Gentran Integration Suite™

Reports in Gentran Integration Suite

Version 4.2

Sterling Commerce

An IBM Company

Contents

Reports

In Gentran Integration Suite, you use **Operations > Reports** to work with the reports available on your system. You can produce reports on demand by running the report wizard, which prompts you to supply settings (or to accept default settings) for various parameters. You can produce reports automatically by calling them from a schedule or business process. Finally, you can preview or generate reports in several formats:

✦ PDF. To preview or generate reports in PDF format, you must have the correct version of Adobe Acrobat Reader installed on your Windows Client system. See *System Requirements*.

✦ HTML. Previewed and generated reports are displayed in your browser.

✦ XLS. Previewed and generated reports are displayed in your browser.

Additionally, you can customize a report configuration by saving your parameter settings under a new report name or as a version of an existing report. Because report configurations are versioned resources, each report configuration has a unique name and may have multiple versions. Just as you manage multiple versions of business processes, you use the Version Manager to identify one version of a report configuration as the default version. If a business process or schedule calls a report, the default version of the report is the one that is executed.

From **Operations > Reports**, there are three ways to work with reports on your system:

✦ You can save your parameter settings under a new name. After you provide a unique name for the new configuration, the report wizard prompts you to specify each parameter before generating and saving the report. Afterwards, you can create multiple versions of the new configuration.

✦ You can copy an existing report configuration, saving it under a new name and specifying any parameter settings that are different from the original. Afterwards, you can create multiple versions of the copied configuration.

✦ You can edit an existing report configuration and save your changes as a new version of the original configuration. An edited report configuration has the same name as the original configuration, but its description indicates the version information that you supplied.

Whether you should name, copy, or edit a report configuration depends on how you want to use it.

✦ If you want the new configuration to be called by name from a business process or schedule, then you should set up the configuration by creating or copying an existing one. The name you give the new configuration is the name used in business processes or schedules to generate the report.

✦ If you want the new configuration to be a version of an existing configuration (one that may or may not be the default version), then you should set up the configuration by editing an existing one.

Finding and Running Reports On Demand or on a Schedule

You can select a report configuration and execute it immediately, or you can set up a schedule to run the report automatically.

To Search for a Report Configuration

The Search function enables you to search for a report configuration by name or by report type. Once the Search function returns a list of matching report configurations, you can edit, copy, or delete a report configuration.

1. Select **Operations > Reports**. Then choose one of the following search methods:

✦ To search for a report configuration by name, locate the Search section. In the **By Configuration Name** box, type the name you want. Then click **Go!**

✦ To search for report configurations by type, locate the Search section. In the **Type** box, select the type of report you want. Or you can select **ALL.** Then click **Go!**

✦ To list report configurations alphabetically by name, locate the List section. In the **Alphabetically** box, select the letter or number corresponding to the report name. Or you can select **ALL.** Then click **Go!**

To Find and Run Reports On Demand

1. Select **Operations > Reports**. Then choose one of the following search methods:

✦ To search for a report configuration by name, locate the Search section. In the **By Configuration Name** box, type the name you want. Then click **Go!**

✦ To search for report configurations by type, locate the Search section. In the **Type** box, select the type of report you want. Or you can select **ALL.** Then click **Go!**

✦ To list report configurations alphabetically by name, locate the List section. In the **Alphabetically** box, select the letter or number corresponding to the report name. Or you can select **ALL.** Then click **Go!**

2. On the second page, click **Source Manager** next to the report configuration that you want to execute immediately.

3. Select the report format from the list and click **Execute**. It may take several minutes to generate the report, depending on its size.The report is displayed in the format you selected.

To Run Reports on a Schedule

Before you can set up a schedule, the report configuration must exist. Only one schedule can exist for each report configuration. After a scheduled report is generated, it can be stored on your file system or e-mailed (in .zip format) to a recipient. Creating a schedule for a report automatically creates a business process that is called [*reportname*]_scheduleBP.

1. Know the name of the report that you want to schedule. Then select **Operations > Reports**.

2. Click **Go!** to the right of **Schedule Report.**

3. Work through the scheduling wizard to set up the schedule.

Creating, Copying, or Editing Report Configurations

To Create a New Report Configuration for a Supported Report Type

To create a new report configuration based on one of the supported report types:

1. From **Operations > Reports**, click **Go!** to the right of **New Report Configuration**.

2. Select the type of report you want and work through the report configuration wizard to supply the parameter definitions. Then select the format for the report.

3. When you finish, click **Save**. The new report configuration is saved under the name you specified. You can also choose to generate the report.

