bookmarks pane. The Customer Education crosstab report opens in the viewer.
7. Close the bookmarks pane by clicking the x in the upper right corner of the pane.



# CHAPTER 4 SCHEDULING REPORTS AND DASHBOARDS

Using the JasperReports Server scheduler, you can run reports and take snapshots of dashboards repeatedly and unattended during off hours or at other times. The reports and dashboards are saved in a file format of your choice to the repository, the host machine, or an FTP server. Scheduling these jobs to run in the background or during off hours can reduce the performance impact on the server.

You can view a list of scheduled reports or dashboards on the **View > Schedules** page.

This chapter contains the following sections:

- [Creating a Schedule](#)
- [Viewing the List of Scheduled Jobs](#)
- [Changing Schedules](#)
- [Pausing a Job](#)
- [Deleting a Job](#)
- [Running a Job in the Background](#)
- [Event Messages](#)

## 4.1 Overview of the Scheduler

Using the scheduler, you set up a schedule for generating reports or dashboard with parameters, output options, and notifications:

- Schedule – When to run the scheduled job, and how often
- Parameters – If the report or dashboard was designed with input controls, which parameters the scheduled job will use
- Output Options – The name of the output file, the output format and locale, and where the output file is stored
- Notifications – Email options for sending the output to recipients and for sending administrative messages

The permissions of the user who schedules a job determines the data that is exposed. For example, Gloria only has access to inventory data from the Southeast US region. A report that she schedules only shows data from that region, even when the report is viewed by users in other regions. Other users schedule the report themselves to see the data for their own regions.



Sensitive data could be exposed to unauthorized users if you schedule a job as an administrative user with no data restrictions because the output will contain all requested data in the data source. Any user who receives the output can view all the data regardless of the user's access restrictions.

Scheduling a dashboard requires having Chrome/Chromium installed on the computer hosting JasperReports Server. For information on configuring Chrome/Chromium for dashboards, see the System Configuration chapter in the TIBCO JasperReports Server Administrator Guide.

## 4.2 Creating a Schedule

### To create a schedule:

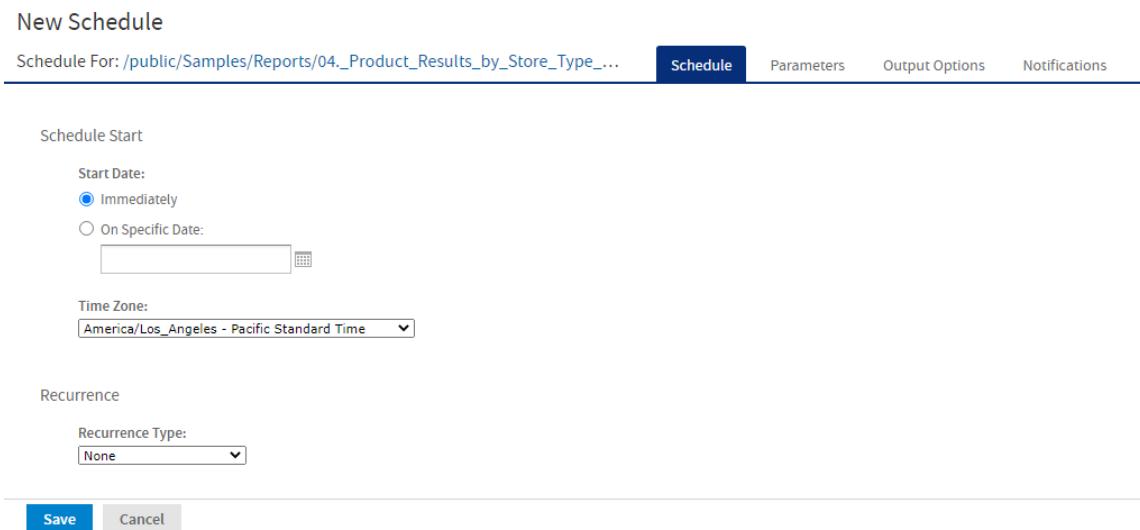
1. Locate the report or dashboard you want to schedule in the repository.
2. Right-click the report or dashboard and select **Schedule...** from the context menu, or if it already has a schedule, click the schedule icon . The Scheduled Jobs page appears.



The screenshot shows the 'Scheduled Jobs' page for a report titled '/public/Samples/Reports/04.\_Product\_Results\_by\_Store\_Type\_Report'. The page includes a header with 'Back', 'Create Schedule', 'Run Now', and 'Refresh List' buttons, and a toolbar with columns for 'Job ID', 'Job Name', 'Owner', 'State', 'Last Run', 'Next Run', and 'Enabled'. There are no visible scheduled jobs listed.

**Figure 4-1 Scheduled Jobs Page**

3. Click **Create Schedule**. The Schedule tab of the scheduler appears.



The screenshot shows the 'New Schedule' tab for a job scheduled for '/public/Samples/Reports/04.\_Product\_Results\_by\_Store\_Type\_Report'. The tab has tabs for 'Schedule', 'Parameters', 'Output Options', and 'Notifications', with 'Schedule' selected. The 'Schedule Start' section includes fields for 'Start Date' (radio buttons for 'Immediately' and 'On Specific Date' with a calendar icon), 'Time Zone' (dropdown menu set to 'America/Los\_Angeles - Pacific Standard Time'), and 'Recurrence' (dropdown menu set to 'None'). At the bottom are 'Save' and 'Cancel' buttons.

**Figure 4-2 New Schedule Tab**

4. Set a start date, choosing whether to run immediately or on a specific date. If a specific date is selected, click the calendar icon  to select a start date and time.
5. Specify the time zone for the schedule. The default time zone is the time zone of the server, the time zone you entered at log in. If you're in a different time zone, set this field accordingly.
6. Choose a recurrence setting, as described in **"Running a Job Repeatedly" on page 84**. If you select Simple or Calendar Recurrence, additional controls appear on the page.
  - **None:** Run the job once.

- **Simple:** Schedule the job to recur at a regular interval, specified in minutes, hours, days, or weeks.
- **Calendar:** Schedule the job to recur on days of the week, days of the month, specific dates, or date ranges.



If you set up a job with simple recurrence to start immediately, the job schedule will change after export/import or a server restart. This happens because the job does not retain the previous run history and therefore starts immediately after import or restart. If you have a large number of scheduled jobs, all scheduled jobs with simple recurrence will attempt to start at the same time after export/import or restart. This can impact server performance. In addition, some scheduled jobs may be locked out and they will continue to try to run.

To ensure a recurring schedule does not change after export/import or restart, either use simple recurrence with a specific start time, or set up calendar recurrence.

7. If the report or dashboard you are scheduling has input controls that prompt for user input, click the Parameters tab.

New Schedule

Schedule For: /public/Samples/Reports/04.\_Product\_Results\_by\_Store\_Type\_...

Schedule    **Parameters**    Output Options    Notifications

Save Current Values

Country

Canada

Search list...

Canada

Mexico

No Country

USA

**Save**    Cancel

**Figure 4-3 Set the Parameter Values Page for Scheduling a Report**

Saved values, if there are any, appear in a drop-down list at the top of the page, as shown in [Figure 4-3](#). In the **Use saved values** drop-down, you can set the input controls defined for the report or dashboard you’re scheduling. You can set the input values for the scheduled job, and click **Save Current Values** to save the input value as a named set of values.

For more information about using saved values and saving input values, see “[Running a Report with Input Controls or Filters](#)” on page [71](#).

8. Choose a set of saved values, or set the input controls.
9. Click the Output Options tab and set the output format and location, as described in [Setting Output Options](#).
10. Click the Notifications tab and set up email notifications, as described in [Setting Up Notifications](#).
11. Click **Save**. The Save dialog box appears.
12. In the **Scheduled Job Name** field, enter a name for the job, for example, Weekly Report. The description is optional.

13. Click **Save** to save the schedule. The job appears in the list of saved jobs for the report or dashboard.

#### 4.2.1 Setting Output Options

On the Output Options tab, you can change these settings:

- **File name** – The base name for the output file in the repository. This name must be unique; if you attempt to create a schedule with the same file name as an existing output file, you will not be able to save.
- **Description** – The optional description of the file that appears to users who view the repository.
- **Time Zone** – The output time zone for generating the report.
- **Output Locale** – The locale settings for generating the report.  
The report must support locales, for example a report based on a Domain with locale bundles. For more information on locale bundles, see *TIBCO JasperReports Server Data Management Using Domains*.
- **Formats** – The available output formats. Select one or more formats; the default format is PDF. When you select more than one, each format is stored as a separate file in the selected output destination.
- **Canvas Size** – Sets the size of the canvas when exporting a dashboard.
- **File Handling** – Select one or more checkboxes to specify handling for multiple output files with the same name:
  - **Overwrite Files** – Overwrites old output files with newer ones of the same name.
  - **Sequential File Names by Timestamp** – Appends a timestamp to the names of files created by the job. Useful for the output of recurring jobs or for time-sensitive reports where the output must be dated. When the timestamp is used, the output filename is <basename>-<timestamp>. <extension>. Note that, depending on the frequency of the schedule and the format of the timestamp, it may be possible to have two output files with the same name; in this case, modify the timestamp or use the **Overwrite Files** checkbox to specify the behavior you want.
  - **Timestamp Pattern** – When **Sequential File Names by Timestamp** is selected, a required pattern for the timestamp, based on the `java.text.SimpleDateFormat` is required. Valid patterns for output files can contain only letters, numbers, dashes, underscores, and periods. The default pattern is `yyyyMMddHHmm`, for example `200906150601`.
  - For more information about the valid patterns for this field, refer to:  
<http://download.oracle.com/javase/6/docs/api/java/text/SimpleDateFormat.html>

New Schedule

Schedule For: /public/Samples/Reports/04.\_Product\_Results\_by\_Store\_Type\_...

Schedule Parameters Output Options Notifications

Output File Options

File name (required):  
04.\_Product\_Results\_by\_Store\_Type\_Report

Description:

Time Zone:  
America/Los\_Angeles - Pacific Standard Time

Output Locale:  
(Default)

Formats:

<input type="checkbox"/> CSV	<input type="checkbox"/> HTML	<input type="checkbox"/> RTF
<input type="checkbox"/> DOCX	<input type="checkbox"/> ODS	<input type="checkbox"/> XLSX
<input type="checkbox"/> Excel (Paginated)	<input type="checkbox"/> ODT	<input type="checkbox"/> XLSX (Paginated)
<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> PPTX

File Handling:

Overwrite Files

Sequential File Names by Timestamp

Timestamp Pattern:  
yyyyMMddHHmm

**Save** **Cancel**

**Figure 4-4 Output Page for Scheduling a Report – Output File Options**

- **Output Destination** – To save the output file, select one or more checkboxes to specify the output location. If you do not want to save the report output (for example, if you only want to email the report) leave all checkboxes blank.
- **Output To Repository** – If checked, saves the report output to the specified location in the repository. You must have write permission to the output folder. JasperReports Server validates the path when you click **Save** and will display an error message if the location doesn't exist. You can change the repository location that appears here by default. See *TIBCO JasperReports Server Administrator Guide* for more information.
- **Output To Host File System** – If checked, saves the report output to the specified folder on the Server host machine; check with your administrator for the correct location to enter. **Output To Host File System** must be configured by an administrator; if the check box is grayed out, saving to the host file system has not been enabled for your system. See the *TIBCO JasperReports Server Administrator Guide* for more information
- **Output To FTP Server** – If checked, saves the report output to the specified FTP server. You must have write permission to the selected directory on the FTP server. Enter the following properties of your FTP server:
  - **Server Address** – The host, IP address or URL of the FTP server.
  - **Port** – Specifies the FTP connection port. For FTP, the default port is 21; for FTPS, the default port is 990; for SFTP, the default port is 22.
  - **Transfer Protocol** – Specifies the file transfer protocol that the server uses. You can select one of the following:
    - **FTP**.

- **FTPS (FTP over SSL).**
- **SFTP (FTP over SSH).** If selected, the **SSH Key Authentication** checkbox and SSH private key fields appear.
- **SSH Key Authentication.** Check if the server requires an SSH private key for SFTP transfers.
- **Path to SSH Private Key.** When **SSH Key Authentication** is checked, the location of the SSH private key in the repository is required.
- **SSH Key Passphrase.** When **SSH Key Authentication** is checked, enter the passphrase for the SSH private key, if it has one.
- **Directory** – The directory on the FTP server where the report output is saved.
- **Username** – The username for access to the FTP server.
- **Password** – The password for the username.

New Schedule

Schedule For: /public/Samples/Reports/04.\_Product\_Results\_by\_Store\_Type\_... Schedule Parameters Output Options Notifications

Output Destination

Output To Repository

Output To Host File System

Output To FTP Server

Server Address:

Port:  Transfer Protocol:

Directory:

Username:  Password:

**Figure 4-5 Output Page for Scheduling a Report – Output Destination**

When you click **Save**, the job appears in the list of scheduled jobs.

#### 4.2.2 Setting Up Notifications

On the Notifications page, you can set up email notifications to the recipients of the report or dashboard and to administrators.



Notifications are sent to all users with the organization **ROLE\_ADMINISTRATOR** role, who belong to the same organization as the user who creates the scheduled job.

### Send report when scheduler runs:

Enter one or more email addresses to send the output after the job has run. You can configure the following:

- **To** – One or more email addresses separated by commas for sending email notification.



By default, the mail server is not configured by the JasperReports Server installer. To send email notifications, the administrator must configure the mail server, as described in the *TIBCO JasperReports Server Installation Guide*.

- **CC** – One or more email addresses separated by commas for sending an email notification on the CC line.
- **BCC** – One or more email addresses separated by commas for sending blind carbon-copy email notification; the addresses in this field are not revealed to the other recipients.
- **Subject** – The subject line of the notification email.
- **Message** – Content of the notification email.
- Choose one of the radio buttons to specify how email recipients access the output:
  - **Include reports/dashboards as repository links in email body** – Sends a link to the output in the repository. Not available unless **Output to Repository** is selected on the Output Options tab.
  - **Include report/dashboard files as attachments** – Sends the output as attachments to the notification email. If you have selected multiple output formats, each one is attached as a separate file to the email notification.
  - **Include report/dashboard files as ZIP attachment** – Zips all outputs into a single archive file before attaching to the email.
  - **Include HTML report in email body** – Displays the report directly in the email body. This option is available only when **Include report files as attachments** or **Include report files as ZIP attachment** is checked and HTML is selected as one of the options on the Output File Options page. When this option is selected, you cannot include a message in the email body. This option is not available for dashboards.



Be careful when sending reports containing sensitive data by email, either in the email body or as an attachment.

- **Do not send emails for empty reports** – A check box option that, if checked, prevents the server from attaching empty report output files to email notifications. This applies to parametrized reports where there is no data that matches the parameters. This option is not available for dashboards.

### Send job status notifications:

Enter one or more email addresses to send notification of job success or failure to administrators:

- **To** – One or more email addresses separated by commas for sending email notification.



By default, the mail server is not configured by the JasperReports Server installer. To send email notifications, the administrator must configure the mail server, as described in the *TIBCO JasperReports Server Installation Guide*.

- **Subject** – The subject line of the notification email.
- **Send success notification** – Check box option that, when checked, sends a notification when the scheduled job runs.
  - **Success Message** – The message in the body of the notification email sent on success.

- **Send failure notification** – Check box option that, when checked, sends a notification when the scheduled job fails to run.
  - **Failure Message** – The message in the body of the notification email sent on failure.
- **Include report/dashboard job information** – A check box option that, if selected, includes the report or dashboard's label, ID, description, and job status in the notification email.
- **Include stack trace** – A check box option that, if selected, includes the stack trace for failed jobs in the body of the email.

New Schedule

Schedule For: /public/Samples/Reports/04\_Product\_Results\_by\_Store\_Type\_...

Schedule   Parameters   Output Options   Notifications

Email Notification

Send report when scheduler runs

To:   
Use commas to separate addresses

CC:   
Use commas to separate addresses

BCC:

Subject:

Message:

Include reports as repository links in email body  
 Include report files as attachments  
 Include report files as ZIP attachment  
 Include HTML report in email body  
 Do not send emails for empty reports

Send job status notifications

To:   
Use commas to separate addresses

Subject:

Send success notification  
Success Message:

Send failure notification  
Failure Message:

Include report job information  
 Include stack trace

**Save**   **Cancel**

**Figure 4-6 Notifications Page for Scheduling a Report**

#### 4.2.3 Running a Job Repeatedly

To run jobs automatically on a regular basis, select simple or calendar recurrence on the Schedule tab:

- **Simple** recurrence repeatedly runs the job at a regular interval set in minutes, hours, days, or weeks.
- **Calendar** recurrence involves more settings: time of day, days of the week, or days of the month, and months of the year.

In **Figure 4-7** you can see an example of how to set simple recurrence.

New Schedule

Schedule For: /public/Samples/Reports/04.\_Product\_Results\_by\_Store\_Type\_...

Schedule    Parameters    Output Options    Notifications

Schedule Start

Start Date:

Immediately

On Specific Date:

2020-08-26 00:00

Time Zone:

America/Los\_Angeles - Pacific Standard Time

Recurrence

Recurrence Type:

Simple

Repeat every (required):

1 days

Schedule End

End Date:

Run a set number of times

Number of runs:

Run until a specified date:

Run indefinitely

Holidays

Calendar of dates to exclude:

None

**Figure 4-7 Simple Recurrence Settings**

Simple recurrence options are:

- **Repeat every** – The interval between jobs, in minutes, hours, days, or weeks.
- **Run a set number of times** – Runs the specified number of times.
- **Run until a specified date** – Runs until a calendar date is reached. Click the calendar icon, , to select the date.
- **Run indefinitely** – Runs at the specified times until you delete the job.
- **Holidays** – A holiday calendar specifies a list of days when the scheduled job will not run. To use a holiday calendar, select it from the drop-down list. Only one holiday calendar can be selected at a time. Holiday calendars are configured by an administrator; if no calendars are available in this list, this option has not been configured for your system.



If your server recognizes Daylight Savings Time (DST), jobs scheduled using simple recurrence may seem to occur one hour later (when DST ends) or one hour earlier (when DST begins). If you want jobs to recur at the same time of day and respect DST adjustments, use calendar recurrence.



If you set up a job with simple recurrence to start immediately, the job schedule will change after export/import. This happens because the imported job does not retain the previous run history and therefore starts immediately after successful import. To ensure a recurring schedule does not change after export/import, either use simple recurrence with a specific start time, or set up calendar recurrence.

In **Figure 4-8** you'll see an example of calendar recurrence settings.

**New Schedule**

Schedule For: /public/Samples/Reports/04.\_Product\_Results\_by\_Store\_Type\_...

**Schedule** Parameters Output Options Notifications

On Specific Date:  
2020-08-26 00:00

Time Zone:  
America/Los\_Angeles - Pacific Standard Time

**Recurrence**

Recurrence Type:

Months:  
 Every Month  
 Selected Months:  
 Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Days:  
 Every Day  
 Selected Days:  
 Sun Mon Tue Wed Thu Fri Sat

Times:  
 Hours (required): 20  
Enter 24-hour times like 9, 12, 15 or ranges like 9-12, 1-17  
 Minutes (required): 0  
Enter 0, 15, 30, 45 to run every 1/4 hour

Dates in Month:  
  
Enter dates (9, 12, 15) or date ranges (9-12, 1-17)

**Schedule End**

End Date:

**Holidays**

Calendar of dates to exclude:

**Save** **Cancel**

**Figure 4-8 Calendar Recurrence Settings**

Calendar recurrence options are:

- **Months** – The months during which the job runs.
  - Every Month
  - Selected Months

- **Days** – The days when the job runs.
  - Every Day
  - Selected Days
  - Dates in Months – Enter dates or date ranges separated by commas, for example: 1, 15.
- **Times** – The time of day in minutes and hours when the job should run. The hours use 24-hour format. You can also enter multiple minutes or hours, and ranges, separated by commas. For example, entering 0,15,30,45 for the minutes, and 9-17 for the hours, runs the report every 15 minutes from 9:00 a.m. to 5:45 p.m. Enter an asterisk (\*) to run the job every minute or every hour.
- **End Date** – Calendar recurrence runs until a calendar date is reached. Click  to select the date.
- **Holidays** – A holiday calendar specifies a list of days when the scheduled report will not run. To use a holiday calendar, select it from the drop-down list. Only one holiday calendar can be selected at a time. Holiday calendars are configured by an administrator; if no calendars are available in this list, this option has not been configured for your system.  
Administrators see the chapter on scheduling in the *TIBCO JasperReports Server REST API Reference* for more information on configuring calendars.

## 4.3 Viewing the List of Scheduled Jobs

### View a list of all scheduled jobs:

All scheduled jobs that the user has defined appear on the Click **View > Schedules** page.

Schedules						
Resource	Job Name	Job ID	Owner	Last Run	Next Run	Enabled
01. Geographic Results by Segment R... /public/Samples/Reports/01_Geogra...	01 Geographic Results ...	2309	superuser	2020-07-22 1...	2020-07-29 1...	<input checked="" type="checkbox"/>  
01. Geographic Results by Segment R... /public/Samples/Reports/01_Geogra...	01 Geographic Results ...	2301	superuser	2020-07-22 1...	2020-07-23 1...	<input checked="" type="checkbox"/>  

**Figure 4-9 The Schedules Page**

Typical users see only the jobs they have defined; administrators see the jobs defined by all users. In **Figure 4-9**, jasperadmin has scheduled two jobs for the Geographic Results by Segment report.

You can use the Schedules page's search field to find the scheduled job you want.

The Schedules page shows the name of the scheduled report or dashboard, the repository URI of the job, the internal ID number of the job, the user (owner) who created the job, and the state of the job. Job states are:

- **NORMAL** – The job is scheduled.
- **EXECUTING** – The server is generating the output.
- **COMPLETE** – The server has finished running the job and placed output to the repository.
- **PAUSED** – The job has been disabled. Click **Enabled** to resume the schedule.
- **ERROR** – The scheduler encountered an error while scheduling or triggering the job. This doesn't include cases where the job is successfully triggered, but an error occurs while it runs.
- **UNKNOWN** – The scheduler encountered an error with the job trigger.

The Schedules page includes these controls:

- **Enabled** checkbox – When checked, the job will run at the scheduled times. When unchecked, the job is paused.
-  – Edits the schedule.
-  – Deletes the scheduled job.

When the server receives a request to delete a job that is running, the server completes running the job before deleting it.

#### View scheduled jobs for an individual report or dashboard:

Scheduled jobs appear in the repository with a  icon beside the report or dashboard's name. To view the list of scheduled jobs for a report or dashboard, locate it in the repository, click on the  icon or right-click the report or dashboard, and select **Schedule** from the context menu. The Scheduled Jobs page appears. The Scheduled Jobs display information that's similar to the Schedules page.



You can filter search results for scheduled jobs in the repository using the following options: **Any schedule** (scheduled and unscheduled reports), **Scheduled**, **Scheduled by me**, or **Not scheduled**. See [1.5.2, “Filtering Search Results,” on page 17](#) for more information.

Buttons on the Scheduled Jobs page include:

Button	Description
<b>Back</b>	Returns to the repository.
<b>Create Schedule</b>	Opens the Schedule tab to define a new job.
<b>Run Now</b>	Opens the scheduler and allows you to run the job immediately. See <a href="#">“Running a Job in the Background” on page 89</a> .
<b>Refresh List</b>	Refreshes the list of jobs, for example to see if a job has finished running.

## 4.4

## Changing Schedules

If the start date for a schedule has not yet passed, you can edit the schedule. Once the start date for a schedule has passed, create a new schedule rather than changing the start date.

### To edit a schedule:

1. Click **View > Schedules**.
2. Click  in the row of the job you want to change.
3. Make the changes on the Schedule, Parameters, Output, and Notifications pages.
4. Click **Save**. The update occurs immediately.

## 4.5 Pausing a Job

To stop a job from running without deleting it, disable the job.

**To pause a scheduled job:**

1. Click **View > Schedules**.
2. In the row of the job you want to stop, uncheck **Enabled**.

**To resume a paused job:**

1. Click **View > Schedules**.
2. In the row of the job you want to resume, check **Enabled**. When a stopped job is re-enabled, it waits until the next scheduled time to run.

## 4.6 Deleting a Job

**To delete a scheduled job:**

1. Click **View > Schedules**.
2. In the row of the job you want to delete, click .

## 4.7 Running a Job in the Background

Running a job in the background generates a report or exports a dashboard without interrupting your workflow. You can keep working in the server as the job runs. When the job completes, you can export the job directly to any format and save it in the repository. You can share the output with others by sending it by email.

Running a job in the background is equivalent to scheduling it to run immediately without recurrence.

**To run a job in the background:**

1. Locate the report or dashboard you want in the repository.
2. Right-click the report or dashboard and select **Run in Background** from the context menu.
3. Set the output format and location, as described in [Setting Output Options](#). By default, the output is saved in the repository.
4. If the job you are running has input controls that prompt for user input, click the Parameters tab. Choose a set of saved values, or set the fields one at a time.
5. Click the Notifications tab and set up email notifications, as described in [Setting Up Notifications](#).
6. Click **Save**. The job begins to run immediately.

## 4.8 Event Messages

When an event occurs (for example, a scheduled report returns errors), JasperReports Server sends the owner of the job a notification message. You can browse these messages to troubleshoot report scheduling problems in the server. For example, you can determine that a job fails because its data source configuration uses incorrect credentials.



A common cause of the error message indicating that the job failed to execute is an incorrectly configured mail server. The mail server must be manually configured after installation in order for users to send email notifications.

The Messages page displays the list of events logged for the current user.

**To open the Messages page:**

1. On any page, click **View > Messages**. The Messages page appears.
2. To view a message, click its name. The message opens in the Message Detail page.
3. To activate the buttons on the Messages page, click in a blank area of the message row that you want to manage. The buttons become enabled.

The screenshot shows a table with three columns: Subject, Date, and Type. There are two rows of data, both of which are highlighted with blue bars at the top. The first row has a subject of "The job failed to execute. Review its parameters" and a date of "Today". The second row also has the same subject and date. The Type column for both rows is "Error". The Component column for the first row is "Report Scheduler" and for the second row is "Report Scheduler". At the top left of the table, there is a dropdown menu labeled "Messages: All" with a downward arrow. Below the dropdown are three buttons: "Mark as Read", "Mark as Unread", and "Delete".

Subject	Date	Type	Component
The job failed to execute. Review its parameters	Today	Error	Report Scheduler
The job failed to execute. Review its parameters	Today	Error	Report Scheduler

**Figure 4-10 Message Management Buttons**

4. Use the buttons on the Messages page to manage the list of messages.

# CHAPTER 5 WORKING WITH THE AD HOC EDITOR



This section describes functionality that can be restricted by the software license for JasperReports Server. If you don't see some of the options described in this section, your license may prohibit you from using them. To find out what you're licensed to use, or to upgrade your license, contact Jaspersoft.

The Ad Hoc Editor is the interactive designer for creating and editing an Ad Hoc view, where you can explore and analyze data from your Topic, Domain, or OLAP data source. Ad Hoc views can also be used to create content for reports.

This chapter discusses the Ad Hoc Editor and Ad Hoc views, and includes the following sections:

- [Overview of the Ad Hoc Editor](#)
- [Working with Tables](#)
- [Working with Charts](#)
- [Working with Standard Crosstabs](#)
- [Working with OLAP Connection-based Crosstabs](#)
- [Calculated Fields and Measures](#)
- [Using Filters and Input Controls](#)
- [Creating a View from a Domain](#)
- [Working with Topics](#)

After you create an Ad Hoc view, you - and other users with the proper permissions - can run the report, then further refine the displayed information and personalize the look of the report in the report viewer. For more information on that process, see [“Running Reports and the Report Viewer” on page 55](#).

## 5.1 Overview of the Ad Hoc Editor

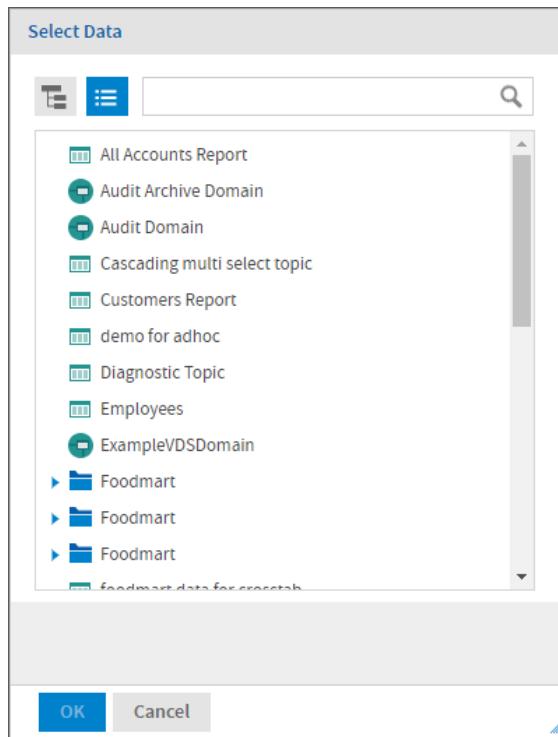
The Ad Hoc Editor is an interactive tool for creating views for various types of reports: tables, crosstabs, and charts. You create these views by simply dragging and dropping elements. You can add and summarize fields, define groups, label and title the report, and format data for each field. The effects of your changes are evident immediately, and you can adjust the display to highlight the most relevant and compelling aspects of your data.

The Ad Hoc Editor provides analysis options (such as slice, pivot, and filter) to help you recognize trends and outliers in your data. You can drill into specific details or analyze your data at a very high level.

### To open the Ad Hoc Editor:

1. Click **Create > Ad Hoc View**. This opens the **Select Data** dialog.

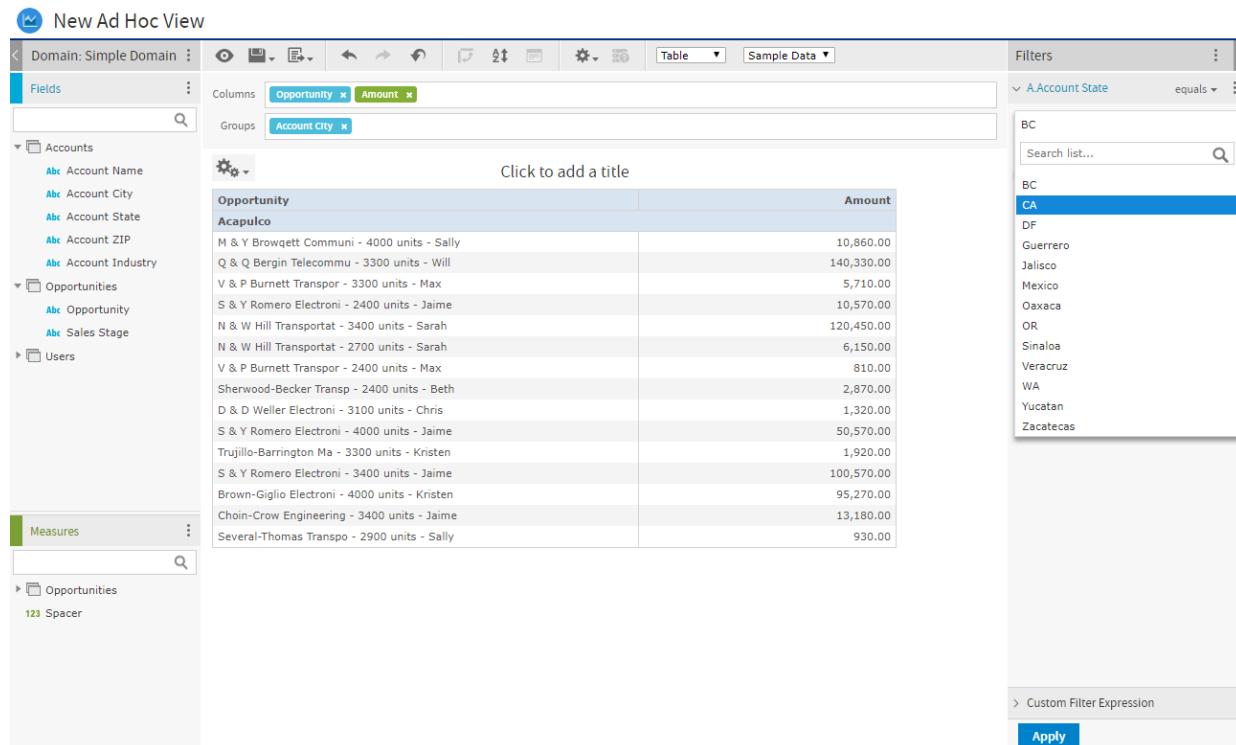
2. Choose your data source from the list and click **OK**.



**Figure 5-1 List of Data Sources in the Select Data Dialog**

The Ad Hoc Editor contains the following panels, from left to right:

- **Data Source Selection**, which contains the fields, dimensions, and measures available in the source Domain, Topic, or OLAP connection.
- **Ad Hoc View**, the main view design panel.
- **Filters**, which defines a subset of data to retrieve from the data source.



**Figure 5-2 User Interface of the Ad Hoc Editor**

We'll discuss how to use these panels to create an Ad Hoc view later in this section.

### 5.1.1 Ad Hoc Sources: Topics, Domains, and OLAP Connections

The following repository objects provide a prepared connection to a data source for Ad Hoc view creation:

- **Topics**, JRXML files created externally and uploaded to JasperReports Server as a basis for Ad Hoc views.
- **Domains**, virtual views of a data source that present the data in business terms, allow for localization, and provide data-level security.
- **OLAP Connections**, multi-dimensional views of data that allow users to analyze a large number of aggregate data levels.

You can also open and edit an existing Ad Hoc view to create a new Ad Hoc view.

#### 5.1.1.1 Topics

Generally, an administrator or Jaspersoft Studio user creates a Topic as a JRXML file. The JRXML topic is then associated with a data source in the server. A Topic can also be created from a Domain in the server. Both types of topics appear in the Select Data wizard when you create an Ad Hoc view.

Using a Topic as your source generates an empty view, which allows you to begin adding data to your view right away, without choosing, pre-filtering, or changing display names of the data (all of which are required steps when creating a Domain-based view).

The views in the /Ad Hoc Components/Topics folder populate the Topics tab that appears when users click **Create > Ad Hoc View**.

**To begin designing a Topic-based view:**

1. Launch the Ad Hoc Editor by clicking **Create > Ad Hoc View**.
2. In the Select Data wizard, click  and navigate to **Ad Hoc Components > Topics**.
3. Expand the Topics folder and select a topic.
4. Select the type of view you intend to create: table, chart, or crosstab. For an overview of view types, see [“Ad Hoc View Types” on page 95](#).

You can now begin working on your view in the Ad Hoc Editor.

#### 5.1.1.2 Domains

Administrators create Domains that typically filter the data, create input controls, and manage the list of available fields and measures. A Domain specifies tables in the database, join clauses, calculated fields, display names, and default properties, all of which define items and sets of items for creating Ad Hoc views.

Unlike Topics, which must be stored in a specific folder in the repository, Domains are detected regardless of their location in the repository. The /Domains folder is included for your convenience, but the Domains tab in the Source dialog displays all the Domains to which you have access in the repository.

**To begin designing a Domain-based view:**

1. Launch the Ad Hoc Editor by clicking **Create > Ad Hoc View**.
2. In the Select Data wizard, click  and navigate to **Domains**.
3. Expand the Domains folder and select a domain.
4. Click **Choose Data...**, and click the options on the left of the window to perform the following tasks:
  - Click **Fields** to select fields of data to use in the view.
  - Click **Pre-filters** to create filters to limit the data available in the Ad Hoc Editor.
  - Click **Display** to change the fields' display names.
  - Click **Save as Topic** to save the customized topic for later use.
5. Select the type of view you want to create: table, chart, or crosstab. For an overview of view types, see [“Ad Hoc View Types” on page 95](#).

You can now begin working on your view in the Ad Hoc Editor.

#### 5.1.1.3 OLAP Connections

Administrators create OLAP client connections that expose transactional data and define how the data can be seen as a multidimensional cube. An OLAP connection can expose multiple cubes in a single OLAP connection.



With OLAP connections, you can create chart and crosstab views only.

**To begin designing an OLAP connection-based view:**

1. Launch the Ad Hoc Editor by clicking **Create > Ad Hoc View**.
2. In the Select Data wizard, click  and navigate to **Analysis Components > Analysis Connections** and select a sample project and a connection.

You can now begin working on your view in the Ad Hoc Editor.

For more information about OLAP-based view functionality, refer to the following sections:

- “Working with OLAP Connection-based Crosstabs” on page 132
- “Working with Topics” on page 169

## 5.1.2 Ad Hoc View Types

The Ad Hoc Editor allows you to select from three view types:

- **Tables**, which are used to view values in the database and to summarize the values in columns.
- **Charts**, which compare one or more measures across multiple sets of related fields.
- **Crosstabs**, which aggregate data across multiple dimensions.

This section provides an overview of each view type. The design and content tasks for working with each type of view are discussed in more detail in the following sections:

- For more information on table views, see “[Working with Tables](#)” on page 109.
- For more information on chart views, see “[Working with Charts](#)” on page 115.
- For more information on crosstab views, see “[Working with Standard Crosstabs](#)” on page 127.

### 5.1.2.1 Tables

The architecture of a table view consists of columns, rows, and groups.

Columns in a table correspond to the columns in the data source. They are included by adding fields or measures to the table in the Ad Hoc view.

Rows correspond to rows in the database. The information in each row depends on what columns are included in the table.

