Getting Started with Intellicus

Intellicus Enterprise Reporting and BI Platform

intellicus

Enterprise Reporting and
Business Insights Platform

Dated: April 2014

Acknowledgements

Intellicus acknowledges using of third-party libraries to extend support to the functionalities that they provide.

For details, visit: http://www.intellicus.com/acknowledgements.htm

Contents

Introduction

Most organizational decisions are consequential of reports and thus reporting is a vital and integral component of Information System of the organization. Analytics and insights obtained from several types and volume of data that is generated or accessible by the organization plays a key role in the decision making and planning.

Intellicus is an enterprise class reporting suite and business insights platform is a very flexible and handy tool that provides complete life-cycle or reporting and ad hoc analytics.

What does Intellicus 7 Offer?

Intellicus BI Server is a highly scalable Server that is capable of handling simultaneous reporting requests 24x7 without performance issues and delivering graphical and rich formatted reports in any of the offered formats. BI server has built-in reporting engine, OLAP engine, scheduling and delivery engine and data extraction and transformation engines. A very simple SOA architecture provides a high value to the complete organization's multi-facet BI needs.

Intellicus Web Portal provides web-based secure access to all Intellicus functionalities from end user reporting to data administration and monitoring. Navigation panel and Objects Explorer provide users quicker access to functionalities. Personalized Favorites menus, which users can build on their own, provide one-click access to entities they frequently use.

Dashboards collate multiple key performance indicators, drillable to detailed, richly designed graphical reports. Each end user gets a personalized and customizable view of dashboard, according to their business needs.

Intellicus Studio designs richly formatted graphical reports with pixel perfect alignment of data represented as charts, tables and matrices. Features like drill down, conditional formatting and alerting will improve your report viewing experience.

Ad hoc Reporting empowers your non-technical business users to tweak their ad hoc reports according to emergent needs allowing decision makers to access required business facts in an agile fashion.

OLAP engine provides a multidimensional data storage and pre-aggregation solution. Huge volumes of transactional data can be summarized on multiple dimensions at multiple levels. Intellicus stores the OLAP cubes in its system and serves requests for analysis queries.

Heterogeneous Data Sourcing of Intellicus lets you connect to multiple databases of your organization to co-relate their data and prepare common cubes, reports from them.

Scheduler allows users to create recurring jobs to generate reports and deliver by email, print or publishing on FTP locations.

Mobile Analytics Server and iOS /Android applications, combined together, provide the Reporting and Dashboard functionalities on popular mobile devices to decision makers for on-the-move access of required information in required format.

Supported Platforms

A platform can be defined as computer architecture, an operating system, or combination of both. **Intellicus can be installed on most of the popular platforms**. The list of such platforms is given below:

- Windows (on Intel or on AMD) 32 bit and 64 bit

- Linux   (On Intel, IBM, or others) 32 bit and 64 bit

- Solaris   (on Sun or Intel)

- HP UX

- AIX

Supported Web Servers

A Web Server is a server application that is responsible for serving web browsers with HTML content – pages or applications.

Intellicus portal can be deployed on industry-standard web servers – Namely:

- IBM-Websphere

- Jakarta Tomcat

- Microsoft-IIS

- Oracle Application Server

- Oracle-Glassfish

- Oracle-Weblogic

- Resin

Supported Databases

Intellicus supports most of the widely used databases:

- Oracle
- MS SQL Server
- MySQL
- PostgresSQL
- Sybase
- CacheDB
- ODBC
- DB2
- Hadoop
- Hive
- HP Vertica
- Greenplum
- AsterData
- Teradata
- Sand
- Amazon EC2
- HBASE
- Cassandra
- HortonWorks
- Gridsql
- SQLLite

Editions

Intellicus is scalable to cater to the needs of varied spectra of customers in terms of features and load requirements. It has the following editions:

- Basic
- Standard Plus
- Professional Edition
- Enterprise Edition

The following table lists down the features of the various Intellicus' editions:

