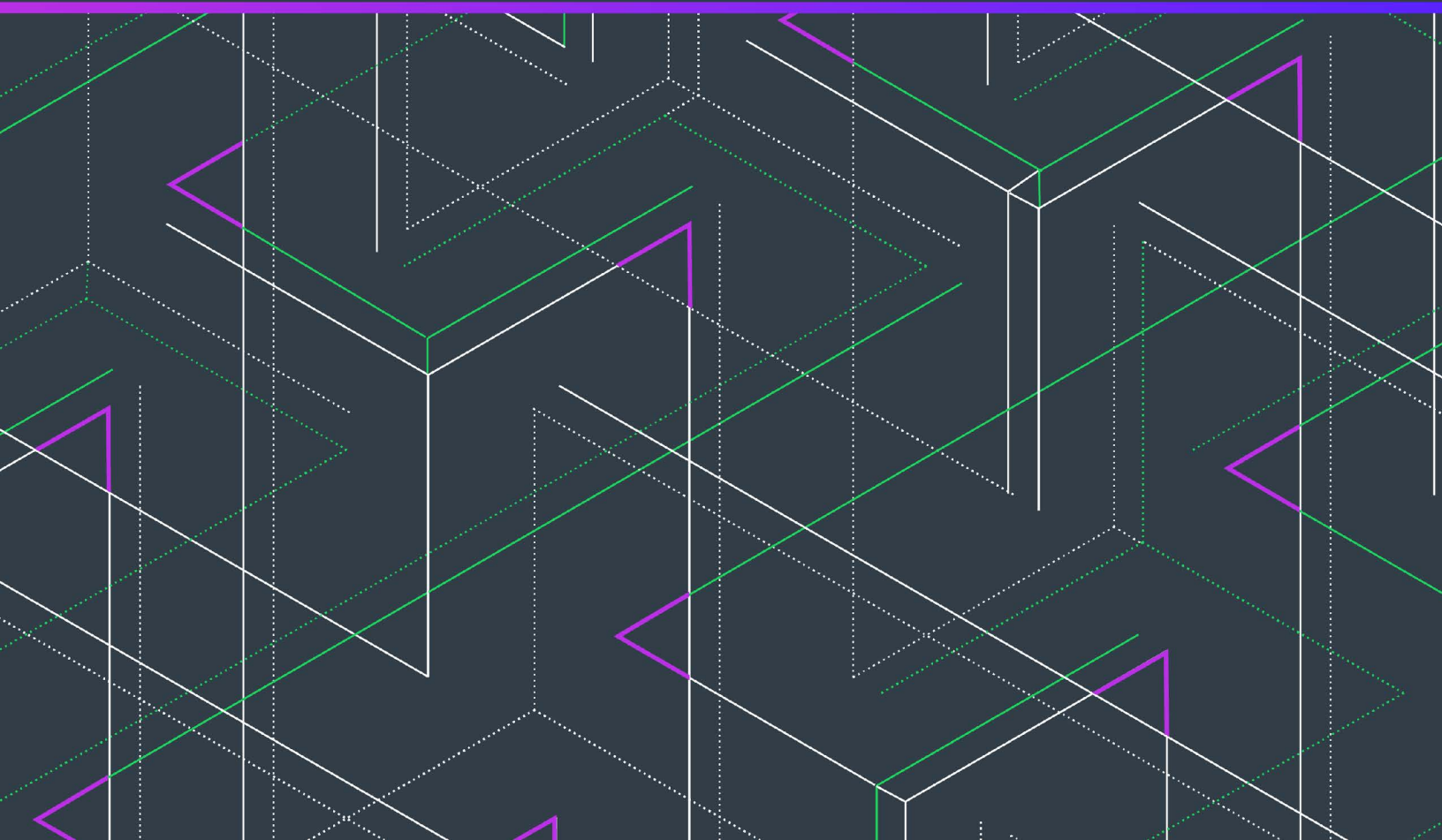


# FlexNet Operations

Reporter User Guide



# Legal Information

**Book Name:** FlexNet Operations Reporter User Guide  
**Part Number:** FNO-2024-RUG01  
**Product Release Date:** May 2024

## Copyright Notice

Copyright © 2025 Flexera Software

This publication contains proprietary and confidential information and creative works owned by Flexera Software and its licensors, if any. Any use, copying, publication, distribution, display, modification, or transmission of such publication in whole or in part in any form or by any means without the prior express written permission of Flexera Software is strictly prohibited. Except where expressly provided by Flexera Software in writing, possession of this publication shall not be construed to confer any license or rights under any Flexera Software intellectual property rights, whether by estoppel, implication, or otherwise.

All copies of the technology and related information, if allowed by Flexera Software, must display this notice of copyright and ownership in full.

## Intellectual Property

For a list of trademarks and patents that are owned by Flexera Software, see <https://www.reverera.com/legal/intellectual-property.html>. All other brand and product names mentioned in Flexera Software products, product documentation, and marketing materials are the trademarks and registered trademarks of their respective owners.

## Restricted Rights Legend

The Software is commercial computer software. If the user or licensee of the Software is an agency, department, or other entity of the United States Government, the use, duplication, reproduction, release, modification, disclosure, or transfer of the Software, or any related documentation of any kind, including technical data and manuals, is restricted by a license agreement or by the terms of this Agreement in accordance with Federal Acquisition Regulation 12.212 for civilian purposes and Defense Federal Acquisition Regulation Supplement 227.7202 for military purposes. The Software was developed fully at private expense. All other use is prohibited.

