Intellicus Getting Started

Intellicus Web-based Reporting Suite Version 4.5

- Enterprise
- Professional
- Smart Developer
- Smart Viewer

intellicus
Enterprise Reporting

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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 .

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Introduction

Most organizational decisions are consequential of reports and thus reporting is a vital and integral component of any company. Intellicus is a Reporting Tool that can deal with operational and analytical reports right through complete reporting life-cycle.

Supported Computer 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)
- Linux (On Intel, IBM, or others)
- Solaris (on Sun or Intel)
- HP UX
- AIX

Web Servers supported by Intellicus Web Application

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

Intellicus is a web application that can be deployed on industry-standard web servers – Namely:

- Apache Tomcat
- Web Logic Server
- IBM Web Sphere
- J Boss
- Oracle Application server
- Pramati

What does Intellicus Offer?

Following are various features or components that you get from Intellicus, when you install it.

Intellicus Report Server is the serving force behind all other components of Intellicus. This is an independent process that runs to handle reporting needs by all users demanding through various Intellicus reporting components. This generally is installed in such a way that it automatically starts when the computer starts.

Report Studio is a tool for designing pixel-perfect reports of business operational usage – ranging from invoices, labels to ledgers and audit reports. Using this GUI based designer having Wizards, drag & drop and scripting features, you can design and preview any complex report and deploy it on the report server. The designer comes in two variants; Desktop Studio works on windows platform, needs installation, Web Studio works on any platform from a browser.

Web Portal is the interface that Intellicus provides to various users for different reporting needs. An end user uses portal to generate reports; an Administrator uses portal to design, deploy and manage reports as well as to perform any administration related task.

Ad hoc Report Wizard is a browser-based tool that is specially designed for the business users. Using this wizard they can design ad hoc reports on their own, with groupings, summaries and charts.

Report Viewer is a part of Intellicus portal that presents report output to the end user. **Viewing, Saving, Printing, Exporting to popular formats** are the operations that a user can perform on the viewer.

Power Viewer is an extension to report viewer. An end user can re-organize the information on a report including re-grouping, re-sorting data, re-drawing charts. Power Viewer helps end users to categorize, summarize and analyze their business information independently.

Dashboard is an interactive platform for providing you an insight into disparate corporate data with end-user driven collaboration. Dashboard provides collection of interactive and auto-refreshing reports and charts from various data sources on a single screen.

Scheduler helps you auto-run the reports at pre-specified times once or recurring and get delivered. Scheduled Reports can run in batches and delivered to one or more destinations (like email, ftp or printer).

With this you can use your resources such as servers and printers optimally.

iPackager is a report bundling and distribution tool that comes very handy for a software product company, who need to distribute reports and related objects to its customers regularly.

This unique tool provides software vendors a sound control over reporting repository at customers' site.

Seamless integration is a feature made available through APIs. You will not notice the presence of another application for reporting activities.

Customization capability of Intellicus gives you substantial power to change the look-and-feel of Intellicus portal to match your application's aesthetics. It enables you to turn on/off the various elements of the portal and to change the terminology.

Note: An **application programming interface** (API) is a programatic interface that a program library provides to achieve that programs functionalities in your program.

Varied Editions for diverse requirements

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:

- Enterprise Edition
- Professional Edition
- Standard Edition

Enterprise Edition

- For a large, multi-location organization, such as Bank, Healthcare, Finance Institution, Insurance corporation, etc.
- For a corporate office having more than a hundred report-users requiring secured access to reports and data.
- For an organization that has one or more enterprise data sources and is looking for a reporting system that can provide seamless integration with a single sign-on.

Professional Edition

- For an organization that has an office or is part of a big organization that has an independent setup locally or nationally.
- Reporting users range from 10 to 100.

Standard Edition

- For a small business unit, a shop or a charity institution, with a small computer setup that has from 1 to 10 report-users.
- For a user who does not need secured access to reports.

Based on specific reporting needs, you can deploy the appropriate edition of Intellicus. Intellicus can be installed either on a stand-alone desktop system or in a distributed environment.