Feature	Basic	Standard Plus	Professional	Enterprise
Reporting				
Web Studio	Yes	Yes	Yes	Yes
Desktop Studio	Yes	Yes	Yes	Yes
Standard Report Run	Yes	Yes	Yes	Yes
Ad hoc Reporting				
Ad hoc Report Run	Yes	Yes	Yes	Yes
Ad hoc Report Wizard	Yes	Yes	Yes	Yes
Power Viewer	No	No	Yes	Yes
MetaLayer-QO Creator	Yes	Yes	Yes	Yes
Dashboards	No	Single Personal	Multi-Personal	Corporate
OLAP	No	No	Add-on	Yes
Management & Delivery				
Alerts & Notifications	No	No	Yes	Yes
Quick Schedules	No	Yes	Yes	Yes
Batch Schedules	No	No	Yes	Yes
Report Commenting	No	No	Yes	Yes
Approval Workflow	No	No	Yes	Yes
Output Formats				
HTML/PDF/CSV/RDF*	Yes	Yes	Yes	Yes
XLS/DOC	No	Yes	Yes	Yes
TXT	No	Yes	Yes	Yes
RAW TXT	No	No	No	Yes
IHTML	No	No	Yes	Yes
Output Mode				
Email	No	Yes	Yes	Yes
FTP	No	No	Yes	Yes
Print & Publish	Yes	Yes	Yes	Yes
Performance & Security				
Performance Control				
Health Monitor to check system status	No	No	Yes	Yes
Run in background	No	Yes	Yes	Yes
Advanced Properties (Max rows limit, Restrict to formats by Admin)	No	Yes	Yes	Yes
Load Balancer	No	No	No	Add-on
Security				
Column Masking	No	No	Yes	Yes
Authorization &	Yes	Yes	Yes	Yes

Feature	Basic	Standard Plus	Professional	Enterprise
Authentication				
Log Events	No	No	Yes	Yes
Role based Granular Access	No	Yes	Yes	Yes
Platform & Capacity				
Number of named users	5	10	Unlimited	Unlimited
Number of Concurrent requests	2	2	As per License	As per License
CPU Support	Single	Multi	Multi	Multi
Multi-tenant Support	No	No	No	Yes
Operating System	Windows, Linux	Windows, Linux	Windows, Linux, Solaris, AIX, HPUX	Windows, Linux, Solaris, AIX, HPUX
Architecture	32 bit	32 bit	32 bit/ 64 bit	64 bit

Supported Web Servers

- **Basic:** IBM-Websphere, Jakarta Tomcat, Microsoft-IIS, Oracle Application Server, Oracle-Glassfish, Oracle-Weblogic.

- **Standard:** IBM-Websphere, Jakarta Tomcat, Microsoft-IIS, Oracle Application Server, Oracle-Glassfish, Oracle-Weblogic.

- **Standard Plus:** IBM-Websphere, Jakarta Tomcat, Microsoft-IIS, Oracle Application Server, Oracle-Glassfish, Oracle-Weblogic.

- **Professional:** IBM-Websphere, Jakarta Tomcat, Microsoft-IIS, Oracle Application Server, Oracle-Glassfish, Oracle-Weblogic.

- **Enterprise:** IBM-Websphere, Jakarta Tomcat, Microsoft-IIS, Oracle Application Server, Oracle-Glassfish, Oracle-Weblogic.

Databases

- **Basic:** Oracle, MS SQL Server, MySQL, PostgresSQL.

- **Standard:** Oracle, MS SQL Server, MySQL, PostgresSQL, Sybase, CacheDB, ODBC.

- **Standard Plus:** Oracle, MS SQL Server, MySQL, PostgresSQL, Sybase, CacheDB, ODBC.

- **Professional:** Oracle, MS SQL Server, MySQL, PostgresSQL, Sybase, CacheDB, ODBC.

- **Enterprise:** Oracle, MS SQL Server, MySQL, PostgresSQL, Sybase, CacheDB, ODBC, Hadoop, HDFS, HBase, Cassandra, Greenplum, AsterData, Teradata.

Deployment Scenarios

Intellicus can be deployed in several ways. You can deploy Intellicus in a way that best meets your organizational needs.

Single machine or distributed deployment

- You can install Report Server and Web Component on the same or on different machines.

Standalone or Integrated

- You can install Intellicus as a stand-alone reporting application or as a bundled in setup of another application.

Intellicus on a Single machine

You can install all the components of Intellicus Web-based reporting suite on a single machine.