# Contents

- 1 FlexNet Operations Reporter User Guide ..... 7**
  - Getting Started .....7**
    - Accessing the Reporter .....8
    - Terminology Used in this Guide. ....8
    - Reporter Version Information .....9
    - Additional Documentation .....9
    - Data Refresh Intervals .....9
    - Default Time Zone .....10
    - Default Date Format. ....10
    - File Sizes in Reporter .....10
    - Product Support Resources .....11
    - Contact Us .....11
  
- 2 Managing Web Intelligence Reports ..... 13**
  - Object Organization In Reporter ..... 14**
    - Accessing Objects on the Home Tab .....14
    - Folders .....15**
      - Public Folders vs Personal Folders* .....16
      - Creating a Folder* .....16
      - Deleting a Folder* .....17
    - Categories .....17**
    - Documents .....17**
    - BI Inbox. ....18**
    - Instances .....18**
    - Recycle Bin. ....19**
  - Navigating in Reporter. ....19
  - Managing Objects in Reporter .....19
- Running a Standard Report ..... 19**
- Creating a Web Intelligence Report ..... 20**

Steps to Create a Web Intelligence Report . . . . .	20
Building a Query . . . . .	22
Modifying a Query . . . . .	24
Controlling the Retrieval of Duplicates . . . . .	24
Viewing Modes . . . . .	25
Displaying Contextual Commands for Managing Reports . . . . .	26
<b>Modifying the Report . . . . .</b>	<b>26</b>
Modifying Report Elements . . . . .	27
Inserting Cells . . . . .	27
Inserting Charts . . . . .	28
Converting a Report to a Table or a Chart . . . . .	28
Modifying Charts . . . . .	29
Viewing a Query Summary . . . . .	29
Formatting Reports . . . . .	29
Adding Customized Variables . . . . .	31
Filters and Input Controls . . . . .	33
Adding Filters . . . . .	33
Creating Input Controls . . . . .	34
Adding Multiple Reports to a Document . . . . .	35
<b>Viewing the History of Reports . . . . .</b>	<b>35</b>
<b>Refreshing Reports . . . . .</b>	<b>36</b>
<b>Exporting Reports in Different Formats and Purpose . . . . .</b>	<b>36</b>
<b>Scheduling Reports . . . . .</b>	<b>38</b>
Scheduling a Report . . . . .	39
Events Options for a Scheduled Report . . . . .	40
Destination Options for a Scheduled Report . . . . .	41
Default Enterprise Location . . . . .	41
BI Inbox . . . . .	41
Email . . . . .	42
FTP Server . . . . .	44
SFTP Server . . . . .	45
File Formats for Scheduled Documents . . . . .	47
Delivery Rules for Scheduled Documents . . . . .	47
Deleting a Report's Schedule . . . . .	48
Pausing a Report's Schedule . . . . .	48
<b>3 Reporter Standard Reports . . . . .</b>	<b>49</b>
<b>Before You Begin . . . . .</b>	<b>49</b>
<b>Standard Reports . . . . .</b>	<b>50</b>
ACT-Accounts Created in Last X Days . . . . .	51
ENT-Entitlement Lines Created in Last X Days . . . . .	52
ENT-Entitlement Lines Expiring in X Days . . . . .	54
ENT-Maintenance Expiring in Next X Days . . . . .	55
FUL-Fulfillments Created in Last X Days . . . . .	57
FUL-Fulfillments with Returns/Rehosts/Reinstallations . . . . .	62

PRD-Product Created in Last X Days.....64



# 1

# FlexNet Operations Reporter User Guide

This document provides a high-level description on how to use the FlexNet Operations Reporter. In the remainder of this document, FlexNet Operations Reporter is also simply referred to as *Reporter*.

**Table 1-1** ▪ FlexNet Operations Reporter User Guide

Topic	Content
<a href="#">Getting Started</a>	Explains how to access the Reporter, terminology used in this guide, and product support resources.
<a href="#">Managing Web Intelligence Reports</a>	Covers concepts and common tasks of running Web Intelligence reports in Reporter.
<a href="#">Reporter Standard Reports</a>	Describes the set of standard reports Revenera has predefined for producers.

## Getting Started

The following information helps you get started with the FlexNet Operations Reporter to generate and manage Web Intelligence reports:

- [Accessing the Reporter](#)
- [Terminology Used in this Guide](#)
- [Reporter Version Information](#)
- [Additional Documentation](#)
- [Data Refresh Intervals](#)
- [Default Time Zone](#)
- [Default Date Format](#)

- [File Sizes in Reporter](#)
- [Product Support Resources](#)
- [Contact Us](#)

## Accessing the Reporter

To get started with the FlexNet Operations Reporter, open the Producer Portal and select **Reports** in the **System** menu, as shown below:

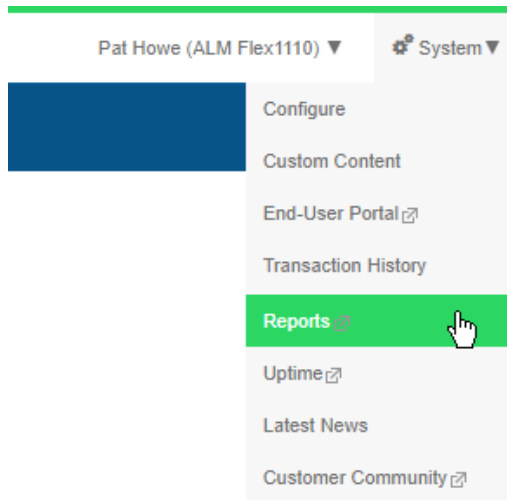


Figure 1-1: Reports Selection on the System Menu

## Terminology Used in this Guide

The following are key terms used in this guide:

- **Web Intelligence**—A reporting tool that is part of the FlexNet Operations Reporter and used for analytical and ad hoc reporting.
- **Reporting data warehouse**—A data warehouse of report-readable FlexNet Operations information refreshed with data from the FlexNet Operations transactions database every four hours. The reports are run against this data warehouse.
- **Reporter universe**—A collection of data from the Reporting data warehouse. For example, a universe could consist of entitlements, device history or usage, served features, or another FlexNet Operations entity type on which to generate a report.



## Reporter Version Information

FlexNet Operations Cloud Reporter is an out-of-the-box solution for common reports using SAP BusinessObjects Business Intelligence (BI). Reporter has recently been upgraded from version 4.2 to 4.3. Customers will notice the different look and feel of the Reporter interface, as well as some differences in functionality. Where appropriate, this document points out differences between versions 4.2 and 4.3. These are marked with a Version note, which looks like this:





---

**Version** ▪ This note points out differences between Reporter versions 4.2 and 4.3.

## Additional Documentation

In addition to this document, the Reporter includes the Web Assistant. To access the Web Assistant, click the  icon in the top right corner of Reporter.

For a short overview of the new functionality in version 4.3, click  and then the **What's New**  icon. Then select **What's New in BI Launch Pad**.