To Copy a Report Configuration for a Supported Report Type

Gentran Integration Suite allows you to copy a report configuration and save it under another name, so you can quickly and easily create multiple versions of a report configuration to address all your reporting needs.

Reports are versioned resources in the Gentran Integration Suites system. Therefore, when you edit and save a report it is saved as a new version with the same name.

To copy a report configuration:

1. From **Operations > Reports**, use the Search or List boxes to find the report you want.

2. On the second page, click **Copy** next to the one you want.

3. In the **Name** box, type the name of the new report configuration.

4. In the **Comments** box, type a description that is meaningful for to you. The text you enter here helps you track the changes you made for this version. Click **Next**.

5. Work through the wizard to modify any necessary parameters and select the report format. When you finish, click **Save**. The new report configuration is saved under the name you specified. You can also choose to generate the report.

To Edit a Report Configuration

Reports are versioned resources in Gentran Integration Suite. When you edit a report, it is saved as a new version under the same report name. If a business process or schedule calls a report, the default version of the report is the one that is executed.

To edit a report configuration:

1. From **Operations > Reports**, use the Search or List boxes to find the report you want.

2. On the second page, click **Source Manager** next to the report configuration that you want and click **edit**.

3. Work through the report configuration wizard, making the appropriate changes to the parameter definitions. Then select the format for the report.

4. When you finish, click **Save**. The altered configuration is saved as a new version of the original report configuration. You can also choose to generate the report.

Deleting a Report Configuration or Version

The system allows you to delete a report configuration or a version of a report configuration if more than one version exists.

✦ Do *not* delete the original version of a report. If you do, you will not be able to access the version of the report installed with Gentran Integration Suite.

✦ When you delete all versions of a report configuration that has been scheduled (including the default configuration), the system also deletes the associated schedule and the business process that was created automatically by the schedule.

To delete a report configuration or version:

1. From **Operations > Reports**, use the Search or List boxes to find the report you want.

2. On the second page, click **Source Manager** next to the report configuration you want.

3. Choose one:

   ◆ To delete a report configuration, click **Delete** next to it.

   ◆ To delete a version of a report configuration if multiple versions are listed, select a version and click **Go!** next to **Delete Selected Versions**.

   ◆ To delete all versions of a report configuration (if multiple versions are listed), click **Go!** next to **Delete All Versions**.

4. Click **Return** to exit to the Reports page.

Printing a Report

You can print saved or scheduled reports using standard desktop applications. For example, if a report is saved in .PDF format, you can open and print the report using any desktop application that supports that format.

To print a report from within the Gentran Integration Suite Reporting feature:

1. On the Confirm page, select the format in which you want to access the report from the **Report Preview Format** list and click **Preview**. It may take a few minutes to generate the report, depending on its size.

2. Select **File > Print** to print the report and exit when finished.

Setting the Default Report Configuration

You can have more than one version of the same report configuration because Gentran Integration Suite stores them as versioned resources. Just like you manage different versions of a business process, you use the Version Manager to identify which version of a report configuration is used as the default version.

1. From **Operations > Reports**, use the Search or List boxes to find the report you want.

2. On the second page, click **Version Manager** next to the report you want. All versions of the report are listed.

3. From the list, select the report configuration you want to be used as the default version and click **Save**.

Report Wizard Parameters

For all reports, the report wizard prompts you for the type and name of the report you want. Afterwards, the wizard displays pages that filter data according to the parameters appropriate for the report you chose.

Report Wizard: Report Type Page

Parameter	Description
Business Process Definition List	Enables you to obtain a listing of business process definitions sorted by parameters including business process name and whether the business process is enabled in Gentran Integration Suite. You may want to use this report if, for example, you need to know how many business process definitions were modified during a specified time period.
Business Process Detail	Enables you to sort and report on business process instances (when a business process is executed), categorized by business process name, workflow state, and workflow status. You may want to use this report to determine, for example, how many business processes created on a particular day are still marked with the status Waiting.
EDI Outbound Acknowledgment	Enables you to monitor functional acknowledgments at the group or interchange level, organized by parameters including sender identifier, receiver identifier, EDI standard, and acknowledgment status. You may want to use this report to determine, for example, how many functional acknowledgments from a specified sender ID are overdue.
EDI Translation Detail	Enables you to access EDI data (transaction, group, or interchange) for a specified time period. It further allows you to organize the report by selecting criteria such as direction of the transmission, sender and receiver identifier, envelope name, unique identifier for the envelope level, EDI standard used, and translation success or failure, among other parameters. This report allows you to quickly and easily access information about EDI translation in the Gentran Integration Suite system.
Map List	Enables you obtain a listing of maps categorized by map name or map type (Draft (if you check in the source map only but not the compiled translation object), Draft XML (if you check in the source XML file but not the compiled translation object), Translation, and XML Encoder). You may want to use this report to determine, for example, how many of the maps enabled with the system are of the XML encoder type.
Translation Service	Enables you to sort and report details of translations performed by the Translation Service that occur outside of EDI processing in Gentran Integration Suite. You may want to use this report to ascertain, for example, how many translations failed or how many large documents were translated. **Note:** To use the Translation Service Report, you must have document tracking enabled in your business process.