The availability of a feature depends on the edition that you use.

What does specific Edition of Intellicus offer?

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

Features	Enterprise	Professional	Standard
Maximum reports that can run at a time	As per License	As per License (Max 100)	As per License (Max 10)
Maximum users that can be served	As per License	100	10
Maximum Dashboards that can be served	As per License	100	10
Maximum Schedules that can be served	As per License	100	10
Maximum number of Helper threads	As per License	100	10
Report output formats	PDF, HTML RDF, CSV , TXT, DHTML, XLS, XML, DOC, RWT	PDF, HTML RDF, CSV , TXT, DHTML, XLS, XML, DOC, RWT	PDF HTML RDF, CSV
Asynchronous report execution	Yes	Yes	No
HTML Power Viewer (Add On)	Yes	Yes	No
Save, Print a report	Yes	Yes	Yes
E-mail the report	Yes	Yes	No
Collaboration	Yes	Yes	No
Designer APIs	Yes	Yes	No
Other APIs	Yes	Yes	Yes
Number of databases that can be connected	No Limit	4	2

Features	Enterprise	Professional	Standard
Organization, User and Role based Security	Yes	Yes	No
Personalization	Yes	Yes	No
Windows-based Report Design studio	Yes	Yes	Yes
Web-based Report Design Studio	Yes	Yes	Yes
Ad hoc Wizard	Yes	Yes	No
Ad hoc PowerViewer	Yes	No	No
Ability to set report priority	Yes	Yes	No
Scheduling of report generation and delivery	Yes	Yes	No
Dashboard	Corporate	Personal	No
Asynchronous execution	Yes	Yes	No
Approval Process	Yes	Yes	No
Notifications	Yes	No	No

Some of the features are available as Add-ons:

Features	Enterprise	Professional	Standard
Load Balancer	Add-on	Add-on	No

Licensing

Intellicus Setup generally ships with a demo license of professional edition. The demo license provides all the functionalities available in the edition, except for pages limitation and a watermark on some pages.

If you decide to deploy Intellicus, you need to apply the product license. You need to refer to the *Intellicus Installation and Administration Manual* documentation on how to request for and deploy the production license of Intellicus.

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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 you might be getting Intellicus in a bundled setup of another application.

Accessing Intellicus

To access Intellicus portal, after you install Intellicus, you should know the name or network address of the machine where web component is installed.

You can launch a browser and type the following in the address bar to start using Intellicus.

http://<IP of the server>/Intellicus

> For example, if the IP of the server is 120.98.99.256 and port is 7000, then the URL would be:
>
> http://120.98.99.256:7000/Intellicus
>
> If the port is standard (80) then the URL would be:
>
> http://120.98.99.256/Intellicus

Tip: For more information, refer to **Getting started with Evaluation** chapter.

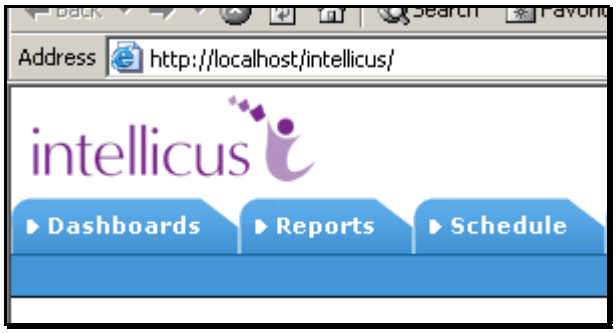
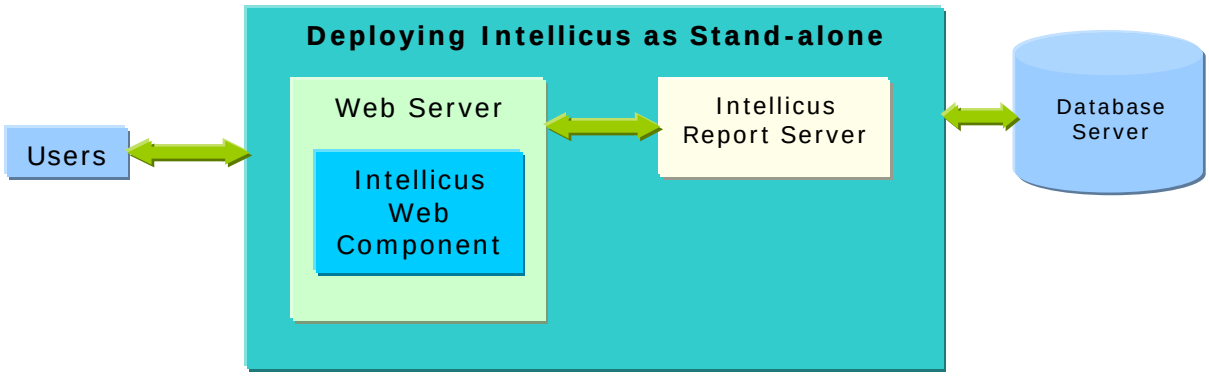


