

Sterling B2B Integrator



Reports

Version 5.2

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Reports

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Note

Before using this information and the product it supports, read the information in "Notices" on page 9.

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Reports

You can configure reports using the report wizard. The report wizard generates a report configuration based on the resources you select.

The report wizard submits the configuration to the reporting engine, which uses the configuration data to select data from the database, organize it, and format the final report. Additionally, you can customize a report configuration by saving your configuration under a new report name or as a version of an existing report.

Report output can be:

- PDF
- HTML
- XLS

In addition to the report configuration, you can schedule reports to run based on time or date or generate reports on demand. 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 (compressed format) to a recipient. When you create a report schedule, the system creates a business process called *ReportName_scheduleBP*, where *ReportName* is the name of report configuration.

The system allows you to delete a report configuration or a version of a report configuration if more than one version exists. You should not delete the original version of a report installed with the system.

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.

Note: If your output is a PDF with Chinese, Japanese, or Korean fonts, you might need to do some special configuration. For more information, see “How can I view Chinese, Japanese, or Korean characters in a report PDF?” on page 7.

Report Versioning

Reports are versioned resources in the system. When you edit a report, the system creates a new version under the same report name. The new version is not the default version. If a business process or schedule calls a report, the default version of the report is the one that is executed.

Report Management

Report management includes:

- Search for Reports
- View Report Configurations
- Create Report Configurations
- Copy Report Configurations
- Edit Report Configurations
- Delete Report Configuration

- Select Default Version of a Report
- Print Reports
- Schedule Reports
- Run Reports on Demand
- Edit Report Schedule

Search for Report Configurations

Procedure

1. From the **Administration** menu, select **Operations > Reports**.
2. Choose one of the following search methods:
 - To search for a report configuration by name, enter the report name in **Search By Configuration Name** and click **Go!**
 - To search for report configurations by type, select the report **Type** and click **Go!**
 - To list report configurations alphabetically by the first letter in the name, select the letter from **List Alphabetically** and click **Go!**
 - To list all of the report configurations, select **ALL** from **List Alphabetically** and click **Go!**

Create Report Configurations

About this task

To create a new report configuration:

Procedure

1. From the **Administration** menu, select **Operations > Reports**.
2. Next to the **Report Configuration**, click **Go!**
3. Select the type of report you want from the list and click **Next**.
4. Enter the report **Name**.
5. Enter any **Comments**.
6. Click **Next**.
7. The report wizard provides addition pages that you need to complete. The pages are dependant on the type of report you selected. Enter the report configuration information and click **Next** until you reach the Report Configuration Settings page.
8. Review the report configuration settings information.
9. If you want to preview a copy of the report, select the **Report Preview Format**, and click **Preview**.
10. Click **Finish** to save the report configuration.

Edit Report Configurations

About this task

Reports are versioned resources. 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:

Procedure

1. From the **Administration** menu, select **Operations > Reports**.
2. Search and find the report.
3. Click **source manager** for the report you want to edit.
4. Click **edit**.
5. Enter any additional **Comments**.
6. Click **Next**. The report wizard provides addition pages so that you can update the report configuration.
7. Update the report configuration information, as needed, and click **Next** until you reach the Report Configuration Settings page.
8. Review the report configuration information.
9. If you want to preview a copy of the report, select the **Report Preview Format**, click **Preview**.
10. Click **Finish**. The report configuration is saved to a new version. If you want this version to be the default version, select this version as the default.

Copy Report Configurations

About this task

To copy a report configuration:

Procedure

1. From the **Administration** menu, select **Operations > Reports**.
2. Search and find the report.
3. Click **copy** for the report configuration that you want to copy.
4. Enter a new **Name** for the report.
5. Enter any **Comments**.
6. Click **Next**. The report wizard provides addition pages that you need to review and update.
7. Review and update the report configuration information, as needed, and click **Next** until you reach the Report Configuration Settings page.
8. Review the report configuration information.
9. If you want to preview a copy of the report, select the **Report Preview Format** and click **Preview**.
10. Click **Finish**.

Delete Report Configurations

About this task

When you delete all of the versions of a report configuration, that has been scheduled (including the default configuration), the system deletes the associated schedule and the business process that was created by the schedule. Do not delete the original version of a report installed with the system.