---

**Note** ▪ Functionality related to SAP Crystal Reports is not supported.

The following SAP documentation provides general information about functionality in version 4.3:

- [Business Intelligence Platform Administrator Guide](#) (PDF format)
- [Business Intelligence Platform User Guide](#) (PDF format)
- [Business Intelligence Launch Pad User Guide](#) (SAP Help Portal)
- [Technology Blogs by SAP](#) (SAP Community)

## Data Refresh Intervals

Universes are refreshed on a daily basis. The exception are the following universes, which are refreshed every four hours, starting at 00:00 Coordinated Universal Time (UTC):

- ALM Accounts And Users
- ALM Device Addon History
- ALM Device History
- ALM Entitlement
- ALM Fulfillments



---

**Important** ▪ The daily refresh of the universes (with the exception of the universes listed above) finishes at 5:00 A.M. Pacific Time. It is recommended that you do not schedule a report to run between 00:00 and 5:00 A.M.

Pacific Time (equivalent to 8:00 A.M. and 1:00 P.M. UTC), to avoid conflicts between the scheduled report running and the refresh.

## Default Time Zone




**Version** - In Reporter 4.2, the default time zone was Pacific Time. In version 4.3, this has changed to UTC.

By default, Reporter displays dates and times in Coordinated Universal Time (UTC).

You can change the time zone settings to ensure that scheduled objects are processed in the time zone you are working in.



### Task **To change the time zone**

1. From the Home page, click the **User Settings** icon.  
The **User Settings** page opens.
2. Click  **Settings**.  
The **Settings** dialog box appears.
3. From the pane on the left, choose **Account Preferences**.
4. In the **Account Preferences** pane on the right, choose the **Locale and Time Zone** tab.
5. In the **Current Time Zone** field, select the desired time zone.
6. Click **Save**.



**Note** - For more information about locale and time zone settings, see the topic [Setting Preferred Viewing Locale and Time Zone Preferences](#) in the SAP Help Portal.

## Default Date Format



**Version** - In Reporter 4.2, the default date format was mm/dd/yyyy. This has changed in version 4.3.

By default, Reporter displays dates in the format dd/mm/yyyy. At present, this format cannot be changed.

## File Sizes in Reporter

In Reporter, file sizes are calculated using a power of 10 instead of using binary conversion. This means, for instance, that in Reporter 1 KB represents 1000 bytes.

# Product Support Resources

The following resources are available to assist you:

- [Reverera Product Documentation](#)
- [Reverera Community](#)
- [Reverera Learning Center](#)
- [Reverera Support](#)

## Reverera Product Documentation

You can find documentation for all Reverera products on the [Reverera Product Documentation](#) site:

<https://docs.reverera.com>

## Reverera Community

On the [Reverera Community](#) site, you can quickly find answers to your questions by searching content from other customers, product experts, and thought leaders. You can also post questions on discussion forums for experts to answer. For each of Reverera's product solutions, you can access forums, blog posts, and knowledge base articles.

<https://community.reverera.com>

## Reverera Learning Center

The Reverera Learning Center offers free, self-guided, online videos to help you quickly get the most out of your Reverera products. You can find a complete list of these training videos in the Learning Center.

<https://learning.reverera.com>

## Reverera Support

For customers who have purchased a maintenance contract for their product(s), you can submit a support case or check the status of an existing case by first logging into the [Reverera Community](#), clicking **Support** on the navigation menu to open the **Support Hub** page, and then clicking the **Open New Case** or **Case Portal** button.

# Contact Us

Reverera is headquartered in Itasca, Illinois, and has offices worldwide. To contact us or to learn more about our products, visit our website at:

<http://www.reverera.com>

You can also follow us on social media:

- [Twitter](#)
- [Facebook](#)
- [LinkedIn](#)
- [YouTube](#)

- [Instagram](#)

# Managing Web Intelligence Reports

A Web Intelligence report helps you to understand trends and root causes with easy-to-use tools for ad hoc queries, reporting, and analysis.

This section covers what you need to get started to use Reporter and explains how to create Web Intelligence reports. The next chapter covers how to run standard reports.

**Table 2-1** ▪

Topic	Content
<b>Object Organization In Reporter</b>	Covers the initial requirements for using Reporter and explains a number of basic concepts and common tasks.
<b>Running a Standard Report</b>	Explains how to run the pre-built reports included in Reporter.
<b>Creating a Web Intelligence Report</b>	Describes how to create a Web Intelligence report based on information currently in the Reporting data warehouse.
<b>Modifying the Report</b>	Describes how to modify the Web Intelligence report, including inserting cells and charts, applying formatting, and using customized variables.
<b>Viewing the History of Reports</b>	Covers how to display a history of report instances.
<b>Refreshing Reports</b>	Explains the options for refreshing a report.
<b>Exporting Reports in Different Formats and Purpose</b>	Describes how to export a complete document or one/more reports to a text file, a PDF, an Excel spreadsheet or a CSV file.
<b>Scheduling Reports</b>	Shows how to schedule and then email report documents.


# Object Organization In Reporter



**Version** - Object organization has changed significantly in Report version 4.3.

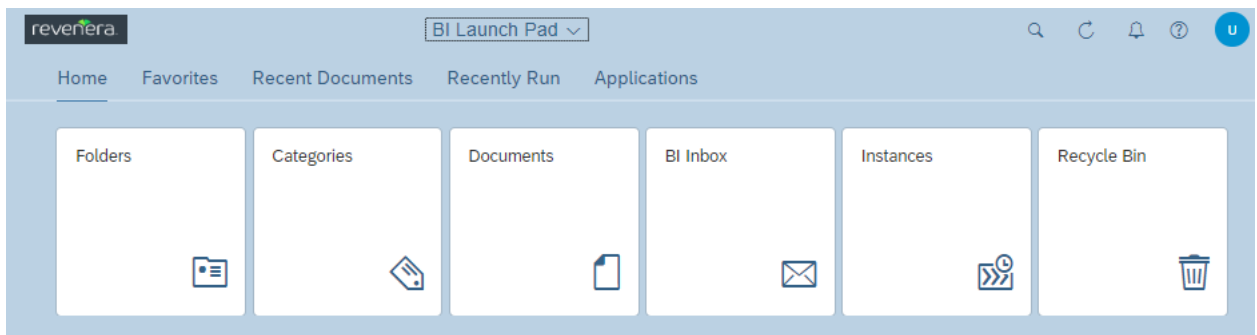
The main Reporter interface has the following tabs, which enable you to quickly navigate to the related tiles:

- Use the **Home** tab to access various content objects.
- The **Favorites** tab contains the content objects that you marked as favorites so that you can easily access them.
- The **Recent Documents** tab lists the recent documents that you have viewed; sorted by type, with the most recently viewed document at the top.
- The **Recently Run** tab lists the recent document instances created for the scheduled content objects.
- The **Applications** tab allows you to create Web Intelligence reports.