Parameter	Description
Admin Audit	Enables you to obtain a listing of changes made to protected Gentran Integration Suite entities such as User, Group, Permission, Mailbox, Mailbox Virtual Root, Mailbox Routing Rule, Adapters and Services, and which user (or principal) made the changes. Changes include create, edit, delete, enable and disable. Use this report if you want to know which users made changes to certain protected Gentran Integration Suite resources.
Authentication	Enables you to obtain a listing user authentication attempts both against Gentran Integration Suite, and as a user to a remote system.
Authorization	Enables you to obtain a listing of attempts to access protected resources within Gentran Integration Suite including Mailboxes, Business Processes, War files and URIs including the name of the protected resource, the principal attempting the access, and whether Gentran Integration Suite granted access or not.
Traffic	Enables you to report on the transfer of documents into and from Gentran Integration Suite using the various AFT Visibility enhanced protocols (FTP, Connect:Direct, HTTP, WebDAV and Mailbox).
Traffic Summary	Enables you to obtain a quick summary of the amount of data transferred to various end points across various protocols into and out from Gentran Integration Suite.
systemDetail_LOGS	Provides information about the system logs.
WFFactModelDetail_*[report name]*	Provides detailed information about various events in the Work Flow fact model (WFFactModel).

Report Wizard: Configuration Name Page

Parameter	Description
Name	Mandatory. The name of the report configuration must be unique. The name of the generated report is based on the report configuration name followed by the format extension: RPT_[configuration name].[format extension] Additionally, the name of the generated report is listed in Process Data and can be used for reference in Process Data.
Comments	Mandatory. Contains comments on the report configuration. Type a description that is meaningful for to you. The text you enter here helps you track the changes you made for this version of the report.

Report Wizard: Filtering Data Pages

In the report wizard, you set **operator filters** to indicate the data you want extracted from the database. The operator filters displayed by the report wizard vary with each report and include the following types of filters:

Operator Filter	Description
All	No filtering. This is the default.
Equal To	Precisely the same as the specified numeric, date, or string.
Not Equal To	Different from as the specified numeric, date, or string.
Like	Case-insensitive wildcard search for strings only. For example, "abc" is *like* "abcdefg," and a search for "abc" using the like operand returns "abcdefg" as a result.
Greater Than	Larger than the specified numeric or date.
Less Than	Smaller than the specified numeric.
None	No filter used with this parameter.

Date Filters

You filter data by date either by specifying a quantified time period or by specifying a date range. The date calculation is made at run-time.

Quantified Time Period (During Previous)

This method of date filtering allows you specify a concrete number of hour(s), day(s), week(s), or month(s) for which the reporting engine searches for matching data. The time period is not inclusive. For example, if you specify 2 day(s), it does not include the day the report is run.

Date Range

This method of date filtering allows you specify a range in which the reporting engine searches for matching data. The range consists of a beginning date and time and an ending date and time.

Report Wizard: Confirmation Page

Parameter	Description
Report Configuration Settings	Lists the parameters you chose for the report.

Parameter	Description
Report Preview Format	The format in which the report is displayed online when you click **Preview**. From the preview, you can view and print the report. Depending on the amount of data in the report, it may take several minutes to display the preview. ◆ PDF. You must have the correct version of Adobe Acrobat Reader installed on your Windows Client system. See *System Requirements*. ◆ HTML ◆ XLS

FAQs: Reports

What reports are available in Gentran Integration Suite?

Gentran Integration Suite gives you visibility into system management and execution through a variety of reports and reporting features.

✦ From **Operations > Reports**, you can work with report configurations that provide visibility into business processes, EDI transactions, translation maps, and more. You can use the report wizard to run reports on demand, or you can set up schedules and business processes to run reports automatically. You can customize report configurations by saving your parameter settings under a new name or as a version of an existing report. Each report configuration is saved in the system as a versioned resource so you can run it later, either on demand or from business processes and schedules.

✦ While you are working in various parts of the system, you can generate reports about pertinent activities, such as performance statistics, document activity, registrations, and more.

What is a report configuration?

A report configuration is a set of parameters and their settings. The report wizard submits the configuration to the reporting engine, which uses it to select data from the database, organize it, and format the final report.