To delete a report configuration or version:

Procedure

1. From **Operations > Reports**,
 2. Use the Search or List to find the report you want.
 3. Click **Source Manager** next to the report configuration you want.
 4. 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**.
-

Print a Report

About this task

To print a report:

Procedure

1. From the **Administration** menu, select **Operations > Reports**.
 2. Search and find the report.
 3. Select Source Manager. On the Report Source Manager page, select PDF and click **execute**. It may take a few minutes to generate the report, depending on its size.
 4. In Adobe Reader, select **File > Print**.
-

Select the Default Version of a Report

About this task

To select the default version of a report:

Procedure

1. From the **Administration** menu, select **Operations > Reports**.
 2. Search and find the report.
 3. Click **version manager**. The Report Version Manager page is displayed.
 4. Review the **Default** column in the version manager table.
 5. Click **Default** next to the report version that you want to be the default version.
 6. Click **Save**.
-

Generate Reports On Demand

About this task

Before you can run a report on demand, you must create the report configuration:

Procedure

1. From the **Administration** menu, select **Operations > Reports**.
2. Search and find the report.
3. Click **source manager** for the report configuration that you want to execute immediately. The Report Source Manager page is displayed.

4. Select the report format from the list.
5. Click **Execute**.
6. Click **OK** to continue. It may take several minutes to generate and display the report.

Schedule Reports

About this task

Before you can schedule reports, you must create the report configuration. When you create a schedule for a report, the system creates a business process called *ReportName_scheduleBP*.

To create a schedule:

Procedure

1. From the **Administration** menu, select **Operations > Reports**.
2. Click **Go!** to the right of **Schedule Report**.
3. Select the **Report to Schedule** from the list.
4. Select the output **Format** for the report.
5. Click **Next**.
6. If you do NOT want to store the report on the File System, clear the checkbox.
7. If you want email the report, select **E-mail Address**.
8. Enter the **Subject, E-mail Address, Host, and Port**.
9. Click **Next**.
10. If you want to use the **24 Hour Clock Display**, select the checkbox.
11. Select the report **Schedule** from the list and click **Next**. Depending on which schedule option you pick, the schedule report wizard displays several pages.
12. Enter the schedule times, click **add**, and click **Next**.
13. Enter any days that you want to **Exclude** from the schedule and click **add**. Perform this procedure for the dates on which you do not want to generate the report.
14. Click **Next**.
15. Review the Report Schedule.
16. Click **Finish**. The system creates a business process called *ReportName_scheduleBP*.

Edit Report Schedule

To edit a report schedule:

Procedure

1. From the **Administration** menu, select **Operations > Reports**.
2. Search and find the report.
3. Review the Schedule column. If NONE is displayed, the report has not been scheduled.
4. Select **edit** (in the Schedule column).
5. Review all of the schedule configuration and update as needed.
6. Click **Next** until you get to the Report Schedule Confirmation page.
7. Click **Finish**.

Frequently Asked Questions: Reports

What reports are available?

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

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.

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, the system creates a business process that is stored separately from the configuration. The business process is named using the report name followed by *scheduleBP*.

Can I schedule reports through the Reports Service?

Yes. 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 import or export report configurations?

Yes. The system also allows you to export report configurations from one system and import them into another 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 so that you can open it in another viewer or print it.

What do I do if the report is blank?

If you are generating 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.

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

How can I view Chinese, Japanese, or Korean characters in a report PDF?

If you are viewing PDF reports that contain Chinese, Japanese, or Korean (double-byte) characters, and the characters are either blank or are missing information, do the following:

1. Add the following files from the iText library to the classpath of IBM® Sterling B2B Integrator:
 - iTextAsian.jar
 - iTextAsianCmaps.jar
2. Download the Adobe Reader Asian font pack from the Adobe web site.
3. In the report.properties.in file in the properties subdirectory of your installation, do the following:
 - Set the Global.reportFont.[font style].pdfFontName property to the appropriate font name in the Adobe Reader font pack (for example, pdfFontName=STSong-Light).
 - Set the Global.reportFont.[font style].pdfEncoding property with an appropriate encoding for that character set (for example, pdfEncoding=UniGB-UCS2-H).
 - Set the Global.reportFont.[font style].isPdfEmbedded property to false.
4. If you need to export your report to other formats, set the Global.reportFont.[font style].pdfFontName property to the appropriate TrueType font name installed on your operating system, or use the FONT_MAP export parameter.
5. After you update the report.properties.in file, run the setupfiles command.

The following example shows how to change the properties in the report.properties.in file.

```
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=[appropriate
font name in the Adobe Reader font pack],1
Global.reportFont.Core.Normal.pdfEncoding=[appropriate
encoding for the character set]
Global.reportFont.Core.Normal.isPdfEmbedded=false
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=[appropriate
font name in the Adobe Reader font pack],1
Global.reportFont.Core.Bold.pdfEncoding=[appropriate
encoding for the character set]
Global.reportFont.Core.Bold.isPdfEmbedded=false
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=[appropriate
font name in the Adobe Reader font pack],1
Global.reportFont.Core.Error.pdfEncoding=[appropriate
encoding for the character set]
Global.reportFont.Core.Error.isPdfEmbedded=false
```

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