The tiles on the **Favorites**, **Recent Documents**, and **Recently Run** tabs include a **More actions**  menu which offers shortcuts to frequently used actions. See also [Managing Objects in Reporter](#).

## Accessing Objects on the Home Tab

The default **Home** tab features modules that enable you to better manage the documents you work with most.



**Figure 2-1:** Tiles on the **Home** tab

The **Home** tab contains the following modules:

- [Folders](#)
- [Categories](#)
- [Documents](#)
- [BI Inbox](#)
- [Instances](#)
- [Recycle Bin](#)

## Folders



**Version** - In version 4.2, you navigated to the folders by clicking the **Documents** tab. In the **Folders** area, the navigation is very similar to the classic design you already know.

In Reporter, documents are organized into folders. The **Folders** tile in the **Home** tab displays the reports that you have access to. It lists both Public and Personal Folders.

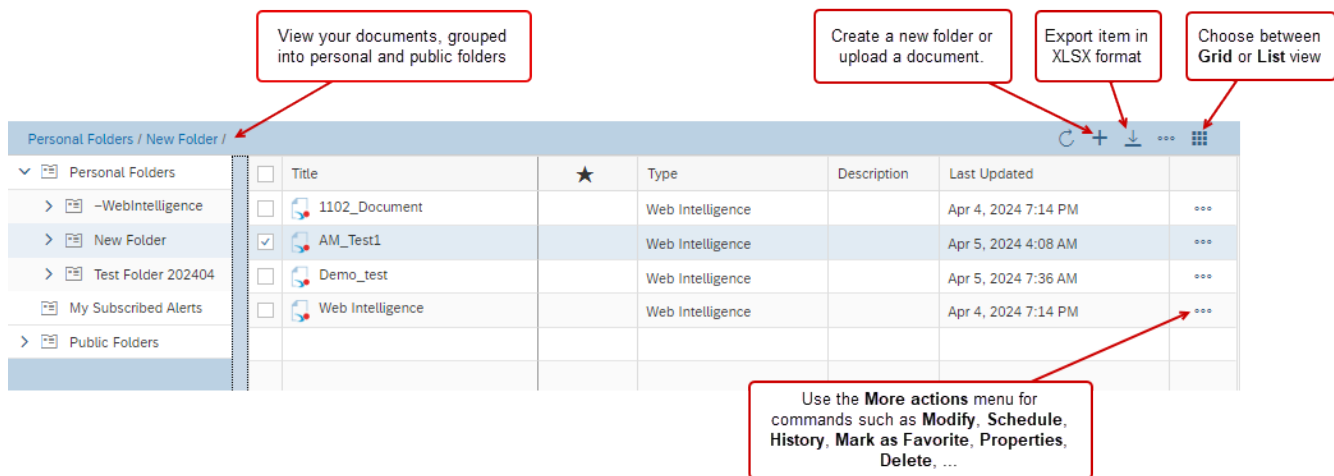
Public Folders are typically created by a system administrator. Depending on your access rights, you can create Personal folders.



**Version** - In version 4.2, personal folders were in the **My Documents** drawer; public folders were in the **Folders** drawer. In version 4.3, you access both folder types from the **Folders** tile.

Expand or collapse folders by clicking the arrow next to the folder name.

Click a folder name to show its contents in the right pane. Click a report to open it.



**Figure 2-2:** Actions in the **Folders** view

This sections covers the following:

- [Public Folders vs Personal Folders](#)
- [Creating a Folder](#)
- [Deleting a Folder](#)



**Note** - For information about other actions that are available when managing folders, see the [Folders](#) topic in the [SAP Help Portal](#).

## Public Folders vs Personal Folders

### Personal Folders

Save your personal folders and documents under **Personal Folders**.

#### ~Webintelligence Folder

Drafts of documents are saved automatically here.

This folder can be removed, but it will re-appear the next time a document is created.

#### My Subscribed Alerts

Alerts display the daily refresh date and time. No other alerting functionality is supported in this implementation.

### Public Folders

By default, the following **Public Folders** are available:

- **ALM Standard Reports**—This folder contains sample documents created by Revenera for FlexNet Operations ALM.
- **Shared - *Company Name***
  - Reports saved here can be accessed by other users in your organization.
  - Only the owner/creator of the report can delete or save the same named document to this folder.
  - You cannot schedule a report from the shared folder.



---

**Note** - Some customers using FlexNet Operations ALM might also see the **FlexNet Standard** folder. This folder contains legacy reports which should not be run.

## Creating a Folder

You can create additional folders to organize your objects.



---

**Note** - You cannot add folders in the **ALM Standard Reports** folders in the **Folders** drawer.



### Task

#### To create a folder

1. On the **Home** page, click the **Folders** tile.
2. On the **Folders** page, navigate to the location where you want to create a folder:
  - To create a personal folder, expand the **Personal Folders** drawer.
  - To create a public folder, expand the **Public Folders** drawer.
3. When you are at the desired location, from the menu bar, click **Add (+) > New Folder**.



4. In the **Create folder** dialog box, enter the following information
  - **Name**—Enter a meaningful name for the new folder.
  - **Description**—Optionally, enter a description for the new folder.
  - **Keywords**—Optionally, enter keywords that you want to associate with the new folder.
5. Click **Save**.


## Deleting a Folder

You cannot delete folders from the **ALM Standard Reports** folders in the **Folders** drawer.



---

### **Task**      **To delete a folder**

1. On the **Home** page, click the **Folders** tile.
2. On the **Folders** page, navigate to the desired folder.
3. Click the **More actions**  menu corresponding to the desired folder and select **Delete**.

The selected folder is deleted.

## Categories

The **Categories** tile on the **Home** tab displays the categories that you have access to. Categories help you organize your content objects. You can also create your own categories.

## Documents

The **Documents** tile on the **Home** tab shows all the content objects (such as reports and documents) present in Reporter. The list is sorted by view date with the most recently viewed document at the top.