Deploying Intellicus as Stand-alone
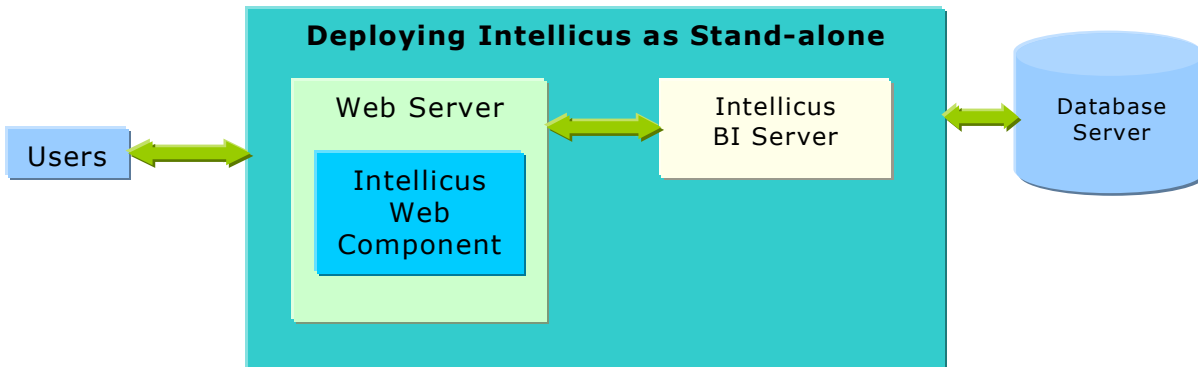
However, it is also possible to install any of the following on separate machines:

- Intellicus Report Server
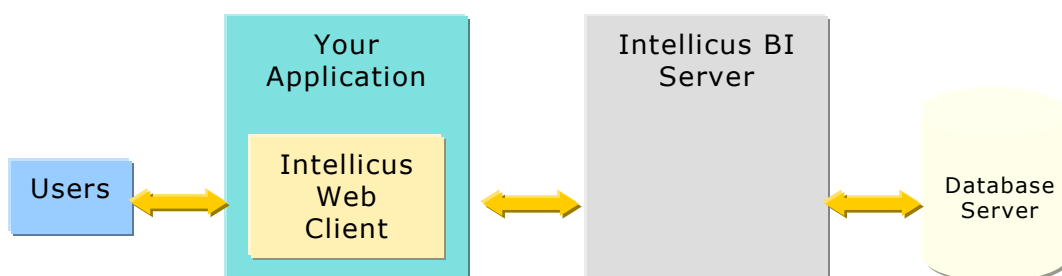
- Intellicus Web Client (web component)

- Database

Intellicus, integrated with other applications

Intellicus provides seamless integration with other applications. Your application can use the Intellicus portal (installed on the same web server or a separate server) for reporting related activities or can use its native UI and make a call for reporting related activities.

This way, Intellicus becomes completely transparent to the end user.

To deploy Intellicus web component, a host application can:

- Use its own web server or

- Use the Intellicus' default web server.

Intellicus Report Server can be installed on one machine and Intellicus Web Client (portal) can be installed on another machine where your web application is running.

Getting started with Evaluation

This chapter has information and steps to get you started with installing and evaluating Intellicus in the quickest way.

Downloading Intellicus

If you do not have Intellicus setup, you can download evaluation version from the web site: www.intellicus.com.

Before you install

Here are a few points to be kept in mind before starting the Installation.

Operating System

Intellicus server and portal can be deployed on most of the popular Operating Systems. Instructions provided in this manual are for Windows platform.

Server Port

By default, Intellicus report server listens at port 45450. If this port is busy on the machine where Intellicus is being installed for evaluation, you can specify a different server port at the time of Installation.

Intellicus Portal

By default Intellicus runs under Jakarta tomcat web server. It runs at port 80. If this port is already used by another application, you can specify a different portal port for Intellicus at the time of installation.

> **Note:** You will receive "HTTP 404 error: Page not found" message in the browser when Intellicus portal does not start up because port 80 (or the one allocated to web server) was used by another application.