Figure 1: The URL to start Web portal when it is installed on local machine.

Intellicus on a Single machine

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



However, it is also possible to install any of the following on separate machines:

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

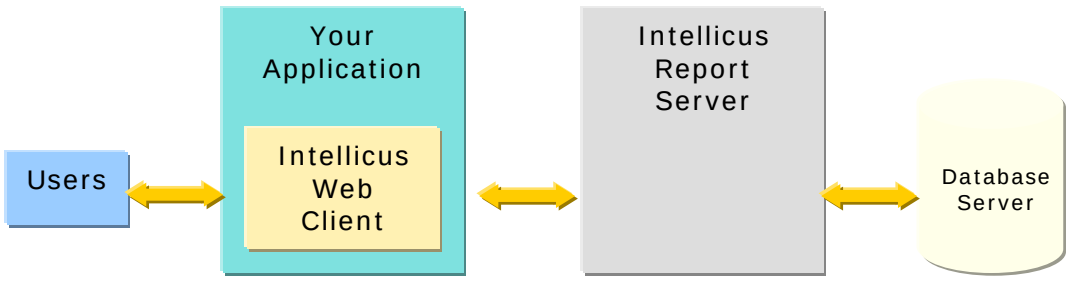
Intellicus, integrated with other applications

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 a separate machine and Intellicus Web Client can be installed on the machine where your web application is running. However, it can be installed on a separate machine also.

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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 going ahead with Installation.

Operating System

Intellicus server and portal can be deployed on most of the popular Operation Systems. Instructions provided here are for Windows platform.

Server Port

By default, Intellicus report server listens at port 45450. Before going ahead please make sure port 45450 is not used by any application on the machine where Intellicus is being installed for evaluation.

Note: You can specify a different server port at the time of Installation.