Click a document to open it.

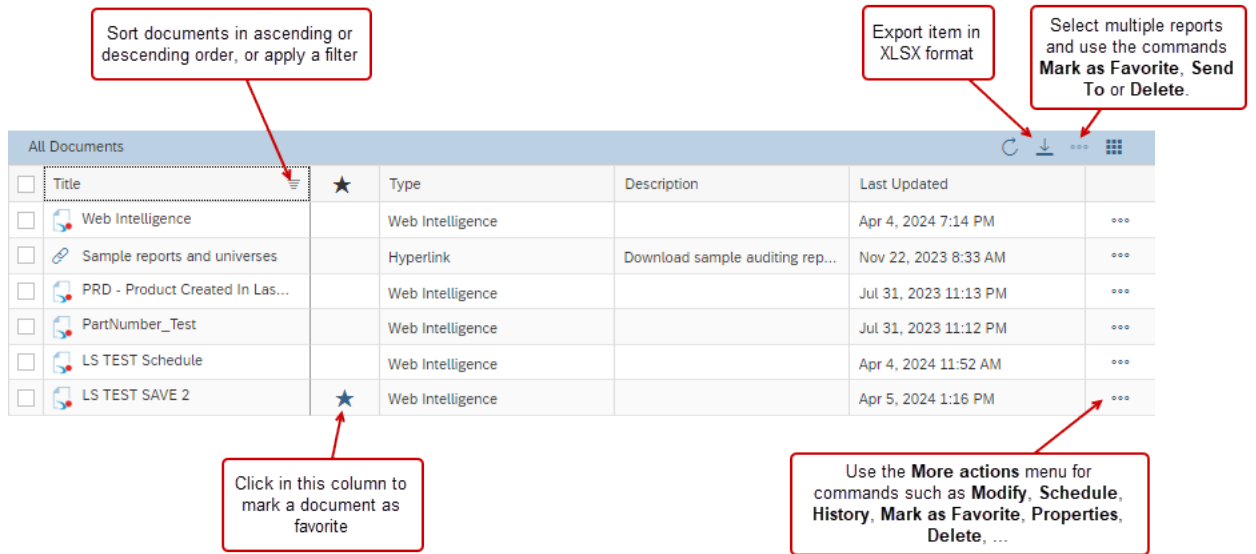


Figure 2-3: Actions in the Documents view

## BI Inbox

The **BI Inbox** tile on the **Home** tab shows a list of all messages and reports that have been sent to you via the BI Inbox.

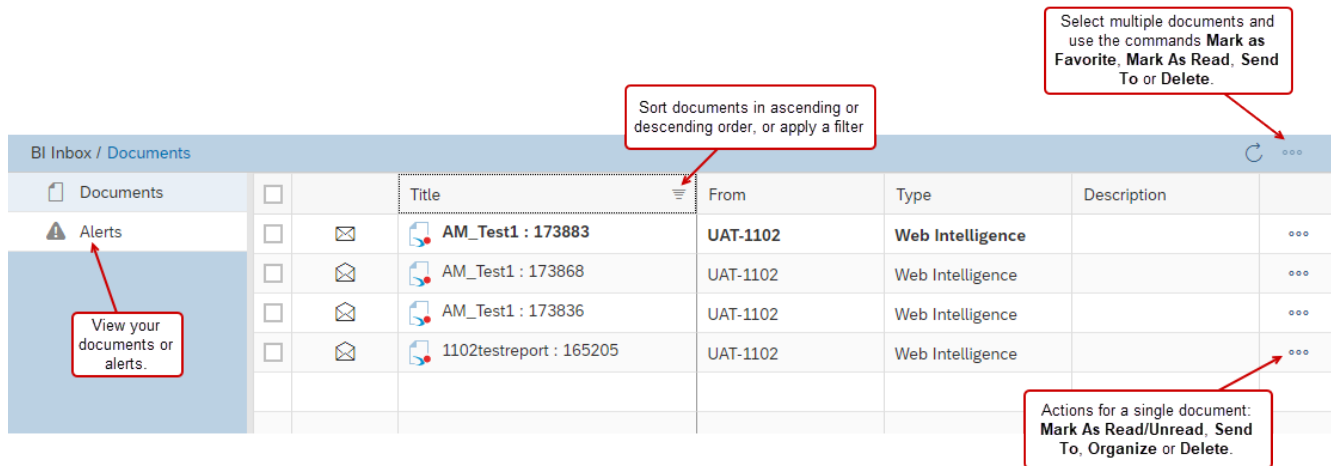


Figure 2-4: Actions in the BI Inbox view

## Instances

You can schedule an object to run automatically at specified times. When a scheduled object runs successfully, an instance is created. An instance is a version of the object that contains data when an object is run.



**Version** - Instances being easily accessed on the **Home** tab is new in version 4.3.

## Recycle Bin

Lists all deleted content objects.

When you delete a content object from the system, it is moved to the Recycle Bin, where it is temporarily stored until the Recycle Bin is emptied. This helps you to recover the accidentally deleted objects and restore them to their original locations.

## Navigating in Reporter

On any page, use the following elements for navigation:

- Click the **Navigate Back** < button to return to the previous page that you visited.
- Click the **Home** 🏠 button to return to the Home page.
- At the top of each page in the middle, click the down arrow ▾ button to display a list of currently open documents. Click a document in the list to switch to it.

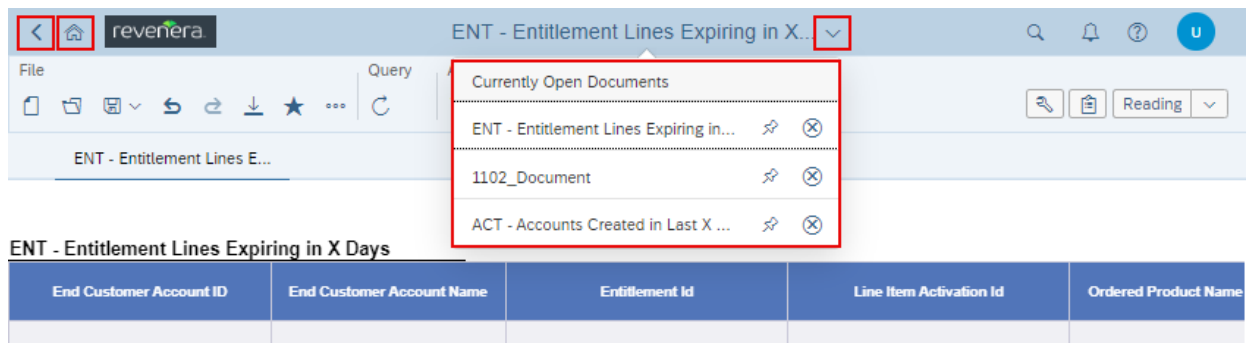


Figure 2-5: Buttons for navigating in Reporter 4.3

## Managing Objects in Reporter

In Reporter, use the **More actions** ⋮ menu to manage your documents. The menu is available from several locations:

- In the **Folders** page, on the right side, or from the context menu.
- In the **Documents** page, on the right side, or from the context menu.
- On the **Home** page, on each tile in the **Favorites**, **Recent Documents**, and **Recently Run** sections.