Installing

Intellicus setup for Windows is made available as setup.exe file. To start installation, you need to double-click setup.exe.
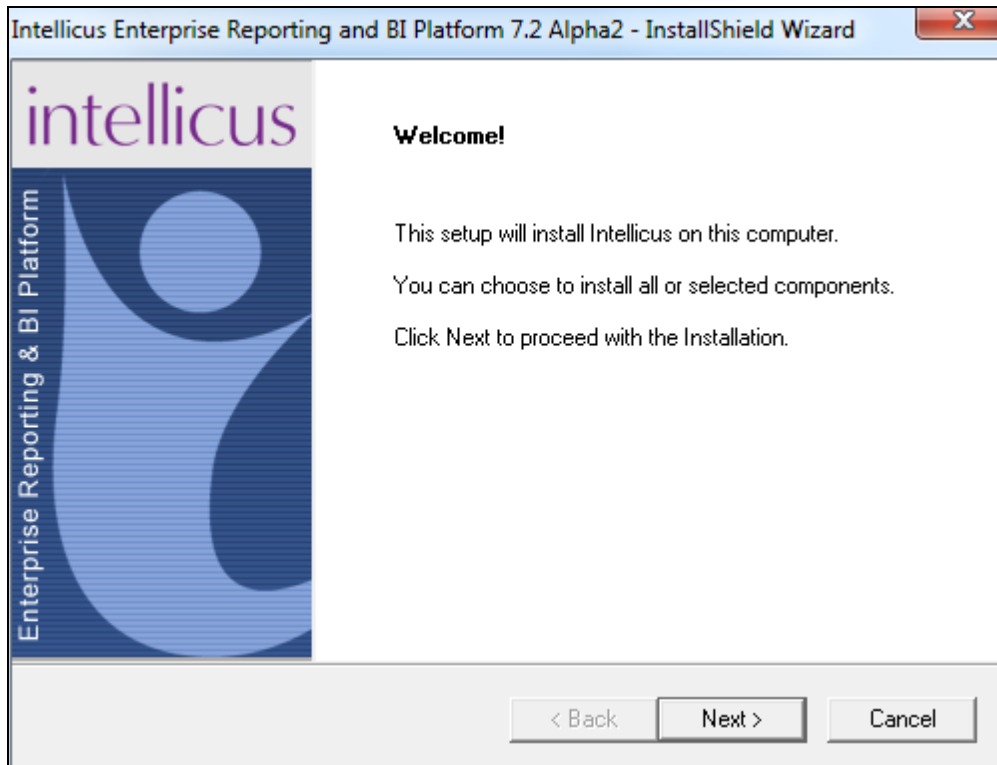

Figure 1: Welcome screen will be displayed when you double-click setup.exe

Click **Next** on screens to install Intellicus with default configuration:

- Installation folder: C:/Program Files/

- Server port: 45450

- Web Server: Jakarta tomcat

- Portal port: 80

- Timeouts: 600 seconds

Note: As part of installation steps, you will be allowed to change above information.

How to know Intellicus (Server and Portal) is running?

In the last step of Installation, setup asks if it should start Intellicus Service and Launch Portal.
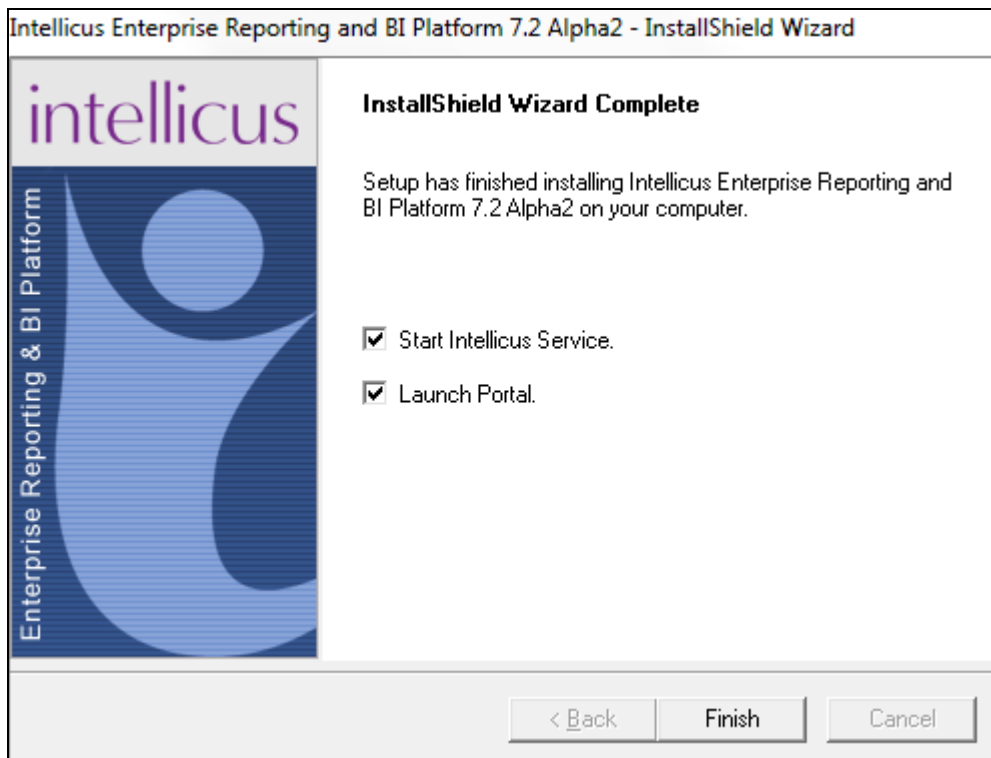
Figure 2: "Installation Complete" screen