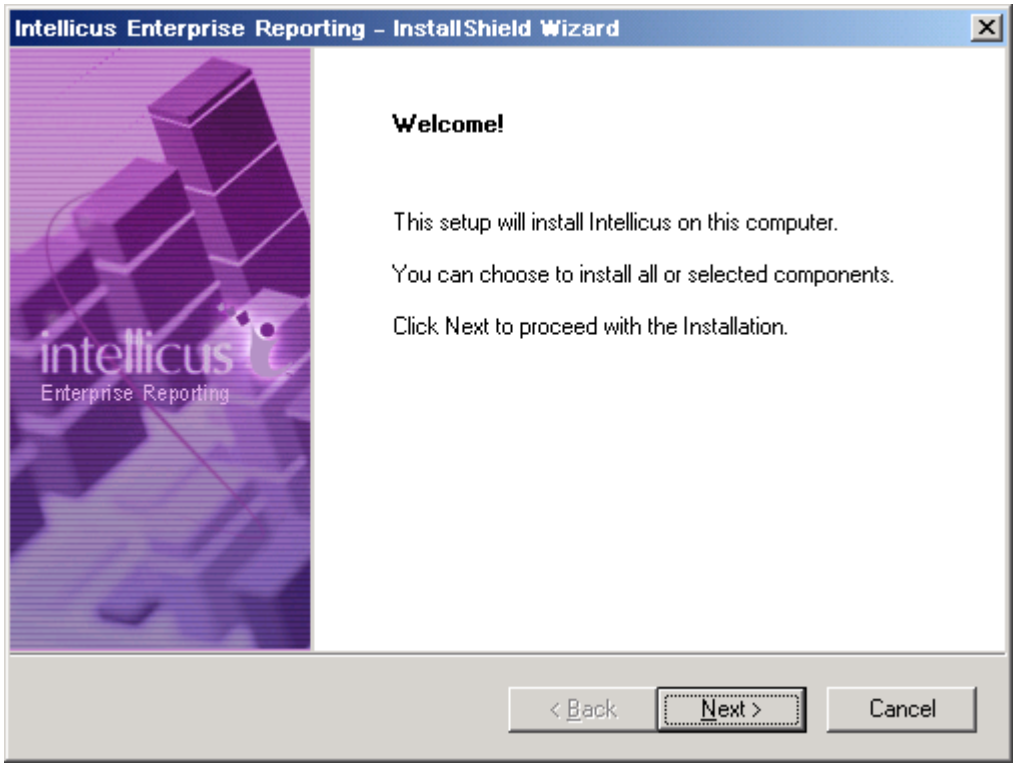
Intellicus Portal

By default Intellicus runs under Jakarta tomcat web server. It runs at port 80. Before going ahead, please make sure no other web application is running at port 80 on the machine where Intellicus is being installed for evaluation.

Note: You can specify a different portal port at the time of Installation.

Installing

Intellicus setup for Windows comes as setup.exe file. All you need to do is double-click setup.exe.



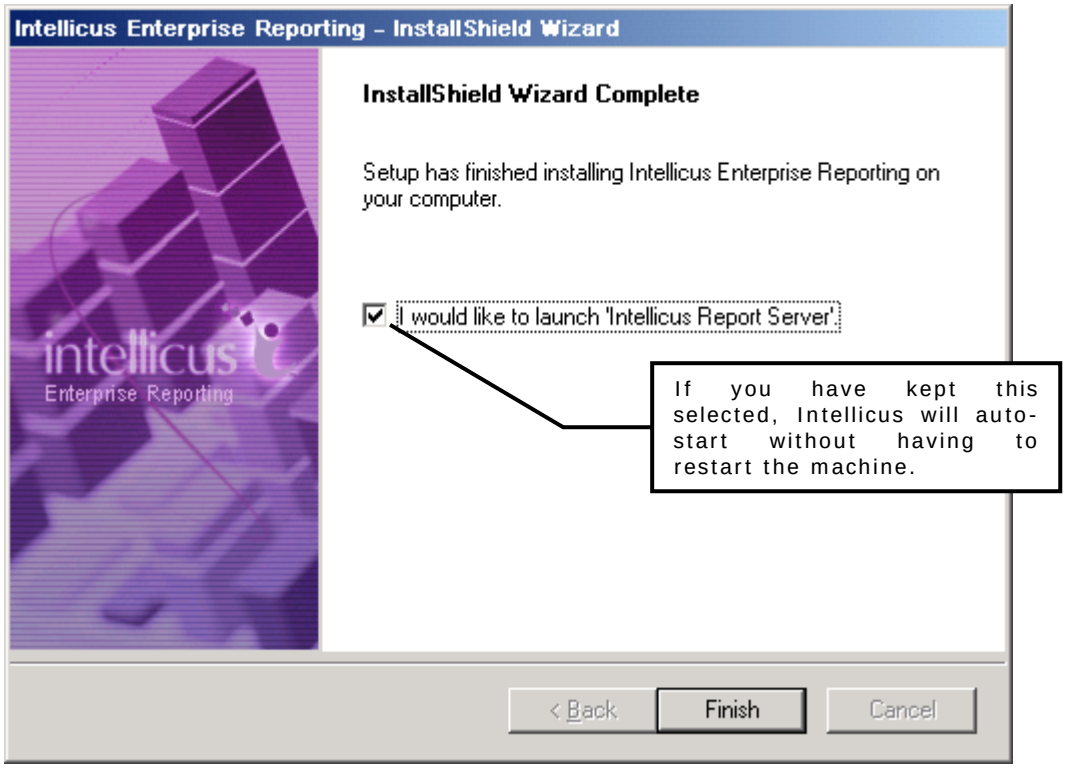
Setup installs Intellicus having default configuration:

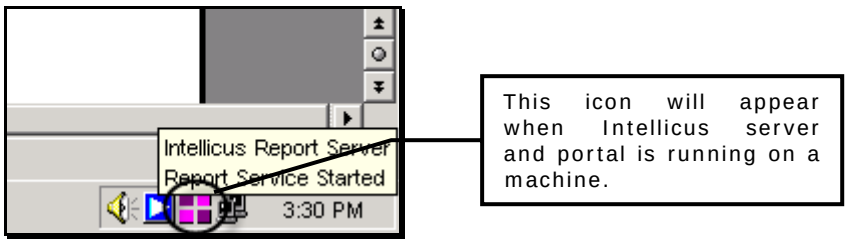
- Installation folder: C:/Program Files/
- Server port: 45450
- Web Server: Jakarta tomcat
- Portal port: 80
- Timeouts: 600 seconds

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 the server.





Opening Intellicus Portal

Intellicus provides browser based user interface. Specify following in your browser to start Intellicus running on local computer (at default server and portal ports:

http://localhost/Intellicus

Intellicus' demo installation has three pre-set user names / password combinations.

Tip: For URL to be used if Intellicus is running on a remote machine, refer to **Deployment Scenarios** chapter.

To explore and evaluate all the features of Intellicus, login using Admin / Admin user name and password combination.

What to do next

Intellicus demo installation includes a limited demo data. You can use this to get a feel of Intellicus features.

Explore what you can do on Portal

Some of the portal pages you may wish to explore:

- Database connections: Administration > Configure > **Database**
- Query Objects / Data sources: Repository > Report Objects > **Query**
- Adhoc Reports – wizard customization and report design: Administration > Configure > **Adhoc Wizard**, Design > **Adhoc Wizard**
- Running Reports: Reports > Demo > **Run**
- Dashboards: Dashboards > **Design Dashboard**, Dashboards > **Preferences**, Dashboard > **View**
- Batch Scheduler: Menus under Schedule.
- Archiving: Tabs under Administration > Archiving
- Customziations: Tabs under Admin > Configure
- Parameter objects: Repository > Report Objects > **Parameters**

To design standard reports

After having a look at portal, and running pre-deployed demo reports as well as designing and running adhoc reports, you may wish to actually try designing standard reports.

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

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Documents

The User Assistance Documents are organized in terms of their usability. Intellicus provides a blend of PDF, Web-based help and On-line help files. The objective is to provide the right amount of information at the right place.

Printable Documents in PDF Format

- IntellicusGettingStarted.pdf
- IntellicusInstallationAndConfigurationManual.pdf
- IntellicusAdministrationManual.pdf
- IntellicusEndUserReference.pdf
- IntellicusDevelopersGuide.pdf
- IntellicusScheduler.pdf
- IntellicusDashboards.pdf
- IntellicusStudioUserManual.pdf
- WorkingWithCrosstabs.pdf

You can use these documents for guidance as well as a ready reference.

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 on your screen.

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.

iPackager

User documentation of iPackager includes Online Help as well as User Guide in PDF format.

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Support

For problems with installation, configuration or while using the application, you may email a description of the problem to support@intellicus.com, with your contact details and full details of the problem.

Although we have taken care to capture and incorporate all aspects of Intellicus Reporting Tool in the documents, if you find any inconsistencies or discrepancies please inform us on documents@intellicus.com .

Website

http://www.Intellicus.com
Our website is updated periodically with the product updates, white papers, product extensions, press releases and much more.

FTP

ftp://ftp.Intellicus.com
You can download the product upgrades and sample reports from this site.