## Running a Standard Report

Standard reports are sample documents (pre-defined queries) created by Revenera. For a list of standard reports, see [Reporter Standard Reports](#).



---

**Task**      **To run a standard report**

1. On the **Home** page, click the **Folders** tile.
2. On the **Folders** page, navigate to **Public Folders** and expand it.
3. Click **ALM Standard Reports** to view a list of available standard reports.



---

**Note** ▪ Some customers using FlexNet Operations ALM might also see the **FlexNet Standard** folder. This folder contains legacy reports which should not be run.

4. Click the document name to run.
5. Enter required prompts. The **Prompts** window pops up if there are required prompts to fill in for the report. Click each prompt and enter appropriate values.
6. Click **Run**. (If there were no prompts, this step is skipped.)

The document opens with the requested data.

## Creating a Web Intelligence Report

The following procedure creates a Web Intelligence report once you open FlexNet Operations Reporter. The report is based on information currently in the Reporting data warehouse.

- [Steps to Create a Web Intelligence Report](#)
- [Building a Query](#)
- [Modifying a Query](#)
- [Controlling the Retrieval of Duplicates](#)
- [Viewing Modes](#)
- [Displaying Contextual Commands for Managing Reports](#)

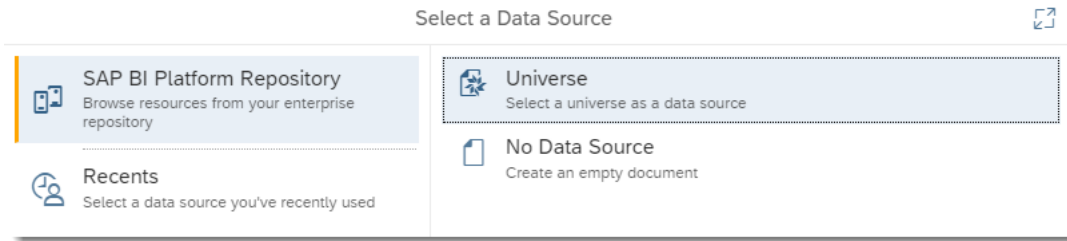
## Steps to Create a Web Intelligence Report



---

**Task**      **To create a Web Intelligence report**

1. On the **Home** page, click the **Applications** tile and select **Web Intelligence**.
2. Click **SAP BI Platform Repository** and select the **Universe** data source. Click **OK**.



**Note** - The options **Recents** and **No Data Source** are not supported in this implementation.

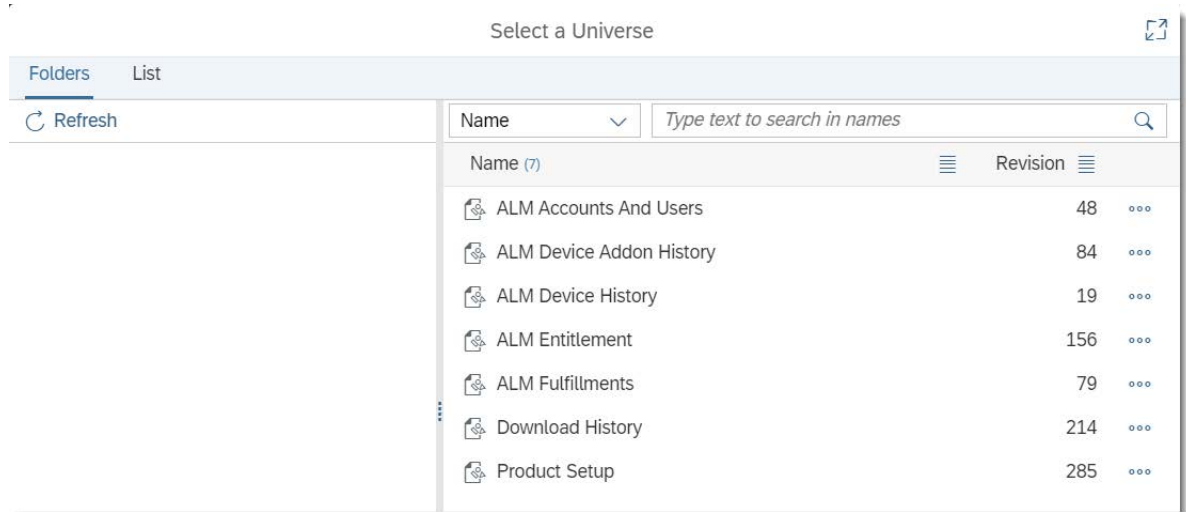
- From the **Universe** dialog box, select a universe on which to create the report, and click **OK**.