Is the name of a report the same as the name of the report configuration or the report schedule?

The name of a generated report is based on the report configuration name followed by the format extension: **RPT_[configuration name].[format extension]**

For example, if the report configuration name is *Acme* and the report is generated in PDF format, the report name is **RPT_*Acme*.PDF**. The name of the generated report is listed in Process Data and can be used for reference in Process Data.

If you set up a schedule for a report, Gentran Integration Suite automatically creates a business process that is stored separately from the configuration. The business process is named using the default report name followed by *scheduleBP*: **[reportname]_scheduleBP**.

Can there be more than one version of a report configuration?

Yes. You can have more than one version of a report configuration because Gentran Integration Suite stores a report as a *versioned resource* just like a business process is stored. Each report configuration has a unique name and may have multiple versions. You use the Version Manager to identify which version is the default version. If a business process or schedule calls a report, the default version of the report is the one that is executed. Using versioning allows you to change which configuration is executed (by altering which version is the default) rather than editing schedules and business processes that call the report by name.

How are reports formatted?

You can preview or generate reports in PDF, HTML, or XLS format. To use PDF format, you must have the correct version of Adobe Acrobat Reader installed on your Windows Client system.

How do I run a report? Can reports be scheduled?

You can run reports in three ways:

✦   On demand from **Operations > Reports**.

✦   From a schedule set up through **Operations > Reports**. Scheduled reports can be run at any time. The report configuration must exist before you set up the schedule. You can have only one schedule per report configuration. After a scheduled report is generated, it can be stored on your file system or e-mailed (in .zip format) to a recipient. Creating a schedule for a report automatically creates a business process that is called **[reportname]_scheduleBP**.

✦   Through the Report Service. The Report Service requires that the report configuration already exist, that you specify the name of the report configuration, and that you specify the format of the report.

Can I send reports to others?

If you set up a schedule for a report, you can e-mail a copy of the report to a recipient. The report is e-mailed in .zip format.

Can I import or export report configurations?

Gentran Integration Suite also allows you to export report configurations from one Gentran Integration Suite system and import them into another Gentran Integration Suite system. This feature allows you to configure reports in a test environment and import them into your production environment.

Additionally, once you export a report configuration, you can open it in another viewer, which enables you to view and print the report.

Can I use other software to work with reports?

Yes. You can export a report configuration so that you can open it in another viewer or print it.

What if a report is blank?

If you are generating Gentran Integration Suite reports and they are either blank or are missing information, check with your system administrator to determine the tracking level that is configured in your *<install_dir>*/**properties/enveloping.properties.in** file.

Note: If the tracking level is set to improve performance, this may have a negative impact on reporting capabilities.

How can I view Japanese characters in the PDF summary file for reports?

If you are viewing Gentran Integration Suite reports that contain Japanese (double-byte) characters in PDF format, and they are either blank or are missing information check, you need to specify a font that supports Japanese characters in the **<installdir>/properties/report.properties.in** file, as shown in this example, and then run **setupfiles**:

```
Global.reportFont.Core.Normal.fontStyle=Arial
Global.reportFont.Core.Normal.size=10
Global.reportFont.Core.Normal.isBold=false
Global.reportFont.Core.Normal.isItalic=false
Global.reportFont.Core.Normal.isUnderline=false
Global.reportFont.Core.Normal.isStrikeThrough=false
Global.reportFont.Core.Normal.pdfFontName=[path to Japanese supported font file],1
Global.reportFont.Core.Normal.pdfEncoding=Identity-H
Global.reportFont.Core.Normal.isPdfEmbedded=true

Global.reportFont.Core.Bold.fontStyle=Arial
Global.reportFont.Core.Bold.size=12
Global.reportFont.Core.Bold.isBold=true
Global.reportFont.Core.Bold.isItalic=false
Global.reportFont.Core.Bold.isUnderline=false
Global.reportFont.Core.Bold.isStrikeThrough=false
Global.reportFont.Core.Bold.pdfFontName=[path to Japanese supported font file],1
Global.reportFont.Core.Bold.pdfEncoding=Identity-H
Global.reportFont.Core.Bold.isPdfEmbedded=true

Global.reportFont.Core.Error.fontStyle=Arial
Global.reportFont.Core.Error.size=12
Global.reportFont.Core.Error.isBold=true
Global.reportFont.Core.Error.isItalic=false
Global.reportFont.Core.Error.isUnderline=false
Global.reportFont.Core.Error.isStrikeThrough=false
Global.reportFont.Core.Error.pdfFontName=[path to Japanese supported font file],1
Global.reportFont.Core.Error.pdfEncoding=Identity-H
Global.reportFont.Core.Error.isPdfEmbedded=true
```

Index