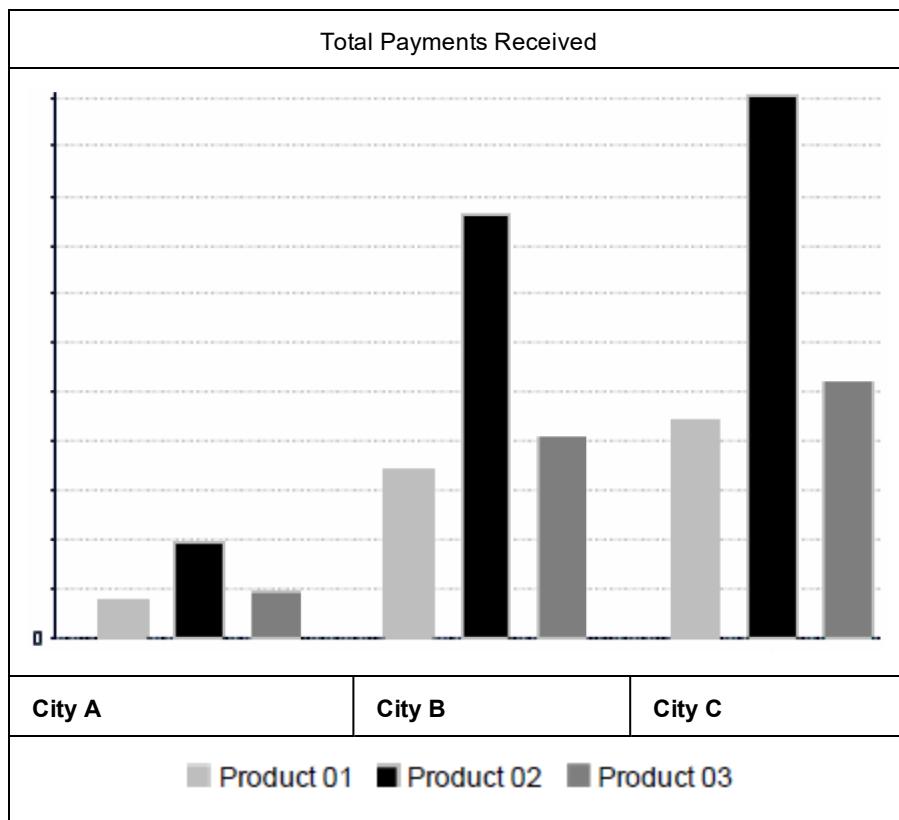
Using groups, rows can be grouped by identical values in any field with intermediate summaries for each grouped value. For example, a table view of product orders might contain columns to show the dates and amounts of each order, and its rows might be grouped by city and product.

	Date Placed	Date Filled	Payment Received
<b>City A</b>			
<b>Product 01</b>			
	Date	Date	Amount
	Date	Date	Amount
<b>Product 01 totals:</b>		<b>Count</b>	<b>Sum</b>
<b>Product 02</b>			
	Date	Date	Amount
	Date	Date	Amount
<b>Product 02 totals:</b>		<b>Count</b>	<b>Sum</b>
<b>Product 03</b>			
	Date	Date	Amount
	Date	Date	Amount
<b>Product 03 totals:</b>		<b>Count</b>	<b>Sum</b>
<b>City A totals:</b>		<b>Count</b>	<b>Sum</b>
<b>City B</b>			
<b>Product 01</b>			
	Date	Date	Amount
	Date	Date	Amount
	Date	Date	Amount
	...	...	...

For more information on working with tables, see [“Working with Tables” on page 109](#).

#### 5.1.2.2 Charts

Charts summarize data graphically. Types of charts include bar chart, line chart, and pie chart, among others. With the exception of time series and scatter charts, each type of chart compares summarized values for a group. For example, the **Chart** tab might show the data in a bar chart that compared the sum of Payments Received for each of the products in each of the cities.



Time series and scatter charts use time intervals to group data.

For more information on working with charts, see [“Working with Charts” on page 115](#).

#### 5.1.2.3 Crosstabs

Crosstabs are more compact representations than tables; they show only aggregate values, rather than individual database values. Columns and rows specify the dimensions for grouping; cells contain the summarized measurements. For instance, the example above could be displayed in a crosstab with columns grouped by sales manager and year.

		Tom			Harriet			Manager Totals
		2012	2013	Year Totals	2012	2013	Year Totals	
City A	<b>Product 01</b>	Payment Received	Payment Received	<b>Payment Received</b>	Payment Received	Payment Received	<b>Payment Received</b>	<b>Payment Received</b>
	<b>Product 02</b>	Payment Received	Payment Received	<b>Payment Received</b>	Payment Received	Payment Received	<b>Payment Received</b>	<b>Payment Received</b>
	<b>Product 03</b>	Payment Received	Payment Received	<b>Payment Received</b>	Payment Received	Payment Received	<b>Payment Received</b>	<b>Payment Received</b>
	<b>Product Totals</b>	<b>Payment Received</b>						
City B	<b>Product 01</b>	Payment Received	Payment Received	<b>Payment Received</b>	Payment Received	Payment Received	<b>Payment Received</b>	<b>Payment Received</b>
	...	...	...	...	...	...	...	...
<b>City Totals</b>		<b>Payment Received</b>						

For more information on working with crosstabs, see “[Working with Standard Crosstabs](#)” on page 127.

OLAP connection-based crosstabs behave differently than those created from Topics or Domains. See “[Working with Topics](#)” on page 169.

### 5.1.3 The Data Source Selection Panel

The Data Source Selection panel contains a list of available fields in the chosen Topic or Domain. If you are using a Domain, fields may appear in nested sets. Use the arrow beside the set name to expand or collapse a set of fields.

Available fields may be divided into two sections in the panel, **Fields** and **Measures**. You can use the search field in each section to locate a specific field or measure.

To hide this panel, click < in the top left corner; this is helpful when arranging content in a large Ad Hoc view. Click the same icon on the minimized panel to expand it.

For more information on working with fields, see “[Using Fields in Tables](#)” on page 110, “[Using Fields and Measures in Charts](#)” on page 116, and “[Using Fields in Crosstabs](#)” on page 128.

### 5.1.4 The Ad Hoc View Panel

The Ad Hoc View panel provides tools that allow you to control what data is included in a view, and how it is organized.

Along the top of the panel, there is a tool bar and a drop-down menu.

The drop-down menu contains options for displaying a subset of the available data (**Sample Data**), all available data (**Full Data**), or none of the available data (**No Data**) in the view. Using the sample data can make the design process quicker by loading less data. Use the subset for initial design; use the full set for refining layout elements such as column width. This drop-down menu is not available for charts, which use all available data.

By default, the editor displays only a smaller, sample set of the data in the table. Use the drop-down menu to select **Full Data** to view the full set of data.



Depending on its configuration, JasperReports Server may load a Topic, Domain, or OLAP connection's entire result set into memory when you edit the view, or run a report from it. If the data policies and other options that control JasperReports Server's memory are disabled, ensure that each Topic, Domain, or OLAP connection returns a manageable amount of data, given the environment's load capacity. Alternately, you can change the server's configuration.

The tool bar at the top of the panel provides access to many functions of the Ad Hoc Editor. The toolbar is described in [Table 5-1 on page 99](#).

**Table 5-1 Ad Hoc Editor Tool Bar Icons**

Icon	Name	Description
	Display Mode	Click this icon to hide the editor interface. This mode provides a subset of the editor's full feature set.
	Save	Place the cursor over this icon to open a menu of save options.
	Export	Place the cursor over this icon to open a menu of export options.
	Undo	Click this icon to undo the most recent action.
	Redo	Click this icon to redo the most recently undone action.
	Undo All	Click this icon to revert the view to its state when you last saved.
	Switch Group	Click this icon to change the way groups are displayed. For more information, refer to <a href="#">“Creating a View from a Domain” on page 164</a> .
	Sort	When working with tables, click this icon to view the current sorting and to select fields for sorting data. For more information, refer to <a href="#">“Sorting Tables” on page 113</a> .
	Input Controls	Click this icon to see the input controls applied to this view. For more information, refer to <a href="#">“Using Input Controls” on page 161</a> .
	Page Options	Place the cursor over this icon to open a menu of page-level options. You can: <ul style="list-style-type: none"> <li>Change whether to display the Layout Band.</li> <li>Change whether to display the title area.</li> <li>In crosstabs, you can merge or unmerge cells with the same data.</li> </ul>
	View SQL/MDX Query	For more information on viewing SQL queries, see <a href="#">“Viewing the SQL Query” on page 100</a> For more information viewing MDX queries, see <a href="#">“Viewing the MDX Query” on page 135</a>

Icon	Name	Description
	Select Visualization Type	Click this icon to select the type of table, chart, or crosstab you want to use in your Ad Hoc view. For information on all the types of visualizations available, see " <a href="#">IThe Visualization Selector" on page 100</a> for more information.

#### 5.1.4.1 The Layout Band

Directly beneath the tool bar is the Layout Band. Here there are two fields. These fields have different labels and functions, depending on the type of view you are creating:

- For tables, these fields are **Columns** and **Groups**.
- For charts, these fields are **Columns** and **Rows**.
- For crosstabs, these fields are **Columns** and **Rows**.

You can drag and drop fields and measures into these boxes to populate your view.

#### 5.1.4.2 Managing Canvas Options

When working with a table or chart view, the Canvas Options selector appears below the Layout Band, to the left of the view title. This tool allows you to control the level of detail displayed in your table or chart. Click



to display the options available for your Ad Hoc view type.

For tables, the Canvas Options selector includes the following options:

- **Detailed Data** (default) displays table detail only.
- **Totals Data** displays table totals only.
- **Details and Totals** displays both details and totals.
- **Show/Hide Duplicate Rows**, which displays only the distinct values in your table if you choose to hide the duplicate rows.

For charts, the Canvas Options selector includes the following options:

- **Chart Format** displays formatting options.

#### 5.1.4.3 Viewing the SQL Query

You may want to look at the SQL query for your view, to verify what data users are hitting. If you have the proper permissions, you can do this in the Ad Hoc Editor with the **View Query** button.

The query is read-only, but can be copied onto a clipboard or other document for review.

**To view the SQL query:**

- In the tool bar, click .

The View Query window opens, displaying the SQL query.

### 5.1.5 [IThe Visualization Selector](#)

The Visualization Selector lets you switch between Ad Hoc view types, allowing you to choose the best way to represent your information in the Ad Hoc view, including:

- Table, which displays values corresponding to the rows and columns in the data source.
- Crosstab, which compares one or more values across multiple sets of related fields.
- Column, which compares values displayed as columns.

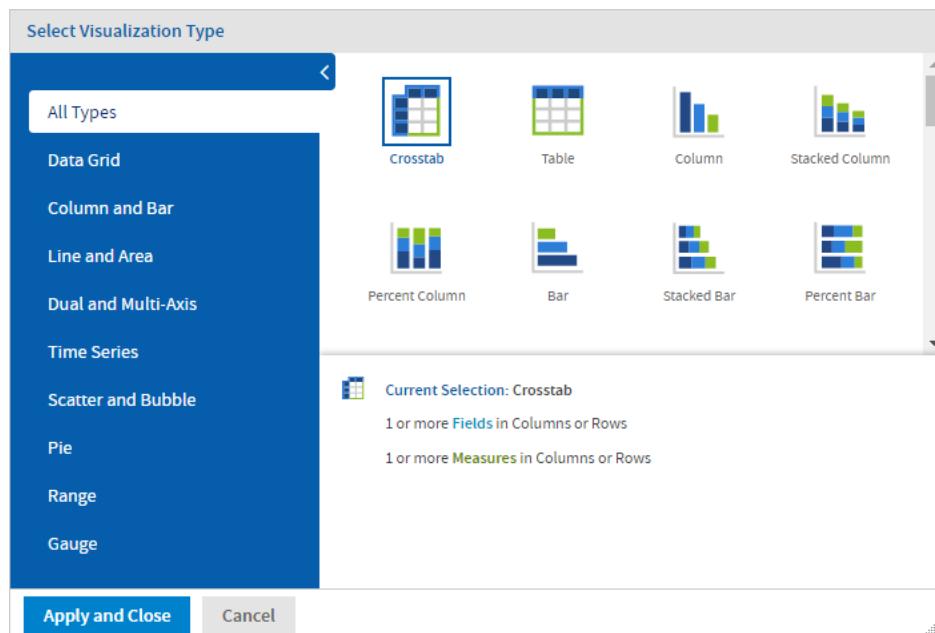
- Bar, which compares values displayed as bars.
- Line, which compares values displayed as points connected by lines.
- Area, which compares values displayed as shaded areas.
- Spider, which compares three or more values on a series of spokes. Spider charts can use columns, lines, or areas to display values.
- Dual- and Multi-Axis, which display values using two or more measures.
- Time Series, which compares time intervals displayed as points connected by lines. The Time Series chart type is only available for non-OLAP charts.
- Scatter, which compares values as individual points arrayed across both axes of a chart.
- Bubble, which compares three measures displayed as circles of varying sizes arrayed across both axes of a chart.
- Pie, which compares values displayed as slices of a circular graph.
- Range, which displays values as heat and tree maps. Only the Heat Map chart is available for OLAP data sources.
- Gauges, which displays values as a radial or arc gauge, based on a defined minimum and maximum measure setting.



JasperReports Server has limited support for scatter charts created in some older versions. You can use the Ad Hoc views for those scatter charts to generate new reports, but you can't edit them.

#### To select a new visualization type:

1. In the Ad Hoc Editor tool bar, click the icon to display the **Select Visualization Type** window.



**Figure 5-3 Select Visualization Type Window**

2. Click the type of visualization you want to apply to your report. The selected visualization type is outlined in blue. The Visualization Selector displays a description of the selected visualization and the number of fields and measures it uses.
3. Click **Apply and Close** to use the visualization type.

The following table describes the available visualization types, and rules (if any) affecting their use:

**Table 5-2 HTML5 Visualization Types**

Icon	Description	Rules
<b>Data Grid</b>	<b>Data grids</b> display values from the data source in columns and rows as either individual or aggregate values.	
	<b>Crosstab</b> . Compares one or more measures across multiple sets of related fields.	
	<b>Table</b> . Displays values corresponding to the columns and rows in the data source.	
<b>Column and Bar</b>	<b>Column charts</b> compare values displayed as columns and bars.	
	<b>Column</b> . Multiple measures of a group are depicted as individual columns.	
	<b>Stacked Column</b> . Multiple measures of a group are depicted as portions of a single column whose size reflects the aggregate value of the group.	
	<b>Percent Column</b> . Multiple measures of a group are depicted as portions of a single column of fixed size.	
	<b>Spider Column</b> . Multiple measures of a group are depicted as portions of individual "columns" along a spoked chart.	
	<b>Bar</b> . Multiple measures of a group are depicted as individual bars.	
	<b>Stacked Bar</b> . Multiple measures of a group are depicted as portions of a single bar whose size reflects the aggregate value of the group.	

Icon	Description	Rules
	<b>Percent Bar.</b> Multiple measures of a group are depicted as portions of a single bar of fixed size.	
<b>Line and Area</b>	<b>Line charts compare values displayed as points connected by lines.</b>	
	<b>Line.</b> Displays data points connected with straight lines.	
	<b>Spline.</b> Displays data points connected with a fitted curve.	
	<b>Spider Line.</b> Displays data points connected with straight lines on a spoked chart.	
	<b>Area.</b> Displays data points connected with a straight line and a color below the line; groups are displayed as transparent overlays.	
	<b>Stacked Area.</b> Displays data points connected with a straight line and a solid color below the line; groups are displayed as solid areas arranged vertically, one on top of another.	
	<b>Percent Area.</b> Displays data points connected with a straight line and a solid color below the line; groups are displayed as portions of an area of fixed size, and arranged vertically one on top of the other.	
	<b>Area Spline.</b> Displays data points connected with a fitted curve and a color below the line; groups are displayed as transparent overlays.	
	<b>Spider Area.</b> Displays data points connected with straight lines and a solid color between the line and the center of a spoked chart; groups are displayed as transparent overlays.	

Icon	Description	Rules
<b>Dual and Multi-Axis</b>	<b>Dual and multi-axis charts compare two or more measures, using one charting type or multiple charting types, with the charts listed here.</b>	
	<b>Column Line.</b> Displays leftmost measures as columns, last measure as a line.	<ul style="list-style-type: none"> <li>Requires two or more measures.</li> <li>Measures must be placed in the Columns location.</li> <li>Fields and dimensions can be placed only in the Rows location.</li> </ul>
	<b>Stacked Column Line.</b> Displays leftmost measures as stacked bars, last measure as a line.	<ul style="list-style-type: none"> <li>Requires three or more measures.</li> <li>Measures must be placed in the Columns location.</li> <li>Fields and dimensions can be placed only in the Rows location.</li> </ul>
	<b>Column Spline.</b> Displays leftmost measures as columns, last measure as a spline.	<ul style="list-style-type: none"> <li>Requires two or more measures.</li> <li>Measures must be placed in the Columns location.</li> <li>Fields and dimensions can be placed only in the Rows location.</li> </ul>
	<b>Stacked Column Spline.</b> Displays leftmost measures as stacked columns, last measure as a line.	<ul style="list-style-type: none"> <li>Requires three or more measures.</li> <li>Measures must be placed in the Columns location.</li> <li>Fields and dimensions can be placed only in the Rows location.</li> </ul>
	<b>Multi-Axis Line.</b> Displays each measure as a separate axis line.	<ul style="list-style-type: none"> <li>Requires two or more measures.</li> <li>Measures must be placed in the Columns location.</li> <li>Fields and dimensions can be placed only in the Rows location.</li> </ul>

Icon	Description	Rules
	<b>Multi-Axis Spline.</b> Displays each measure as a separate axis spline.	<ul style="list-style-type: none"> <li>Requires two or more measures.</li> <li>Measures must be placed in the Columns location.</li> <li>Fields and dimensions can be placed only in the Rows location.</li> </ul>
	<b>Multi-Axis Column.</b> Displays each measure as a separate axis column.	<ul style="list-style-type: none"> <li>Requires two or more measures.</li> <li>Measures must be placed in the Columns location.</li> <li>Fields and dimensions can be placed only in the Rows location.</li> </ul>
<b>Time Series</b>	<b>Time Series charts illustrate data points at successive time intervals.</b>	
	<b>Line.</b> Displays date and time data points connected with straight lines.	<ul style="list-style-type: none"> <li>Requires a single date/time field in the Rows location.</li> <li>Field must be set to the "day" group function.</li> </ul>
	<b>Spline.</b> Displays date and time data points connected with a fitted curve.	<ul style="list-style-type: none"> <li>Requires a single date/time field in the Rows location.</li> <li>Field must be set to the "day" group function.</li> </ul>
	<b>Area.</b> Displays date and time data points connected with a straight line and a color below the line; groups are displayed as transparent overlays.	<ul style="list-style-type: none"> <li>Requires a single date/time field in the Rows location.</li> <li>Field must be set to the "day" group function.</li> </ul>
	<b>Area Spline.</b> Displays date and time data points connected with a fitted curve and a color below the line; groups are displayed as transparent overlays.	<ul style="list-style-type: none"> <li>Requires a single date/time field in the Rows location.</li> <li>Field must be set to the "day" group function.</li> </ul>

Icon	Description	Rules
<b>Scatter and Bubble</b>	<b>Scatter charts show the extent of correlation between the values of observed quantities.</b> <b>Bubble charts show the correlation between three measures, displayed as disks.</b>	
	<b>Scatter.</b> Displays first measure as the x-axis, the second measure as the y-axis. Other fields and dimensions in the column group become data points.	<ul style="list-style-type: none"> <li>Requires exactly two measures.</li> <li>Measures must be placed in the Columns location.</li> </ul>
	<b>Bubble.</b> Displays first measure as the x-axis, the second measure as the y-axis, and the third measure determines the size of the disk.	<ul style="list-style-type: none"> <li>Requires exactly three measures in the Columns location.</li> <li>The measures cannot be placed between other fields.</li> </ul>
<b>Pie</b>	<b>Pie charts display values as slices of a circular graph.</b>	
	<b>Pie.</b> Multiple measures of a group are displayed as sectors of a circle.	
	<b>Dual Pie.</b> Multiple measures of a group are displayed as sectors of concentric circles.	<ul style="list-style-type: none"> <li>Requires at least one measure and one field.</li> <li>Fields must be placed in the Rows location. Only one field can be placed in the Rows location if it contains a measure.</li> <li>Two fields can be placed in the Rows location if it contains no measures.</li> <li>Multiple measures are allowed in the Rows location, but only one measure is allowed in the Columns location.</li> </ul>
	<b>Semi-Pie.</b> Multiple measures of a group are displayed as sectors of a half-circle.	

Icon	Description	Rules
<b>Range</b>	<b>Range charts display values as heat maps.</b>	
	<b>Heat Map.</b> Individual values represented as colors.	<p>Non-OLAP:</p> <ul style="list-style-type: none"> <li>• One field, followed by one Measure, required in the Columns location.</li> <li>• One field required in the Rows location.</li> </ul> <p>OLAP:</p> <ul style="list-style-type: none"> <li>• One Dimension level, followed by one Measure, required in the Columns location.</li> <li>• One Dimension level required in the Rows location.</li> </ul>
	<b>Time Series Heat Map.</b> Individual values across dates/times represented as colors.	<ul style="list-style-type: none"> <li>• One Measure required in the Columns location.</li> <li>• One Date/Time field required in the Rows location.</li> <li>• Only available for non-OLAP data sources.</li> </ul>
	<b>Dual Measure Tree Map.</b> Displays data as color-coded rectangles; the size of each rectangle is proportional to the first measure and the color represents the second measure.	<ul style="list-style-type: none"> <li>• Two Measures required in the Columns location.</li> <li>• One field required in the Rows location.</li> <li>• Only available for non-OLAP data sources.</li> </ul>
	<b>Tree Map.</b> Displays data as rectangles; the size of each rectangle is proportional to the measure of the data it represents. The tree map displays nested rectangles when you have more than one field; the parent rectangle represents the leftmost measure while the nested rectangles represent the current level of aggregation. Click on a parent rectangle to drill down to the nest rectangles.	<ul style="list-style-type: none"> <li>• One Measure required in the Columns location.</li> <li>• One or more fields required in the Rows location.</li> <li>• Only available for non-OLAP data sources.</li> </ul>

Icon	Description	Rules
	<b>Parent Tree Map.</b> Displays data as nested rectangles; the size of each rectangle is proportional to the measure of the data it represents. The nested rectangles represent the current level of aggregation while the larger rectangle represents the parent level in the hierarchy. Click on a parent rectangle to drill down to the nest rectangles.	<ul style="list-style-type: none"> <li>One Measure required in the Columns location.</li> <li>Two or more Fields required in the Rows location.</li> <li>Only available for non-OLAP data sources.</li> </ul>
Gauges	<b>Gauges display values as a portion of a radial or arc gauge.</b>	
	<b>Gauge.</b> Displays a single data value as a portion of a circle; the length of the circle is the data's numeric value proportional to the maximum size defined for the measure.	<ul style="list-style-type: none"> <li>One or more Measures required in the Columns location.</li> <li>One or more Fields required in the Columns location.</li> <li>Define the minimum and maximum sizes, color stops, and layout on the Appearance tab.</li> </ul>
	<b>Multi-level Gauge.</b> Displays one or more data values as concentric circles; each circle represents a measure and the length of the circle is the data's numeric value proportional to the maximum size defined for the measures.	<ul style="list-style-type: none"> <li>Two or more Measures required in the Columns location.</li> <li>One or more Fields required in the Columns location.</li> <li>Define the minimum and maximum sizes, color stops, and layout on the Appearance tab.</li> </ul>
	<b>Arc Gauge.</b> Displays a single data value as a portion of a semi-circular arc; the length of the arc is the data's value proportional to the maximum size defined for the measure.	<ul style="list-style-type: none"> <li>One or more Measures required in the Columns location.</li> <li>One or more Fields required in the Rows location.</li> <li>Define the minimum and maximum sizes, color stops, and layout on the Appearance tab.</li> </ul>

### 5.1.6 The Filters Panel

The Filters panel displays any filters defined for the view. You can set the filter values and see the resulting change in the Ad Hoc View panel. To hide the Filters panel, click the < button in the top left corner of the panel. Click the > button or icon on the minimized panel to expand it again.

For more information on working with filters, see “[Using Filters and Input Controls](#)” on page 157.

## 5.1.7 Saving an Ad Hoc View, Previewing and Creating a Report

After you create a compelling table, chart, or crosstab, you can save the view in the repository for future use.

**To save an Ad Hoc view:**

1. Hover your mouse over  .
2. Select **Save Ad Hoc View** or **Save Ad Hoc View As**.
3. Name the view as needed, and click **Save**. The view is saved in the repository.

You can also save an Ad Hoc view as a report. Typically, a report is created when you want to:

- See data in the interactive report viewer.
- Perform additional formatting of the table data.
- Embed the data content in a dashboard.

Create a report from the view by selecting **Save Ad Hoc View and Create Report**; you can also create and run a report directly from the repository. For more information, see “[Running or Creating a Simple Report](#)” on page 58. When you run the report, it is displayed as a JasperReport.

### 5.1.7.1 Dependent Reports

When you create a report from an Ad Hoc view, the report is considered “dependent” on that view.

When you save an Ad Hoc view, some, but not all, of its changes appear in its dependent reports. For example, if you open an Ad Hoc view with a table and adjust the data level for its columns, the column changes will show up in previous reports created from that view.

In cases where changes to an Ad Hoc view could cause errors in dependent reports, you should save the updated view with a different file name and create a new report.

## 5.2 Working with Tables

The following sections explain how to populate, edit, and format your table-type view.

Opportunity	Amount	Probability
<b>BC</b>		
Kobylinski-Verdad Comm - 2900 units - Sally	55,390.00	70.00
Smith-Hensley Electron - 2700 units - Will	5,740.00	85.00
Chapla-Cameron Machine - 3100 units - Will	14,300.00	75.00
Kobylinski-Verdad Comm - 2400 units - Sally	10,390.00	75.00
Smallwood-Chavez Telec - 2900 units - Will	1,580.00	70.00
Smith-Hensley Electron - 1900 units - Will	12,540.00	85.00
E & M Tullao Electroni - 3100 units - Beth	12,240.00	50.00
Chapla-Cameron Machine - 3400 units - Will	150,300.00	35.00
D & Z Kesslep Electron - 4000 units - Max	140,330.00	50.00
Kobylinski-Verdad Comm - 4100 units - Sally	1,190.00	80.00
Caro-Robertson Communi - 2600 units - Beth	120,450.00	80.00
Smallwood-Chavez Telec - 1900 units - Will	200,480.00	80.00
McDonald-Walter Electr - 2700 units - Max	9,510.00	60.00
Smith-Hensley Electron - 2600 units - Will	1,240.00	85.00
I & M Weyerhaeuser Tra - 3100 units - Chris	45,210.00	45.00

**Figure 5-4** Ad Hoc Editor's Table View

### 5.2.1 Using Fields in Tables

Insert data into your table by adding fields. All available fields are listed in the **Data Source Selection** panel, on the left side of the Ad Hoc Editor.

The available fields are divided into two sections in the panel:

- **Fields**, which can be added to the table as columns or groups.
- **Measures**, which are specialized fields that contain data values.

#### To add fields and measures as columns to a table:

1. In the **Data Source Selection** panel, click to select the field or measure you want to add to the table. Use Ctrl-click to select multiple items.
2. Drag the selected item into the **Columns** box in the Layout Band.  
The field is added to the view as a column in the table.

#### To remove a field or measure from a table:

- In the Layout Band, click the **x** next to the field or measure's name.

### 5.2.2 Groups

Groups allow you to create detailed data rows. For example, if you have a table that lists the suppliers for a national restaurant chain, you can group the suppliers by the State field. The suppliers' names are then

rearranged so that all suppliers located in Maine, for instance, are located under a “Maine” header row; suppliers in Maryland are together under a “Maryland” header row, and so on.

You can use multiple fields to make more specific nested groups. By adding a group based on the “City” field to the table described above, the restaurant suppliers are arranged by City within the State groups. Under the “Maine” header row, new header rows for Augusta, Bangor, and Portland are added, and the names of the Maine-based suppliers appear under their respective cities. Under the “Maryland” header row, header rows for Annapolis, Baltimore, and Silver Spring are added, and the names of Maryland-based suppliers appear under those headers, and so on.

Only fields can be applied to a table as a group; measures cannot.

Data is grouped in the table according to the order they have defined. You can change the order by dragging the groups into position if needed.

#### To create a group:

1. In the **Data Source Selection** panel, click to select the field you want to add to the table as a group.
2. Drag the field to the **Groups** box in the Layout Band.

The Ad Hoc view refreshes and displays the data grouped under a new header row.



You can also add a group to the table by right-clicking a field and selecting **Add as Group**.

#### To remove a group:

- In the Layout Band, click the **X** next to the field’s name in the **Groups** box.

#### To move a the grouping order up or down in a table:

- In the Layout Band, drag the name of the group you want to move into its new position.

### 5.2.3 Summaries

You can display summary data for any column in your table. Summary data may be in the form of various functions, such as:

- Sum
- Count
- Distinct Count
- Average

For example, in a table with a list of stores, grouped by City and Country, you can display the number of stores in each City, and in each Country, using this function.

By default, the summary function for each field is defined by the data source, OLAP, or domain definition.

#### To add a summary to a specific column:

- In the table, right-click the column you want to calculate a summary for, and select **Add Summary**. The summary information is added to the group header, or is added to the bottom of a column if no groups are included in the table.

#### To remove a summary from a specific column:

- In the table, right-click the column with the summary you want to remove, and select **Remove Summary**.

The summary information is removed from the table.

**To add or remove summaries from all columns:**

- Click  and select **Detailed Data**.

#### 5.2.4 Column and Header Labels

You can edit a column or header label directly in the Ad Hoc Editor.

**To edit a column or header label:**

1. On the Ad Hoc view panel, right-click the column or group header you want to rename.
2. Select **Edit Label** from the context menu. The Edit Label window opens.
3. In the text entry box, delete the existing name and enter the new name.
4. Click **Submit**.

If space is at a premium, you can remove labels from the view. When you delete a label, it still appears when you look at the view in the Ad Hoc Editor, but does not appear when you run the report.

**To delete a column or header label:**

1. On the Ad Hoc view, right-click the column or header label you want to remove.
2. Select **Delete Label** from the context menu.

**To re-apply a label:**

1. Right-click the column or header label you want to replace.
2. Select **Add Label** from the context menu. The Edit Label window opens.
3. Enter the label name, if needed.
4. Click **Submit**.

#### 5.2.5 Managing Column Size and Spacing

You can change the size of, and spaces between, columns to manage the appearance of your table or use space more efficiently.

**To resize a column:**

1. In the Ad Hoc View panel, click to select the column you want to resize.
2. Move the cursor to the right edge of the column.
3. When the cursor changes to the resize icon (, click and drag the column edge right or left until the column is the needed size.

Spacers can be added to a table to arrange columns farther apart, or add margins to a table.

**To change the spacing between columns:**

1. In the **Data Source Selection** panel, in the Measures section, click **Spacer**.
2. Drag the spacer into the **Columns** box in the Layout Band between names of the two columns you want to move apart.

A spacer column, labeled , appears in the table.

3. Repeat this action to add space as needed between columns.
4. To remove a spacer, right-click the spacer column and select **Remove from Table**.

**To use spacers to create table margins:**

1. In the **Data Source Selection** panel, click to select **Spacer**.
2. Drag the spacer into the **Columns** box in the Layout Band.
3. Repeat until the margins are as wide as needed.
4. Repeat the steps above, adding the spacer to the right edge of the table.

## 5.2.6 Reordering Columns

You can move columns to the right or left to reorder data in your table.

**To reorder a column:**

1. In the Ad Hoc View panel, right-click the column you want to move.
2. Select **Move Right** or **Move Left** from the context menu.

### 5.2.6.1 Sorting Tables

In the Ad Hoc Editor, you can sort the rows of a table by any field, using a number of different methods.

**To sort a table:**

1. Click  . The Sort window appears. If the table is already sorted, the window shows the fields used.
2. To add a field to sort on, double-click the field in **Available Fields**. The Available Fields panel now lists only fields not currently in Sort On.
3. Select one or more fields to sort by. You can also use Ctrl-click to select multiple fields.

4. Click .

5. To arrange the sorting precedence of the fields, select each field in the Sort window and click **Move to top**,

**Move up**, **Move down**, or **Move to bottom**: , , , and .

6. To remove a field, select it and click .

7. Click **OK**. The table updates to display the rows sorted by the selected fields.

You can also sort a table using the following methods:

- Right-click a field in the Fields section of the **Data Source Selection** panel, and select **Use for Sorting** from the context menu. In this case, the table is sorted by a field that isn't in the table; you may want to note the sorting fields in the title.
- Right-click a column header on the Canvas of the **Ad Hoc View** panel, and select **Use for Sorting** from the context menu.



If a column is already being used and you want to stop using it or change the sorting, right-click the column and select **Change Sorting** from the context menu.

### 5.2.7 Adding a Title

1. Above the table, click the text **Click to add a title**.
2. Enter the new table title in the text entry box.

### 5.2.8 Changing the Data Format

You can change the formatting for columns containing numeric data, such as dates and monetary amounts. The format is applied to all rows as well as the group- and view-level summaries. By default, non-integer fields use the -1,234.56 data format; integers use -1234.

**To change the data format for a column:**

1. In the Ad Hoc view, right-click the column header.
  2. Select **Change Data Format** from the context menu.
  3. Select the format you want to use. These options vary, depending on the type of numeric data contained in the column.
- The data in the column now appears in the new format.

### 5.2.9 Changing the Data Source

You may need to select a new data source for your table. This is a simple task, but you should keep in mind that **all view data and formatting are lost when you select a new Topic, Domain, or OLAP connection**. Any changes to the view are also lost if you navigate to another page using the browser navigation buttons, the main menu, or the **Search** field. To preserve changes, accept the current Topic or click **Cancel**.

**To change the table's data source:**

1. At the top of the **Data Source Selection** panel, click and select **Change Source**.
2. Select a different Topic, Domain, or OLAP connection.
3. Click **Table** to apply the new data source.

Click **Cancel** to return to the editor without changing the Topic.

### 5.2.10 Controlling the Data Set

You can control the data displayed in the table using the Canvas Options selector: .

Your options are:

- **Detailed Data**, which displays table detail only. For instance, in a table listing sales in dollars for all stores in a region for a given month, the amount sold by each store that month is displayed.
- **Totals Data**, which displays the table totals only. In the table described above, the total amount of all sales at all regional stores that month is displayed.
- **Details and Totals**, which displays both the individual store sales numbers, as well as the total sales numbers at the bottom of the store sales column.
- **Show/Hide Duplicate Rows**, which displays only the distinct values in your table if you choose to hide the duplicate rows. See **Showing Distinct Values** for more information.

Click to select the option you want to apply to your table.

### 5.2.11 Showing Distinct Values

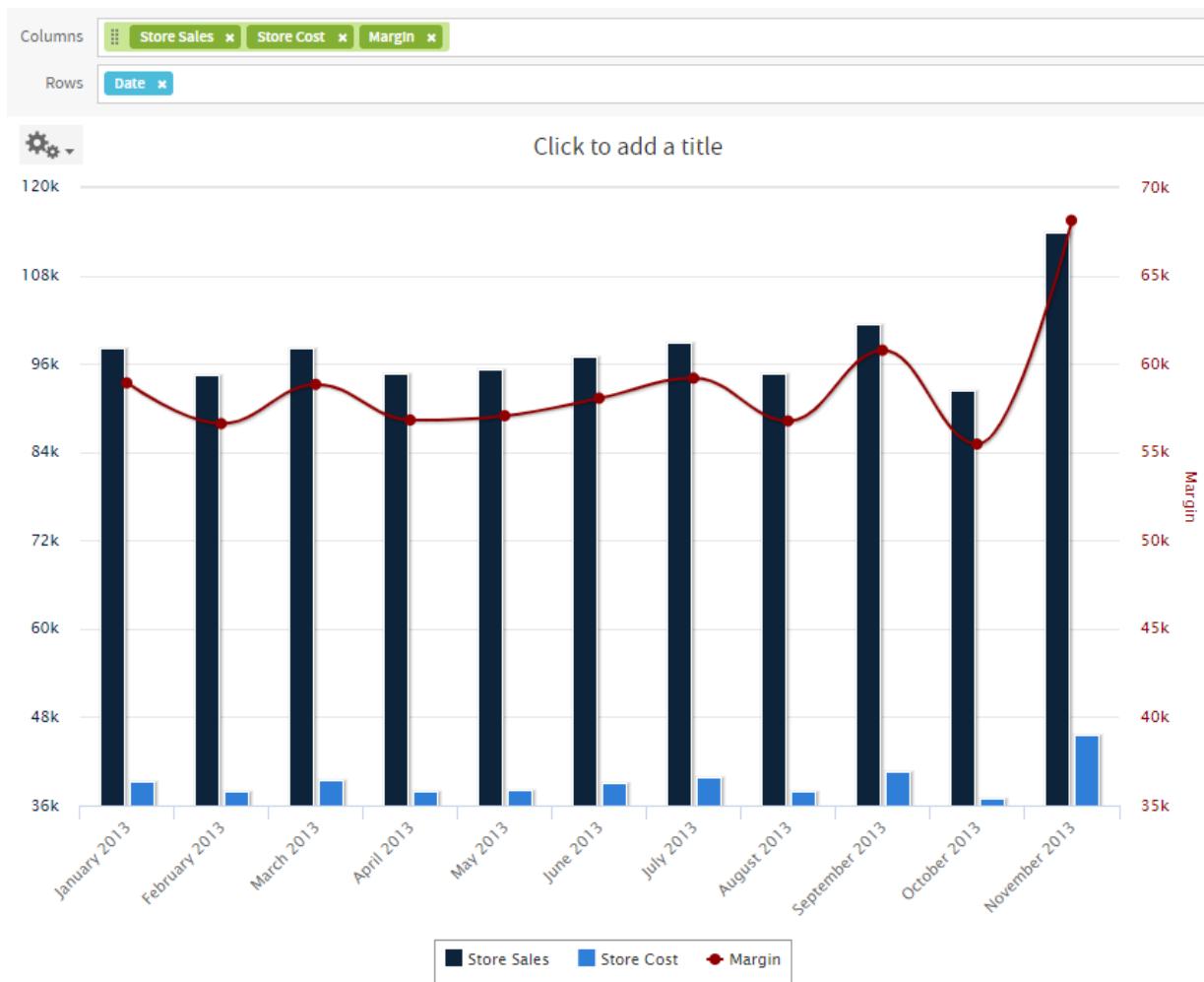
Tables sometimes contain duplicate values in multiple rows, making it difficult to find relevant data. You can choose to show only distinct values in your tables by choosing to hide duplicate rows, making the table shorter and easier to read.