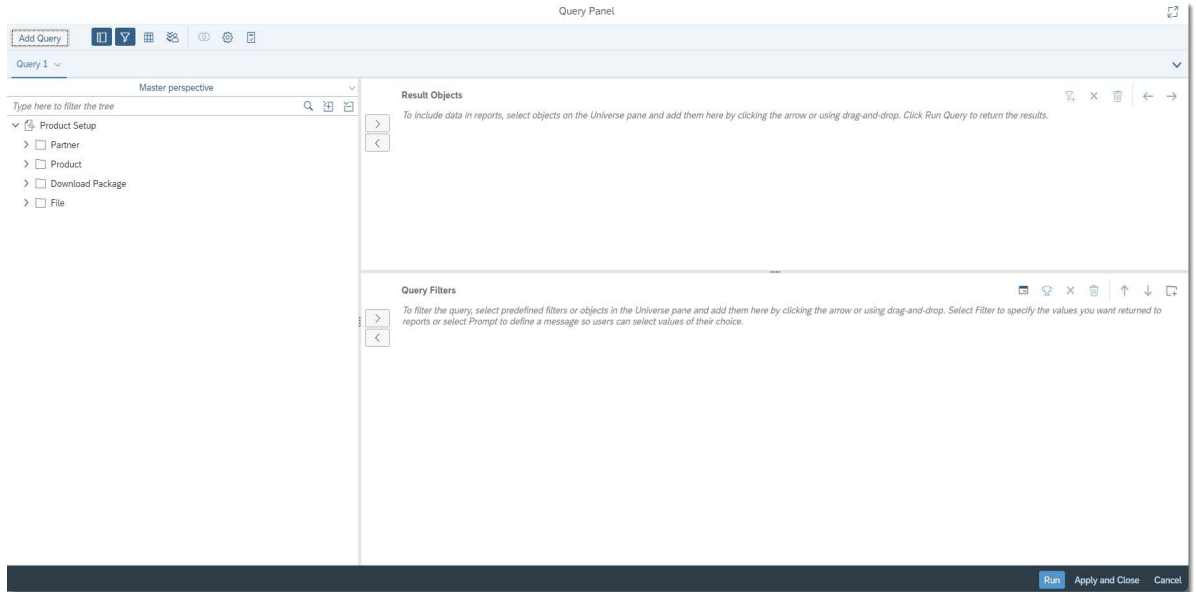
**Tip** - For a brief description of a universe, point to its entry in the list to view the description.



**Note** - The **Revision** and **Folder** columns can be ignored; these are only for Revenera reference.



The **Query Panel** is displayed.



You can now start to build a query. See the next topic, [Building a Query](#).

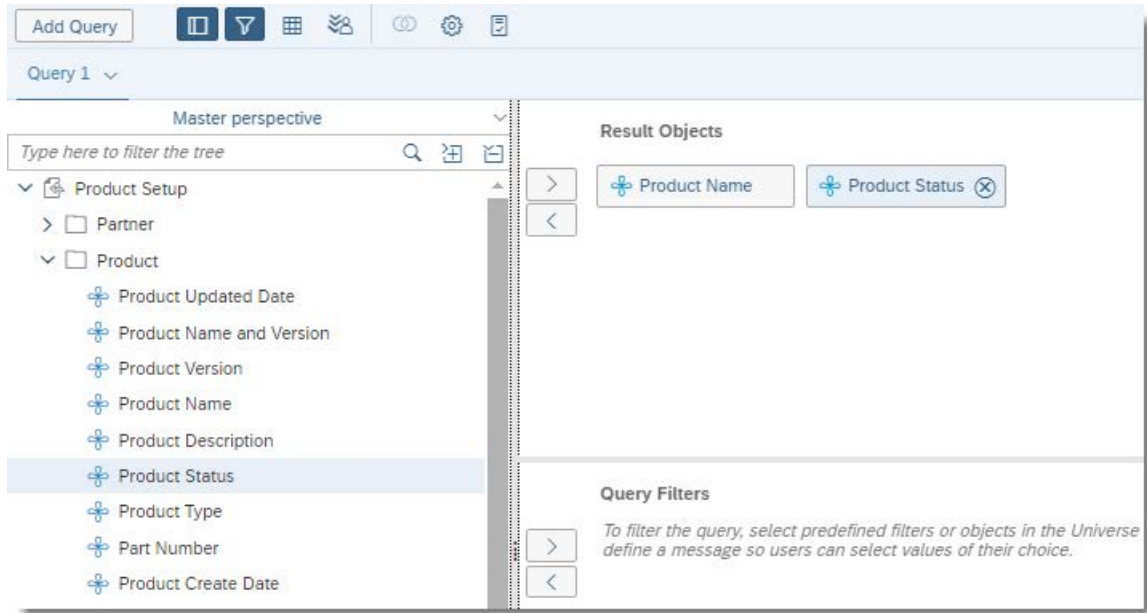
## Building a Query

After you created a Web Intelligence report (see [Steps to Create a Web Intelligence Report](#)), you can build your query.