Launching Intellicus Portal

Intellicus provides browser based user interface. Specify following in your browser's address bar to launch Intellicus when it is running on local machine:

```
http://localhost/intellicus
```

When Intellicus is running on a remote machine, the URL will be:

```
http://<ip of the machine>/intellicus
```

Intellicus' demo setup has three pre-set user names / password combinations.
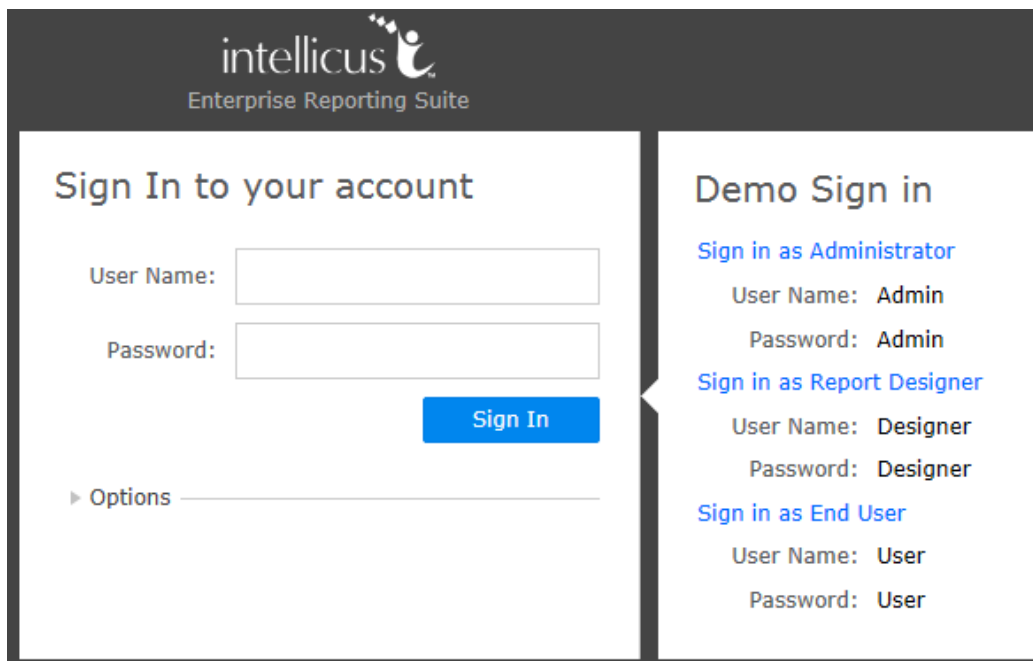
Figure 3: Intellicus login page

To explore and evaluate all the features of Intellicus, login using Admin / Admin user name and password combination. Following page will appear after successful login.

Changing the port number

Here is the information about how to change the port number when Jakarta Web Server is used.