To show only the distinct values in a table, click on the Grid Detail Selector  and choose **Hide Duplicate Rows**.

When you choose to hide duplicate rows, all columns will be sorted in ascending order based on their distinct values by default, but columns explicitly sorted in ascending or descending order by the user will have higher priority. Sorting by hidden fields will have no effect.

## 5.3 Working with Charts

Ad Hoc charts are a flexible, interactive way to explore your data graphically. You can choose different levels of aggregation for rows and columns, change a field from a column to a row, pivot the entire chart, hide chart values, and zoom in to see chart details.



**Figure 5-5 Ad Hoc Editor’s Chart View**

The following sections explain how to populate, edit, and format an Ad Hoc chart. Many tasks related to working with charts are identical (or very similar) to those for tables and crosstabs. For any tasks not discussed in this section, see the information in “[Working with Tables](#)” on page 109.

### 5.3.1 Using Fields and Measures in Charts

You must add at least one measure to view a chart. Before any measures are added to the chart, the Ad Hoc Editor displays a placeholder with the legend displaying a single entry: Add a measure to continue. As you add measures, the editor displays the grand total of each measure in the chart.

The initial display reflects only the measures you add; it does not change when you add fields or dimensions. For example, for each measure you add to a bar chart, you see a bar with the total value of the measure, regardless of how many fields you add. This means you can add, remove, and arrange measures and fields without waiting for the display to update. Once you have the fields and measures you want, you can use the sliders on the right to select the level of detail you want. See [Figure 1-2](#) for more information.

All available fields are listed in the Data Selection panel, as either standard fields or measures.

- Standard fields can be added to a column or a row.
- Measures contain summarized values. They are typically numeric fields that determine the length of bars, size of pie slices, location of points (in line charts), and height of areas. They can be added to rows or columns, but must all be in the same target — that is, you can add one or more measures to the chart as columns, or add one or more measures to the chart as rows, but you cannot have one measure as a column and another as a row in the same chart.

When creating a chart, keep in mind that row and column groups are arranged in hierarchies, with the highest member of the hierarchy on the left. For an Ad Hoc view based on an OLAP data source, you can change the order of distinct dimensions by dragging, but you cannot change the order of levels within a dimension. For an Ad Hoc view based on a non-OLAP data source, you can drag the field headings to rearrange the hierarchy; the highest level in a group should appear to the left; the lowest level in a group should appear to the right. For example, it doesn't make sense to group first by postal code then by country, because each postal code belongs to only one country.

To add a field or measure to a row or column:

1. In the **Data Selection** panel, select the field you want to add to the chart as a group. Use Ctrl-click to select multiple items.
2. Drag the selected item into the **Columns** or **Rows** box in the Layout Band.

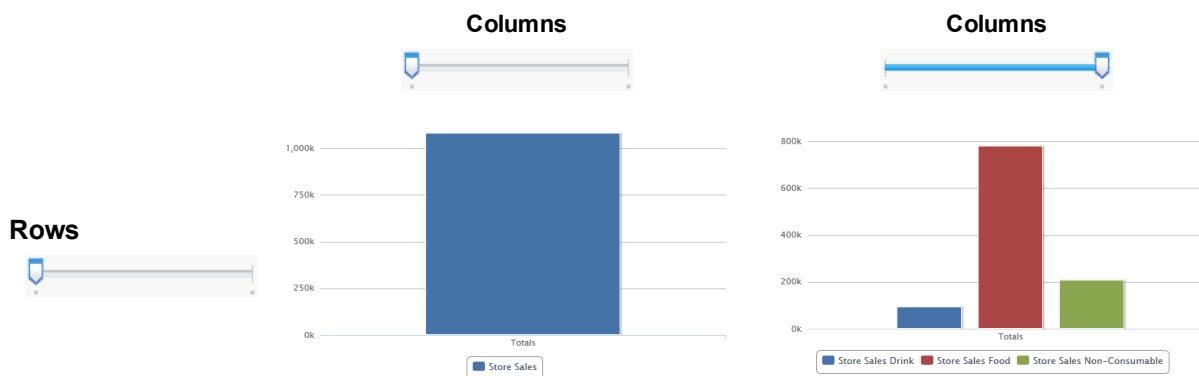
### 5.3.1.1 Setting Levels

When you add a field or dimension to a column or row, a multi-level slider located at the top of the Filters pane allows you to set the level of aggregation to use for viewing the data. The number of fields or dimensions in the row or column determines the number of levels on the slider. Measures are not reflected in the slider.



You cannot adjust levels on time series charts.

The following figure shows the effect of the slider on a chart with one level of aggregation for both rows and columns.





**Figure 5-6 Effect of the Slider on a Chart**

To recreate this view:

1. Select **Create > Ad Hoc View**.
2. In the Select Data wizard, select **foodmart data for crosstab** and click **OK**.
3. Click to open the Visualization Selector.
4. Click and then **Apply and Close**.
5. Drag the following from the Fields panel to the Layout Band:
  - Store Sales from **Measures** to **Columns**. The view changes to show a column with the total. No slider is added for measures.
  - Product Family from **Fields** to **Columns**. The **Data Level** area is shown in the **Filters** panel, with a **Columns** slider added.
  - Date from **Fields** to **Rows**. A **Rows** slider is added to the **Data Level** area in the **Filters** panel.
6. Use the sliders to see how the view changes.

The sliders help you explore your data visually in a number of ways:

- The slider reflects the hierarchy of the row or column groups, as determined by the order in which fields are arranged in the Layout Band.
- Hovering over a setting on the slider shows the name of the field or dimension corresponding to that setting.
- When you pivot a chart, slider settings are preserved and applied to the new target. For example, if you have the **Row** slider set to Month, the **Column** slider is set to Month when you pivot. See “[Pivoting a Chart](#)” on page 119 for more information.
- When you remove the currently selected level from a row or column, the slider is reset to the total; when you remove a field that is not selected, the level remains the same. When you add a field or dimension to a row or column, the number of levels of the slider changes to reflect your addition. When you change the order of the fields in a row or column, the level on the slider changes to reflect the new level of the field corresponding to the selection.

### 5.3.1.2 Changing Date Grouping

If your chart includes data based on a date field, you can change the level of aggregation for the time data. To select the unit of time to chart:

- Right-click on the date field in the Layout Band and select **Change Grouping**. Then select the time period you want from the cascading submenu. The view updates to reflect the new date grouping.



Time Series charts can use only day, or smaller, intervals.

### 5.3.1.3 Changing the Summary Function of a Measure

You can get a new view of your data by changing the summary function of a measure, for example, from sum to average. To select a new summary function for a measure:

- Right-click on the measure in the Layout Band and select **Change Summary Function**. Then select the function you want from the cascading submenu. The view updates to reflect the new summary function.

### 5.3.1.4 Pivoting a Chart

You can pivot a chart in two ways:

- Pivot the entire chart by clicking  . The row and column groups switch places; slider levels are maintained. The following figure shows the effect of pivoting a basic column chart.



**Figure 5-7 Effect of Pivoting a Chart**

- Pivot a single group:
  - To pivot a single row group, right-click it and select **Switch To Column Group**. You can also move any field or dimension by dragging. You cannot drag a measure to a different group.
  - To pivot a single column group, right-click it and select **Switch To Row Group**. You can also move any field or dimension by dragging. You cannot drag a measure to a different group.

## 5.3.2 Formatting Charts

You can control some aspects of how data points, field names and labels are displayed on your chart, including:

- Whether data points are displayed.
- Showing a measure name on charts including only a single measure.
- Restricting the number of labels displayed.
- Rotating the direction of label text.
- Selecting the colors used by the chart.
- Defining how gauges are displayed.

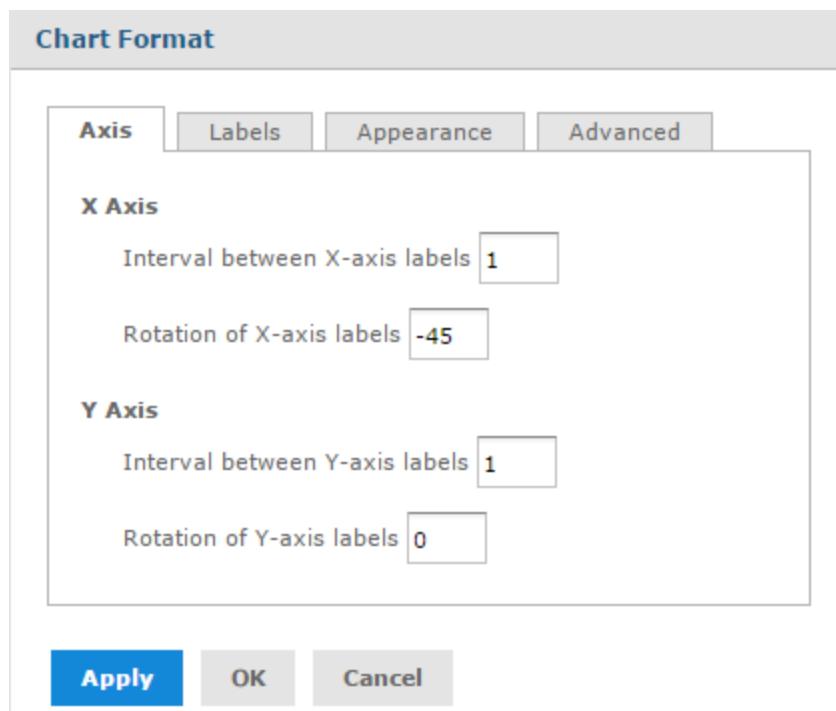
JasperReports Server also allows you to edit many of the chart's properties for cases when you want more control over the appearance of a chart.

### 5.3.2.1 Displaying Data Points

You can choose whether to display data points in your line, time series, or area chart. Data points can help users visualize chart data more accurately.

**To show data points on a chart:**

1. In the Ad Hoc View panel, click the  icon.
2. Select **Chart Format...** from the menu. The **Chart Format** window is displayed.
3. Click the **Appearance** tab and select **Show data points on line charts**.
4. Click **OK**. The name appears along the value axis.
5. To remove data points from the chart, open the **Appearance** tab and deselect **Show data points on line charts**.



**Figure 5-8 Chart Format Window**

### 5.3.2.2 Displaying the Measure Name on the Value Axis

By default, in charts that include only a single measure, that measure's name is not displayed. For instance, if your measure displays the number of employees for each store in the region, that measure's label appears along the Y- (or value) axis, but the name of the measure ("Number of Employees" or similar) does not. You can, however, choose to display that measure name to clarify the information on your chart.

**To show a measure name on the value axis:**

1. In the Ad Hoc View panel, click the  icon.
2. Select **Chart Format...** from the menu. The **Chart Format** window is displayed.
3. Click the **Labels** tab.
4. Select **Show measure name on value axis**.
5. Click **Apply**, then **OK**. The name appears along the value axis.
6. To remove a measure name, open the **Labels** tab and deselect **Show measure name on value axis**.

**5.3.2.3 Restricting Label Display**

By default, every field included in your chart has a label displayed along either axis. Measures will show up as numeric values, often along the Y axis, and fields being measured will show up as text along the X axis. On some charts - especially those with many included fields - these labels may overlap, crowd together, or become difficult to read. You can alleviate this problem by "stepping," or reducing, the number of labels displayed on your chart.

**To reduce the number of labels on your chart:**

1. In the Ad Hoc View panel, click the  icon.
2. Select **Chart Format...** from the menu. The **Chart Format** window is displayed.
3. Click the **Axis** tab.
4. In the **Interval between X-axis labels** numeric entry box, specify how often you want the axis label to appear. For instance:
  - To display every second label, enter 2.
  - To display every third label, enter 3, and so on.
5. Repeat this process in the **Interval between Y-axis labels** numeric entry box.
6. Click **Apply**, then **OK**. The labels appear as entered.
7. To display every label, open the **Axis** tab and enter **1** in the numeric entry boxes.

**5.3.2.4 Rotating Label Text**

By default, labels on your chart are displayed horizontally. Multiple labels, or very long ones, can be difficult to read. You can change the direction of these labels, on both the X and Y axes, to improve chart readability.

**To rotate label text:**

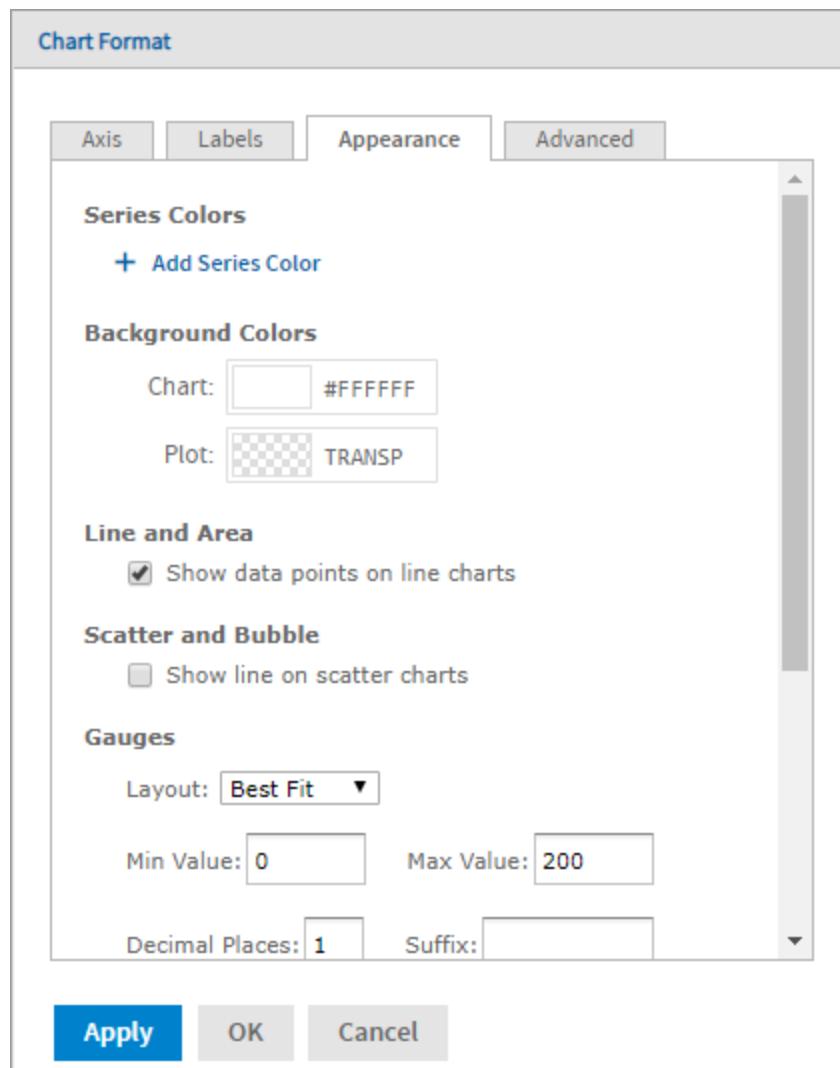
1. In the Ad Hoc View panel, click the  icon.
2. Select **Chart Format...** from the menu. The **Chart Format** window is displayed.
3. Click the **Axis** tab.
4. In the **Rotation of X-axis labels** specify the degree of rotation to apply to labels. For instance:
  - To rotate labels clockwise 90 degrees, enter 90.
  - To rotate labels counter-clockwise 90 degrees, enter -90.
  - To rotate labels clockwise 45 degrees, enter 45, and so on.
5. Repeat this process in the **Rotation of Y-axis labels** entry box for measures along the Y axis.
6. Click **OK**. The labels are rotated.
7. To return the labels to their original, horizontal position, open the **Axis** tab and enter **0** in the numeric entry boxes.

### 5.3.2.5 Changing the Chart's Colors

You can choose the colors of your chart by defining a series of colors for it to use. You can also choose the background's colors.

To choose the chart's colors:

1. In the Ad Hoc View panel, click the  icon.
2. Select **Chart Format...** from the menu. The **Chart Format** window is displayed.
3. Click the **Appearance** tab.



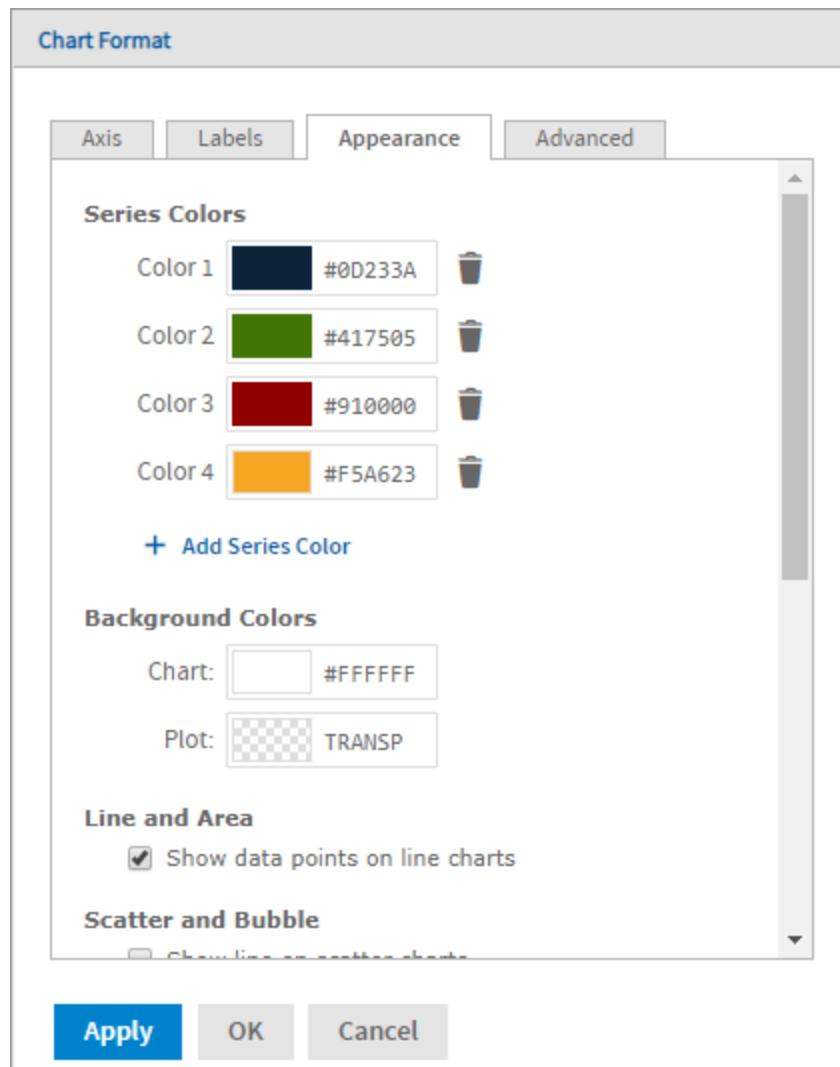
**Figure 5-9 Appearance Tab**

4. Under **Series Colors**, click **+ Add Series Color** to add the first color. The color picker button appears. The button will display a color and a corresponding Hex value.
5. Click on the button to open the color picker window.
6. Select the color you want to use.

7. Click outside the color picker window to close it.
8. Click **+ Add Series Color** to add additional colors.



The order of the colors added to the chart is the order they appear in the series.



**Figure 5-10 Appearance Tab with Multiple Colors in Series**

9. You can change the colors of the charts background and plot using the color picker buttons under **Background Colors**.
10. When you are done adding colors to the chart, click **OK**.  
JasperReports Server reloads the chart with the new colors.

### 5.3.2.6 Changing the Display Settings for Gauges

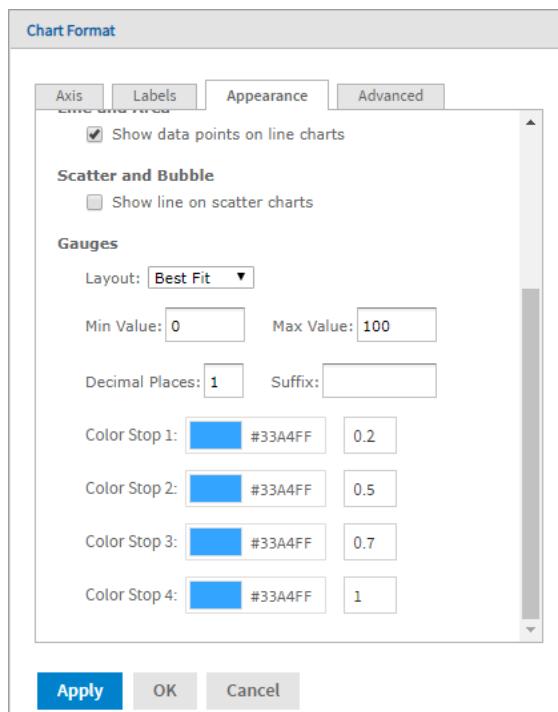
Gauges are circular and semi-arc charts. The length of the circle or semi-arc is based on a single data value in proportion to the minimum and maximum measurement amounts you define.

Gauges have their own display settings on the **Appearance** tab, where you can select how they appear in the Ad Hoc view. You can specify the layout of the gauges on the canvas, the color stops, and the minimum and maximum values for the gauge's measure.

The settings on the Appearance tab apply to all gauges in the Ad Hoc view.

#### To edit a gauge's display settings:

1. In the Ad Hoc View panel, click the  icon.
2. Select **Chart Format...** from the menu. The **Chart Format** window is displayed.
3. Click the **Appearance** tab.



**Figure 5-11 Gauge Settings on the Appearance Tab**

4. Under **Gauges**, select the layout for displaying the gauges. By default, the layout is Best Fit, which displays all of the gauges on the canvas in one or more rows. The gauges can also be displayed in a single vertical column or a single horizontal row.
5. Enter the minimum and maximum values for the gauge's measure. For gauge and arc gauge charts, each measure added to the Ad Hoc view will be displayed as its own gauge and the gauge's circle or arc represents how a single data value in the data source compares to the maximum measure. For multi-level gauge charts, each measure is displayed as concentric circles in the gauge. By default, the minimum is 0 and the maximum is 100. The measures selected for the Ad Hoc view also determine whether to display the data as percentages or as numeric values.

6. Enter the number of decimal places to show as part of the value displayed in the gauge. The maximum number of decimal places you can specify is 8.
7. Enter a suffix string if you want to label the value displayed in the gauge.
8. Enter a value for each color stop for the gauge. Color stops define a gradient progression for the gauge's colors in the Ad Hoc view. The default color stop values are 0.2, 0.5, 0.7, and 1.



You can have a maximum of four color stops in your gauge. Each color selected is the specific color displayed at the corresponding stopping point. The colors displayed in the gauges are based on where the gauge's value falls on the defined gradient.

9. Click on the color picker button for each stop to open the color picker window and select the color.
10. When you are done changing the colors, click **OK**.

JasperReports Server reloads the Ad Hoc view's gauges with the new display settings.

### 5.3.2.7 Changing the Chart's Appearance Using Advanced Formatting

The **Advanced** tab on the **Chart Format** window gives you more control over the appearance of an Ad Hoc chart by allowing you to edit certain chart properties. For example, you can specify a list of colors for the chart, change the position of the legend, choose whether to display data values in the chart, and much more. You can find a full list of supported commands by clicking the **More Information** link on the **Advanced** tab or browsing to the [Advanced Chart Formatting page](#) on the Jaspersoft Community Site.

#### To edit the chart's properties:

1. In the Ad Hoc View panel, click the icon.
2. Select **Chart Format...** from the menu. The **Chart Format** window is displayed.
3. Click the **Advanced** tab.
4. Click **Add New Property**.
5. In the Property field, enter the chart property you want to format and then enter the value(s) for the property. For instance:
  - To format the chart's colors, enter colors for the property and a comma-separated list of colors in brackets for the values, such as ["red", "blue", "green", "magenta", "purple", "black", "yellow"].
  - To change the vertical alignment of the legend, enter legend.verticalAlign for the property and "top" or "bottom" or "center" for the value.
  - To display data values on the chart, enter plotOptions.series.dataLabels.enabled for the property and true for the value.

Click the **More Information** link to see a list of the properties you can edit.



The Ad Hoc Designer does not validate the property name or values. The chart will ignore any invalid property you enter.

6. Click to save the property formatting.
7. Click **OK**. The chart is updated with the new formatting.
8. To remove the formatting, open the **Advanced** tab and click next to the property you want to remove.

### 5.3.3 Interacting with Charts

Once you have chosen rows and columns and selected the type of chart you want, you can further explore your data using interactive features such as brushing an area of the chart to zoom in or clicking on a legend to hide the members of a group.

#### 5.3.3.1 Zooming

Zooming lets you view a specific area of a chart more closely. Zooming can also be helpful when the labels at the bottom of a chart are difficult to read, because only the labels corresponding to the selected area are displayed.



Zoom is a viewing feature of the Ad Hoc Editor. When you save an Ad Hoc view, or create a report from an Ad Hoc view, the zoom is automatically reset to show the whole chart.

##### To zoom in on an area of a chart:

- Click and drag or brush the area you want to zoom in on. As you are dragging or brushing a pale blue area indicates your selection. When you release the mouse button, the view zooms in on the area you selected.

##### To view the whole chart again:

- Click **Reset zoom** at the upper right of the canvas.

The following images show a bar chart before and after zooming:

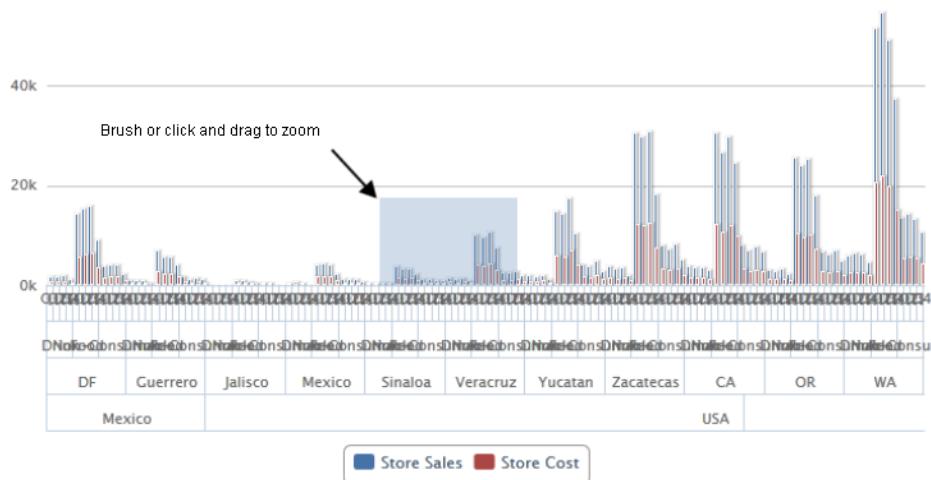


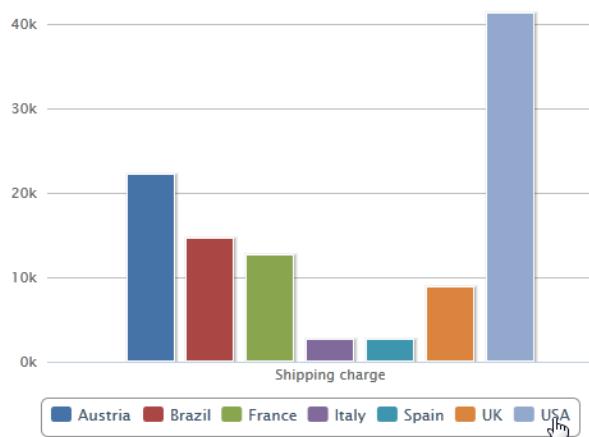
Figure 5-12 Selecting a Zoom Area

**Figure 5-13 Area After Zooming**

### 5.3.3.2 Hiding Group Members

Use the legends below the chart to hide or show group members.

- To hide a group member, click the member name in the legend below the chart. The member is removed from the chart and the legend is grayed out.
- To unhide a group member that has been hidden, click the grayed-out legend for the member.

**Figure 5-14 Hiding a Group Member**

Hidden members are a view feature of the Ad Hoc Editor. When you save an Ad Hoc view, or create a report from an Ad Hoc view, the chart is automatically reset to show all members.

## 5.4 Working with Standard Crosstabs



This section describes crosstabs based on Topics and Domains. For information about crosstabs based on OLAP connections, refer to “[Working with OLAP Connection-based Crosstabs](#)” on page 132 and “[Working with Topics](#)” on page 169.

Crosstabs have different data, layout, and format options than tables or charts.

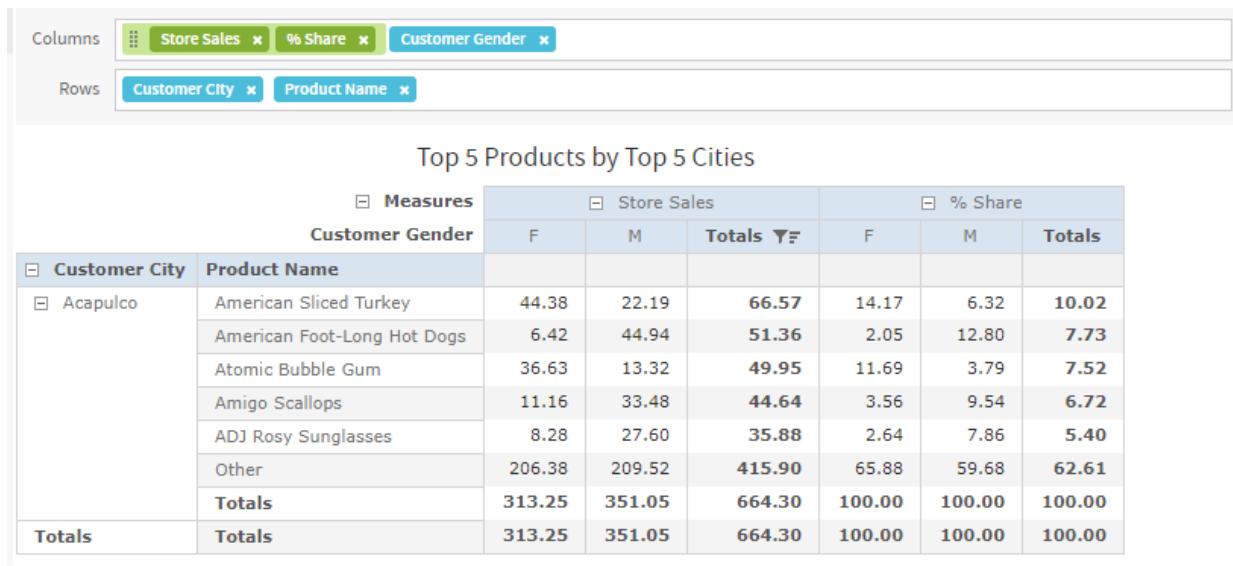


Figure 5-15 Ad Hoc Editor's Standard Crosstab View

If you selected Crosstab when you created a view, as described in “[Ad Hoc View Types](#)” on page 95, the following sections explain tasks specific to your crosstab development.

## 5.4.1 Using Fields in Crosstabs

Fields can be added to crosstabs as row groups or column groups. Measures can be added to crosstab rows or columns as well, but all measures must be included as either a row or a column – that is, you can add one or more measures as columns, or add one or more measures as rows, but you cannot have one measure as a column and another as a row in the same crosstab.

### 5.4.1.1 Crosstab Rows and Columns

When creating a crosstab view, keep in mind that row and column groups are arranged in hierarchies. Drag the group headings to rearrange the hierarchy; you can also right-click a heading and select a **Move** option from the context menu or press the cursor keys. Rearranging the groups may change the preview data in the editor.

#### To add a field or measure to a crosstab group:

1. In the **Data Source Selection** panel, click to select the field(s) you want to add to the crosstab as a group. Use Ctrl-click to select multiple items.
2. Drag your selection into the **Columns** or **Rows** box in the Layout Band.

### 5.4.1.2 Crosstab Measures

Measure labels are displayed in the crosstab based on their status as a row or column:

- Measures included as rows appear in the crosstab below the **Measures** heading.
- Measures included as columns appear in the crosstab to the right of the **Measures** heading.

You can right-click a measure in the crosstab to open a context menu that provides these options:

- **Change Summary Calculation**
- **Change Time Balance Calculation**

- **Change Data Format**
- **Remove From Crosstab**
- **Create Filter**
- **Move Up or Move Down or Move Left or Move Right**

Measures are arranged in cells. You can add any number of measures. All the measures appear together in every cell. To rearrange the measures, drag them in the measure label area.

#### 5.4.1.3 Pivoting

You can pivot a crosstab in two ways:

- Pivot the entire crosstab by clicking . The row and column groups switch places. For more information, see “[Creating a View from a Domain](#)” on page 164.
- Pivot a single group:
  - To pivot a single row group, right-click it and select **Switch To Column Group**.
  - To pivot a single column group, right-click it and select **Switch To Row Group**.



Pivoting removes any custom sorting applied to headings in your crosstab. It does not affect column or row sorts.

#### 5.4.1.4 Slicing

The slice feature lets you keep or exclude group members in a crosstab. To slice, right-click a group member and select:

- **Keep Only** to remove all groups except the selected one from the crosstab.
- **Exclude** to remove this group from the crosstab.

Use Ctrl-click and Shift-click to select multiple groups to keep or exclude.



You can select multiple row groups or multiple column groups; you can't slice by both row groups and column groups at once. Compare slice to drill-through, drill to details, and filtering.

For more information about filtering, see “[Using Filters and Input Controls](#)” on page 157.

#### 5.4.1.5 Summarizing

All row and column groups are summarized automatically:

- To turn off a group summary, right-click any heading in the group and select **Delete Row Summary** or **Delete Column Summary** from the context menu. To reapply the summary, right-click the heading and select **Add Row Summary** or **Add Column Summary**.



The Delete Summary option is available only for the outermost group on either axis (that is, either the outermost row group or the outermost column group)

- To select the summary function and data format for a measure, right-click the measure label and select from the context menu. Note that you can't change the summary function on custom fields that calculate percents (Percent of Total, Percent of Column Group Parent, and Percent of Row Group Parent).
- The summary functions for numeric fields are Sum, Average, Maximum, Minimum, Distinct Count, and Count All. Distinct Count is the number of different items in the row or column; Count All is the total number of items. For instance, if there are 3 widgets of type A and 3 widgets of type B, Distinct Count is 2 and Count All is 6.

#### 5.4.1.6 Collapsing and Expanding Members

By default, the editor displays each row and column group of a crosstab in a collapsed state. This means you can see the totals for the group, but not the measures for its individual members. To see measures for a group's members, right-click the group label and select **Expand Members**.

When a group's members are expanded, select **Collapse Members** from the same menu to hide the measures. Collapsing an outer group also collapses its inner groups. The **Expand Members** and **Collapse Members** options are available only for outermost groups, or for inner groups nested in an expanded outer group.

When you collapse a group, its summary is automatically displayed; this prevents invalid crosstab layouts in which there is nothing to display for some totals if the summary has been deleted previously.

#### 5.4.1.7 Merging and Unmerging Crosstab Cells

By default, the editor merges cells containing the same data into a larger, single cell to make the crosstab data easier to read. The following image shows a crosstab with merged cells.

To display all of the individual cells in the crosstab instead of merged cells, hover over  and select **Unmerge crosstab cells**. The following image shows a crosstab with unmerged cells.

To merge the crosstab cells, hover over  and select **Merge crosstab cells**.

#### 5.4.1.8 Sorting

By default, the rows and columns of crosstabs are sorted in alphabetical order of the group names.

##### To sort your crosstab:

- Right-click the heading you want to use for sorting and select one of these options:
  - Sort Ascending**
  - Sort Descending**
  - Don't Sort**

The crosstab is updated to reflect your sorting option. A blue dot appears in the context menu next to the currently applied sort option.

When the crosstab includes more than one row group or more than one column group, the inner groups are also sorted according to your selection. Only one measure can be used for sorting at any one time; changing the sort order for another measure resets all others to the default.

##### To filter top or bottom N values:

You can filter the numeric data shown in a crosstab to show only the rows with the top or bottom N values, where N is a number that you specify. For example, you can filter a crosstab to display only the top 10 values in a column.

- Right-click the heading you want to use for filtering and select one of these options:
  - Filter Top N Values**
  - Filter Bottom N Values**
  - Don't Filter Values**
- Enter the number of values you want to show in the crosstab.
- Select whether to show an aggregate of the unranked values in the crosstab.
- Select whether to apply the filter across all row groups.
- Click **OK**.

The crosstab is updated to reflect your filter option. The  icon appears in the heading when filtering a column for the top N values, while the  icon appears when filtering for the bottom N values. A blue dot appears in the context menu next to the currently applied filter option. Only one measure can be used for filtering at any one time; changing the filtering or sort order for another measure resets the filtered column.

#### 5.4.1.9 Changing How Totals Are Calculated Using Time Balance

By default, crosstabs show the Totals of numeric values as the sum of the values in a column. For example, if the crosstab view displays product sales grouped by month, the crosstab displays the total sum sold during those months as the Totals value.

You can change the data that the crosstab displays as the Totals value for a period of time using the Time Balance options. These options allow you to change the Totals to display the first and last numeric values for the period. For example, if you want to see the number of products left in your inventory at the end of a certain time period, use the Time Balance Last option and the Totals fields will display the last numeric value entered for the time period. If you want to see the number of products in your inventory at the beginning of the time period, use the Time Balance First option.



Changing the time balance calculation requires the crosstab to use the Date field. You cannot drill through the data when using a Time Balance option other than the default or when using Day of Week for the grouping.

##### To change the totals calculation using time balance:

1. In the Ad Hoc view, right-click the column or row header.
2. Select **Change Time Balance** from the context menu.
3. Select the option you want to use. You can select one of the following:
  - Time Balance Default. This option displays the sum of all the numeric data for a period of time as the Total value.
  - Time Balance First. This option displays the first numeric value for a period of time as the Total value. For example, if the period of time is a month, the crosstab will display the first numeric value entered for the month.
  - Time Balance Last. The option displays the last numeric value for a period of time as the Total value. For example, if the period of time is a month, the crosstab will display the last numeric value entered for the month.

The crosstab is updated to show the new Total values.

#### 5.4.1.10 Changing the Data Format

You can change the formatting for rows and columns containing numeric data, such as dates and monetary amounts. By default, non-integer fields use the -1,234.56 data format; integers use -1234.

##### To change the data format for a column:

1. In the Ad Hoc view, right-click the column or row header.
2. Select **Change Data Format** from the context menu.
3. Select the format you want to use. These options vary, depending on the type of numeric data contained in the column.

The data in the column or row now appears in the new format.

#### 5.4.1.11 Resizing and Layout

Many of the layout and formatting options that are set manually in tables are set automatically in crosstabs. In particular, row and column sizes are fixed and no spacer is available.

#### 5.4.1.12 Drilling Through Data

Drill-through functionality is available for crosstab data. A drill-through table displays the supporting details for the selected roll-up value.

**To view the drill-through table for a value in your crosstab:**

- Click hyperlinked data to display additional columns from that specific fact data.

By default, the drill-through table opens in its own window or tab, depending on your browser settings.

## 5.5 Working with OLAP Connection-based Crosstabs

An OLAP connection is a definition for retrieving OLAP data for use in Ad Hoc views and reports. An OLAP connection is either a direct Java connection (Mondrian connection) or an XML-based API connection (XML/A connection). You must create OLAP client connections in order to use this functionality, which may be restricted by your license. For more information on creating OLAP client connections, as well as other administrative tasks regarding OLAP, refer to the *TIBCO Jaspersoft OLAP User Guide*.

The Ad Hoc Editor displays a more focused tool bar when your Ad Hoc view is based on an OLAP connection. It contains a subset of the options available in the standard tool bar, including Display Mode, Redo, Undo All, Switch Group, Display Options, and View MDX Query. For a description of these options, see **Table 5-1**.

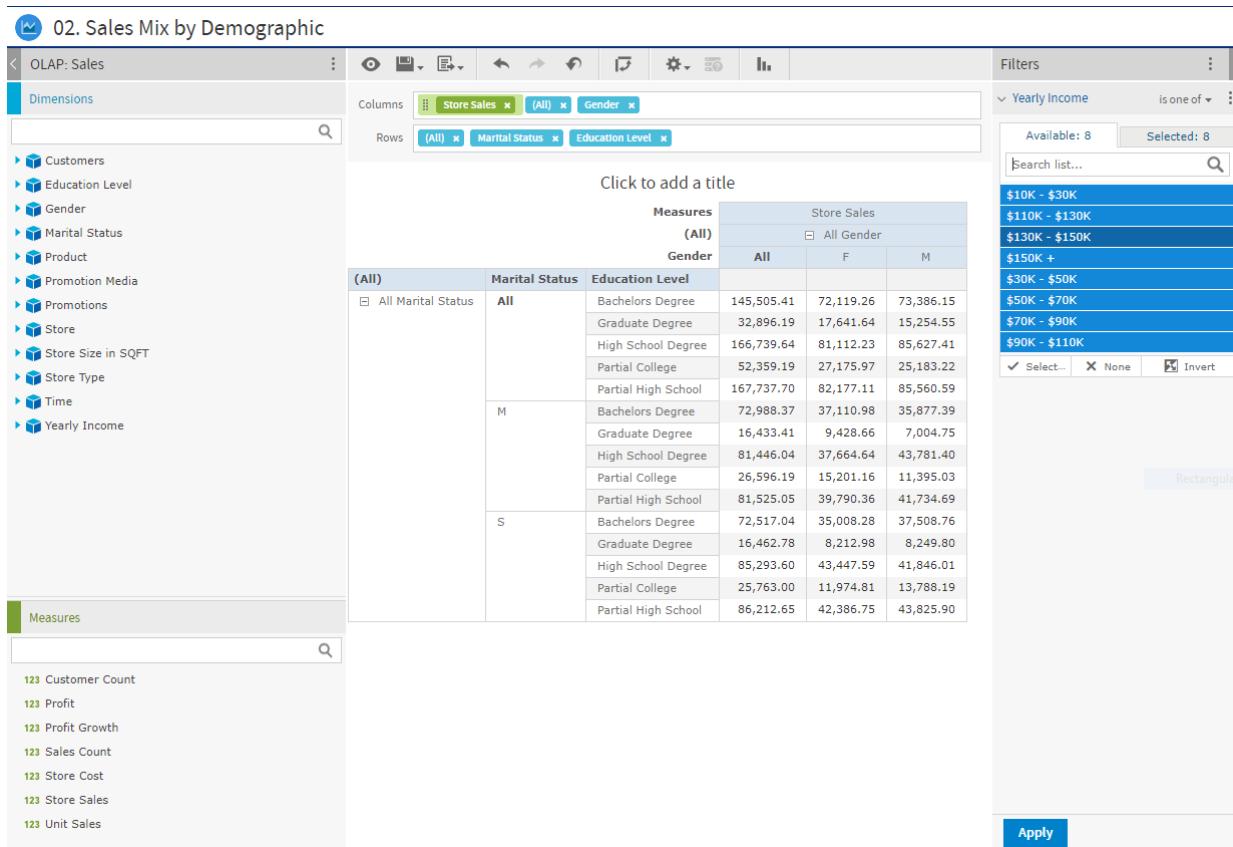


Figure 5-16 Ad Hoc Editor's OLAP Connection-based Crosstab View

### 5.5.1 Dimensions and Measures

When you create a view based on an OLAP connection, the cube metadata defined in the connection's OLAP schema is automatically applied to your data: the dimensions and measures in the cube are shown in the Data Source Selection panel.

Dimensions and measures describe your data in terms of these organizing principles and facts:

- **Dimension:** A categorization of the data in a cube. For example, a cube that stores data about sales figures might include dimensions such as time, product, region, and customer's industry. A dimension is a hierarchical series of relationships in which each level has a parent and may also have children. Note that a level is a particular location within the dimension, whereas a member is a specific data element at a particular level. For example, if the dimension is Geography, then one of its levels might be Country; at the Country level, USA might be a member.  
Some dimensions include a special level at the top of the hierarchy that includes every level in the dimension. This All member is used to display the summarized data across the dimension. The All member of dimensions is a common feature in many OLAP solutions.
- **Measure:** A field that displays the facts that constitute the quantitative data in a cube. For example, a cube that stores data about sales figures might include measures such as unit sales, store sales revenue, and store sales cost.

The items in the **Dimensions** section of the Data Source Selection panel may appear in a multi-level tree structure. You can add the entire dimension tree, or any sub-trees, to your crosstab by dragging the top-level name into the Layout Band. Individual items can be added to the crosstab in the same manner.

Items in the Measures section are organized into a single-level list. Any calculated measures are indicated by a calculation icon .

When working with OLAP connections, the Layout Band at the top of the Ad Hoc View panel allows you to drag and drop dimensions and measures into the crosstab. As you add columns and rows, the crosstab automatically builds on the panel. In the **Columns** and **Rows** fields, each item in your crosstab is represented as a token; drag tokens left and right to change their position on an axis or drag them between the fields to pivot them.

The cube metadata applied to your view provides structure to your crosstab: you can add a dimension with any number of levels, but it must follow the hierarchy defined in the cube. For example, if a dimension's levels are Country, State, and City, you can place any one of them in the crosstab, but if you add two or more, their order (defined in the OLAP schema) is enforced. For example:

Possible	Impossible
Country, State, City	State, Country, City
Country, City	City, Country
State, City	City, State
Country, State	State, Country

In addition, you can't mix members from different dimensions. For example, consider a crosstab that includes both a Geography dimension (Country, State, and City) and a Time dimension (Year, Quarter, and Month): you can't insert the Year level between the Country and State levels. The levels of each dimension are always kept together.

All measures in the crosstab must be either rows or columns. You can't have measures on both axes at the same time. To move measures between dimensions, right-click and select **Switch To Column Group** or **Switch To Row Group**. All the measures move to the other axis.

### 5.5.2 Drilling Through Data

Drill-through functionality is available for crosstab data. A drill-through table displays the supporting details for the selected roll-up value.

**To view the drill-through table for a value in your crosstab:**

1. Click hyperlinked data to display additional columns related to that information.
2. Use the page controls to navigate the table.

The drill-through table opens in its own window or tab, depending on your browser settings.

### 5.5.3 Sorting

Like standard crosstabs, the rows and columns of an OLAP crosstab are sorted in alphabetical order of the group names.

**To change the sorting of your OLAP crosstab:**

- Right-click the heading you want to use for sorting and select one of these options:
  - **Sort Ascending**
  - **Sort Descending**
  - **Don't Sort**

The crosstab is updated to reflect your sorting option. A blue dot appears in the context menu next to the currently applied sort option.

When the crosstab includes more than one row group or more than one column group, the inner groups are also sorted according to your selection. Only one measure can be used for sorting at any one time; changing the sort order for another measure resets all others to the default.

#### 5.5.4 Viewing the MDX Query

You may want to view the MDX query created for the OLAP connection used with your crosstab, to verify what data users are hitting. If this option is enabled, you can do this in the Ad Hoc Editor with the **View Query** button.

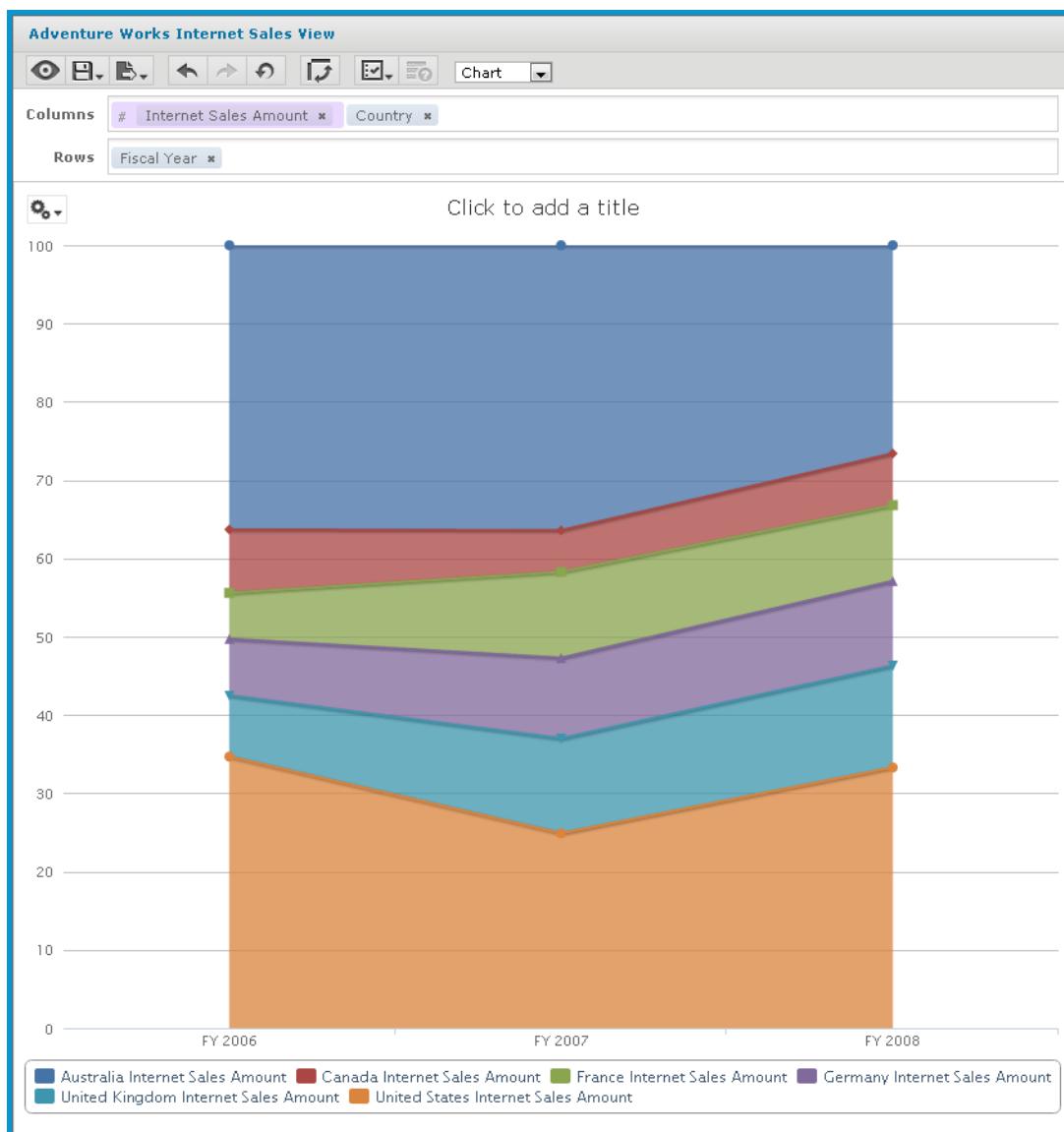
The query is read-only, but can be copied to a document for review.

**To view the MDX query:**

- In the tool bar, click  . The View Query window opens, displaying the query.

#### 5.5.5 Working with Microsoft SSAS

The Ad Hoc Editor allows you to view data from Microsoft SQL Server Analytical Services (SSAS) to populate views and reports with multi-dimensional OLAP data. XML/A connections that point to your SSAS data are listed with the other OLAP connections when you create an Ad Hoc view, as in the following chart example.



**Figure 5-17 Search Results Listing**

For details, refer to the *TIBCO Jaspersoft OLAP User Guide*.

## 5.6 Calculated Fields and Measures

You can create new fields or measures in an Ad Hoc view by applying formulas to a view's existing fields and measures. For example, consider a view that includes both a Cost and a Revenue field. You could calculate the profit for each record by creating a custom field that subtracts the Cost field from the Revenue field. For example, you can divide the Profit custom field in the previous example by the Revenue field to express each record's margin as a percent.

If you have installed the samples, the Ad Hoc view **10. Calculated Fields and Measures** includes examples of calculated fields (shown by the icon ) or calculated measures (shown by the icon ). You can explore their formulas by right-clicking the field or measure name and selecting **Edit**. You can also create tables, charts, or crosstabs to see how these calculations work in views.

## 5.6.1 Overview of the Calculated Fields Dialog Box

The **Calculated Field** or **Calculated Measures** dialog box allows you to create a calculated field or measure and set its summary function. This section describes the functionality available in this dialog box.

### To open the calculated fields dialog box for Ad Hoc views:

1. Create or open an Ad Hoc view.
2. Open the calculated fields dialog using one of these methods:
  - Click at the top right of either the **Fields** section or the **Measures** section of the Data Source Selection panel and select **Create Calculated Field...** from the context menu.
  - Right-click on an existing calculated field (shown by the icon ) or calculated measure (shown by the icon ) and select **Edit**.

The dialog displays a text field for the name and two tabs, **Formula Builder** and **Summary**.



The following are reserved words and cannot be used as field names: AND, And, and, IN, In, in, NOT, Not, not, OR, Or, or. Names containing these strings, such as "Not Available", can be used.

### 5.6.1.1 The Formula Builder Tab

The Formula Builder tab is where you create the formula for your calculated field or measure. This tab includes the following:

- Formula entry box — Shows the current formula for calculating your field or measure. You can edit the formula by typing directly in the panel. You can also add Fields, Measures, and Functions by double-clicking them. Click the buttons below the Formula field to add operators. Formulas must use the following syntax:
  - a. Labels for fields and measures must be in double quotes ("): "Customer ID", "Date ordered".
  - b. Text must be in single quotes (): '--'.
  - c. Levels must be in single quotes (): 'ColumnGroup', 'Total'. See **Levels in Aggregate Functions** for more information about levels.

For more information on syntax, see **Calculated Field Syntax**.

- Operator buttons — Click these buttons to insert the operator in the Formula entry box. For more information on operators, see **Operators in Ad Hoc Views**
- Fields and Measures — Lists all the fields and measures currently in your Ad Hoc view, including any calculated fields or measures you have already created.
- Functions — Lists all the available functions you can use in your formula. For more information, see **Calculated Field Reference**.
- Function Description panel — Gives a brief description of the function selected in the Functions list, if any. The sample inputs are intended to be as descriptive as possible. See **Calculated Field Reference** for the precise syntax each function requires.
- Show arguments in formula checkbox — When this checkbox is selected, double-clicking a function name in the Functions list adds the full description to the Formula entry box; when the checkbox is not selected, double-clicking a function name adds only the function. For example, double-clicking Round adds Round

("NumberFieldName", Integer) when the checkbox is selected, and adds Round() when the checkbox is not selected. If you select this checkbox, you can double-click on a string, such as NumberFieldName, and then replace it by double-clicking a name in the Fields and Measures list.

- Validate button — Checks the formula for syntax errors, such as missing parentheses or quotes. Your calculated field or measure must be valid before you can create it. Syntax validation does not guarantee that your formula will give the results you want.

#### 5.6.1.2 The Summary Tab

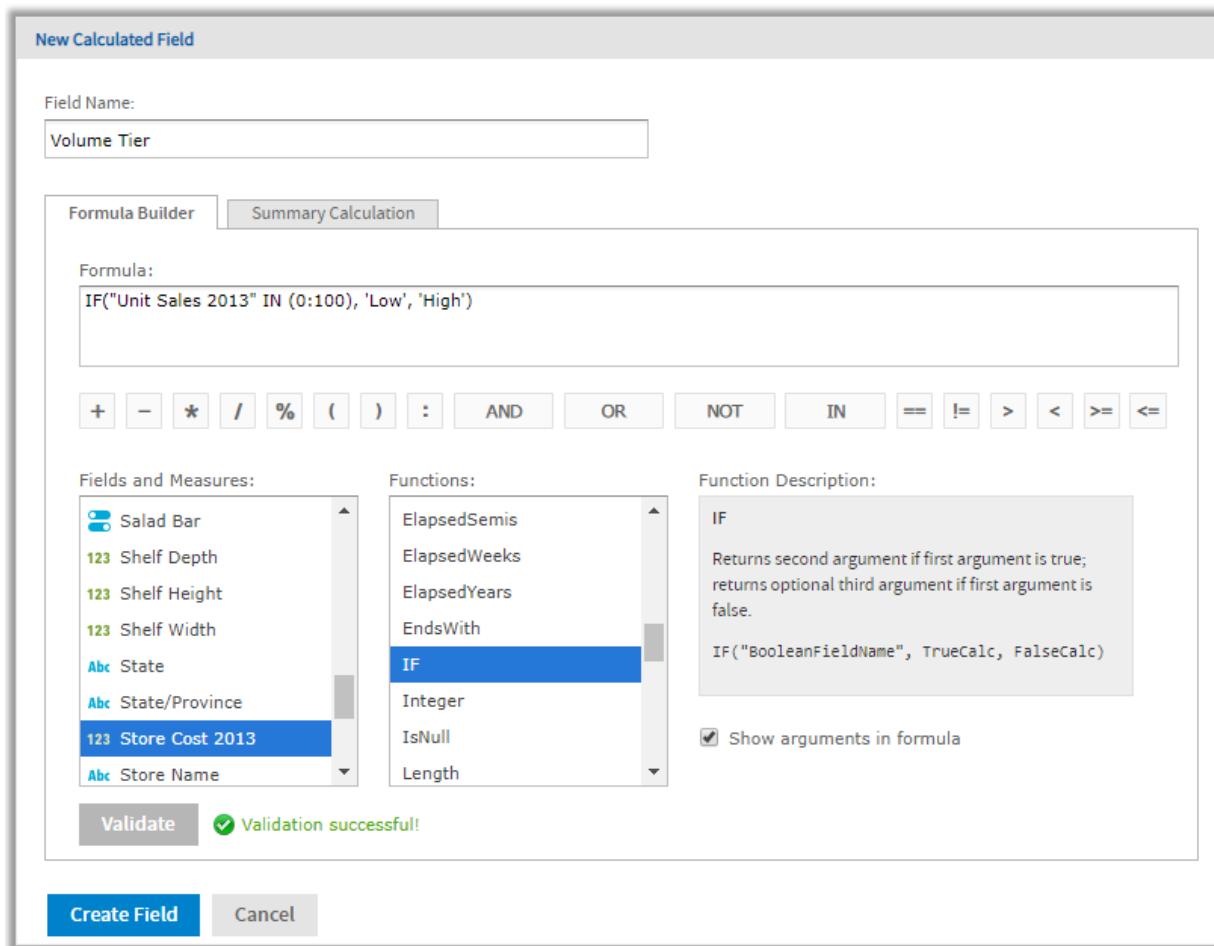
Summaries show a result applied to all data values. For example, for a numeric fields such as Cost, the summary value might be the sum of all the costs; for a text field such as Customer Name, the summary value might be the count of all customers. The Summary tab lets you set the default summary function for your calculated field or measure.

- Calculation list — Displays allowed summary functions for your calculated field or measure. The available options depend on the data type of the calculation. See [Summary Calculations](#) for more information. Depending on your selection, you may see additional options:
  - Custom selection — Displays the same options available in the Formula Builder tab, including the Formula entry box, operator buttons, Fields and Measures list, Functions list, and Validate button. You use these options to build a formula for your custom summary. However, for summaries, you are limited to aggregate functions, that is, functions that operate on all the values in your field. For example, Sum and Mode are valid summary functions, because they use all available field values to get a result. Round is not a valid summary function, because it operates on a single value at a time. See [Summary Calculations](#) for more information.
  - Weighted Average — Displays a Weighted On drop-down list, which allows you to choose another field or measure to use as the weight for the average.

### 5.6.2 Creating a Calculated Field

#### To create a calculated field:

1. First, create the Ad Hoc view to use. To do this, select **Create > Ad Hoc View** from the menu. The **Select Data** wizard appears.
2. Click  and navigate to **Domains**.
3. Select **Supermart Domain**. Click **Choose Data**. The Data Chooser window appears.
4. In the Data Chooser window, double-click **Sales** to select it and click **OK**. A new Ad Hoc view opens.
5. In the Ad Hoc view, click  at the top right of the **Fields** section and select **Create Calculated Field...** from the context menu. The New Calculated Field dialog box appears, displaying the Formula Builder.



**Figure 5-18 Formula Builder Tab in New Calculated Measure Dialog Box**

6. Enter Volume Tier for the **Field Name**.

#### Creating the formula:

This section shows how to create a simple text formula that says Low when the Unit Sales amount is under 100 and High otherwise.

Formulas must use the following syntax:

- a. Labels for fields and measures must be in double quotes ("): "Customer ID", "Date ordered".
- b. Text must be in single quotes (): '--!.
- c. Levels must be in single quotes (): 'ColumnGroup', 'Total'.

7. Make sure **Show arguments in formula** is selected.

8. Now create the formula. Double-click IF() in the **Functions** list.

Because **Show arguments in formula** is selected, `IF("BooleanFieldName", TrueCalc, FalseCalc)` is entered in the Formula Builder.

9. Double-click BooleanFieldName to select it, then double-click Unit Sales 2013 in the **Fields and Measures** list.

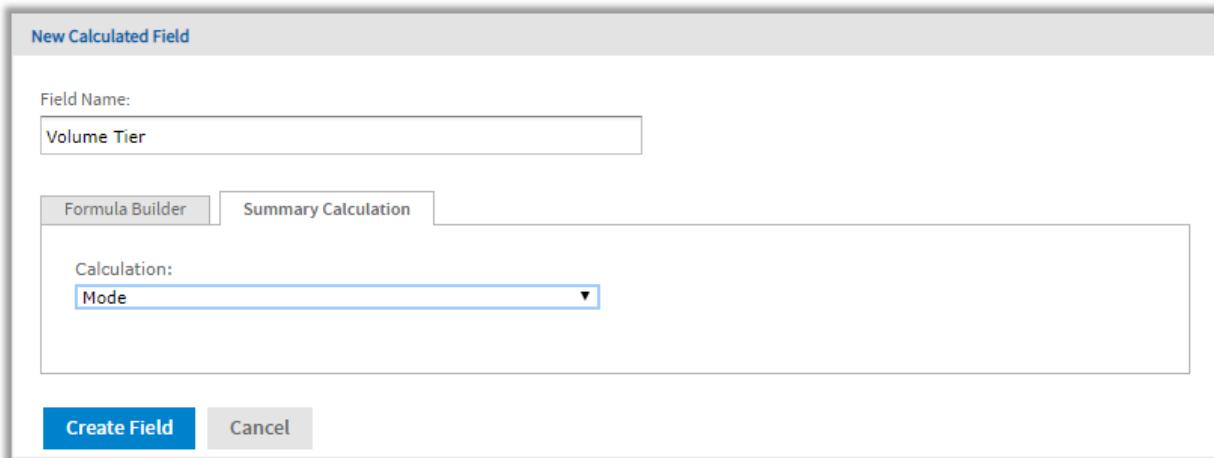
The Formula Builder displays `IF("Unit Sales 2013", TrueCalc, FalseCalc)`.

10. Edit the expression in the Formula Builder to read as follows: `IF("Unit Sales 2013" IN (0:100), 'Low', 'High')`.
11. Click **Validate** to verify that the formula does not have any syntax errors.

#### **Creating a summary calculation:**

The Ad Hoc Editor creates a default summary calculation based on the type of formula you have entered. This section shows how to select a different summary function.

12. Click the **Summary Calculation** tab.



**Figure 5-19 Summary Tab in New Calculated Measure Dialog Box**

13. Select Mode from the **Calculation** menu.
14. Click **Create Field**.

The calculated field appears in bold text at the bottom of the list of available fields. A special icon indicates it is a calculated field .

If you have installed the samples, the Ad Hoc view **10. Calculated Fields and Measures** includes examples of calculated fields and measures (indicated by ). You can explore their formulas by right-clicking the field or measure name and selecting **Edit**. You can also create tables, charts, or crosstabs to see how these calculations work in views.

### **5.6.3 Planning and Testing Calculated Fields and Measures**

When you are creating calculated fields and measures, you may need to follow an iterative process: first create your new fields and measures, then view the results, and finally adjust as needed. The following practices can help:

- Reduce the size of your data set — To speed field creation and testing, reduce the size of your working data set in the following ways:
  - Select **Sample Data** from the drop-down menu in the Ad Hoc tool bar.
  - Create one or more filters. This is especially useful for tables, which display all data by default.
  - Limit the number of fields and measures you add to your test reports to restrict the number of summary levels to one or two.

- Create one or more formulas, as described in [Creating a Calculated Field](#).
- After you have created your fields and measures, add them to a table or crosstab in your view and verify that they behave as you expect. You may need to edit your fields to get the desired behavior. See [Creating a Calculated Field](#) for more information.

In addition, keep the following in mind when creating calculated fields:

- When you create a calculated field, it appears at the bottom of the list.
- Calculated fields that use aggregate functions cannot be added to groups and should not be used as filters.
- By default, the Ad Hoc Editor supports only two decimal places. If the calculated fields return data that are significant to the third decimal place, you can add new masking options by editing configuration files. For more information, refer to the *TIBCO JasperReports Server Administrator Guide*.
- You can't delete a calculated field that is in use; these fields have their name in *italics*.
  - If the calculated field is used in the Ad Hoc view panel, remove the calculated field from the Ad Hoc View panel and then delete it from the **Data Source Selection** panel.
  - If the calculated field is the basis of another field, you can't delete it until you delete the one that builds on it.
  - If the calculated field uses an item that was removed from the data source, the Ad Hoc Editor displays an error message. You will need to either edit or delete the calculated field.

#### 5.6.4 Calculated Field Reference

This section lists all functions that can be used to create calculated fields and measures in Ad Hoc views. For details of the supported syntax, see [Calculated Field Syntax](#).



These functions are available for calculated fields and measures in Ad Hoc views only. See *TIBCO JasperReports Server Data Management Using Domains* for supported operators and functions in Domains.

The examples in this section indicate correct syntax, but are not necessarily associated with an Ad Hoc view. If you have installed the Jaspersoft samples, the Ad Hoc view **10. Calculated Fields and Measures** includes examples of calculated fields (shown by the icon ) or calculated measures (shown by the icon ). You can explore their formulas by right-clicking on the field or measure name and selecting **Edit**. You can also create tables, charts, or crosstabs to see how these calculations work in views.

##### **Absolute(NumericExpression)**

Returns the absolute value of a number or field, that is, the non-negative value of the number.

##### **Examples:**

`Absolute("Transaction Amount")` — Shows the magnitude of each transaction, regardless of whether the transaction is positive or negative.

`"Commission Rate" * Absolute("Transaction Amount")` — Computes a positive commission on all transactions, regardless of whether the transaction is positive or negative.

##### **Attribute('StringExpression1', [StringExpression2' ])**

Given the name of an attribute as the first argument and an optional category as the second argument, returns the attribute's current value as a String. If a category is specified (USER, TENANT, or SERVER), returns a

categorical attribute; returns a hierarchical attribute otherwise. This value can be cast to a different datatype using one of the casting functions available in Ad Hoc: Boolean(), Date(), Decimal(), Integer(), Time(), or Timestamp(). It is your responsibility to ensure the attribute's format and values work correctly with your Ad Hoc view. See the *TIBCO JasperReports Server Administrator Guide* for more information about creating and using attributes.

**Example:**

```
Attribute('my_attribute')
```

**Average(NumericExpression[,Level])**

Returns the average value of a measure or numeric field, based on an optional level. Null values are not included. See [Levels in Aggregate Functions](#) for more information.

**Example:**

```
Average("Salary", 'RowGroup')
```

**Boolean ('StringExpression')**

Casting function that takes a String expression and converts it to a Boolean data type. The String can be any expression that returns a supported string, including a field value or an attribute retrieved with the Attribute() function. The Boolean() function requires one of the following Strings: true, false, True, False, TRUE, or FALSE. Other Strings will return an error.

**Examples:**

```
Boolean('true')
```

```
Boolean(Attribute('my_boolean_attribute'))
```

**Case(Expression, ValueExpression1, ReturnExpression1, ValueExpression2, ReturnExpression2[,...,ValueExpressionN, ReturnExpressionN][,DefaultReturnExpression])**

Takes 2N+1 or 2N+2 arguments: an expression followed by one or more value expression/return expression pairs, with an optional final return expression. Compares the expression in the first argument to each value expression in order of appearance. Returns the value of the expression immediately following the first value expression that matches. If no expression matches, returns the final DefaultReturnExpression if present, null otherwise.

The types of all the return expressions must be compatible. For example, you can't mix numeric and text return value types.

**Example:**

```
Case("Shipped by", 1, 'FedEx', 2, 'UPS', 3, 'USPS', 'Unknown')
```

**CaseRange (NumericExpressionInput, NumericExpression1, ReturnExpression1, NumericExpression2, ReturnExpression2[,..., NumericExpressionN, ReturnExpressionN][,DefaultReturnExpression])**

Takes 2N+1 or 2N+2 arguments: an expression followed by one or more numeric expression/return expression pairs, with an optional final return expression. Finds the first numeric expression that is greater than the input expression and returns the value of the corresponding return expression. If no expression is greater, returns the final DefaultReturnExpression if present, null otherwise.

The types of all the return expressions must be compatible. For example, you can't mix numeric and text return value types.

**Examples:**

```
Case("Temperature", 60, 'too cold', 80, 'just right', 'too hot')
CaseRange(CountAll("Shipping charge") % CountAll("Shipping charge", 'Total'), 2.0, 'Less than 2%', 5.0, '2% - 5%', 'More than 5%)
```

**CaseWhen(*BooleanExpression1*, *ReturnExpression1*, *BooleanExpression2*, *ReturnExpression2*[,...,  
*BooleanExpressionN*, *ReturnExpressionN*][, *DefaultReturnExpression*])**

Takes 2N or 2N+1 arguments: one or more pairs of Boolean expressions followed by return expressions, with an optional final return expression. Returns the expression immediately following the first true Boolean expression. If no expression is true, returns the final *DefaultReturnExpression* if present, null otherwise. This is the most flexible construct.

The types of all the return expressions must be compatible. For example, you can't mix numeric and text return value types.

**Examples:**

```
CaseWhen("Shipped by" == 1, 'FedEx', "Shipped by" == 2, 'UPS', "Shipped by" == 3, 'USPS',
'Unknown')
Case("Temperature" <= 60, 'too cold', "Temperature" > 80, 'too hot', 'just right')
```

**Concatenate(*TextExpression1*[ ,*TextExpression2*,...,*TextExpressionN*])**

Combines multiple text strings and/or fields into a single text field. Text strings are enclosed in single quotes; labels for fields or measures in Ad Hoc are enclosed in straight quotes.

**Examples:**

```
Concatenate("Last Name", ' ', ' ', "First Name")
Concatenate("Product Category", ' -- ', "Product Name")
```

**Contains(*TextExpression1* ,*TextExpression2*)]**

Boolean that returns true if the first string contains the second, false otherwise.

**Example:**

```
Contains("Product Name", 'Soda')
```

**CountAll(*Expression*[,'*Level*'])]**

Returns the count of non-null items in a field or measure; note that *CountAll* always returns a non-negative integer. *Level* can be one of the following: Current (default), ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total. See [Levels in Aggregate Functions](#) for more information.

**Example:**

```
CountAll("Transaction Amount", 'RowGroup') — Counts the total number of non-null transactions in the specified group.
```

**CountDistinct(*Expression*[,'*Level*'])]**

Returns the distinct count of non-null items in the input. Always returns a non-negative integer. *Level* can be one of the following: Current (default), ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total. See [Levels in Aggregate Functions](#) for more information.

**Example:**

```
CountDistinct("Customer Name", 'Total')— Counts the number of distinct customers.
```

**Date('StringExpression')**

Casting function that takes a String expression and converts it to a Date data type. The String can be any expression that returns a supported string, including a field value or an attribute retrieved with the `Attribute()` function. The `Date()` function requires a String value formatted as 'yyyy-MM-dd'. Other Strings will return an error.

**Examples:**

```
Date('2015-07-17')  
Date(Attribute('my_date_attribute'))
```

**Decimal('StringExpression')**

Casting function that takes a String expression and converts it to a Decimal data type. The String can be any expression that returns a supported string, including a field value or an attribute retrieved with the `Attribute()` function. The `Decimal()` function requires a String value in decimal format, for example, '123.45'. Other Strings will return an error.

**Example:**

```
Decimal('1234.567')
```

**DayName (DateExpression)**

Given a date field, returns a text field with the name of the day of the week.

**Examples:**

```
DayName("Open Date")— Displays the day of the week on which a store was opened.  
Mode(DayName("Open Date"), 'Total')— The day of the week on which the most stores were opened.
```

**DayNumber (DateExpression)**

Numeric field that returns the day of the month from a date field.

**Example:**

```
DayNumber("Open Date")— Displays the day of the month on which a store was opened.
```

**ElapsedDays (DateExpression1, DateExpression2)**

Calculates the number of days elapsed between two date fields that contain time values.

**Example:**

```
ElapsedDays ("Date shipped", "Date required")
```

**ElapsedHours (DateTimeExpression1, DateTimeExpression2)**

Calculates the number of hours elapsed between two date fields that contain time values.

**Example:**

```
ElapsedHours ("Date shipped", "Date required")
```

**ElapsedMinutes (*DateTimeExpression1,DateTimeExpression2*)**

Calculates the number of minutes elapsed between two date fields that contain time values.

**Example:**

```
ElapsedMinutes ("Date shipped", "Date required")
```

**ElapsedMonths (*DateTimeExpression1,DateTimeExpression2*)**

Calculates the number of months elapsed between two date fields that contain time values.

**Example:**

```
ElapsedMonths ("Date shipped", "Date required")
```

**ElapsedQuarters (*DateExpression1, DateExpression2*)**

Calculates the number of quarters elapsed between two date fields.

**Example:**

```
ElapsedQuarters ("Date shipped", "Date required")
```

**ElapsedSeconds (*DateTimeExpression1,DateTimeExpression2*)**

Calculates the number of seconds elapsed between two date fields that contain time values.

**Example:**

```
ElapsedSeconds ("Date shipped", "Date required")
```

**ElapsedSemis (*DateExpression1,DateExpression2*)**

Calculates the number of semi-years elapsed between two date fields.

**Example:**

```
ElapsedSemis ("Date shipped", "Date required")
```

**ElapsedWeeks (*DateExpression1,DateExpression2*)**

Calculates the number of weeks elapsed between two date fields that contain time values.

**Example:**

```
ElapsedWeeks ("Date shipped", "Date required")
```



This replaces the two-date custom field operation **Date Difference > Weeks** available in Ad Hoc views created in Server 5.5 or earlier.

**ElapsedYears (*DateExpression1,DateExpression2*)**

Calculates the number of years between two date fields.

**Example:**

```
ElapsedYears ("Date shipped", "Date required")
```

**EndsWith(*TextExpression1, TextExpression2*)**

Boolean that returns true if the first text input ends with the string specified in the second input; false otherwise.