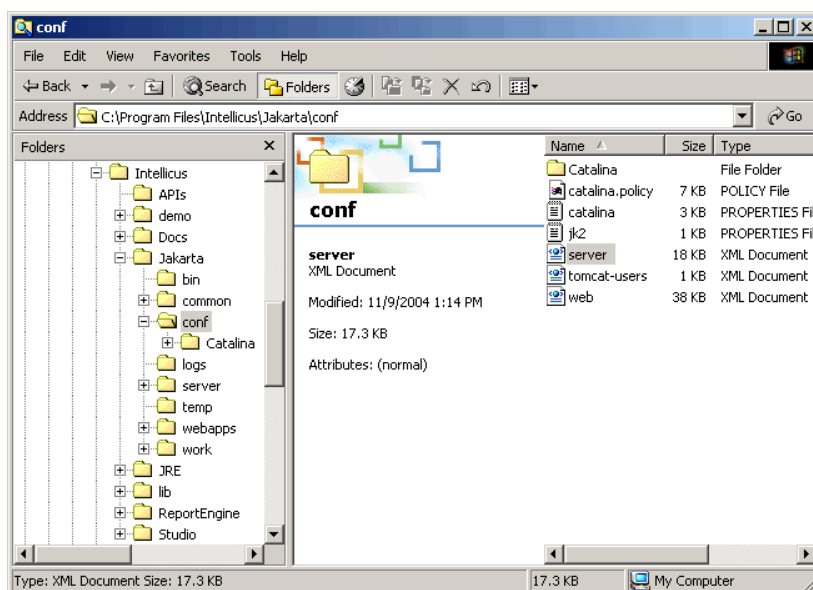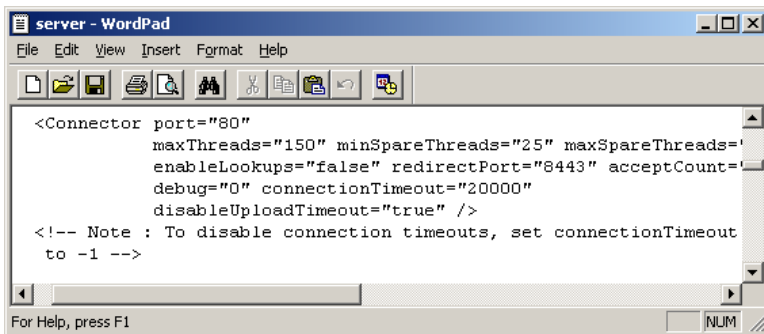The port number information is stored in server.xml file.

Figure 4: Location of server.xml

To change the port number:

1. Open server.xml in a text editor.
2. Change the value of **Connector port** to a number that is free.
3. Save the changes.

Figure 5: Changing the port number

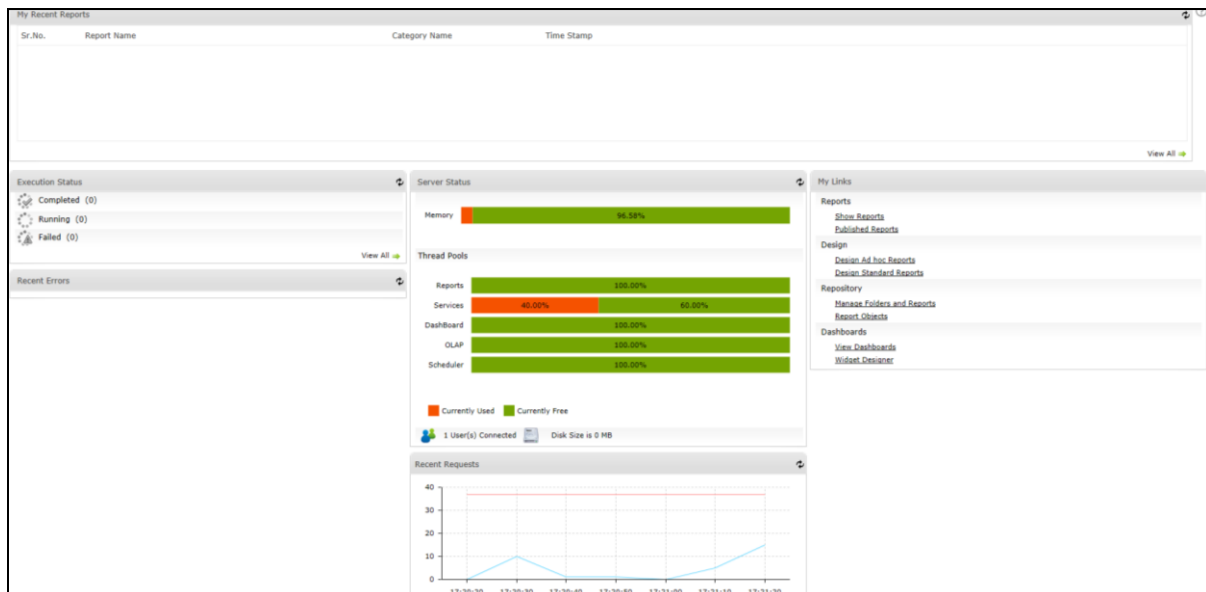Upon successful login, the following Home Page appears:

Figure 6: Homepage for the Admin user

What to do next

Intellicus demo installation includes a limited demo data which you can use to get a feel of Intellicus features.

Explore what you can do on Portal

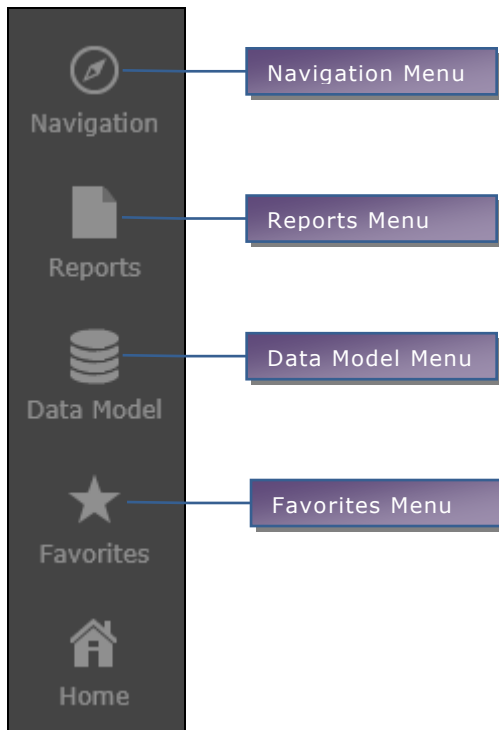Listed here are some of the portal pages you may wish to explore.

Figure 7: Intellicus Menu

- Database connections: Navigation > Administration > Configure > **Database**

- Query Objects / Data sources: Navigation > Repository > **Report Objects**

- OLAP reports: Navigation > Analytics > **OLAP Viewer**

- Ad hoc Reports – wizard customization and report design: Administration > Configure > **Ad hoc Wizard**, Navigation > Design > **Ad hoc Template Configuration,** Navigation > Design > **Ad hoc Report Wizard,** Navigation > Analytics > **Ad hoc Visualizer**

- Running Reports: Reports > Demo > **Run Report**

- Dashboards: Navigation > Dashboards > **Widget Designer**, Navigation > Dashboards > **Preferences**, Navigation > Dashboards > **View**

- Batch Scheduler: Navigation > Schedule > Jobs

- Customizations: Navigation > Administration > Configure

- Favorites: Adding items to favorites

To design standard reports

After having a look at portal, running pre-deployed demo reports as well as designing and running ad hoc reports, you may wish to design standard reports.

You need to use Intellicus Studio to design and deploy standard reports. In Windows, click Start > Intellicus > **Studio**.

Documents

The User Assistance Documents are organized in terms of their usability. Intellicus provides a blend of PDF documents, Web-based help and On-line help files. The objective is to make necessary information available where a user may need it.

Printable Manuals in PDF Format

Intellicus manuals are created based on functionalities. For example, to know how to run a report in Intellicus, you may refer RunningReportsInIntellicus.pdf. Similarly, to understand how to create, modify or delete database connections, you may refer WorkingWithDatabaseConnections.pdf.

These manuals can be accessed from an html page that opens from Intellicus menu shortcut. This page contains list of documents and information about the contents that you can expect in each document.

Online Help Content

Desktop Studio

A context-sensitive online help containing text and images explains the functionality of each dialog and screen. You need to press the Help (F1) key on any given screen to launch this help. Depending upon the context, the right topic will be displayed.

Web Portal

Every screen on portal has a help icon. You need to click this icon to access help for that screen, a help page will pop up with explanation of the screen functionality.