**Examples:**

```
EndsWith("Product Name", 's')
```

**IF (BooleanExpression, ExpressionWhenTrue[, ExpressionWhenFalse])**

Given a Boolean field or calculation as the first argument, returns the second argument if true; optionally returns the third argument if false. Returns null if the first argument is null.

ExpressionWhenFalse must be of the same type as ExpressionWhenTrue. For example, if ExpressionWhenTrue is a date, ExpressionWhenFalse must be a date in the same format. If ExpressionWhenFalse is not set, then a false result returns a null value.



You can create a BooleanExpression using the comparison operators ("==", "!="), ">", ">=", "<", "<="); any functions that return Boolean values (StartsWith, EndsWith, IsNull, Contains) and logical operators (and, or, not).



When dates are used in comparisons or the IF function, they must be the same type, (date only, date/time, or time only). Make sure to use the correct modifier (d, ts, t) when using date constants in comparisons.

**Example:**

```
IF(Contains("Product Name", 'Soda'), 'Yes', 'No')— Uses the Contains function to see whether the product name contains the string "Soda"; if it does, sets the field value to Yes.
```

**Integer('StringExpression')**

Casting function that takes a String expression and converts it to a Integer data type. The String can be any expression that returns a supported string, including a field value or an attribute retrieved with the Attribute() function. The Integer() function requires a String value that can be read as an integer, such as '123'. Other Strings will return an error.

**Examples:**

```
Integer('123')  
Integer(Attribute('my_integer_attribute'))
```

**IsNull(Expression)**

Boolean that returns true if the field value is null; false otherwise.

**Example:**

```
IsNull("First Name")
```

**Length(TextExpression)**

Given a text string, returns its length. Null values return null.

**Example:**

```
Length("First Name")
```

**Max (NumericExpression|DateExpression[, 'Level'])**

Returns the maximum value reached by the specified field or calculation. Level can be one of the following: Current (default), ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total. See [Levels in Aggregate](#)

**Functions** for more information.

**Example:**

```
Max ("Salary")
```

**Median (NumericExpression|DateExpression[, 'Level'])**

For an odd number of values, returns the middle value after all values are listed in order. For an even number of values, returns the average of the middle two values. For example, if a field has only five instances, with values {1,1,3,10,20}, the median is 3. Level can be one of the following: Current (default), ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total. See **Levels in Aggregate Functions** for more information.

**Example:**

```
Median ("Salary")
```

**Mid (TextExpression, Integer1, Integer2)**

Given a text string, returns the substring starting at Integer1 with length Integer2.

**Example:**

```
Mid("Phone", 1, 3) — Given an American phone number starting with a 3-digit area code, extracts the area code.
```

**Min (NumericExpression|DateExpression[, 'Level'])**

Returns the minimum value reached by the specified field or calculation based on an optional level. Level can be one of the following: Current (default), ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total. See **Levels in Aggregate Functions** for more information.

**Example:**

```
Min ("Salary")
```

**Mode (Expression[, 'Level'])**

Returns the most frequent value reached by the specified input, based on an optional level. For example, if a field has only five instances with values {1,2,2,4,5}, the mode is 2. Level can be one of the following: Current (default), ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total. See **Levels in Aggregate Functions** for more information.

**Example:**

```
Mode (DayName ("Order Date", RowGroup)) — For each row group, returns the day of the week on which the most orders were placed.
```

**MonthName (DateExpression)**

Returns a text field with the name of the month.

**Example:**

```
MonthName ("Order Date" )
```

**MonthNumber (DateExpression)**

Returns the number of the month, with January = 1 and December = 12. Null values return null.

**Example:**

```
MonthNumber ("Order Date")
```

### PercentOf (*NumericExpression*[,'*Level*'])

Returns the value as a percent of total for the specified level. Null values are ignored. Note that possible values for Level are ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total (default). See [Levels in Aggregate Functions](#) for more information.



PercentOf (*NumericExpression*, Total) replaces the custom field calculation **Percent of Total Group** available in Ad Hoc views created in Server 5.5 or earlier.



Calculated fields using the PercentOf function should not be used as filters; if PercentOf is used as a filter, then the total percent may not be 100.

#### Example:

```
PercentOf("")
```

### Range (*NumericExpression*[,'*Level*'])

The difference between the largest and smallest values of the given input.

#### Example:

```
Range("Salary", 'ColumnGroup')
```

### Rank (*NumericExpression*)

Returns the position of each value relative to the other values after all the values are listed in order. For example, the top ten in sales are the top ten in rank. Null values are ignored.

#### Example:

```
Rank("Store Sales")
```

### Round (*NumericExpression*[,*Integer*])

Rounds a number to a specified number of digits; default is zero (0) digits. Decimal values greater than 0.5 are rounded to the next largest whole number, and values less than 0.5 are rounded down.

#### Example:

```
Round("Sales")
```

### StartsWith (*TextExpression1*, *TextExpression2*)

Boolean that returns true if the first text input starts with the string specified in the second input; false otherwise.

#### Examples:

```
StartsWith("Product Name", 'Q')
```

### StdevP (*NumericExpression*[,'*Level*'])

Standard deviation based on the entire population, taken over the values at the specified (optional) level. Null values are excluded. Level can be one of the following: Current (default), ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total. See [Levels in Aggregate Functions](#) for more information.

**Examples:**

```
StdevP("Sales", 'RowTotal')
```

**StdevS (NumericExpression[,Level])**

Standard deviation based on a sample, taken over the values at the specified level. Null values are excluded. Level can be one of the following: Current (default), ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total. See [Levels in Aggregate Functions](#) for more information.

**Example:**

```
StdevS("Sales", 'RowTotal')
```

**Sum (NumericExpression[,Level])**

The sum of all values in the range. Null values are excluded. Level can be one of the following: Current (default), ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total. See [Levels in Aggregate Functions](#) for more information.

**Examples:**

```
Sum("Sales", 'RowGroup')
```

**Time('StringExpression')**

Casting function that takes a String expression in the format 'HH:mm:ss.SSS' and converts it to a Time data type. The String can be any expression that returns a valid String, including a field value or an attribute retrieved with the Attribute() function.

**Examples:**

```
Time('17:12:33:147')  
Time(Attribute('my_time_attribute'))
```

**Timestamp('StringExpression')**

Casting function that takes a String expression in the format 'yyyy-MM-dd HH:mm:ss.SSS' and converts it to a Timestamp data type. The String can be any expression that returns a valid String, including a field value or an attribute retrieved with the Attribute() function.

**Examples:**

```
Timestamp('2015-07-17 17:12:33:147')  
Timestamp(Attribute('my_timestamp_attribute'))
```

**Today (Integer)**

Calculates the date that is the specified number of days from the current system date.

**Examples:**

Today (0) — The current system date.  
Today(1) — The day after the current system date.  
Today(-1) — The day before the current system date.

### WeightedAverage (*NumericExpression1*,*NumericExpression2*,*'Level'*)

Returns the weighted average for the first input weighted with respect to the second input, calculated at an optional level. Null values are excluded. Level can be one of the following: Current (default), ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total. See [Levels in Aggregate Functions](#) for more information.

#### Examples:

`WeightedAverage ("Price","Units", 'Current')` — The extended price based on the number of units.

`WeightedAverage ("Price","Units", 'RowGroup')` — The sum of the extended price for all units in the row group.

### Year (*DateExpression*)

Given a date field, returns the year.

#### Examples:

`Year("Order Date")`

## 5.6.5 Calculated Field Syntax

This section describes the syntax required when creating calculated fields in Ad Hoc views. See [Calculated Field Reference](#) for more information.

Use the following syntax for inputs:

- To reference a text string, use single quotes () — '*Text String*'.
- To reference a field label, use double quotes () — "*Ad Hoc Label*".
- To reference date constants, indicate the date type as part of the syntax, as listed below:
  - To reference a date without time data (for example: yyyy-dd-mm), use `d` followed by single quotes () — `d'2014-06-10'`
  - To reference a date with day and time data (for example: yyyy-dd-mm hh:mm:ss), use `ts` followed by single quotes () — `ts'2014-06-10 01:30:00'`. If you use `ts` and enter the date information only, the time is automatically set to 00:00:00.
  - To reference a date with time data only (hh:mm:ss), use `t` followed by single quotes () — `t'01:30:00'`
- To reference a date field label, use double quotes () — "*Ad Hoc Date Field Label*".



The following are reserved words and cannot be used as field names: AND, And, and, IN, In, in, NOT, Not, not, OR, Or, or. Names containing these strings, such as "Not Available", can be used.



When dates are used in comparisons or the IF function, they must be the same type, (date only, date/time, or time only). Make sure to use the correct modifier (d, ts, t) when using date constants in comparisons.

In the function descriptions for calculated fields in [Calculated Field Reference](#), the argument name describes the type of input the function accepts. For more information about input types, see *TIBCO JasperReports Server Data Management Using Domains*:

- BooleanExpression — Any expression that takes on Boolean values, including the label of a Boolean field or measure, a Boolean calculation, or a Boolean value.



You can create a BooleanExpression using the following: comparison operators (==, !=, >, >=, <, <=, in); functions that return Boolean values (StartsWith, EndsWith, IsNull, Contains) and logical functions (AND, OR, NOT).

- DateExpression — Any type of date or timestamp values, including the label of a date field or measure, or a calculation that returns dates.
- DateTimeExpression — Date expressions that contain time values, including the label of a date field or measure, or a calculation that returns dates. These values are also known as timestamp values.
- Expression — Any valid date, date-time, numeric, or string expression.
- NumericExpression — Numeric values, including the label of a numeric field or measure, or a calculation that returns numbers.
- TextExpression — Text values, including the label of a text field or measure, or a text string.
- Level — For aggregate functions, specifies the set of values used to compute the calculation. Possible values include Current (not available for PercentOf), ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total. See [Levels in Aggregate Functions](#) for more information.

## 5.6.6 Operators in Ad Hoc Views

Ad Hoc views support the following operators in calculated fields. Operators are evaluated in the order they are shown in the table:

Operator	Syntax	Description
multiply, divide	i * j / k	Arithmetic operators for numeric types only.
percent	i % j	Calculates i as a percent of j; numeric types only.
add, subtract	i + j - k	Arithmetic operators for numeric types only.
equal	i == j	Comparison operators for string, numeric, and date types.
not equal	i != j	
less than	i < j	Comparison operators for numeric and date types only.
less than or equal	i <= j	
greater than	i > j	
greater than or equal	i >= j	
IN set	i IN ('apples', 'oranges')	Sets can be of any type.
IN range	i IN (j:k)	Ranges must be numeric or date types.

Operator	Syntax	Description
NOT	NOT( i )	Boolean operators. Parentheses are required for NOT.
AND	i AND j AND k	
OR	i OR j OR k	
parentheses	()	Used for grouping.

 When dates are used in comparisons or IF functions, they must be the same type, (date only, date/time, or time only). Make sure to use the correct modifier (d, ts, t) when using date constants in comparisons.

 The following reserved words cannot be used as field names: AND, And, and, IN, In, in, NOT, Not, not, OR, Or, or. Names containing these strings, such as "Not Available", can be used.

## 5.6.7 Aggregate Functions

Aggregate functions in calculated fields perform calculations based on groups of rows, rather than on single rows. For example, it doesn't make sense to use Sum or Average on a single value; instead, you want to take the sum or average over a row or column group or over the total set. In many cases, aggregate functions in the Ad Hoc Editor are analogous to SQL functions that can be used with the GROUP BY clause in a SELECT statement.

The aggregate functions are as follows:

Average	Median	Range	WeightedAverage
CountAll	Min	StdDevP	
CountDistinct	Mode	StdDevS	
Max	PercentOf	Sum	

Because aggregate functions already operate on groups, their use is restricted in the following ways:

- You can use aggregate functions only in calculated measures; aggregates should not be used to create non-measure fields.
- You cannot add an aggregate function to a group.
- You should not use an aggregate function as a filter.
- Only Aggregate Formula, Custom, or None are supported as summary calculations for aggregate functions. Custom appears in the **Change Summary** right-click menu only if you have defined a custom function in the **Create Calculated Field** dialog box.

### 5.6.7.1 Levels in Aggregate Functions

Many aggregate functions accept an optional level to specify the grouping of the aggregate. A level used in an aggregate, must be enclosed in straight quotes ('), for example, 'RowGroup'.

The available levels are as follows:

- Current (default) — use the current value when at a looking at detail rows in a table view.
- RowGroup — use the parent values from a row location.

- RowTotal — use the grand total value from a row location.
- ColumnGroup — use the parent values from a column location.
- ColumnTotal — use the grand total value from a column location.
- Total — use the grand total value from a cross tab and the RowTotal from a Table.

The following example shows how RowGroup works with the PercentOf() function.

### Setting up the Ad Hoc view:

The examples in this section uses the Ad Hoc view created in [Creating a Calculated Field](#). The initial view for these examples can be set up as follows:

1. Select Crosstab from the Visualization Selector.
2. Add Store Sales 2013 and Low Fat to the Columns entry bar.
3. Add Country and Store Type to the Rows Entry Bar.
4. To make the example clearer, the data has been restricted. To do this, create three filters:
  - a. Expand Regions in the Fields Picker, right-click on Country, and select **Create Filter**. In the Filters pane, set the filter to **is one of** then select Canada and USA.
  - b. Create a filter for Store Sales 2013. In the Filters pane, set the filter to **is greater than**, and enter 19.70.
  - c. Right-click on Store Type and select **Create Filter**. In the Filters pane, set the filter to **is one of** then select Deluxe Supermarket, Gourmet Supermarket, and Mid-Size Grocery.

The screenshot shows the TIBCO Spotfire Ad Hoc Editor interface. The top navigation bar includes icons for file operations, search, and help. Below the toolbar is a 'Filters' section with three expanded filter panes labeled A, B, and C.

- Pane A: A.Country** - Set to 'is one of' with options 'Available: 3' and 'Selected: 2'. It lists 'Canada' and 'USA' with a crossed-out 'x' next to each.
- Pane B: B.Store Sales 2013** - Set to 'is greater than' with the value '19.70' entered.
- Pane C: C.Store Type** - Set to 'is one of' with options 'Available: 6' and 'Selected: 3'. It lists 'Deluxe Supermarket', 'Gourmet Supermarket', and 'Mid-Size Grocery' with a crossed-out 'x' next to each.

The main workspace displays a crosstab visualization. The columns are 'Store Sales 2013' and 'Low Fat' (with categories 'false', 'true', and 'Totals'). The rows are 'Country' (with categories 'Canada' and 'USA') and 'Store Type' (with categories 'Deluxe Supermarket', 'Gourmet Supermarket', 'Mid-Size Grocery', and 'Totals'). The data is summarized as follows:

Country	Store Type	Measures		
		Store Sales 2013	Low Fat	Totals
Canada	Deluxe Supermarket	102.17	19.90	122.07
	Mid-Size Grocery		19.75	19.75
	<b>Totals</b>	<b>102.17</b>	<b>39.65</b>	<b>141.82</b>
USA	Deluxe Supermarket	220.56	40.75	261.31
	Gourmet Supermarket	138.80		138.80
	Mid-Size Grocery	19.75		19.75
	<b>Totals</b>	<b>379.11</b>	<b>40.75</b>	<b>419.86</b>
<b>Totals</b>	<b>Totals</b>	<b>481.28</b>	<b>80.40</b>	<b>561.68</b>

Figure 5-20 Base Example for Levels

### RowGroup example:

To create the layout for this example:

1. Click  at the top right of the **Measures** section of the Data Source Selection panel and select **Create Calculated Measure...** from the context menu.
2. In the Create Calculated Measure dialog box, enter Percent of Row Group for the name, and enter `PercentOf("Store Sales 2013", 'RowGroup')` in the Formula entry box. Then click **Create Measure**.
3. Drag the measure you just created to the Columns bar, between Store Sales 2013 and Low Fat.

The crosstab appears as shown in the following figure.

		 <b>Measures</b>		 <b>Store Sales 2013</b>			 <b>Percent of Row Group</b>		
		 <b>false</b>	 <b>true</b>	 <b>Totals</b>	 <b>false</b>	 <b>true</b>	 <b>Totals</b>		
 <b>Country</b>	<b>Store Type</b>								
 <b>Canada</b>	Deluxe Supermarket	102.17	19.90	<b>122.07</b>	100.00	50.19	<b>86.07</b>		
	Mid-Size Grocery		19.75	<b>19.75</b>		49.81	<b>13.93</b>		
	<b>Totals</b>	<b>102.17</b>	<b>39.65</b>	<b>141.82</b>	<b>21.23</b>	<b>49.32</b>	<b>25.25</b>		
 <b>USA</b>	Deluxe Supermarket	220.56	40.75	<b>261.31</b>	58.18	100.00	<b>62.24</b>		
	Gourmet Supermarket	138.80		<b>138.80</b>	36.61		<b>33.06</b>		
	Mid-Size Grocery		19.75	<b>19.75</b>	5.21		<b>4.70</b>		
	<b>Totals</b>	<b>379.11</b>	<b>40.75</b>	<b>419.86</b>	<b>78.77</b>	<b>50.68</b>	<b>74.75</b>		
<b>Totals</b>	<b>Totals</b>	<b>481.28</b>	<b>80.40</b>	<b>561.68</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>		

**Figure 5-21 Example for RowGroup**

Look at the Low Fat values for "false" in the Canada group. The only non-null value under Store Sales 2013 is in the first row, for Deluxe Supermarket. This value, 102.17, is 100% of the row group total of 102.17 on the third line of the crosstab. This percentage is shown in the "false" subcolumn of the Percent of Row Group column.

Compare this to the "true" entry under Store Sales for the same (first) row. There, the value is 19.90, and the row group total is 39.65. The corresponding percentage shown in the "true" subcolumn of Percent of Row Group is 50.19%.

## 5.6.8 Summary Calculations

Summary calculations are aggregate functions used for sub-totals and totals. Summary calculations can be set in the Domain Designer or in the Ad Hoc view.

- In Ad Hoc table views, each field can display a single summary calculation. The summary calculation is automatically applied to all groups in the table. Summaries appear at the bottom of each group, as well as at the bottom of the view. When a new group is added, it includes a summary for each column.
- In crosstabs, each measure displays a summarized value. Summaries determine the values of the Totals at the intersection of each row and column.
- In charts, the type of chart determines whether measures are summarized. If summaries are used, they determine the size or location of the graphical elements that represent your data.



For dual pie charts, the summary function for the field needs to be Sum or CountAll. Dual pie charts with other summary functions may give unexpected results.

In general, you can change the summary calculation of any measure. By default, JasperReports Server summarizes fields of each datatype as shown in the following table.

**Table 5-3 Default Summary Functions in Calculated Fields**

Datatype	Default Summary Calculation	Description
Numeric	Sum	Displays the sum of all values in the set.
Date	CountAll	Displays the total number of values in the set.
String	CountAll	Displays the number of values in the set.
Boolean	CountAll	Displays the number of values in the set.
Aggregate	Aggregate Formula	For a calculated field that uses an aggregate function, uses the same aggregate formula as the summary.
Combined	None	For a calculated field that combines an aggregate function with a non-aggregate function, the summary calculation is null.

Select from the following options to set a measure's summary function in any type of view.

Function	Meaning	Available for....
Aggregate Formula	For a calculation that uses an aggregate function, uses the same aggregate formula as the summary.	Aggregate
Average	Displays the average of all values in the set.	Numeric
CountAll	Displays the number of rows in the set.	Boolean, Date, Numeric, and String
CountDistinct	Displays the number of unique values in the set.	Boolean, Date, Numeric, and String
Custom	Allows you to enter an aggregate calculation for the summary. Only available for calculated fields and measures in the Ad Hoc Editor; not available for Domains.	Aggregate, Date, Numeric
Maximum	Displays the highest value in the set.	Date, Numeric
Median	Displays the median value of the set.	Date, Numeric
Minimum	Displays the lowest value in the set.	Date, Numeric
Mode	Displays the value that occurs most frequently in the set.	Boolean, Date, Numeric, and String

Function	Meaning	Available for....
None	The aggregate function is null; no summary function is displayed.	Aggregate, Boolean, Date, Numeric, and String
Range	Displays the difference between the minimum and maximum values of the set.	Numeric
RangeDays	Displays the difference in days between the minimum and maximum values of the set.	Date
RangeHours	Displays the difference in hours between the minimum and maximum values of the set.	DateTime
RangeMinutes	Displays the difference in minutes between the minimum and maximum values of the set.	DateTime
RangeMonths	Displays the difference in months between the minimum and maximum values of the set.	Date
RangeQuarters	Displays the difference in quarters between the minimum and maximum values of the set.	Date
RangeSemis	Displays the difference in semi-annual periods between the minimum and maximum values of the set.	Date
RangeWeeks	Displays the difference in weeks between the minimum and maximum values of the set	Date
RangeYears	Displays the difference in years between the minimum and maximum values of the set.	Date
Standard Deviation P	Displays the standard deviation for the population of the set.	Numeric
Standard Deviation S	Displays the standard deviation on a sample for the set.	Numeric
Sum	Displays the grand total for the set.	Numeric
WeightedAverage	Displays the weighted average for the set, based on a second numeric field or expression. Only available for calculated fields and measures in the Ad Hoc Editor; not available for Domains.	Numeric

Note the following about summaries:

- If you select a summary calculation other than the default, that calculation is shown in parentheses after the field name in the fields picker.

- In Ad Hoc views, you see special behavior when you create a calculated field or measure with the following type of summary calculation:
  - If you create a Custom summary calculation for a field or measure, **Custom** is available on the **Change Summary Calculation** menu for that field. It is not available otherwise.
  - If you create a WeightedAverage summary calculation for a field or measure, **WeightedAverage** is available on the **Change Summary Calculation** menu for that field. It is not available otherwise.
- You can remove summaries by setting the summary function to **None**.
- Only AggregateFormula, Custom, or None are supported as summary calculations for aggregate functions. Custom only appears in the **Change Summary** right-click menu if you have defined a custom function in the **Create Calculated Field** dialog box.

## 5.7 Using Filters and Input Controls

JRXML Topics, Domains, and OLAP connections use different mechanisms for screening the data they return:

- JRXML Topics can contain Parametrized queries. The parameters can be mapped to input controls that allow users to select the data they want to include.
- Domains (and Domain Topics) can be filtered by selecting fields in the Domain and specifying comparison values. The filters can be configured for users to select the data to include.
- Within the Domain design, filters based on conditions can also be defined; these filters are not displayed in the report viewer when the report runs.
- OLAP connections rely on XML schemas to filter the data in an underlying transactional database. Input controls are never generated directly from the OLAP schema.

You can define filters in the Ad Hoc Editor regardless of whether you are working with data from a Domain, Topic, or OLAP connection. Such filters can be helpful in improving the view's initial performance by reducing the amount of data the view returns by default. For more information, see [“Input Controls and Filters Availability” on page 163](#). To prevent users from seeing the full dataset, you can also use input controls in a JRXML Topic or filters defined in the Domain design, which can be hidden from end users.

If you want to return different data to different users of the same view, define data-level security based on a user roles and profile attributes. This is available for reports based on a Domain, Domain Topic, or OLAP client connection. For more information, refer to the *TIBCO Jaspersoft OLAP User Guide*.

Input controls and filters interact seamlessly. For example, you can create filters in an Ad Hoc view that gets data from a JRXML Topic that includes input controls.

The server refreshes the editor against both the filters and the input controls. Because some combinations of input controls and filters don't return data, this can result in an empty view.



If the result set is empty, check for an incompatible combination of filters and input controls, such as a standard filter (set to Mexico against a Country field) and a **Keep Only** filter (set to Canada against a Country field), or an incorrectly-defined advanced filter expression (data must meet all criteria in multiple filters, rather than meeting criteria in a subset of those filters). See [“Custom Filtering” on page 159](#) for information on advanced filter expressions.

In rare cases, filters can conflict with view parameters, and you'll need to rename the field causing the conflict by editing the JRXML file. Refer to the *TIBCO Jaspersoft Studio User Guide* for more information about editing JRXML files.

For more information about:

- JRXML Topics and input controls, see “[Adding Input Controls](#)” on page 190.
- Domain Topic filters, see “[Creating Topics from Domains](#)” on page 171.
- Localizing input control prompts and lists of values, see “[Localizing Reports](#)” on page 204.

## 5.7.1 Using Filters

Filters can be defined at three levels:

- In the Domain Designer.
- When creating a view from a Domain (with the Data Chooser).
- In the Ad Hoc Editor (even when the view is based on a JRXML Topic or OLAP connection).

In this section, we discuss how to define filters in the Ad Hoc Editor. For information on defining filters in the Domain Designer, see *TIBCO JasperReports Server Data Management Using Domains*. For information on defining filters in the Data Chooser, see “[The Pre-filters Page](#)” on page 167.

In addition, you can control how and what filters are applied to a field or fields by using custom expressions. For more information, see “[Custom Filtering](#)” on page 159.

### To create a filter in the Ad Hoc Editor:

1. Right-click a field in the **Data Source Selection** panel and select **Create Filter**. A new filter appears in the Filters panel. If the Filters panel was hidden, it appears when you create a new filter.  
 If the results are empty and you don't understand why, check for an incompatible combination of filters and input controls. Click  to compare input controls with the filters in the Filters panel.
2. Use the fields in the filter to change its value. Depending on the datatype of the field you selected, the filter maybe multi-select, single-select, or text input.
3. Click  and select **Minimize All Filters** or **Maximize All Filters** to toggle expansion of the items in the filter.
4. Click  and select **Remove All Filters** to remove the filters.
5. Click  to hide the filter's details. Click  to display them again.
6. Click the **Select All** check box (if it appears in the Filters panel) to select all values currently available in the dataset. The **Select All** check box does not appear in the Filters panel for numbers and dates.

Note that the **Select All** check box doesn't guarantee that all values are selected every time the report runs. Instead, the check box is a shortcut to help you quickly select all the values currently available in the dataset. To ensure that all values appear in the view whenever it is edited or a report is run, remove the filter entirely. On the panel, you can also create a filter from the right-click context menu of a column in a table. On the **Chart** tab, you must right-click the field in the **Data Source Selection** panel.

When you change a filter, the server uses the filter's new value to determine what data to display. If you change only the operator in a filter, you must deselect the value in that filter, then reselect it to apply the updated filter.

For filters with multiple values, you do not need to reselect all values. After changing the operator, use Ctrl-click to deselect just one of the values, then Ctrl-click to reselect that value.

### 5.7.1.1 Relative Dates

You can filter information in your view based on a date range relative to the current system date. You can accomplish this using date-based filters, and entering a text expression describing the relative date or date span you want to display, using the format <Keyword>+/-<Number> where:

- **Keyword** indicates the time span you want to use. Options include: DAY, WEEK, MONTH, QUARTER, SEMI, and YEAR. An option used by itself (without +/-<Number>) gives the current value for that option.
- **+** or **-** indicates whether the time span occurs before or after the chosen date.
- **Number** indicates the number of the above-mentioned time spans you want to include in the filter.

For example, if you want to look at all Sales for the prior week, your expression would be: WEEK-1.

#### To create a relative date filter:

1. Following the instructions in “[Using Filters](#)” on page 158, create a filter based on a date field. The filter appears in the Filters panel.
2. In the filter’s first text entry box, enter an expression describing the relative date or date span you want to display.
3. In the filter’s second text entry box, enter the date you want to base your filter on.

For instance, if you want to display all the sales numbers for one month before the current date, enter MONTH-1 in the first text entry box, and enter today’s date in the second box.



When you right-click a group member in a crosstab and select **Keep Only** or **Exclude**, you create complex filters. When you create a filter against an inner group, the filter that appears may be created as a complex filter. You can’t edit a complex filter, but you can remove it. Complex filters also appear in the Ad Hoc Editor if a Data Chooser filter was created and locked.

#### 5.7.1.2 Custom Filtering

When you create multiple filters they are, by default, connected with an implicit AND operator. That is, the data displayed in your table, chart, or crosstab is what remains after all your filters are applied.

However, with the custom filter functionality, you can exercise greater control over the displayed data by applying a custom expression that includes more complex, nested AND, OR, and NOT operators, as well as by applying multiple filters to a single field.



Custom filters are not available for Ad Hoc views created from OLAP connections.

Custom filters are useful in a number of situations, including:

- **When using the AND operator isn’t sufficient.** Consider an international company that wants to view data for stores located on the Pacific Rim; they may create a custom expression with the following criteria:
    - Country is USA  
AND
    - State is California OR Washington OR Oregon OR Hawaii OR Alaska.  
OR
    - Country is Japan OR Indonesia
- Using the AND operator for all of these criteria returns an empty view, as no store is located in all of those areas.
- **When you need to eliminate some results in a field.** For example, if your food and beverage distribution company wants to view sales for all drinks except for high-price items, you might include the following criteria in a custom expression:
    - Product Group is Beverages  
NOT
    - Price is greater than 39.99

This filter displays all items in the Beverage Product Group, but filters out those with prices over \$39.99.

These are only two scenarios where custom filters can hone your results and make your view more precise. There are, of course, many other situations where they can be applied.

In this section, we take you through these tasks:

- Creating a custom expression
- Editing a custom expression
- Removing a custom expression
- Applying multiple filters to a single field



Custom filters are applied to views, but filter details don't appear on previews or on the report generated from that view.

#### To create and apply a custom filter:

1. Create two or more filters for your data, as described in “[Using Filters](#)” on page 158. These can be standard field-based filters, or **Keep Only** and **Exclude** filters.

Note that as you create the filters for use in a custom expression, you may find that the data in your view disappears, since most (if not all) of the data won't meet all of the filter criteria. When you create your custom expression and change some of the ANDs to ORs and NOTs, data reappears in the panel.

2. At the bottom of the Filters panel, expand the **Custom Filter Expression** section.
3. In the text entry box, enter a filter expression using the letter designations, and including the following operators:
  - **AND** narrows your results and includes only fields that meet the criteria of both filters before and after the operator.
  - **OR** broadens your results and includes fields that meet the criteria of either filter before or after the operator.
  - **NOT** excludes results that match the criteria.
  - **Parentheses** combines multiple filters into a single item in the expression.



Filter letter designations are case sensitive, and must be UPPERCASE.

4. Click **Apply**. Your view is updated to reflect the newly-applied filter criteria.

After creating a custom filter, you may want to add another filter to the expression or remove one already included in the expression.



If the simple filter you want to delete is part of a custom filter, you must first remove it from the custom filter expression; otherwise deleting the filter deletes the custom filter expression.

#### To add a new filter to an existing custom expression:

1. If necessary, create the new filter in the **Filter** panel.
2. In the **Custom Filter Expression** section, click inside the text entry box to edit the expression.
3. Add the new filter to the expression.
4. Click **Apply** to apply the new filter criteria.

#### To remove a filter from a custom expression:

1. Expand the **Custom Filter Expression** section.

2. In the text entry box, remove the unwanted filter from the expression and adjust the expression as needed.
3. Click **Apply** to apply the new filter criteria.

When working with custom expressions, you may decide to delete an expression and create a new one.

#### To remove a custom expression from a view:

1. Expand the **Custom Filter Expression** section.
2. Clear the expression from the text entry box.
3. Click **Apply**. The expression is removed, leaving the remaining filters intact.

When you refine your custom expression, you may also want to delete unused filters from the Filters panel.

- If the filter you want to remove isn't part of the custom filter, hover your mouse over  in the filter's title bar and select **Remove Filter**.
- If you want to remove all existing filters, including the custom expression, hover your mouse over  in the upper right corner of the Filters panhandle and select **Remove All Filters**.

You can apply multiple simple filters to a single field, if needed, to further refine your custom filter results. For example, a user may want to view the data in the Shipping Cost field, but only when it meets certain criteria combinations:

- When shipping costs to French cities with postal codes that begin with the number 5 are under five Euros
- When shipping costs to German cities with postal codes that begin with the number 1 are under five Euros



You can recreate the scenario below using the [demo for adhoc](#) topic.

In the following example a user has a table including the following columns:

- Country
- Postal Code
- Shipping Charge

To analyze the specific shipping costs described above, the user creates the following (simple) filters - including two filters each for the Country and Postal code fields:

- A. Country *equals* France
- B. Postal code *starts with* 5
- C. Country *equals* Germany
- D. Postal code *starts with* 1
- E. Shipping Charge *is less than* 5

Then, to display only the information she needs, she creates the following custom expression:

- ((A and B) or (C and D)) and E

This translates to:

- ((FRANCE and POSTAL CODES THAT START WITH 5) or (GERMANY and POSTAL CODES THAT START WITH 1)) and SHIPPING CHARGES LESS THAN 5 EUROS.

## 5.7.2 Using Input Controls

In the Ad Hoc Editor, you can display the input controls defined in the Topic as visible to users. You can accept the controls' default values or enter other values. The Ad Hoc Editor indicates that the view has input

controls by displaying  as active on the tool bar. Click this icon to select new values or to save values as the new defaults for this view.

There are two types of input controls: Single select and multi-select. The input control type is determined by the operator you use. In turn, the available operators are determined by the field type (date, text, numeric, or boolean) you use as a filter.

**Single select controls** present a calendar or drop-down list of values, from which you can choose a single value. To create this type of input control select one of the following operators:

- equals
- is not equal to
- is greater than
- is less than
- is greater or equal to
- is less or equal to
- contains
- does not contain
- starts with
- does not start with
- ends with
- does not end with
- is before
- is after
- is on or before
- is on or after

**Multi-select controls** display a calendar or drop-down list of values, from which you can choose multiple values. You can click to select individual values or shift-click to select multiple sequential values. You can also search for values,  select all available values,  deselect all available values, or  invert the selection. A

**Selected** tab shows only items that are selected and allows you to delete them. To create this type of input control select one of the following operators:

- is one of
- is not one of
- is between
- is not between

#### To add an input control to the view using a filter:

1. Create a new filter or use an existing one in the Filters panel.
2. In the Filters panel, click the operator drop-down menu in the filter's title bar.
3. Select an operator from the drop-down. The operator you select determines whether the input control is single-select or multi-select.
4. Click **Apply**. The filter appears as an input control when the view is used to run the report.
5. Place your cursor over , select **Save Ad Hoc View as....**
6. Name the view, select a location, and click **Save**.
7. On the tool bar, click .

Only the input controls defined in the topic appear here. Again, if no input controls were defined in the topic, the button appears inactive. You can create a report and open it in the report viewer to see a filter listed as an input control.

#### To edit the values for a view's input controls:

1. On the tool bar, click  . A window listing the input controls defined in the Topic appears.
-  The Parametrized Report Topic already includes three input controls created when the report was uploaded: Country, RequestDate, and OrderId.
2. Select new values. For example, select USA from the **Country** drop-down.
  3. To change default values of input controls, select the check box, **Set these values as defaults when saving your view**. The selected values become the default values when you save the view.
  4. Click **OK**. The Ad Hoc view shows USA data.

### 5.7.3 Input Controls and Filters Availability

Input controls and filters can appear in the Editor and when a report runs:

- Input controls can be set to be visible or invisible when you edit a view:
  - Input controls set to **Always prompt** are displayed in the editor and always appear before the report is run.
  - Input controls that aren't set to **Always prompt** are always hidden in the editor and hidden when the report is run.
- Filters defined in the Domain design are always hidden in the editor and when the report is run.
- Filters created in the Data Chooser can be locked or unlocked:
  - Filters that are unlocked display filter information in the editor and are available from the **Options** button when the report is run.
  - Filters that are locked display input controls in the editor when you click  to see the view in display mode but are not available from the **Options** button when the report is run. Users can remove the filter while in the editor, allowing them to see all the data unfiltered when the report is run.
  - You can't change whether the filter is displayed after the report is created.
- Filters defined in the editor are always available in the Filters panel of the editor and from the **Options** button when the report is run.

When setting up input controls for a huge view that takes a long time to run, consider setting the view to **Always prompt**. Before a report is run, the report viewer prompts you to provide the input options, preventing the report from running with the default input options.

Filters that are unlocked are available. When input controls or filters don't appear in the report viewer, click the **Options** button to view them. You can learn more about how filters and input controls interact in the editor by walking through the data exploration tutorial with the Filters panel open.

#### To set an input control to always prompt:

1. Locate a Topic, such as the Parametrized Report Topic, in the repository and click **Edit**.
2. On the Controls & Resources page of the JasperReport wizard, under Input Control Options, select **Always prompt**:

**To determine whether an input control is visible:**

1. Locate a Topic, such as the Parametrized Report Topic, in the repository and click **Edit**.
2. On the Controls & Resources page, click the name of an input control, such as Country.
3. On the Locate Input Control page, click **Next**.

At the bottom of the Create Input Control page, if the **Visible** check box is selected, the input control appears on the report when it runs. For more information, see “[Adding Input Controls” on page 190](#).



If you don't provide a default value for the input control, users are prompted to select a value when they create a view based on the Topic.

**To lock a filter:**

1. Click **Create > Ad Hoc View**.
2. In the Select Data wizard, click and browse to **Domains** to create a new view based on a Domain.
3. Click **Choose Data**.
4. In **Fields**, move tables and fields from **Source** to **Selected Fields**.
5. Click **Pre-filters**.
6. Double-click a field in the **Fields** panel.
7. In the Filters panel, define a filter as described in “[The Pre-filters Page” on page 167](#).
8. Check the **Locked** check box, and click **OK**.
9. Click **Table** to open the Ad Hoc Editor.

In the Filters panel, the name of the filter and a note about the lock appears under the heading **Locked**.

## 5.8

## Creating a View from a Domain

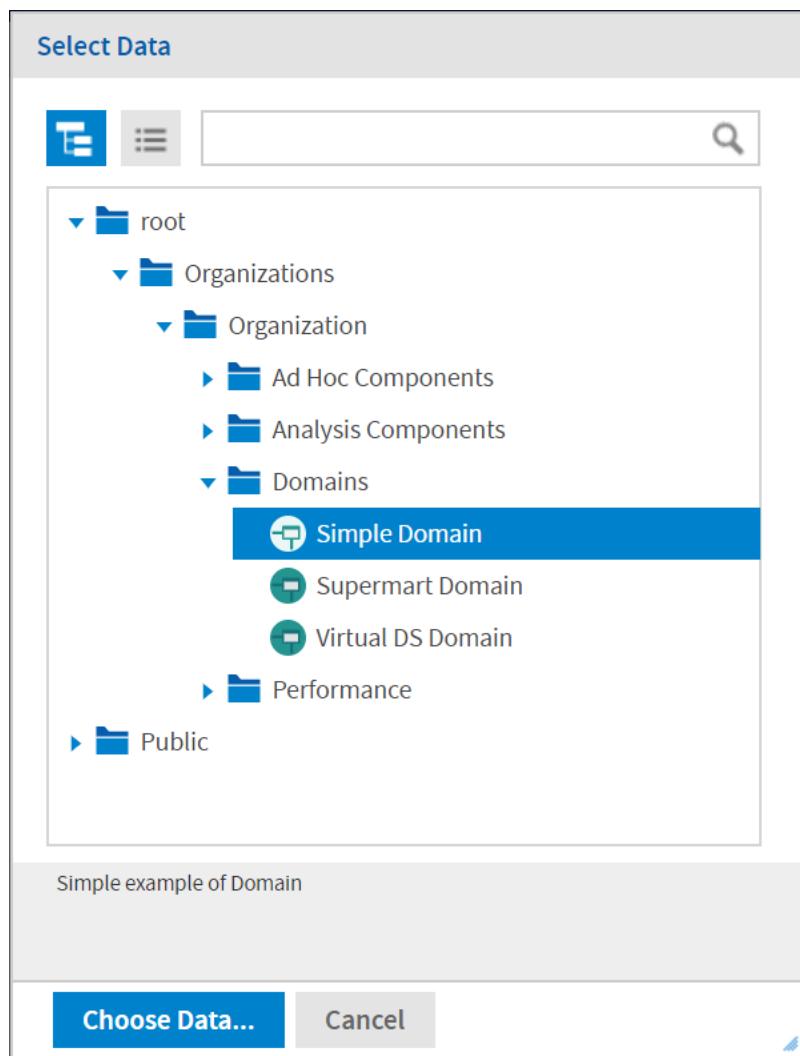
Like Topics and OLAP connections, administrators and data analysts create Domains for reuse to simplify access to data during view design. Domains give view makers more flexibility than Topics in choosing fields from the database and allow filtering of the data before it is included in a view and the subsequent report.

A view based on a Domain can prompt the user for input that determines what data is presented. For example, if a Domain includes all sales data for a company, the view can present detailed information grouped by postal code and prompt the user to select the geographic area, such as a US state. The view displays only the pertinent information.

For a more complete description of how to create Domains, see *TIBCO JasperReports Server Data Management Using Domains*.

**To begin create a basic view from a Domain:**

1. On the Home page, click **Create > Ad Hoc View**. The Select Data wizard opens.
2. Click and navigate to **Domains**. A description of the selected Domain appears at the bottom of the Domains tab.



**Figure 5-22 Simple Domain Selected in the Select Data Dialog**

3. Select the domain you want to use.
4. Click **Choose Data**. the Data Chooser opens to the Fields page.  
You are now ready to configure your data using the Data Chooser Wizard.

### 5.8.1 Referential Integrity

When you create an Ad Hoc view from a Domain, the two elements are connected - the data in the view is dependent on the Domain. This relationship affects users working with the Domain and the dependent view in a number of ways:

- When an item or items from the Domain are used in the dependent Ad Hoc view, removing the items from the Domain will result in a Missing Data error message when opening the Ad Hoc view in the editor. The user is prompted to remove the items from the Ad Hoc view. The removed items no longer appear in the Data Source Selection panel when the editor opens.

- Items not used in dependent views can be removed from the Domain by the Domain's administrator; those items no longer appear in the view's Available Fields list.

## 5.8.2 Using the Data Chooser Wizard

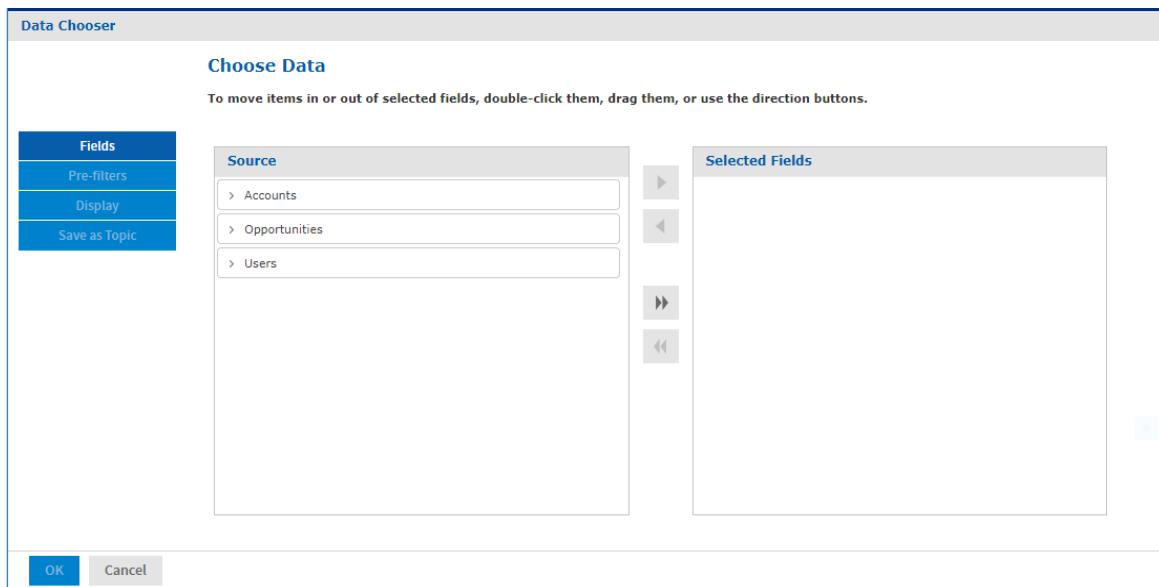
To design a Domain Topic or a view based on a domain, use the Data Chooser wizard. To open the Data Chooser wizard:

1. Click **Create > Ad Hoc View**.
2. Click  and browse to a Domain, then click **Choose Data** to access the following pages of the Data Chooser:
  - **The Select Fields Page** – Choose the fields to make available in the Ad Hoc Editor.
  - **The Pre-filters Page** – Define a filter on any field, with the option of prompting for user input, or to compare fields.
  - **The Display Page** – Change the order and names of fields that appear in the Ad Hoc Editor.
  - **The Save as Topic Page** – Save the settings as a Domain Topic.

You must start by selecting some fields on the Select Fields page, but the other three pages are optional and can be completed in any order. Click **Table**, **Chart**, or **Crosstab** at any time to begin designing a view based on the chosen data.

### 5.8.2.1 The Select Fields Page

Use this page to choose fields and sets of fields to use in the view or make available in the Domain Topic:



**Figure 5-23 The Fields Page of the Data Chooser**

- The Source panel displays the sets of fields in the Domain. Use ▾ and ▶ to collapse or expand each set.
- The Selected Fields panel shows the items you selected. You can move a field or set back and forth between the panels by dragging, double-clicking, or selecting the item and clicking an arrow button, such



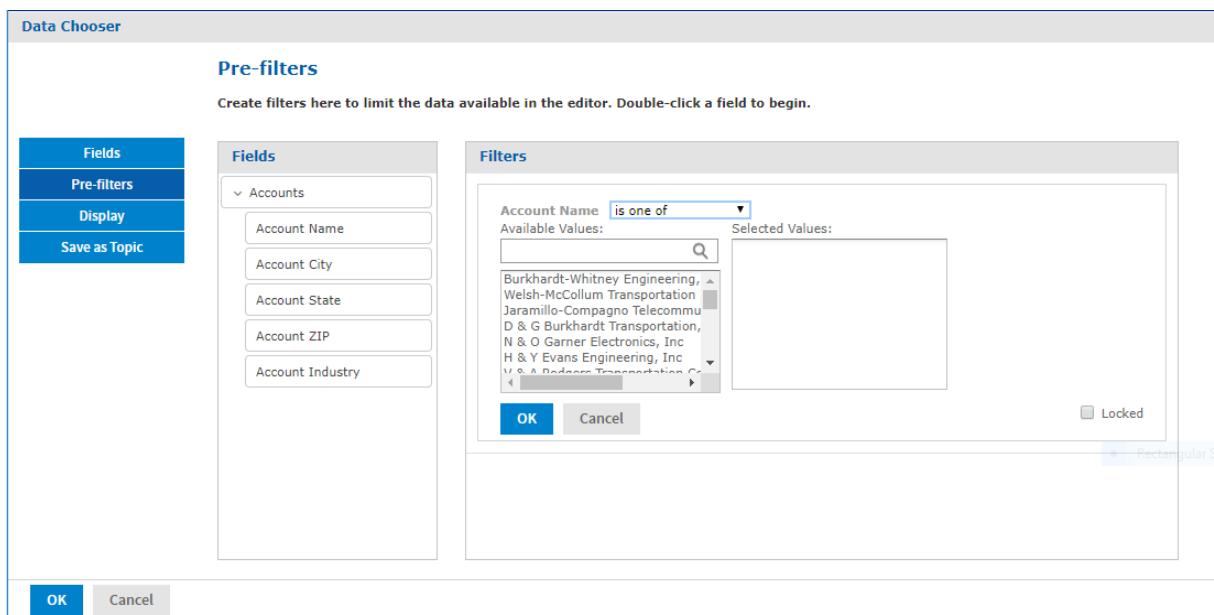
as

- When you select any field from a set in the Source panel, the set name appears with the field in the Selected Fields panel. If you do not want sets, use the settings on the Display page.
- Some Domains define sets that are not joined, also called data islands. When you select a field from such a set, the behavior on the Select Fields page depends on how the joins were created in the Domain:
  - If the Domain uses basic joins, the unjoined sets aren't available. The Domain Designer only creates basic joins.
  - If the Domain uses advanced joins, all joins are available regardless of the join set of the fields you add. In this case, you must manually make sure that you do not add fields that are in different data islands to a single Ad Hoc view. Otherwise you will receive errors when attempting to work with the view.

### 5.8.2.2 The Pre-filters Page

You can pre-filter data in the Data Chooser before launching the Ad Hoc Editor or creating a Domain Topic. Pre-filtering data limits the data choices available in a Domain Topic or the fields that ultimately appear in the Ad Hoc view. You can also define a filter on a field that does not appear in the final report. The filter is still applied and only data that satisfies all defined filters appear in the final report. For example, you can filter data to select a single country, in which case it doesn't make sense for the Country field to appear as a row, column, or group. You can also design reports that prompt users to input data to use as a filter.

The Pre-filters page provides powerful functionality for designing views within the server.



**Figure 5-24 Condition Editor in the Filters Panel on the Pre-filters Page**

#### To define a filter:

- In the Data Chooser, click **Pre-filters**.
- Expand the options in the **Fields** panel.
- Double-click to select a field in the **Fields** panel. Choices appear for filtering the selected field:

4. Choose a comparison operator.

Text fields have both substring comparison operators such as “starts with” or “contains” and whole string matching such as “equals” or “is one of.” When you select a whole string matching operator, a list appears showing all existing values for the chosen field retrieved in real-time from the database.

In the Filters panel, a drop-down appears containing the account names from which you can select multiple values.

5. Click each value for comparison in Available Values to move it to Selected Values. The account names appear in Selected Values.



If there are more than 50 Available Values, click to search for the value. The maximum number of items that can be displayed in Available Values is configurable. For details, see the *TIBCO JasperReports Server Administrator Guide*.

6. To limit the view design to the four account names in Selected Values, check the **Locked** check box.

By default, the **Locked** check box is unchecked, making the filter available to end-users running the report.

In the Report Viewer, users can click the **Options** button to enter a comparison value for this condition; when the user clicks **Apply** or **OK**, the report preview refreshes with data that match the condition. The condition is available as a prompt even if the filtered field does not appear in the report. For example, the final report might present data for a single country, but the country is chosen by the user. Once defined, filter prompts can be modified in the Ad Hoc Editor, as explained in “[Using Input Controls](#)” on page 161.

Note that when the **Locked** check box is checked, the filter is not available to end-users running the report. The condition can be removed from the view, if needed, but not edited.

7. Click **OK** to create the filter.

The **Filters** panel shows the filters you have defined.

8. In the **Filters** panel, click **Change** to modify the condition. Click **OK** to save the changes. After selecting a row, you can also click **Remove** to delete it from the list.



Data rows must match all conditions. In other words, the overall filter applied to the data is the logical AND of all conditions you have defined.

#### 5.8.2.3 The Display Page

Use the Display page to change the default label and order of the fields as they should appear in the list of fields in the Ad Hoc Editor. You can always change the field labels and ordering in the Ad Hoc Editor, but setting them here makes them available in a Domain Topic. The page includes these options:

- To change the order of fields, click once anywhere in a field’s row and use the **Move to top**, **Move up**, **Move down**, or **Move to bottom** buttons:



Fields may be moved only within their set, but sets as a whole may also be moved.

- By default, the field name becomes the display label for the row, column, or measure that you create from it. To change the default display label of a field or set, double-click anywhere in the row and type the new label in the text box.
- Sets and the fields they contain appear in the list of fields in the Ad Hoc Editor. Sets are not used in views, but can be used to add all their fields at once, expediting view creation.

- If you don't want to use sets in the Ad Hoc Editor, select **Flat List** at the top of the Data Source Selection panel. You can now relabel the fields and reorder them.

#### 5.8.2.4 The Save as Topic Page

Here you can enter a name and a description to save the Data Chooser settings as a Domain Topic. Thereafter, you can create different views from the Domain Topic, using its fields, filters, and display label settings. You can also edit the Domain Topic to change the settings.

If an administrator has enabled the Data Staging feature, you can turn data staging on for your domain topic. With data staging, the entire dataset for a Domain Topic is indefinitely cached in the server's Ad Hoc cache. Ad Hoc views and reports from that Domain Topic run faster because they fetch data from the local cache, not by querying the production database. To keep data fresh, you can specify a refresh interval, and the server will periodically access the database in the background to reload the entire dataset.

- By default, Domain Topics are saved in the standard Topics folder. This corresponds to the **Ad Hoc Components > Topics** location in the repository; JRXML Topics and Domain Topics in this folder appear on the **Topics** tab when you start a view. Do not modify this folder name.
- The description text appears with the Domain Topic in the repository and at the bottom of the **Topics** tab on the Ad Hoc Source dialog. Enter an informative description that helps users understand the nature and purpose of this Domain Topic.

## 5.9 Working with Topics

When a user clicks **Create > Ad Hoc View** on the Home page, the Select Data wizard offers a path to a list of Topics populated from the Ad Hoc Components/Topics folder in the repository. There are two types of Topics:

- JRXML-based Topics – Created by administrators using Jaspersoft Studio and uploaded as JRXML files to the proper location in the repository. Topics are typically of this type.
- Domain Topics – Created from a Domain by administrators using JasperReports Server.

Either type of Topic is an empty view associated with a data source in the server, and is then built on in the Ad Hoc Editor.

### 5.9.1 Uploading a Topic Through the Web UI

JRXML-based topics are the most common type of topic. You can upload previously created JRXML topics via the repository.

#### To upload a JRXML-based Topic:

1. Log into the server as administrator and select **View > Repository**.



While any user with sufficient repository permissions can upload a Topic to the server, this example requires an administrator login to access the JServer Jdbc data source.

2. Locate the folder where Topics are stored. The location of the Topics folder depends on your system configuration; by default, Topics are in the **Ad Hoc Components > Topics** folder.
3. Right-click the Topics folder name and select **Add Resource > JasperReport** from the context menu. The Set Up the Report page of the JasperReport wizard appears.



**Add Resource** appears on the context menu only if your login account has write privilege to the folder.

4. In the Set Up the Report page, give the Topic a name, a Resource ID, and an optional description, then click **Next**.
  - The **Name** field is the visible name of the file in the repository, such as Example Topic.
  - The **Resource ID** field is the internal ID of the object, such as Example\_Topic. The server does not accept spaces in an internal ID.
  - The **Description** field, such as Topic uploaded for User Guide example, helps users understand the purpose of the file.
5. In the **Locate the JRXML File** section, select **Upload a Local File**, and click **Browse** to locate the file and upload the Topic from the file system. In this example, the file is <js-install>/samples/adhoc/topics/adhoc\_sample.jrxml.



To locate adhoc\_sample.jrxml, you need access to the server host file system.

6. Click **Data Source**.



Because this is a simple Topic without parameters, there are no controls and resources associated with it. If the Topic has a Parametrized query, you can create input controls for it. See “[Selecting a Data Source for Running the Complex Report](#)” on page 200. Such input controls can appear in the Ad Hoc Editor and when the report is run.

7. Click **Select data source from repository** and **Browse** to locate the data source named **Data Sources/JServer Jdbc data source**.
8. Select Data Source, then click **Select**.  
Topics must be associated with the data source that they were designed for.
9. Click **Submit** at the bottom of the screen.  
Topics usually do not need a query or customization, but you can define them.

When you select **Create > Ad Hoc View** and click in the Select Data wizard, you can browse to **Ad Hoc Components > Topics**. If you select the Example Topic, you can create a report using the columns available in the data source selected in step 7.

The JRXML file that the Topic is based on must contain a query and a field list.



Any report layout in the Topic's JRXML file is ignored by the Ad Hoc Editor. We recommend that a Topic's JRXML file not include anything other than the query and field list.

When you create a JRXML file for use as a Topic, you can specify the name to display for each field that the Topic returns. To do so, define a field property named `adhoc.display` for each field declared in the JRXML. The `adhoc.display` field property must have the following syntax:

```
<property name="adhoc.display" value="Any Name"/>
```



If the Topic includes fields with unusual datatypes, those fields don't appear in the Ad Hoc Editor because it's not equipped to manage them properly. For example, if the Topic is defined against a MongoDB instance that returns data of type array, this field isn't available in the Ad Hoc Editor. For more information on datatype support in the Ad Hoc editor, see the *TIBCO JasperReports Server Administrator Guide*.

For example, this JRXML code declares a StoreState field that is displayed in reports as Store State:

```
<field name="StoreState" class="java.lang.String">
  <property name="adhoc.display" value="Store State"/>
</field>
```

Topics also support the \$R expressions for field names; for more information, see [“Localizing Reports” on page 204](#).

For fields in a non-domain topic the following properties may be of interest:

- dimensionOrMeasure: marks a field as a field or a measure
- defaultAgg: which aggregation should be used for this measure (avg, etc)
- semantic.item.desc: A description for the field
- defaultMask: set a measure as a \$, date etc

For more information on working with JRXML topics, see the *TIBCO Jaspersoft Studio User Guide*.

### 5.9.2 Creating Topics from Domains

In some circumstances it is important to create a Topic based on the Domain and data settings you chose, but it's not always necessary. The main consideration is how reports based on the Domain-based view are used. The following table explains the choices.

If you want to ...	Then do this	Explanation
Create a single-use report from the Domain with your settings.	Click <b>Table</b> , <b>Chart</b> , or <b>Crosstab</b> after defining your settings in the Data Chooser, then format the view and create your report.	Your field selections appear in the Ad Hoc Editor and you can create views from them, but the settings themselves are not saved.
Run a report repeatedly as is or with prompting for new input, or make very similar reports in the Ad Hoc Editor.	Click <b>Table</b> , <b>Chart</b> , or <b>Crosstab</b> after defining your settings in the Data Chooser, then format and save the view in the Ad Hoc Editor.	After you save a view, users can create reports to be run from it repeatedly and be prompted for input each time if you defined unlocked filters.
Reuse your field, filter, and display settings on this Domain to create new views with different formatting.	After saving your settings as a Domain Topic in the Data Chooser, start a new view and choose your Domain Topic from the <b>Domains</b> tab.	Domain Topics are saved in JRXML format in the repository. They appear on the <b>Topics</b> tab when you start a view.
Be able to modify one or more of the settings you made in the Data Chooser wizard.	After saving your settings as a Domain Topic in the Data Chooser, find your Domain Topic in the repository and open it in the Domain Designer.	Domain Topics can be edited as described in <a href="#">“Editing a Domain Topic ” on page 173</a> . After you save your changes, you can create views based on the modified Domain Topic.

If you want to ...	Then do this	Explanation
Create views from the same repository data source but with different Domain settings, such as derived fields and different joins to make new fields available in a report.	Edit the Domain and save it with a new name. Then start a new view and choose your data from the new Domain.	Domains provide advanced functionality such as table joins and derived fields based directly on a data source. Domains usually require administrator permissions to create and modify.



Ad Hoc views based on Domain topics may return duplicate data if Data Staging is enabled.

#### 5.9.2.1 Access Permissions in Domain Topics

If other users create reports from your Domain Topic-based view, and the Domain is configured for security, it's important to consider everyone's access permissions. You might not have access to all of the fields in the Domain nor to all the data in those fields. There may be fields that can be seen only by other users, and in the fields that you can see, some data may be hidden from you. When you save the Domain as a Topic, only the fields that you selected appear in the Domain Topic. When you create a view from the Topic, only the data that you can access in those fields appears. When others create views from the Topic, they see only fields that they have permission to access. These rules also apply to the reports generated from these views.

For example, in a Domain, user Tomas can access fields B-C and data rows 1-3; Anita can access fields C-E and data rows 2-5. Tomas uses the Data Chooser and saves a Domain Topic based on the Domain. When Tomas and Anita create reports from the same view, they see different combinations of fields and the data in them.

	Fields	Data
Tomas's report from his Domain Topic	B C	1 2 3
Anita's report from the same Domain Topic	C	2 3 4 5

Even though Anita has permission to see more fields, they're not available to her because Tomas did not have access to them when he created the Domain Topic. However, Anita does have permission to see more data than Tomas, so when she creates a view, or opens or runs the report based on that view, she can see more rows than Tomas can when he views the report. See the *TIBCO JasperReports Server Security Guide* for a technical explanation of data security for Domains.

#### 5.9.2.2 Saving Domain Settings as a Domain Topic

##### To save settings in the Data Chooser wizard as a Domain Topic:

1. While making selections in the Data Chooser, navigate to the **Save Topic** page.
2. Enter a Topic name and description.

Do not change the location folder. Using the default /adhoc/topics folder makes the saved Domain Topic available in the **Ad Hoc Components > Topics** folder when you select **Create > Ad Hoc View**.

3. If your data selections, filter definitions, and display settings are complete, click **Table**, **Chart**, or **Crosstab**.



If settings are incomplete, navigate to the other pages to finish, then click **Table**, **Chart**, or **Crosstab**

The new Topic appears in the **Ad Hoc Components > Topics** folder.

Because a Domain Topic is a type of report, it appears when the Search page is filtered to show reports:

#### 5.9.2.3 Editing a Domain Topic

You can modify a Domain Topic you created using the Data Chooser.

##### To edit the settings in a Domain Topic:

1. Select **View > Repository** and search (or browse) for the Domain Topic you want to modify. Domain Topics are usually kept in the **Ad Hoc Components > Topics** folder.
2. Right-click the Domain Topic and select **Open in Designer** from the context menu. The Domain Topic opens in the Data Chooser wizard.
3. Follow the guidelines in “[Using the Data Chooser Wizard](#)” on page 166 to edit the Domain Topic as needed.
4. To save changes to the selected Domain Topic, click **Table**, **Chart**, or **Crosstab** on any page.



Use caution when editing Domain Topics that may have been used to create other views. Users relying on the Domain Topic might receive unexpected data or errors. It's safer to save changes as a new Domain Topic.

To save changes as a new Domain Topic, navigate to the Save as Topic page and enter identifying information for the new Topic, then click **Table**, **Chart**, or **Crosstab**.



# CHAPTER 6 ADDING REPORTS DIRECTLY TO THE REPOSITORY



This section describes functionality that can be restricted by the software license for JasperReports Server. If you don't see some of the options described in this section, your license may prohibit you from using them. To find out what you're licensed to use, or to upgrade your license, contact Jaspersoft.

Using the Ad Hoc Editor, you can create reports within JasperReports Server from pre-defined Topics and Domains. You can also create reports outside of JasperReports Server and add them to the repository. To add a report to the repository, you need a valid JRXML file. To create and validate this file, you can use Jaspersoft Studio. Jaspersoft recommends Jaspersoft Studio for most users because its graphical user interface simplifies the job. If you have a thorough understanding of the file structure, you can use a text editor to create the file containing JRXML code.

You can add a report to the server's repository in two ways:

- From within the server  
Add the JRXML file and any other resources the report needs as a report unit. A wizard guides you through each step.
- From Jaspersoft Studio  
Design the report in Jaspersoft Studio, and use a connection to JasperReports Server to add the JRXML and resources to the JasperReports Server repository. See the *TIBCO Jaspersoft Studio User Guide* for information.

To add the sample report units to the server, you need access to the sample data in the server installation directory on the file system (<js-install>/samples). Contact your administrator for help in locating these files.



In most cases, it is preferable to upload the JRXML file from Jaspersoft Studio. Uploading through JasperReports Server is included for completeness.

This chapter includes examples of adding a report to the repository using the server's wizard and the plug-in. The chapter contains the following sections:

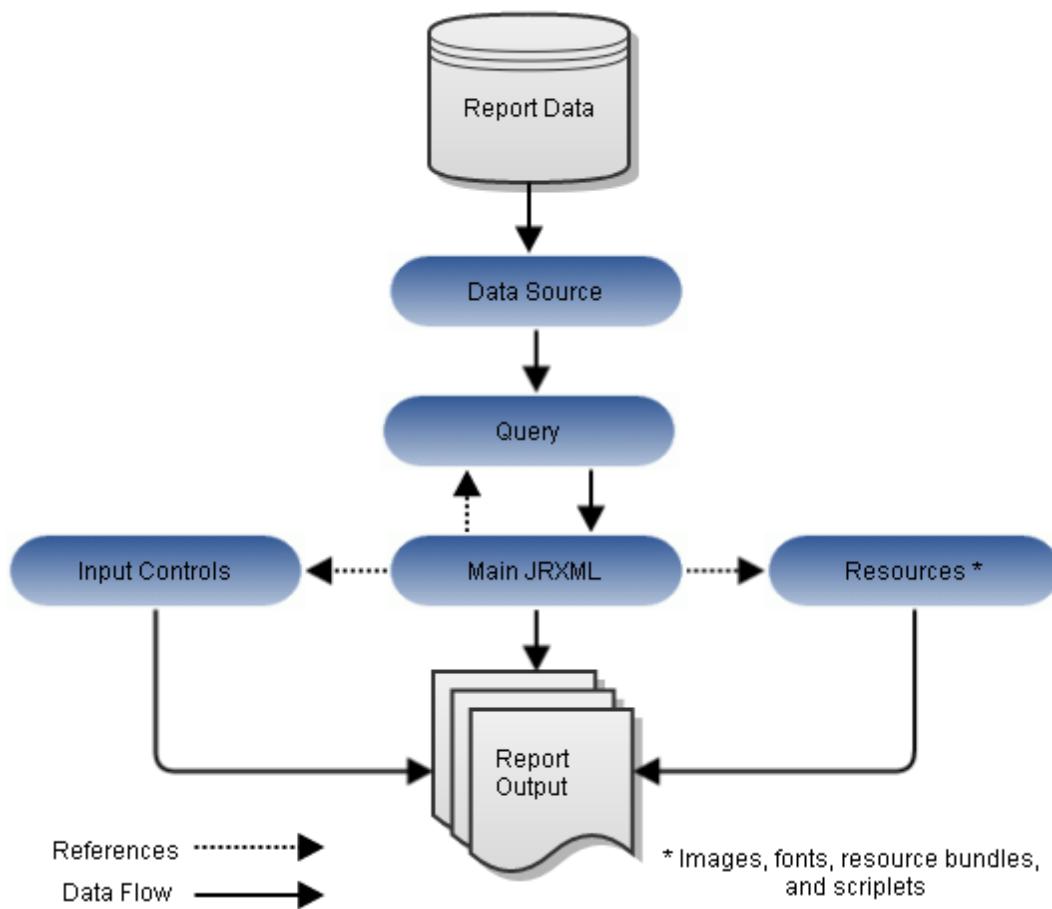
- [Overview of a Report Unit](#)
- [Adding a Report Unit to the Server](#)
- [Modifying the Query When Uploading a Report](#)
- [Adding a Complex Report Unit to the Server](#)
- [Adding Cascading Input Controls to a Report](#)
- [Editing JRXML Report Units](#)
- [Localizing Reports](#)

## 6.1 Overview of a Report Unit

In the server, a report unit is the collection of elements used for retrieving data and formatting output. [Figure 6-1 on page 176](#) shows these elements:

- The data source and the query that retrieves data for the report.
- The main JRXML that determines the layout and is the core of the report unit.
- The main JRXML defines other elements in one of the following ways:
  - Creating definitions internally
  - Referring to existing elements in the repository using the `repo:` syntax
- The input controls and other resources.

For more information about the report unit, refer to the *TIBCO JasperReports Server Ultimate Guide*.



**Figure 6-1 Anatomy of a Report Unit**

## 6.2 Adding a Report Unit to the Server

This section presents an example of uploading a JRXML with resources to the server. This report has two images that need to be added.

### 6.2.1 Selecting the Main JRXML File

If you want to validate the JRXML before uploading it, use Jaspersoft Studio. The server doesn't validate the JRXML when you upload it.

This procedure shows you how to set up a name for the report in the repository and select the main JRXML file that references all other elements.

#### To upload the main JRXML for this example:

1. Log into the server as administrator and select **View > Repository**.



If you log in as a user, you can upload a report unit to the server, but this example requires an administrator login to access the image resources.

2. Locate the folder where you want to add the report. For example, go to **Public > Samples > Reports**.
3. Right-click the Reports folder and select **Add Resource > JasperReport** from the context menu. The Set Up the Report page of the JasperReport wizard appears.



**Add Resource** appears on the context menu only if you have write permission to the folder.

4. In **Naming**, enter the name and description of the new report and accept the generated Resource ID:
  - Name – Display name of the report: New Simple Report
  - Resource ID – Permanent designation of the report object in the repository: New\_Simple\_Report
  - Description – Optional description displayed in the repository: This is a simple example
5. Select **Upload a Local File** and **Browse** to <js-install>/samples/reports/AllAccounts.jrxml.



This example shows how to upload a JRXML file from the samples folder in the installation directory. You can also select a JRXML from the repository.

In **Figure 6-2** you can see the Set Up the Report page.

Add JasperReport: New Simple Report

### Set Up the Report

Set the required values for the report, then, optionally, proceed to other pages in the flow.

**Set Up**

Name:  
New Simple Report

Resource ID (required):  
New\_Simple\_Report

Description:  
This is a simple example

Locate the JRXML File

Upload a Local File  
AllAccounts.jrxml

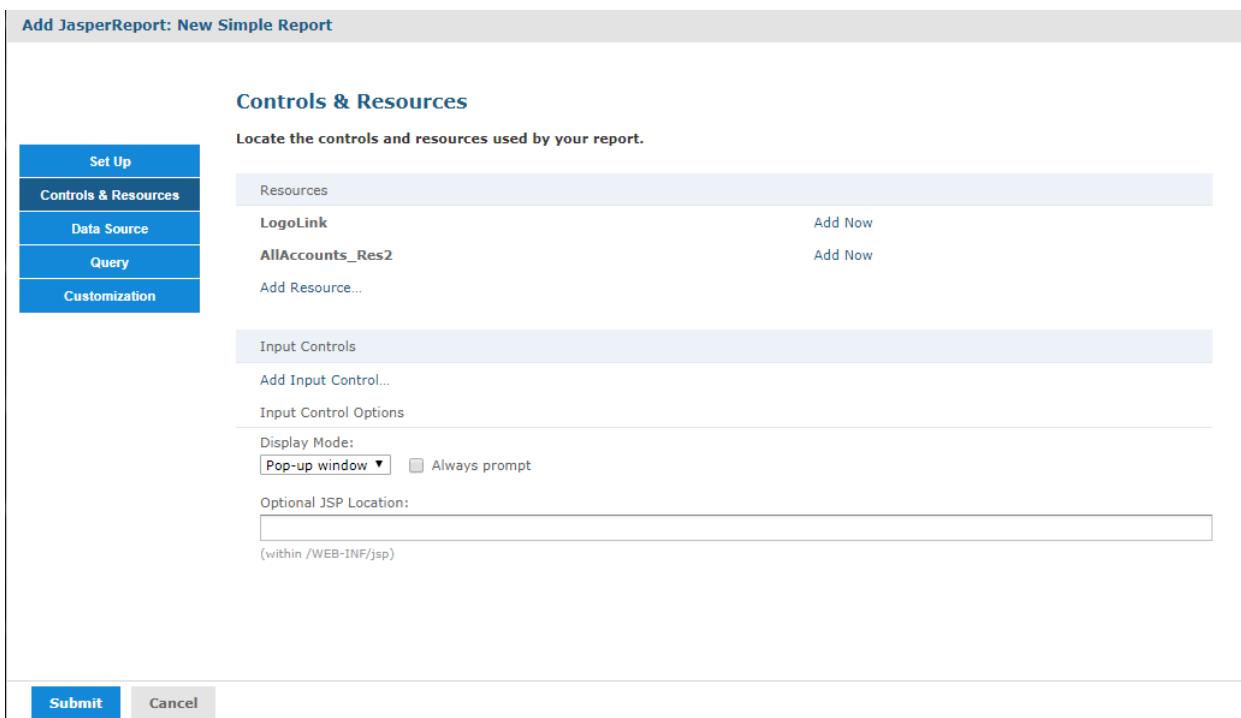
Select a JRXML from the Repository

**Submit** **Cancel**

**Figure 6-2 Required Set Up Values**

6. Click **Controls & Resources**.

The Controls & Resources page appears. If the server detects that the report needs additional resources, you'll be prompted to locate those resources.



**Figure 6-3 Suggested Resources in the Resources List**

A JRXML file doesn't embed resources, such as images. When the server uploads the JRXML, it tries to detect any missing resources. For example, [Figure 6-3, “Suggested Resources in the Resources List,” on page 179](#) shows that two image files are missing:

- LogoLink
- AllAccounts\_Res2

### 6.2.2 Uploading Suggested File Resources

If needed files are missing, as shown in [Figure 6-3](#), you need to take one of the following actions:

- Upload resources that the report needs
- Select a resource from the repository



If the Controls & Resources page doesn't suggest resources, perhaps the report doesn't reference any. However, the server can't always detect all the referenced resources, as discussed in [“Uploading Undetected File Resources” on page 187](#).

#### To upload a resource from the file system:

1. On the Controls & Resources page, click **Add Now** in the row of the missing resource, for example, LogoLink. The Locate File Resource page appears.
2. Choose **Upload a Local File** then click **Choose File**.
3. **Browse** to <js-install>/samples/images. The LogoLink file is not available, but you can use an alternate image, such as <js-install>/samples/images/jasperreports.png.
4. Click **Open** to return to the Locate File Resource dialog.

- Click **Next**. The Add a Report Resource page appears.

**Add JasperReport: New Simple Report**

### Add a Report Resource

Set the properties for the resource.

Type: Image

Selected Resource:  
jasperreports.png

Name (required):

Resource ID (read-only):  
LogoLink

Description:

Buttons: Previous, Next, Cancel

**Figure 6-4 Properties of a Resource**



The properties include the LogoLink name, resource ID, and description.

- Click **Next** to accept the default naming of the file resource.

The Controls & Resources page appears again, showing that the LogoLink resource was added.

**To add a resource from the repository:**

- To add the second resource, click **Add Now** in the row for AllAccounts\_Res2.
- Choose **Select a resource from the Repository** and **Browse** to an image file, for example, **Public > Samples > Images > Jaspersoft\_logo.png**.



Any image file works.

- Click **Select**.

The path to the image appears in the wizard.

- Click **Next**. The Add a Report Resource page displays the properties of the image as set in the uploaded JRXML file.



The properties include the LogoLink name, resource ID, and description. These properties don't redefine the properties of the Jaspersoft\_logo.png file in the repository.

- Click **Next** to accept the default naming of the file resource.

The Controls & Resources page reappears, showing the addition of both resources referenced in the main JRXML.

6. Click **Data Source** and define a data source as described in the next section.

### 6.2.3 Defining the Data Source

Data sources are not defined directly in the report JRXML file and must be specified when you upload a file to JasperReports Server. On the Data Source page of the Add JasperReport wizard, you can select a data source in the repository or create a new data source on-the-fly.

If you want to create a data source, the application server must be able to find the driver for the database you want to use. For example, in a default installation of JasperReports Server, Tomcat looks for data source drivers in <js-install>/apache-tomcat/lib. Put a copy of the driver in this location.

**To define a data source for the simple report example:**

1. In the JasperReport wizard, click **Data Source**. The Link a Data Source to the Report page presents these choices:
  - Do not link a data source – Select or define the data source at a later time. You see an error if you run the report in this state.
  - Click here to create a new data source – Define a new data source available only to your report.
  - Select data source from repository – Select an existing data source from the repository.
2. Choose **Select data source from the Repository** and **Browse to Public > Samples > Data sources > JServer JNDI Data Source**.
3. Click **Select**. The Link a Data Source to the Report page reappears with the path to the data source.

Add JasperReport: New Simple Report

**Link a Data Source to the Report**

Optionally, link a data source to the report. You can choose a data source from the repository or create a new one.

Do not link a data source  
 Click here to create a new data source  
 Select data source from repository  
 /public/Samples/Data\_Sources/JServerJNDIDS

**Set Up**

**Controls & Resources**

**Data Source**

**Query**

**Customization**

**Submit** **Cancel**

**Figure 6-5 Data Source Page**

4. Click **Submit** to add the new report unit to the repository.

## 6.2.4 Saving the New Report Unit

To submit a new report unit to the repository, click **Submit** on any page of the JasperReport wizard, from the Set Up page to the Customization page. You don't have to set options you don't need, such as Customization. When you click **Submit**, the server attempts to upload the report JRXML and its resources. If the upload is successful, a message appears at the top of the repository page, indicating that the report was saved. The report appears in the repository with the description you entered on the Set Up page. To run the report and view the output, click its name, New Simple Report.

Repository					
Folders		Report List			
	Name	Description	Type	Created Date	Modified Date
	11. Sales By Month Report	Sample multi-panel report	Report	July 15	10/16/2019
	12. Promotion Details Report	Drill-through from the Supermart dashboard.	Report	July 15	10/9/2019
	14. World Map	Report with simple Geographic Map and Hyperlink	Report	July 15	10/11/2019
	16. Interactive Sales Report	Interactive table and chart.	Report	July 15	8/27/2019
	17. Report Workbook	Sample report book with table of contents.	Report	July 15	10/27/2015
	20.1 Account List	Sample Report used for basic Visualize.js demo	Report	July 15	5/16/2014
	20.2 Cities	Sample Report used for basic Visualize.js demo	Report	July 15	4/24/2014
	20.3 SalesPerCityReport	Sample Report created from Ad Hoc View for Basic Visualize.js Demo	Report	July 15	4/24/2014
	20.6 Store Details	Sample Report used for basic Visualize.js demo	Report	July 15	4/24/2014
	New Simple Report	This is a simple example	Report	Today	Today

**Figure 6-6** New Report Added to the Repository

In the report viewer, click ► to go to the end of the report, where the logo images that you added appear. The following figure shows the output.

Back	Print	Export	First	Previous	Next	Last	100%	search report	Page 47 of 47	Next									
<hr/>																			
<hr/>																			
<table border="1"> <thead> <tr> <th>Name</th> <th>Phone</th> <th>Address</th> </tr> </thead> <tbody> <tr> <td>10. Taryle-Spencer Transportation Holdings</td> <td>470-555-2278</td> <td>3732 Camino Norte</td> </tr> <tr> <td>11. K &amp; R Brandon Communications Group</td> <td>315-555-7829</td> <td>8067 Olympic Drive</td> </tr> </tbody> </table>  											Name	Phone	Address	10. Taryle-Spencer Transportation Holdings	470-555-2278	3732 Camino Norte	11. K & R Brandon Communications Group	315-555-7829	8067 Olympic Drive
Name	Phone	Address																	
10. Taryle-Spencer Transportation Holdings	470-555-2278	3732 Camino Norte																	
11. K & R Brandon Communications Group	315-555-7829	8067 Olympic Drive																	

**Figure 6-7** Output of the New Simple Report

## 6.3

## Modifying the Query When Uploading a Report

The query in the report unit determines the data that the server retrieves from a data source. You can create multiple reports that look the same but contain different data by defining different queries for the same JRXML file each time you upload it. You can choose use a stored query in the repository or define a new one. This example uses a query that returns accounts from a single country.

You can only override the main query for a report (specifically, the query defined directly within the JRXML root element `<jasperReport>`). If the report has elements that use a sub-dataset (including all table elements and all elements that use a different dataset), the queries for these elements will not be affected.

First you need to upload the report and select a data source, as in the previous example. Then you can create a query which replaces the original query in the report.

#### To locate the sample report for this example:

1. Log into the server as administrator and select **View > Repository**.
2. Locate the folder where you want to add the report. For example, go to **Public > Samples > Reports**.
3. Right-click the Reports folder and select **Add Resource > JasperReport** from the context menu. The Set Up the Report page of the JasperReport wizard appears.



**Add Resource** appears on the context menu only if you have write permission to the folder.

4. In **Naming**, enter the name and description of the new report and accept the generated Resource ID:
  - Name – Display name of the report: Sample Query Report
  - Resource ID – Permanent designation of the report object in the repository: Sample\_Query\_Report
  - Description – Optional description displayed in the repository: Example of changing a query in a report
5. Select **Upload a Local File** and **Browse** to <js-install>/samples/reports/SimpleReport.jrxml.
6. Click **Open** to upload the file.

#### To select a data source for the report:

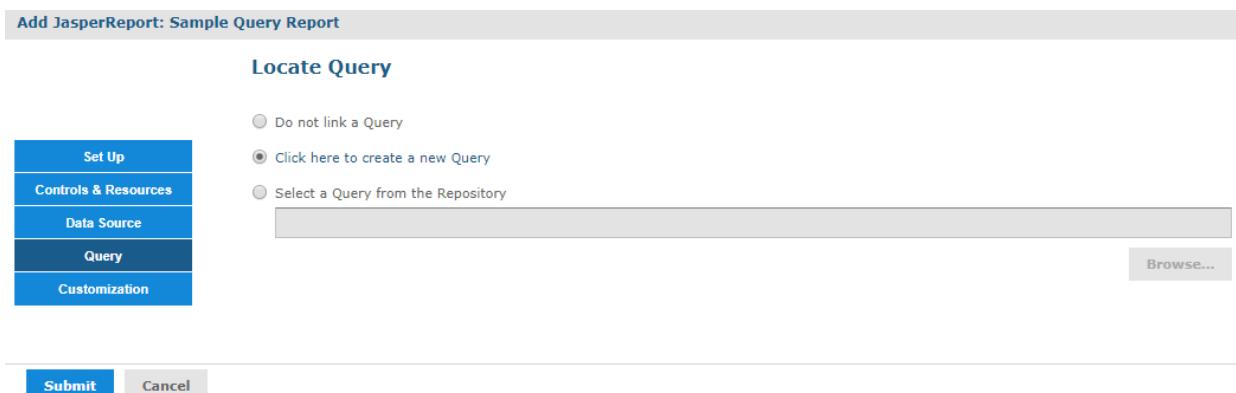
1. In the Add JasperReport wizard, click **Data Source**. The Link a Data Source to the Report page appears.
2. Choose **Select data source from the Repository** and **Browse** to **Public > Samples > Data sources > JServer JNDI Data Source**.
3. Click **Select**. The path to the data source appears on the page.

#### To define a custom query for the simple report example:

1. In the Add JasperReport wizard, click **Query**. The Locate Query page presents the following choices:
  - **Do not link a Query** – Select this option to use the existing query already defined within the main JRXML.
  - **Click here to create a new Query** – Guides you through defining a new query for this report only.
  - **Select a Query from the Repository** – Select this option to use a saved query from the repository.



The SimpleReport.jrxml file already contains a query. Choosing the second or third option overrides the existing query by defining a new one.

**Figure 6-8** Query Page

2. Select **Click here to create a new Query**. The link becomes active.
  3. Click the link, **Click here to create a new Query**. The Add Query wizard appears and displays the Name the Query page.
  4. Enter the name, resource ID, and description of the query. The query in this example retrieves only Mexican accounts. Enter the following values:
    - Name – MexicoAccounts
    - Resource ID – MexicoAccounts
    - Description – Query for example in User Guide
- This query and its properties are visible only within the report unit.

**Figure 6-9** Name the Query Page

5. Click **Next**. The Link a Data Source to the Query page appears. Here you have the option to select a data source to use only with this query. This can be different from the data source you selected for uploading the report. You can choose an existing data source from the repository, define a new one, or select not to link a data source.
6. Select **Do not link a data source** to use the same data source you already selected.

7. Click **Next**. The Define the Query page appears.
8. Select **SQL** in the Query Language drop-down and enter the following query string to retrieve only Mexican accounts:

```
SELECT * FROM accounts WHERE billing_address_country = 'Mexico' ORDER BY billing_address_city
```

The screenshot shows the 'Define the Query' page with the following details:

- Title:** Add Query: MexicoAccounts
- Section:** Define the Query
- Query Language:** SQL
- Query String:**

```
SELECT * FROM accounts WHERE billing_address_country = 'Mexico' ORDER BY billing_address_city
```
- Buttons:** Previous, Save (highlighted in blue), Cancel

**Figure 6-10 Definition of a Query**

9. Click **Save** to save the query. The Customization page appears. No customization is required for the example.
10. Click **Submit** to submit the new report unit to the repository.

#### To run the report:

1. Locate the report in the repository and click to run it. Only accounts in Mexico are shown in the report.

The screenshot shows the report output titled 'Accounts' with the following data:

Name	Phone	Address
<b>1. Acapulco, Mexico</b>		
1. Bruno-Bowers Communications Associates	737-555-2156	9650 Valley View Road
2. Brown-Giglio Electronics, Ltd	295-555-3431	1962 Geary Road
3. Q & Q Bergin Telecommunications Associates	218-555-2598	2810 Guadalupe
4. N & W Hill Transportation Corp	422-555-1772	7572 Easley Drive
5. M & Y Browgett Communications, Ltd	373-555-4575	5312 Riverwood Circle
6. Sherwood-Becker Transportation Holdings	761-555-9439	9825 Mt. Dell Drive
7. Trujillo-Barrington Machinery, Inc	754-555-9987	9865 Montana

**Figure 6-11 Output of the Report**

## 6.4 Adding a Complex Report Unit to the Server

This section includes an example of how to add a report unit with all these resources:

- SalesByMonth.jrxml – the main JRXML file
- SalesByMonthDetail.jrxml – a subreport
- sales.properties – an English resource bundle file
- scriptlet.jar – a scriptlet class JAR file
- JR Logo – an image in the repository
- JServer JNDI data source – a data source file in the repository

These resources are part of the sample data installed with the server. To complete this example and run the report without server errors, you need access to these resources.

The example also guides you through defining every type of input control:

- Text
- Check box
- Drop-down
- Date
- Query

If you're not interested in creating all types of input controls, but want to work through part of the example, delete parameters for the input controls you don't create before you run the report.

The complex report you create in this example is almost exactly like the SalesByMonth report in the **Reports** folder of the repository.

### To upload the main JRXML and suggested resource files for the complex report unit:

1. Log into JasperReports Server as administrator and select **View > Repository**.



If you log in as a user, you can upload a report unit to the server, but this example requires an administrator login to access the image resources.

2. Navigate to the folder containing your report. For example, navigate to **Organization > Reports**.
3. Right-click the Reports folder and select **Add Resource > JasperReport** from the context menu. The Set Up the Report page appears.

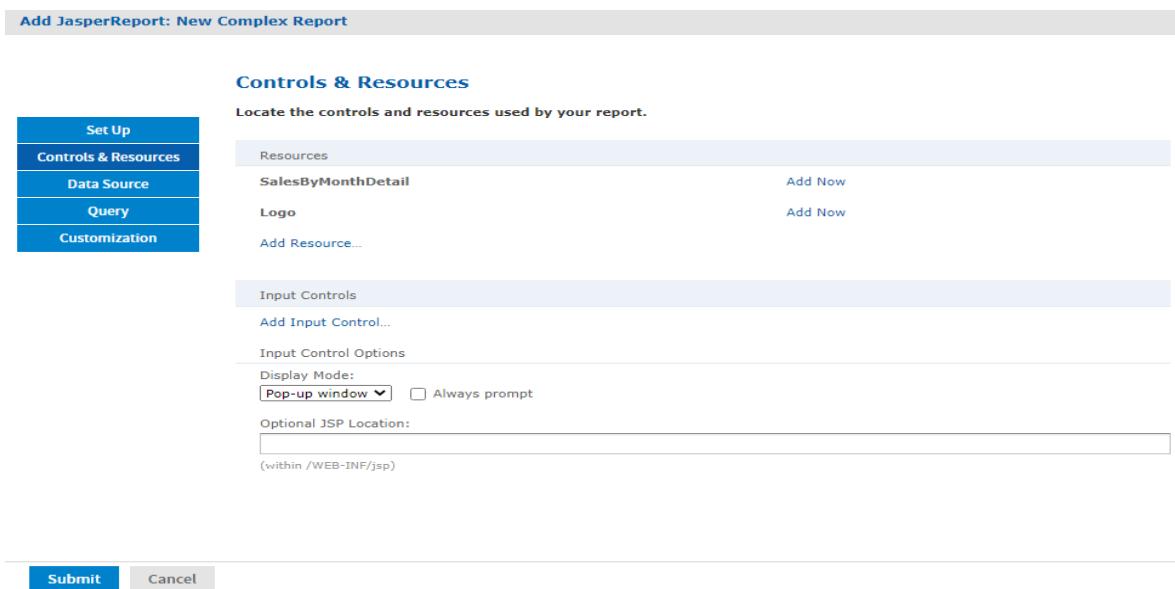


**Add Resource** appears on the menu only if you have write privilege to the folder.

4. Enter these properties:
  - Name – New Complex Report
  - Resource ID – New\_Complex\_Report
  - Description – This is a complex report
5. Select **Upload a Local File** and **Browse** to <js-install>/samples/reports/SalesByMonth.jrxml.
6. Click **Controls & Resources**.

The Controls & Resources page, **Figure 6-12**, suggests resources to be uploaded for the report:

- A sub-report (the SalesByMonthDetail.jrxml file)
- A logo image



**Figure 6-12 Suggested Resources for the Complex Report**

7. On the Controls & Resources page, upload the sub-report:
  - a. Click **Add Now** in the SalesByMonthDetail row. The Locate File Resource page appears.
  - b. Select **Upload a Local File**.
  - c. Click **Browse** and locate the file <js-install>/samples/reports/SalesByMonthDetail.jrxml. Select SalesByMonthDetail.jrxml.  
The path to SalesByMonthDetail.jrxml appears in the **Upload a Local File** field.
  - d. On the Locate File Resource page, click **Next**.
  - e. On the Add a Report Resource page, click **Next** to accept the default report resource name and resource ID.
8. On the Controls & Resources page, upload the logo image resource:
  - a. Click **Add Now** in the Logo row. The Locate File Resource page appears.
  - b. On the Locate File Resource page, click **Select a resource from the Repository**.
  - c. Click **Browse** to locate the file /Images/JR Logo and select JR Logo.
  - d. Click **Next**. The Add a Report Resource page appears.
  - e. On the Add a Report Resource page, click **Next** to accept the default name, resource ID, and description.

#### 6.4.1 Uploading Undetected File Resources

The JasperReport wizard can't detect every type of resource referenced in the main JRXML. You need to add the undetected resources before the server can upload the report. For the following example we provide the names of these resources. To discover undetected resources open the JRXML in Jaspersoft Studio and examine its parameters and properties. For more information about the JasperReports Server Plug-in, see the *TIBCO Jaspersoft Studio User Guide*.

These are the undetected resources in the SalesByMonth.jrxml:

- A scriptlet JAR – The scriptlet writes the message, “I’m a scriptlet in a jar,” to the last page of the report output.
- An English language resource bundle.
- The optional Romanian language resource bundle.

If you’re interested in working with a multi-lingual report, add the Romanian resource bundle. The Romanian resource bundle is part of the sample data installed with the server.

On the Controls & Resources page, upload the undetected resources to the server using exactly the same name Jaspersoft Studio uses for the resource ID.

#### To upload the undetected file resources for the complex report example:

1. Add and upload the scriptlet JAR file:
  - a. On the Controls & Resources page, click **Add Resource**.
  - b. On the Locate File Resource page, select **Upload a Local File** and **Browse** to the <js-install>/samples/jars/scriptlet.jar file. Select scriptlet.jar.  
The path to the file appears in the **Upload a Local file** field.
  - c. Click **Next**.
- The Add a Report Resource page appears. [Figure 6-13 on page 188](#) shows the file name scriptlet.jar, indicating that the server successfully loaded and automatically detected the JAR.
- d. Enter the following information:
  - Name – Scriptlet
  - Resource ID – Scriptlet. The Resource ID is referenced in the main JRXML file, so do not change it.
  - Description – Scriptlet JAR for complex report

[Figure 6-13 on page 188](#) shows these values entered on the Add a Report Resource page.

The screenshot shows the 'Add a Report Resource' dialog box. At the top, it says 'Type: JAR'. Below that, 'Selected Resource:' is listed as 'scriptlet.jar'. The form has four input fields: 'Name (required):' containing 'Scriptlet', 'Resource ID (required):' containing 'Scriptlet', and 'Description:' containing 'Scriptlet JAR for complex reports.' At the bottom, there are 'Previous', 'Next', and 'Cancel' buttons.

**Figure 6-13 Scriptlet JAR Resource Properties**

2. Click **Next**.

3. Add and upload the English resource bundle:
  - a. On the **Controls & Resources** page, click **Add Resource**. The Locate File Resource page appears.
  - b. Select **Upload a Local File, Browse** to <js-install>/samples/resource\_bundles/sales.properties, and select it. The path to the resource bundle appears in the **Upload a Local file** field.
  - c. In Locate File Resource, click **Next**. The **Add a Report Resource** page indicates that the file was successfully loaded and automatically detected as a resource bundle.
  - d. Enter the following information:
    - Name – sales.properties
    - Resource ID – sales.properties
    - Description – Default English resource bundle
4. Click **Next**.
5. Add and upload the Romanian Resource bundle:
  - a. On the Controls & Resources page, click **Add Resource**.
  - b. Select **Upload a Local File, Browse** to the file <js-install>/samples/resource\_bundles/sales\_ro.properties, and select it.
  - c. In Locate File Resource, click **Next**. The Add a Report Resource page shows that uploading the file was successful. The server recognized the type (resource bundle) and name (sales\_ro.properties) of the selected resource.
  - d. Enter the following information:
    - Name – sales\_ro.properties
    - Resource ID – sales\_ro.properties
    - Description – Romanian resource bundle
  - e. Click **Next**. Controls & Resources lists all the files.

Resources	JAR	Remove
sales.properties	Resource Bundle	<a href="#">Remove</a>
sales_ro.properties	Resource Bundle	<a href="#">Remove</a>
SalesByMonthDetail	Added	
Logo	Added	

[Add Resource...](#)

**Input Controls**

[Add Input Control...](#)

**Input Control Options**

Display Mode: **Pop-up window**  Always prompt

Optional JSP Location:

(within /WEB-INF/jsp)

**Submit** **Cancel**

**Figure 6-14 List of Detected and Undetected File Resources**

If you want to upload a different file for a named resource, click its resource ID in the **Resources** list and locate the new file or repository object. You can change the name and description of the resource, but not its resource ID. If there's a mistake in a resource ID:

- Locate the ID in the list of resources on the Controls & Resources page, and click **Remove**.
- Re-add the resource, entering the correct resource ID.

## 6.4.2 Adding Input Controls

Input controls are graphical widgets the server displays with the report. Input controls perform the following functions:

- Prompt the user for input
- Validate the format of the input
- Pass the input to the report

Based on the input, the server modifies the WHERE filter clauses in SQL parametrized queries.

Input controls correspond to the parameters defined in JRXML reports, such as `$P{name}`. The server maps the value the user enters for the input control to the parameter of the same name. If you define an input control in the JasperReport and the server can't find a parameter by the same name in the JRXML, the input control won't function when the report runs.



The JRXML can define a default value for the input control. To prevent users from changing the default, you can make the input control read-only or invisible.

When you create an input control, you provide a datatype. Datatypes define the expected input (numbers, text, date, or date/time) and can include range restrictions that the server enforces. The server uses the datatype to classify and validate the data.

To define a datatype, set properties on the Set the Datatype Kind and Properties page. Properties differ for other datatypes that appear on the page.

Type	The classification of the data, which can be Text, Number, Date, or Date-Time.
Name	The name of the datatype.
Resource ID	The unique ID of the datatype that you cannot edit.
Description	Any additional information you provide about the datatype.
Pattern	A regular expression that restricts the possible values of the field for the Text data type.
Minimum value	The lowest permitted value for the field.
Maximum value	The highest permitted value for the field.
Minimum Is Strict	If checked, the maximum value itself is not permitted; only values less than the maximum value are permitted.
Maximum Is Strict	If checked, the minimum value itself is not permitted; only values greater than the minimum value are permitted.

After determining the list of values to be presented to the user, choose one of these widget types for the input control:

- Boolean – A check box widget for entering a yes/no value.
- Single value – A text, number, date, or date/time widget. Input can be constrained to a minimum value, maximum value, or both. Text input can also be constrained by a matching pattern. A text box widget for entering a value, or a calendar for selecting date and date/time.
- Multiple values – To present a static or a dynamic list of values to the user, choose one of these:
  - Drop-down list to select a single value
  - Radio buttons to select a single value
  - Multi-select list to select multiple values
  - Check boxes to select multiple values

The query in the SalesByMonth.jrxml file has several input control parameters, one for each type of input control. These procedures show you how to add each type to the report unit.

#### 6.4.2.1 Adding a Text Input Control

The simplest input control is a text box. In this example, the datatype for the input value is a number; the server verifies that the user enters a number into the text box.

##### To add a text input control to the complex report example:

1. After completing steps in “[Uploading Undetected File Resources](#)” on page 187, click **Controls & Resources** in the JasperReport wizard.
2. On the Controls & Resources page, click **Add Input Control**. The Locate Input Control page appears.
3. Select **Define an Input Control in the next step**.
4. Click **Next**.
5. On the Create Input Control page, accept the default (**Single Value**) from the **Type** drop-down.
6. Enter the other properties for the input control:

The name is referenced in the main JRXML file, so enter it exactly as shown.

- Prompt Text – The label the user sees next to the widget for this input: **Text Input Control**
- Parameter Name – The name of the report parameter that receives the user value: **TextInput**
- Description – An optional description that appears only within the report wizard: leave blank in this example.
- Mandatory, Read-only, Visible – A setting that determines how the input control appears: check only **Visible**.

**Add Input Control**

**Create Input Control**

First, select the kind of input control you wish to add, then enter the required property values.

Type: Single Value

Prompt Text (required):  
Text Input Control

The label is displayed to users next to the input control.

Parameter Name (required):  
TextInput

This value must match the name of the parameter in your report.

Description:

Mandatory

Read-only

Visible

Previous Next Cancel

**Figure 6-15 Properties of the Text Input Control**

To reuse an input control, add it to the repository independent of any report using **Add Resource > Input Control**. Before using the input control in a report, check that the parameter name in the JRXML matches the name in the Create Input Control page. If it doesn't the server can't run the report.

7. Click **Next**.
8. In Locate Datatypes, select **Define a DataType in the next step** and click **Next**:



Instead of defining a datatype, you can use one in the repository if its type and range are compatible with your input control.

9. In **Set the Datatype Kind and Properties**, enter the properties for the datatype:
  - a. In **Type**, select **Number** from the drop-down as the type of data the user can enter.



The number format allows users to enter integers and decimals.

- b. Enter a name – Integer Type
  - c. Enter a resource ID – Integer\_Type
- The name and resource ID are required, but are visible only when defining the input control.

Add Datatype

**Set the Datatype Kind and Properties**

First, select the kind of datatype you wish to add, then enter the required property values.

Type: Number

Name (required):  
Integer Type

Resource ID (required):  
Integer\_Type

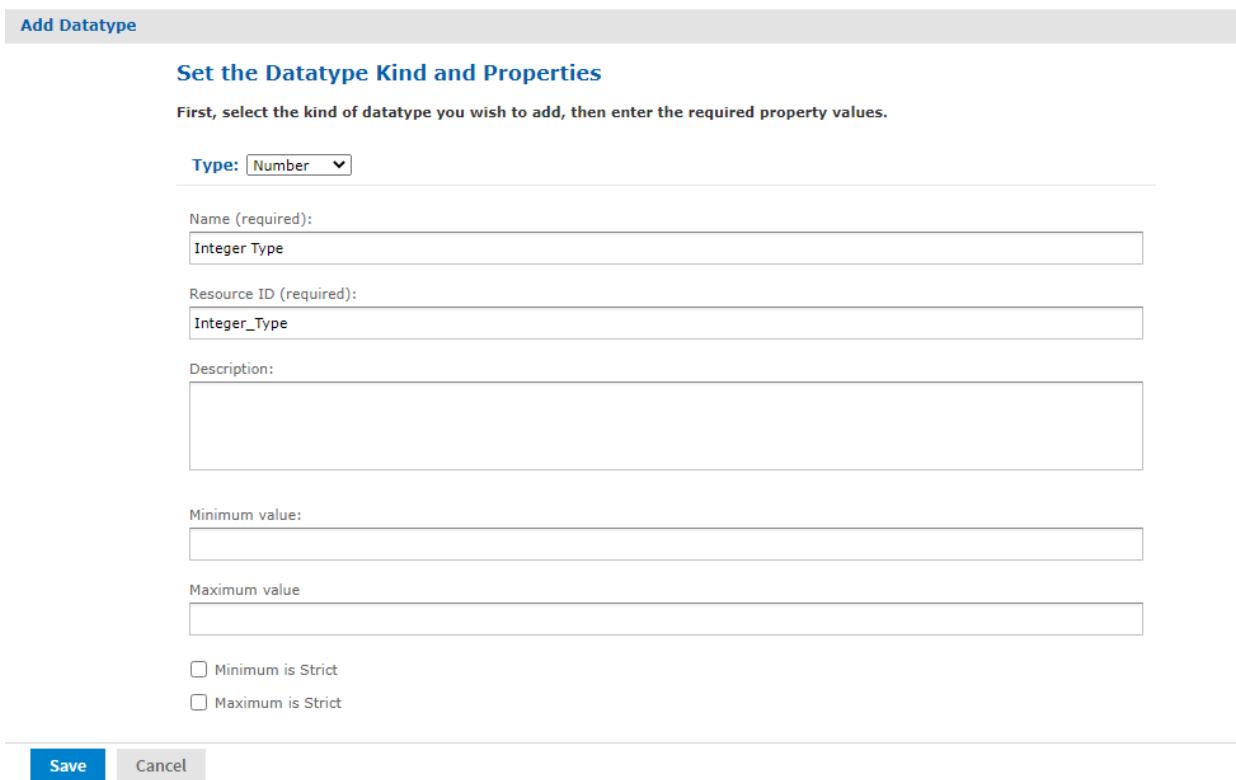
Description:

Minimum value:

Maximum value

Minimum is Strict  
 Maximum is Strict

**Save** **Cancel**

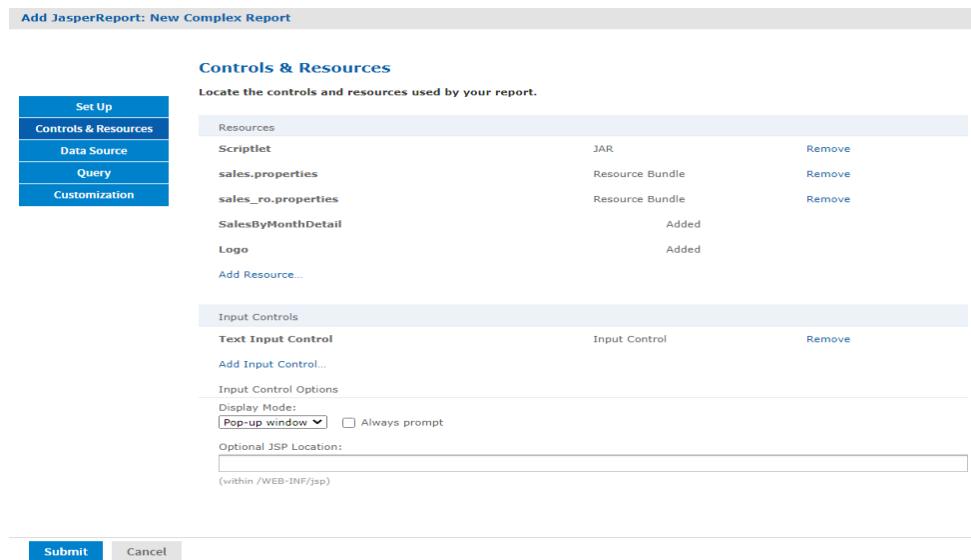


The screenshot shows a web-based form titled 'Add Datatype'. At the top, it says 'Set the Datatype Kind and Properties' with a note: 'First, select the kind of datatype you wish to add, then enter the required property values.' Below this, the 'Type' dropdown is set to 'Number'. The 'Name (required)' field contains 'Integer Type'. The 'Resource ID (required)' field contains 'Integer\_Type'. There is a large 'Description' text area which is currently empty. Below these, there are two fields: 'Minimum value' and 'Maximum value', both of which are also empty. At the bottom of the form, there are two checkboxes: 'Minimum is Strict' and 'Maximum is Strict', neither of which is checked. At the very bottom are two buttons: a blue 'Save' button and a grey 'Cancel' button.

**Figure 6-16 Integer Datatype Properties**

- d. Leave these properties blank in this example:
  - Description – An optional description that appears only within the report wizard.
  - Minimum value – The lower bound of the value the user may enter.
  - Maximum value – The upper bound of the value the user may enter.
  - Minimum is strict – Means the minimum value itself is not allowed.
  - Maximum is strict – Means the maximum value itself is not allowed.
10. Click **Save**.

The Controls & Resources page now lists the Text Input Control.



**Figure 6-17 Text Input Control in Input Controls List**

#### 6.4.2.2 Adding a Simple Check Box Input Control

A check box input control accepts true/false (boolean) input from the user.

##### To add a simple check box input control to the complex report example:

1. Continuing with the previous example, on the Controls & Resources page, click **Add Input Control**.
2. On the Locate Input Control page, click **Define an Input Control in the next step**.
3. Click **Next**.
4. On the Create Input Control page, select **Boolean** from the **Type** drop-down.
5. Enter the other properties:
  - Prompt Text – Check Box Input Control
  - Parameter Name – CheckboxInput. Enter the parameter name exactly as shown because the main JRXML file references this name.
  - Description – Leave blank in this example.
  - Mandatory, Read-only, Visible – Check only visible.
6. Click **Submit**. The Controls & Resources page appears with the new check box input control.

#### 6.4.2.3 Adding a Drop-Down Input Control

The drop-down input control, also called a list, gives the user a pre-determined list of choices. As a report designer, you make these decisions about a drop-down input control:

- To present a single-select or multi-select list to the user
- To present a single choice as a drop-down list or a set of radio buttons
- To present a multi-select control as a multi-select list or a set of check boxes

Radio buttons and check boxes usually work well for five or fewer choices. This example shows how to create an input control that presents three choices in a drop-down list. You can create a new list of values for this input control or use a list of values in the repository.

**To add a drop-down input control to the complex report example:**

1. Continuing with the previous example, on the Controls & Resources page, click **Add Input Control**.
2. On the Locate Input Control page, click **Define an Input Control in the next step**.
3. Click **Next**.
4. On the Create Input Control page, select **Single-select List of Values** from the **Type** drop-down.
5. Enter the other properties:
  - Prompt Text – List Input Control
  - Parameter Name – ListInput Enter the parameter name exactly as shown because the main JRXML file references this name.
  - Description – Leave blank in this example.
  - Mandatory, Read-only, Visible – Check only visible.
6. Click **Next**.
7. On the Locate List of Values page, select **Define a list of values in the next step**.



Instead of defining a list of values, you can use one in the repository if its values are compatible with the parameter defined in the JRXML report.

8. Click **Next**.
9. On the Add List of Values page, enter a name, resource ID, and optional description for the list of values. These properties aren't visible outside of the input control. Enter these values:
  - Name – list\_type
  - Resource ID – list\_type
  - Description – Leave blank in this example.
10. In the **Name Value** panel, enter names and values to present as choices to the user:
  - Enter unique names. The server requires unique names to distinguish which item the user chose.
  - Enter values of the type that match the parameter definition in the JRXML report.

After entering a name and value, click **Add**. If you make a mistake click **Remove**.

For this example enter:

- Name First Item with value 1.
- Name Second Item with value 2.
- Name Third Item with value 3.

**Add List of Values**

Identify the list, then create the name-value pairs.

Name	Value	
First Item	1	Remove
Second Item	2	Remove
Third Item	3	Remove
		Add

**Submit**   **Cancel**

**Figure 6-18 Definition of the List of Values**

- Click **Submit**. The Controls & Resources page appears with the new List Input control.

#### 6.4.2.4 Adding a Date Input Control

This example uses a datatype from the sample data in the repository.

##### To add a date input control to the complex report example:

- On the Controls & Resources page click **Add Input Control**.
- On the Locate Input Control page select **Define an Input Control in the next step**, then click **Next**.
- On the Create Input Control page, select **Single-Value** from the **Type** drop-down.
- Enter the other properties:
  - Prompt Text – Date Input Control
  - Parameter Name – DateInput Enter the parameter name exactly as shown because the main JRXML file references this name.
  - Description – Leave blank in this example.
  - Mandatory, Read-only, Visible – Check only Visible.
- Click **Next**.
- On the Locate Datatypes page select **Select a Datatype from the Repository**.
- Click **Browse**.
- In Select Resource from Repository, expand Input Data Types, and select the **Date Datatype**.
- Click **Select**. The Locate DataTypes page shows the location of this datatype in the repository, /datatypes/DateDatatype.
- Click **Next**. The Controls & Resources page appears with the new Date Input Control.

#### 6.4.2.5 Adding a Query-Based Input Control

A query-based input control presents a dynamically-created list of choices to the user. The server performs a query whose results are used to create the list of choices. You must perform the following tasks:

- Configure the query.
- Designate how to display the results in the input control.
- Specify the value to pass as the corresponding parameter.

**To add a query-based input control to the complex report example:**

- On the Controls & Resources page, click **Add Input Control**.
- On the Locate Input Control page, select **Define an Input Control in the next step**.
- Click **Next**.
- On the Create Input Control page, select **Single-select Query** from the **Type** drop-down.
- Enter the naming properties for the input control:
  - Prompt Text – Query Input Control
  - Parameter Name – QueryInput Enter the parameter name exactly as shown because the main JRXML file references this name.
  - Description – Leave blank in this example.
  - Mandatory, Read-only, Visible – Use the default settings in this example.
- Click **Next**. The Locate Query page appears. Options are:
  - To locate a reusable query in the repository
  - To define a new query dedicated to this input control
- For this example, select **Define a Query in the next step**.
- Click **Next**.
- On the Name the Query page, enter naming properties for the new query. For this example, enter `testQuery` in both the Name and Resource ID fields.

**Add Query:**

**Name the Query**

Enter the required property values.

• **Name the Query**

Link a Data Source      Define the Query

Name (required):  
testQuery

Resource ID (required):  
testQuery

Description:

Previous    Next    Cancel

**Figure 6-19 Entering a Query Name**

10. Click **Next**. The Link a Data Source to the Report page appears. Options are:
  - To use the same data source for the input control as you use for the report
  - To define a new data source, dedicated to this input control
  - To select a reusable data source from the repository
11. For this example, select **Do not link a data source** to use the same data source for the input control as you use for the report. You will select the data source for the report in “[Selecting a Data Source for Running the Complex Report](#)” on page 200.

**Add Query: testQuery**

**Link a Data Source to the Query**

Optionally, link a data source to the query. You can choose a data source from the repository or create a new one.

Name the Query       Do not link a data source  
 Click here to create a new data source  
 Select data source from repository

Define the Query     

Previous    Next    Cancel

**Figure 6-20 Data Source Link for the Query Input Control**

12. Click **Next**.
13. On the Define the Query page, select **SQL** from the Query Language drop-down.
14. Enter this Query String to retrieve the labels and values to be displayed for this input control:

```
SELECT user_name, first_name, last_name FROM users
```

**Add Query: testQuery**

**Define the Query**

Select a language and enter the query

Name the Query      **Query Language:**

Link a Data Source  
 Define the Query

Query String:

Previous    **Save**    Cancel

**Figure 6-21 Query String Definition**

15. Click **Save**.
16. For each row in the results of the query, the server presents a single value, such as Sarah Smith, in the input type widget (drop-down, radio buttons, multi-choice, check boxes). On the Query Information page, name the database columns to comprise the input value presented to the user. The column names must exactly match those in the `SELECT` clause of the query string:
  - a. In the Value Column enter the `user_name`.
  - b. In the Visible Column enter `first_name`.
  - c. Click **Add**.
  - d. In the Visible Column enter `last_name`.
  - e. Click **Add**.

For each column you want to display as a choice, enter the name then click **Add**. If you make a mistake click **Remove**.
17. Click **Submit**. The Controls & Resources page displays all the resources, including the new input controls. [Figure 6-22 on page 200](#) shows these resources.

**6.4.2.6 Setting the Input Control Options**

In this procedure, you set the display mode in **Input Control Options** at the bottom of the Controls & Resources page. [Figure 6-22 on page 200](#) shows these options.

**To configure the appearance of the input controls for the complex report example:**

1. Select **Pop-up window**.



You can also select **Separate page** to display the input controls in a separate browser window, **Top of page** to display them above the report, or **In page** to display them on the side of the report.

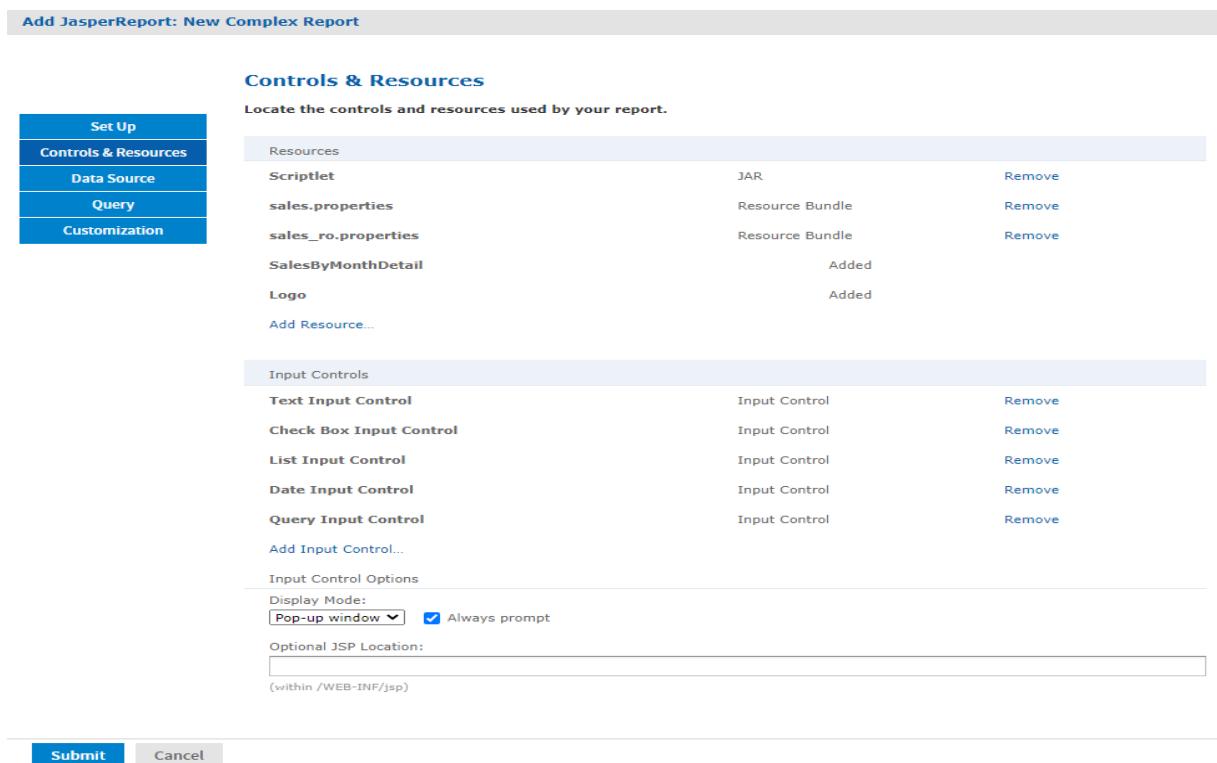
2. Check **Always prompt** when you want the server to display the Input Controls dialog to prompt the user when the report runs.



The definition of input controls in this example specified Visible and not Mandatory. When input controls aren't mandatory and Always prompt isn't checked on the Controls & Resources page, the user must click the Options button in the report viewer to change input controls; otherwise the report runs with default input controls

3. Leave **Optional JSP Location** blank for this example.

You can use the Optional JSP Location option to specify the path to a JSP file that affects the appearance of the input controls.



**Figure 6-22 Input Controls and Resources**

Select the data source to finish the complex report example.

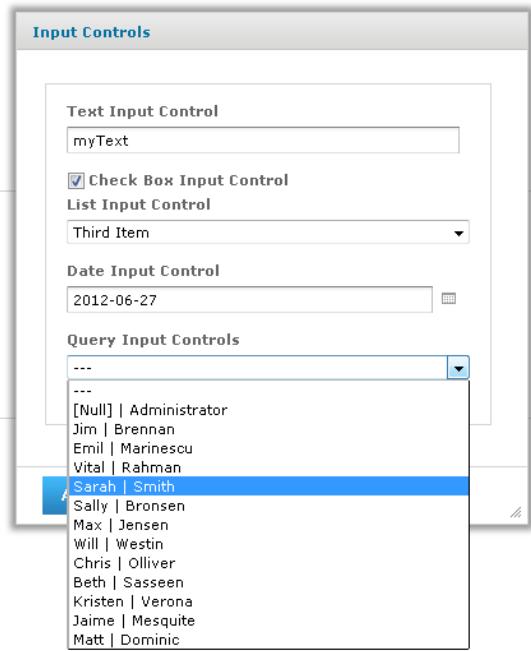
### 6.4.3 Selecting a Data Source for Running the Complex Report

You select a data source to retrieve data for the report and the query input control; otherwise the report and the list of users in the query input control will be blank.

#### To select a data source and run the complex report:

1. On the Controls & Resources page of the JasperReport wizard, select **Data Source**.
2. On the Locate Data Source page, choose **Select data source from repository**.
3. Click **Browse**, choose **Organization > Data Sources > JServerJNDI Data Source**, and click **Select**.
4. On Link a Data Source to the Report, click **Submit**.
5. On the Locate Query Page, click **Submit** again to save the complex report.  
Skip the Query and Customization pages of the JasperReport wizard to use the default settings on those pages.  
The server validates the report and a message appears indicating that the report was added to the repository.
6. In the Repository, click the name New Complex Report to run and view the report.  
Input controls appear.
7. Enter these input values, as shown in **Figure 6-23**:
  - a. Text Input Control: myText
  - b. Check Box Input Control: Check the checkbox.

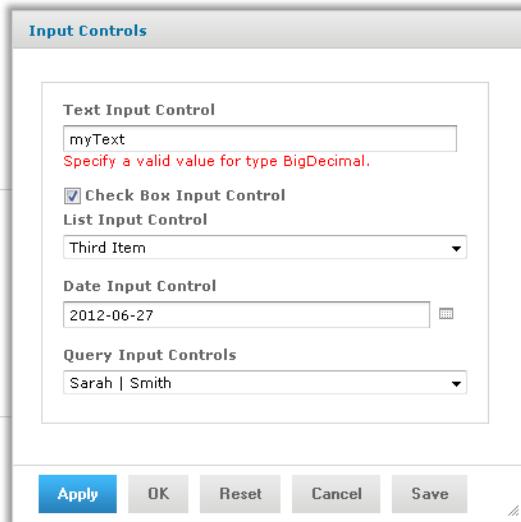
- c. List Input Control: Select **Third Item**.
- d. Date Input Control: Click  and select December 31, 2010.
- e. Query Input Control: Select **Sarah Smith** from the drop-down.



**Figure 6-23** Input Controls Dialog for the New Complex Report

8. Click **OK** or **Apply** to run the report with the selected input, including the incorrect non-numerical input for the Text Input Control.

The server enforces the proper format defined for each input control. You defined the Text Input Control as a numeric type, so it accepts only valid numbers, as indicated by the message to specify a valid float number, as shown in [Figure 6-24](#).

**Figure 6-24 Invalid Input Message**

9. In Text Input Control, enter 3 and click **OK** or **Apply**.

The sample report includes a header that displays the value of each parameter received from the input controls. Values and labels appear in the language specified by the active resource bundle, in this case English.

Sales person	Account	Amount
Sarah Smith	N & W Creek Transportation Corp	600.00
	O & D Rutledge Communications Associat	1900.00
	Wolter-Collins Construction Partners	1630.00
Sally Bronsen	Rutledge-Cavestany Transportation Company	1100.00
	M & Y Planck Communications, Ltd	1330.00

**Figure 6-25 Output Controlled by Input**

In the report viewer, you can open the Input Controls dialog at any time by clicking the **Options** button. Click **OK** to run the report using the chosen values and close the Input Controls dialog; click **Apply** to run the report using the chosen values, but keep the Input Controls open for choosing other values and re-running the report.



If you get an error when you run the report, open it for editing as described in “[Editing JRXML Report Units](#)” on page 203. Review your settings. If you can’t find the problem, edit the SalesByMonth sample report (in the repository at /reports/samples) and compare its settings to your report.



To see the message written by the scriptlet JAR on the last page of the report, click in the report viewer.

## 6.5 Adding Cascading Input Controls to a Report

JRXML-based reports can include input controls that have dynamic values. The values depend on a user’s selection in other input controls. For example, a report has input controls for country, state, and city. The options in the State input control depend on the value selected in the Country input control. When the user selects a state, the list of City values includes only those in the selected state. These cascading input controls use queries to determine the values to display in each input control field.

To use input controls as parameters for a query that populates another input control, you use a special syntax to reference a parameter name in the input control’s query. The syntax is identical to the `$P{parameter_name}` and `$X{...}` syntax used in queries for .

For example, a report returns data identified by country and city. It includes input controls called COUNTRY and CITY. COUNTRY is a query-based input control that returns the list of countries in the data source. CITY is also a query-based input control, but its query uses COUNTRY as input:

```
select address_city from accounts where $X{EQUALS, address_country, COUNTRY}
```

When the user selects a country from the COUNTRY input control, the value selected is used by the query of the CITY input control. The CITY input control is refreshed to show the list of cities for the chosen country. Making two selections from smaller lists is much clearer and quicker for report users. For an example of viewing a report that has cascading input controls, see “[Cascading Input Controls](#)” on page 74.

Note that there are other ways to use a parameter in a query. For details about the `$P` and `$X` syntax and an example of creating a cascading input control, see the *TIBCO JasperReports Server Administrator Guide*.

## 6.6 Editing JRXML Report Units

After you add a report unit to the repository, you can edit any of its elements, including file resources and input controls. This example modifies the display text of the ambiguous Text Input Control.

### To edit the complex report example:

1. Log into the server as an administrator and select **View > Repository**



If you log in as a user, you can edit a report that you created. This example requires an administrator login because an administrator created the complex report.

2. Search or browse the repository to locate the report. In this example, go to **Organization > Reports**.
3. Right-click the New Complex Report and select **Edit** from the context menu. The JasperReport wizard opens the report unit.
4. Navigate to the page of the wizard for making the change; in this example, click **Controls & Resources**.

5. Make changes to an input control prompt and the display mode of the input controls, for example:
  - a. Click the name of the **TextInput** control. The Locate Input Control page shows that this input control is locally defined.
  - b. Click **Next**. The Create Input Control page appears.
  - c. Change the contents of the Prompt Text field to Enter a number. Click **Next**. The Locate Datatypes page appears. You can select a different datatype from the repository. For this example, accept the existing datatype setting.
  - d. In Locate Datatypes, click **Next**.
  - e. In Set the Datatype Kind and Properties, click **Save** to accept the datatype property settings.
6. On the Controls & Resources page:
  - a. Change the Display Mode to **In Page**.
  - b. Clear the **Always prompt** check box.
  - c. Click **Submit**.
7. Run the New Complex Report again.

Instead of appearing in a pop-up before the report, the input controls appear in the Filters panel of the report. In **Figure 6-26** you can see the new prompt **Enter a number** for the text input control. Because none of the input controls in this example are required, the report can display with blank input controls. Enter values and click **Apply** to modify the report output according to your input.

Sales person	Account	Amount
Sarah Smith	N & W Creek Transportation Corp	600.00
	O & D Rutledge Communications Associat	1900.00
	Wolter-Collins Construction Partners	1630.00
Sally Bronsen	Rutledge-Cavestany Transportation Company	1100.00
	M & Y Planck Communications, Ltd	1330.00
Max Jensen	B & D Wolter Machinery Partners	1930.00

**Figure 6-26 Output of the Modified Report**

## 6.7 Localizing Reports

You can adapt reports to global audiences by localizing input controls and field names:

- Input controls – The server supports multi-lingual prompts and static lists of values in reports.
- Field names – The server supports multi-lingual field names in reports.

A \$R expression that you write in the report design triggers linguistic changes in the report output for different locales. Each \$R expression refers to a name-value pair (your translations) in a resource bundle. A resource

bundle file is a text file that has a .properties extension. You create a resource bundle in Jaspersoft Studio or a text editor. You set the base name of the resource bundle in the header of the JRXML file:

```
<jasperReport name="StoreSales" pageWidth="595" pageHeight="842" columnWidth="515"
leftMargin="40" rightMargin="40" topMargin="50" bottomMargin="50"
resourceBundle="simpleTable">
```

For example, simpleTable is the base name of the resource bundle file for this report. If you prefer using a graphical user interface to coding in XML, use Jaspersoft Studio to set the base name of the resource bundle.

### 6.7.1 Running a Localized Report

In this procedure, you run the Romanian version of the complex report that you added in “[Uploading Undetected File Resources](#)” on page 187.

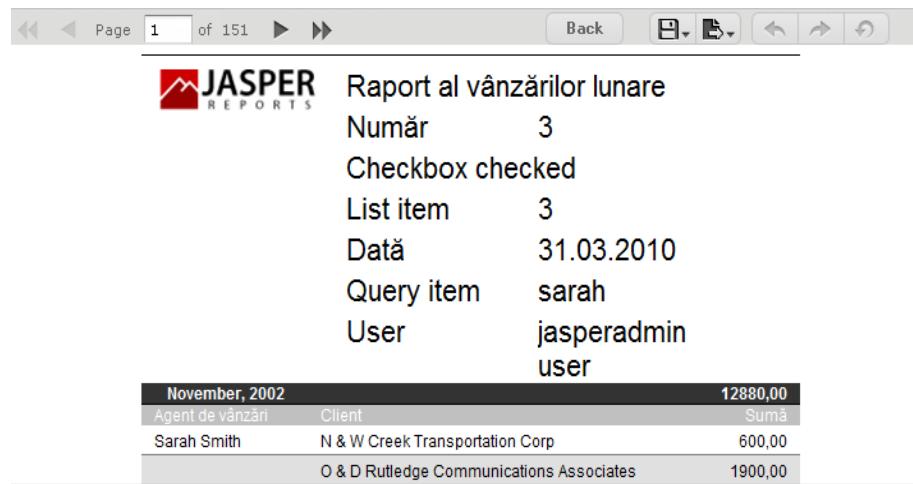
**To run the Romanian version of the complex report:**

1. Choose the Romanian locale on the login page of the server, and login as an administrator.
2. Click **View > Repository**, and navigate to **Organization > Reports**.
3. Click the name of the complex report, New Complex Report. The Input Controls dialog appears.
4. Enter input control values:
  - a. Text Input Control: 3
  - b. Check Box Input Control: Check the check box.
  - c. List Input Control: Select **Third Item**.
  - d. Date Input Control: Click  and select March 31, 2010.
  - e. Query Input Control: Select **Sarah Smith** from the drop-down.
  - f. Click **OK**.

The fields in the title band and column names (sales person, sales account, and sales amount), shown in [Figure 6-27](#), appear in the language set by the Romanian resource bundle sales\_ro.properties:

```
title=Raport al v\u00E2nz\u0103rilor lunare
sales.person=Agent de v\u00E2nz\u0103ri
sales.account=Client
sales.amount=Sum\u0103
param.number=Num\u0103r
param.date=Dat\u0103
```

The currency and dates in the report output header map to Romanian locale settings.



**Figure 6-27 A Report Localized for the Romanian Locale**

By default, the web interface elements appear in US English when you choose an unsupported locale, such as the Romanian locale. If you choose a supported language, the web interface elements appear in that language. Supported languages are Chinese (Simplified), French, German, Japanese, and Spanish. You can customize the server to support additional languages. You can translate the web interface into a different language, server property names, and messages in another language. For some locales, you may also need to change the default locale and time zone. For more information about localizing the server, see the *TIBCO JasperReports Server Administrator Guide*.

### 6.7.2 Reusing Domain Localization Files

The location of a resource bundle determines whether it's reusable and the conditions under which the server uses it. To resolve a \$R expression in a report, the server scans resource bundles at two levels in the order described in this table.

Order	Level	Description
1	Report/ Repository	A report-level bundle declares the resource bundle base name in the header of its JRXML file. The Romanian resource bundle is a report-level bundle. A repository-level bundle is independent of any specific report and can be linked to multiple reports, as described in <i>TIBCO JasperReports Server Data Management Using Domains</i> .
2	Server	A server-wide bundle typically contains server messages and labels of user interface components, as described in the <i>TIBCO JasperReports Server Administrator Guide</i> . This bundle typically resides in the WEB-INF/bundles directory of the server.

First, the server searches the report/repository level and stops scanning resource bundles if it finds a resolution to the \$R expression. If the server does not find a resolution, it scans the server level for the resource ID of the field and uses this ID.

### 6.7.3 Using Default Fonts in JasperReports Server

By default, the server uses three fonts for reports:

- DejaVu Sans
- DejaVu Serif
- DejaVu Sans Mono

Using the DejaVu fonts shipped with the server ensures availability of fonts in all environments; the PDF is pixel-perfect every time.

The DejaVu fonts replace the Java logical fonts used in previous versions of the server:

- SansSerif
- Serif
- Monospaced



SansSerif, Serif, Monospaced can still be used, but are deprecated because these Java logical fonts map to different TTF files in different environments, and run the risk of text being cut when exported to PDF due to font metric mismatches. Also, these Java logical fonts aren't recognized by some browsers, resulting in font substitutions. For example, Firefox in a Windows environment renders the SansSerif logical font as Serif.

When using the DejaVu fonts coming from font extensions, you don't need to set any other font attributes (such as the `pdfXXX` attributes) in the JRXML or specify font mapping. The font extension file that makes these fonts available sets font attributes and mapping.

For more information about DejaVu, refer to its SourceForge project at:

[http://dejavu-fonts.org/wiki/index.php?title=Main\\_Page](http://dejavu-fonts.org/wiki/index.php?title=Main_Page).



When you upload a TrueType font to the repository, the file name must include the correct extension (.TTF).



# GLOSSARY

## **Ad Hoc Editor**

The interactive data explorer in JasperReports Server Professional and Enterprise editions. Starting from a predefined collection of fields, the Ad Hoc Editor lets you drag and drop fields, dimensions, and measures to explore data and create tables, charts, and crosstabs. These Ad Hoc views can be saved as reports.

## **Ad Hoc Report**

In previous versions of JasperReports Server, a report created through the Ad Hoc Editor. Such reports could be added to dashboards and be scheduled, but when edited in Jaspersoft Studio, lost their grouping and sorting. In the current version, the Ad Hoc Editor is used to explore views which in turn can be saved as reports. Such reports can be edited in Jaspersoft Studio without loss, and can be scheduled and added to dashboards.

## **Ad Hoc View**

A view of data that is based on a Domain, Topic, or OLAP client connection. An Ad Hoc view can be a table, chart, or crosstab and is the entry point to analysis operations such as slice and dice, drill down, and drill through. [Compare OLAP View](#). You can save an Ad Hoc view as a report in order to edit it in the interactive viewer, schedule it, or add it to a dashboard.

## **Aggregate Function**

An aggregate function is one that is computed using a group of values; for example, Sum or Average. Aggregate functions can be used to create calculated fields in Ad Hoc views. Calculated fields containing aggregate functions cannot be used as fields or added to groups in an Ad Hoc view and should not be used as filters. Aggregate functions allow you to set a level, which specifies the scope of the calculation; level values include Current (not available for PercentOf), ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total.

## **Amazon Web Services (AWS)**

Cloud platform, used to provide and host a family of services, such as RDS, S3, and EC2.

## **Analysis View**

[See OLAP View](#).

## **Audit Archiving**

To prevent audit logs from growing too large to be easily accessed, the installer configures JasperReports Server to move current audit logs to an archive after a certain number of days, and to delete logs in the archive after a certain age. The archive is another table in the JasperReports Server's repository database.

## Audit Domains

A Domain that accesses audit data in the repository and lets administrators create Ad Hoc reports of server activity. There is one Domain for current audit logs and one for archived logs.

## Audit Logging

When auditing is enabled, audit logging is the active recording of who used JasperReports Server to do what when. The system installer can configure what activities to log, the amount of detail gathered, and when to archive the data. Audit logs are stored in the same private database that JasperReports Server uses to store the repository, but the data is only accessible through the audit Domains.

## Auditing

A feature of JasperReports Server Enterprise edition that records all server activity and allows administrators to view the data.

## Calculated Field

In an Ad Hoc view or a Domain, a field whose value is calculated from a user-defined formula that may include any number of fields, operators, and constants. For Domains, a calculated field becomes one of the items to which the Domain's security file and locale bundles can apply. There are more functions available for Ad Hoc view calculations than for Domains.

## CloudFormation (CF)

Amazon Web Services CloudFormation gives developers and systems administrators an easy way to create and manage a collection of related AWS resources, provisioning, and updating them in an orderly and predictable fashion.

## CRM

Customer Relationship Management. The practice of managing every facet of a company's interactions with its clientele. CRM applications help businesses track and support their customers.

## CrossJoin

An MDX function that combines two or more dimensions into a single axis (column or row).

## Cube

The basis of most OLAP applications, a cube is a data structure that contains three or more dimensions that categorize the cube's quantitative data. When you navigate the data displayed in an OLAP view, you are exploring a cube.

## Custom Field

In the Ad Hoc Editor, a field that is created through menu items as a simple function of one or two available fields, including other custom fields. When a custom field becomes too complex or needs to be used in many reports, it is best to define it as a calculated field in a Domain.

## Dashboard

A collection of reports, input controls, graphics, labels, and web content displayed in a single, integrated view. Dashboards often present a high level view of your data, but input controls can parametrize the data to display. For example, you can narrow down the data to a specific date range. Embedded web content, such as other web-based applications or maps, make dashboards more interactive and functional.

## Dashlet

An element in a dashboard. Dashlets are defined by editable properties that vary depending on the dashlet type. Types of dashlet include reports, text elements, filters, and external web content.

**Data Island**

A single join tree or a table without joins in a Domain. A Domain may contain several data islands, but when creating an Ad Hoc view from a Domain, you can only select one of them to be available in the view.

**Data Policy**

In JasperReports Server, a setting that determines how the server processes and caches data used by Ad Hoc reports. Select your data policies by clicking **Manage > Server > Settings Ad Hoc Settings**. By default, this setting is only available to the superuser account.

**Data Source**

Defines the connection properties that JasperReports Server needs to access data. The server transmits queries to data sources and obtains datasets in return for use in filling reports and previewing Ad Hoc reports. JasperReports Server supports JDBC, JNDI, and Bean data sources; custom data sources can be defined as well.

**Dataset**

A collection of data arranged in columns and rows. Datasets are equivalent to relational results sets and the `JRDataSource` type in the JasperReports Library.

**Datatype**

In JasperReports Server, a datatype is used to characterize a value entered through an input control. A datatype must be of type text, number, date, or date-time. It can include constraints on the value of the input, for example maximum and minimum values. As such, a datatype in JasperReports Server is more structured than a datatype in most programming languages.

**Denormalize**

A process for creating table joins that speeds up data retrieval at the cost of having duplicate row values between some columns.

**Derived Table**

In a Domain, a derived table is defined by an additional query whose result becomes another set of items available in the Domain. For example, with a JDBC data source, you can write an SQL query that includes complex functions for selecting data. You can use the items in a derived table for other operations on the Domain, such as joining tables, defining a calculated field, or filtering. The items in a derived table can also be referenced in the Domain's security file and locale bundles.

**Dice**

An OLAP operation to select columns.

**Dimension**

A categorization of the data in a cube. For example, a cube that stores data about sales figures might include dimensions such as time, product, region, and customer's industry.

**Domain**

A virtual view of a data source that presents the data in business terms, allows for localization, and provides data-level security. A Domain is not a view of the database in relational terms, but it implements the same functionality within JasperReports Server. The design of a Domain specifies tables in the database, join clauses, calculated fields, display names, and default properties, all of which define items and sets of items for creating Ad Hoc reports.

## **Domain Topic**

A Topic that is created from a Domain by the Data Chooser. A Domain Topic is based on the data source and items in a Domain, but it allows further filtering, user input, and selection of items. Unlike a JRXML-based Topic, a Domain Topic can be edited in JasperReports Server by users with the appropriate permissions.

## **Drill**

To click on an element of an OLAP view to change the data that is displayed:

- Drill down. An OLAP operation that exposes more detailed information down the hierarchy levels by delving deeper into the hierarchy and updating the contents of the navigation table.
- Drill through. An OLAP operation that displays detailed transactional data for a given aggregate measure. Click a fact to open a new table beneath the main navigation table; the new table displays the low-level data that constitutes the data that was clicked.
- Drill up. An OLAP operation for returning the parent hierarchy level to view to summary information.

## **Eclipse**

An open source Integrated Development Environment (IDE) for Java and other programming languages, such as C/C++.

## **ETL**

Extract, Transform, Load. A process that retrieves data from transactional systems, and filters and aggregates the data to create a multidimensional database. Generally, ETL prepares the database that your reports will access. The Jaspersoft ETL product lets you define and schedule ETL processes.

## **Fact**

The specific value or aggregate value of a measure for a particular member of a dimension. Facts are typically numeric.

## **Field**

A field is equivalent to a column in the relational database model. Fields originate in the structure of the data source, but you may define calculated fields in a Domain or custom fields in the Ad Hoc Editor. Any type of field, along with its display name and default formatting properties, is called an item and may be used in the Ad Hoc Editor.

## **Frame**

In Jaspersoft Studio, a frame is a rectangular element that can contain other elements and optionally draw a border around them. Elements inside a frame are positioned relative to the frame, not to the band, and when you move a frame, all the elements contained in the frame move together. A frame automatically stretches to fit its contents.

## **Group**

In a report, a group is a set of data rows that have an identical value in a designated field.

- In a table, the value appears in a header and footer around the rows of the group, while the other fields appear as columns.
- In a chart, the field chosen to define the group becomes the independent variable on the X axis, while the other fields of each group are used to compute the dependent value on the Y axis.

## **Hierarchy Level**

In an OLAP cube, a member of a dimension containing a group of members.

## **Input Control**

A button, check box, drop-down list, text field, or calendar icon that allows users to enter a value when running a report or viewing a dashboard that accepts input parameters. For JRXML reports, input controls and their associated datatypes must be defined as repository objects and explicitly associated with the report. For Domain-based reports that prompt for filter values, the input controls are defined internally. When either type of report is used in a dashboard, its input controls are available to be added as special content.

## **Item**

When designing a Domain or creating a Topic based on a Domain, an item is the representation of a database field or a calculated field along with its display name and formatting properties defined in the Domain. Items can be grouped in sets and are available for use in the creation of Ad Hoc reports.

## **JasperReport**

A combination of a report template and data that produces a complex document for viewing, printing, or archiving information. In the server, a JasperReport references other resources in the repository:

- The report template (in the form of a JRXML file)
- Information about the data source that supplies data for the report
- Any additional resources, such as images, fonts, and resource bundles referenced by the report template.

The collection of all the resources that are referenced in a JasperReport is sometimes called a report unit. End users usually see and interact with a JasperReport as a single resource in the repository, but report creators must define all of the components in the report unit.

## **JasperReports IO**

An HTTP-based reporting service for JasperReports Library that provides a REST API for running, exporting, and interacting with reports and a JavaScript API for embedding reports and their input controls into your web pages and web applications.

## **JasperReports Library**

An embeddable, open source, Java API for generating a report, filling it with current data, drawing charts and tables, and exporting to any standard format (HTML, PDF, Excel, CSV, and others). JasperReports processes reports defined in JRXML, an open XML format that allows the report to contain expressions and logic to control report output based on run-time data.

## **JasperReports Server**

A commercial open source, server-based application that calls the JasperReports Library to generate and share reports securely. JasperReports Server authenticates users and lets them upload, run, view, schedule, and send reports from a web browser. Commercial versions provide metadata layers, interactive report and dashboard creation, and enterprise features such as organizations and auditing.

## **Jaspersoft Studio**

A commercial open source tool for graphically designing reports that leverage all features of the JasperReports Library. Jaspersoft Studio lets you drag and drop fields, charts, and sub-reports onto a canvas, and also define parameters or expressions for each object to create pixel-perfect reports. You can generate the JRXML of the report directly in Jaspersoft Studio, or upload it to JasperReports Server. Jaspersoft Studio is implemented in Eclipse.

## **Jaspersoft ETL**

A graphical tool for designing and implementing your data extraction, transforming, and loading (ETL) tasks. It provides hundreds of data source connectors to extract data from many relational and non-relational systems.

Then, it schedules and performs data aggregation and integration into data marts or data warehouses that you use for reporting.

### **Jaspersoft OLAP**

A relational OLAP server integrated into JasperReports Server that performs data analysis with MDX queries. The product includes query builders and visualization clients that help users explore and make sense of multidimensional data. Jaspersoft OLAP also supports XML/A connections to remote servers.

### **Jaspersoft Studio**

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### **JavaBean**

A reusable Java component that can be dropped into an application container to provide standard functionality.

### **JDBC**

Java Database Connectivity. A standard interface that Java applications use to access databases.

### **JNDI**

Java Naming and Directory Interface. A standard interface that Java applications use to access naming and directory services.

### **Join Tree**

In Domains, a collection of joined tables from the actual data source. A join is the relational operation that associates the rows of one table with the rows of another table based on a common value in given field of each table. Only the fields in a same join tree or calculated from the fields in a same join tree may appear together in a report.

### **JPivot**

An open source graphical user interface for OLAP operations. For more information, visit <http://jpivot.sourceforge.net/>.

### **JRXML**

An XML file format for saving and sharing reports created for the JasperReports Library and the applications that use it, such as Jaspersoft Studio and JasperReports Server. JRXML is an open format that uses the XML standard to define precisely all the structure and configuration of a report.

### **Level**

Specifies the scope of an aggregate function in an Ad Hoc view. Level values include Current (not available for PercentOf), ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total.

### **MDX**

Multidimensional Expression Language. A language for querying multidimensional objects, such as OLAP (On Line Analytical Processing) cubes, and returning cube data for analytical processing. An MDX query is the query that determines the data displayed in an OLAP view.

### **Measure**

Depending on the context:

- In a report, a formula that calculates the values displayed in a table's columns, a crosstab's data values, or a chart's dependent variable (such as the slices in a pie).

- In an OLAP view, a formula that calculates the facts that constitute the quantitative data in a cube.

## Mondrian

A Java-based, open source multidimensional database application.

## Mondrian Connection

An OLAP client connection that consists of an OLAP schema and a data source. OLAP client connections populate OLAP views.

## Mondrian Schema Editor

An open source Eclipse plug-in for creating Mondrian OLAP schemas.

## Mondrian XML/A Source

A server-side XML/A source definition of a remote client-side XML/A connection used to populate an OLAP view using the XML/A standard.

## MySQL

An open source relational database management system. For information, visit <http://www.mysql.com/>.

## Navigation Table

The main table in an OLAP view that displays measures and dimensions as columns and rows.

## ODBO Connect

Jaspersoft ODBO Connect enables Microsoft Excel 2003 and 2007 Pivot Tables to work with Jaspersoft OLAP and other OLAP servers that support the XML/A protocol. After setting up the Jaspersoft ODBO data source, business analysts can use Excel Pivot Tables as a front-end for OLAP analysis.

## OLAP

On Line Analytical Processing. Provides multidimensional views of data that help users analyze current and past performance and model future scenarios.

## OLAP Client Connection

A definition for retrieving data to populate an OLAP view. An OLAP client connection is either a direct Java connection (Mondrian connection) or an XML-based API connection (XML/A connection).

## OLAP Schema

A metadata definition of a multidimensional database. In Jaspersoft OLAP, schemas are stored in the repository as XML file resources.

## OLAP View

Also called an analysis view. A view of multidimensional data that is based on an OLAP client connection and an MDX query. Unlike Ad Hoc views, you can directly edit an OLAP view's MDX query to change the data and the way they are displayed. An OLAP view is the entry point for advanced analysis users who want to write their own queries. [Compare Ad Hoc View](#).

## Organization

A set of users that share folders and resources in the repository. An organization has its own user accounts, roles, and root folder in the repository to securely isolate it from other organizations that may be hosted on the same instance of JasperReports Server.

## Organization Admin

Also called the organization administrator. A user in an organization with the privileges to manage the organization's user accounts and roles, repository permissions, and repository content. An organization admin can also create suborganizations and manage all of their accounts, roles, and repository objects. The default organization admin in each organization is the `jasperadmin` account.

## Outlier

A fact that seems incongruous when compared to other member's facts. For example, a very low sales figure or a very high number of help desk tickets. Such outliers may indicate a problem (or an important achievement) in your business. The analysis features of Jaspersoft OLAP excel at revealing outliers.

## Parameter

Named values that are passed to the engine at report-filling time to control the data returned or the appearance and formatting of the report. A report parameter is defined by its name and type. In JasperReports Server, parameters can be mapped to input controls that users can interact with.

## Pivot

To rotate a crosstab such that its row groups become column groups and its column groups become rows. In the Ad Hoc Editor, pivot a crosstab by clicking .

## Pivot Table

A table with two physical dimensions (for example, X and Y axis) for organizing information containing more than two logical dimensions (for example, PRODUCT, CUSTOMER, TIME, and LOCATION), such that each physical dimension is capable of representing one or more logical dimensions, where the values described by the dimensions are aggregated using a function such as SUM. Pivot tables are used in Jaspersoft OLAP.

## Properties

Settings associated with an object. The settings determine certain features of the object, such as its color and label. Properties are normally editable. In Java, properties can be set in files listing objects and their settings.

## Report

In casual usage, *report* may refer to:

- A JasperReport. [See JasperReport](#).
- The main JRXML in a JasperReport.
- The file generated when a JasperReport is scheduled. Such files are also called content resources or output files.
- The file generated when a JasperReport is run and then exported.
- In previous JasperReports Server versions, a report created in the Ad Hoc Editor. [See Ad Hoc Report](#).

## Report Run

An execution of a report, Ad Hoc view, or dashboard, or a view or dashboard designer session, it measures and limits usage of Freemium instances of JasperReports Server. The executions apply to resources no matter how they are run (either in the web interface or through the various APIs, such as REST web services). Users of our Community Project and our full-use commercial licenses are not affected by the limit. For more information, please contact [sales@jaspersoft.com](mailto:sales@jaspersoft.com).

## Repository

Depending on the context:

- In JasperReports Server, the repository is the tree structure of folders that contain all saved reports, dashboards, OLAP views, and resources. Users access the repository through the JasperReports Server web interface or through Jaspersoft Studio. Applications can access the repository through the web service API. Administrators use the import and export utilities to back up the repository contents.
- In JasperReports IO, the repository is where all the resources needed to create and run reports are stored. The repository can be stored in a directory on the host computer or in an S3 bucket hosted by Amazon Web Services. Users access the repository through a file browser on the host machine or through the AWS console.

## Resource

In JasperReports Server, anything residing in the repository, such as an image, file, font, data source, Topic, Domain, report element, saved report, report output, dashboard, or OLAP view. Resources also include the folders in the repository. Administrators set user and role-based access permissions on repository resources to establish a security policy.

## Role

A security feature of JasperReports Server. Administrators create named roles, assign them to user accounts, and then set access permissions to repository objects based on those roles. Certain roles also determine what functionality and menu options are displayed to users in the JasperReports Server interface.

## S3 Bucket

Cloud storage system for Amazon Web Services. JasperReports IO can use an S3 bucket to store files for its repository.

## Schema

A logical model that determines how data is stored. For example, the schema in a relational database is a description of the relationships between tables, views, and indexes. In Jaspersoft OLAP, an OLAP schema is the logical model of the data that appears in an OLAP view; they are uploaded to the repository as resources. For Domains, schemas are represented in XML design files.

## Schema Workbench

A graphical tool for easily designing OLAP schemas, data security schemas, and MDX queries. The resulting cube and query definitions can then be used in Jaspersoft OLAP to perform simple but powerful analysis of large quantities of multi-dimensional data stored in standard RDBMS systems.

## Set

In Domains and Domain Topics, a named collection of items grouped together for ease of use in the Ad Hoc Editor. A set can be based on the fields in a table or entirely defined by the Domain creator, but all items in a set must originate in the same join tree. The order of items in a set is preserved.

## Slice

An OLAP operation for filtering data rows.

## SQL

Structured Query Language. A standard language used to access and manipulate data and schemas in a relational database.

## Stack

A collection of Amazon Web Services resources you create and delete as a single unit.

## **System Admin**

Also called the system administrator. A user who has unlimited access to manage all organizations, users, roles, repository permissions, and repository objects across the entire JasperReports Server instance. The system admin can create root-level organizations and manage all server settings. The default system admin is the superuser account.

## **Topic**

A JRXML file created externally and uploaded to JasperReports Server as a basis for Ad Hoc reports. Topics are created by business analysts to specify a data source and a list of fields with which business users can create reports in the Ad Hoc Editor. Topics are stored in the Ad Hoc Components folder of the repository and displayed when a user launches the Ad Hoc Editor.

## **Transactional Data**

Data that describe measurable aspects of an event, such as a retail transaction, relevant to your business. Transactional data are often stored in relational databases, with one row for each event and a table column or field for each measure.

## **User**

Depending on the context:

- A person who interacts with JasperReports Server through the web interface. There are generally three categories of users: administrators who install and configure JasperReports Server, database experts or business analysts who create data sources and Domains, and business users who create and view reports and dashboards.
- A user account that has an ID and password to enforce authentication. Both people and API calls accessing the server must provide the ID and password of a valid user account. Roles are assigned to user accounts to determine access to objects in the repository.

## **View**

Several meanings pertain to JasperReports Server:

- An Ad Hoc view. See [Ad Hoc View](#).
- An OLAP view. See [OLAP View](#).
- A database view. See [http://en.wikipedia.org/wiki/View\\_%28database%29](http://en.wikipedia.org/wiki/View_%28database%29).

## **Virtual Data Source**

A virtual data source allows you to combine data residing in multiple JDBC and/or JNDI data sources into a single data source that can query the combined data. Once you have created a virtual data source, you create Domains that join tables across the data sources to define the relationships between the data sources.

## **WCF**

Web Component Framework. A low-level GUI component of JPivot. For more information, see <http://jpivot.sourceforge.net/wcf/index.html>.

## **Web Services**

A SOAP (Simple Object Access Protocol) API that enables applications to access certain features of JasperReports Server. The features include repository, scheduling and user administration tasks.

## **XML**

eXtensible Markup language. A standard for defining, transferring, and interpreting data for use across any number of XML-enabled applications.

## **XML/A**

XML for Analysis. An XML standard that uses Simple Object Access protocol (SOAP) to access remote data sources. For more information, see <http://www.xmla.org/>.

## **XML/A Connection**

A type of OLAP client connection that consists of Simple Object Access Protocol (SOAP) definitions used to access data on a remote server. OLAP client connections populate OLAP views.



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