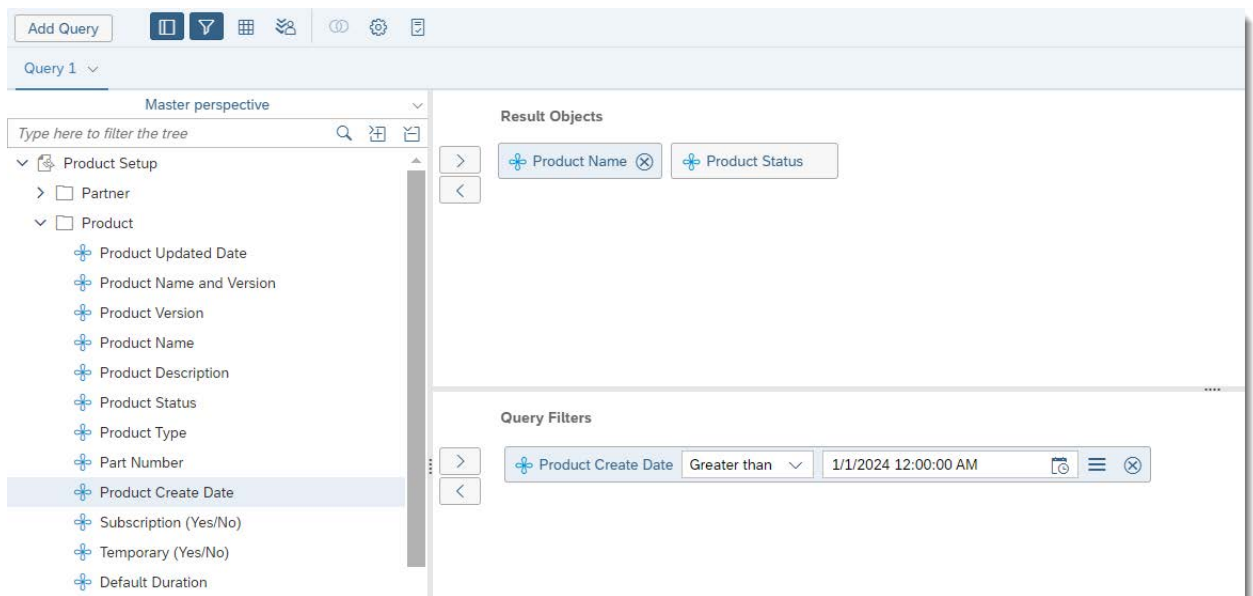


### Task *To build a query using the selected universe*

1. Drag and drop dimensions and measures that you want to include in the query from the universe into the **Result Objects** pane. Note the following:
  - **Dimensions** are qualitative and do not total a sum. A dimension object is the object being tracked; in other words, it can be considered the focus of the analysis. A dimension can be an object such as Service, Price, or Customer. Dimension objects retrieve the data that will provide the basis for analysis in a report. Dimension objects typically retrieve character-type data (customer names, resort names, etc.), or dates (years, quarters, reservation dates, etc.)
  - **Measures** are numerical values that mathematical functions work on. For example, a sales revenue column is a measure because you can determine a total or average its data.



- From the **Master perspective** pane, select the objects on which you want to define query filters, and drag them to the **Query Filters** pane.



- On the **Query Filters** pane, enter a value or select a value against the selected object.

**Example:** You could filter for products created after January 1, 2024, at 12:00:00 AM (see the example in the screenshot above).



**Tip** - To preview the data for the selected objects, click the **Data Preview Panel**  icon in the toolbar to display the **Data Preview** pane, then click **Refresh**.

4. Click **Run Query** to create and view the report of the selected object.

Reporter displays the report.




**Note** - For more information, see the [Building Queries on Universes](#) topic on the SAP Learning site.

## Modifying a Query

You can modify a query after the initial creation.



### Task **To modify a query**



1. In Design mode, in the **Query** section of the toolbar, click the **Edit**  icon. Reporter displays the **Query Panel** dialog.
2. Add objects by dragging and dropping them to the **Result Objects** pane or just double-click objects to add them.
3. Add filters by dragging and dropping predefined filters (marked by a red filter symbol) them to the **Query Filters** pane or just double-click the filters to add them.
4. Click **Run** or **Apply and Close**.

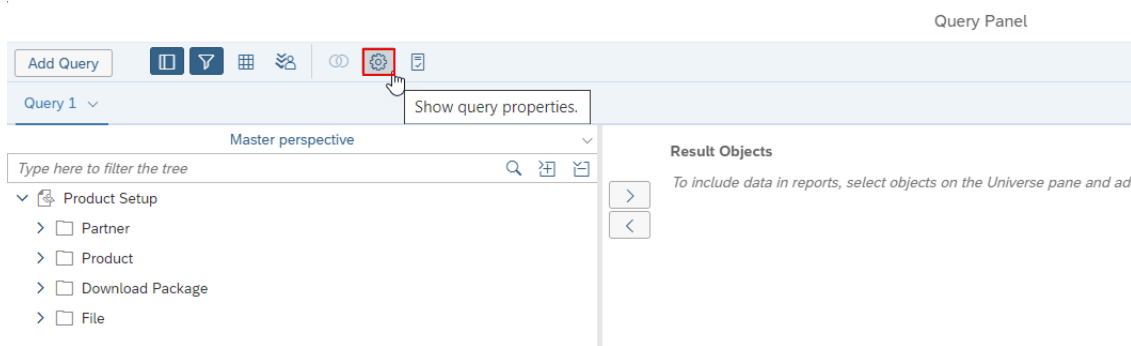
## Controlling the Retrieval of Duplicates

By default, the option to retrieve duplicates is enabled. However, you can turn off this option.



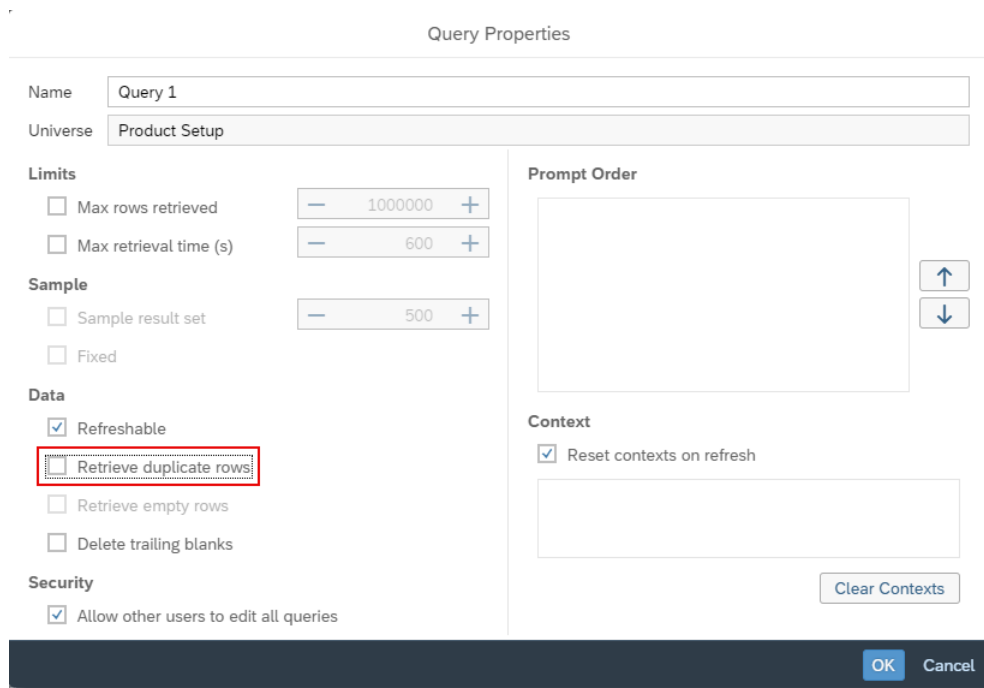
### Task **To disable the retrieval of duplicate records for a report**

1. In Design mode, in the **Query** section of the toolbar, click the **Edit**  icon. Reporter displays the **Query Panel** dialog.
2. On the **Query Panel**, click the **Query Properties**  icon.





3. In the **Query Properties** dialog box, clear **Retrieve duplicate rows** to avoid duplicate records.



4. Click **OK** to close the **Query Properties** dialog.

## Viewing Modes

You can view Web Intelligence reports in different modes depending on how you want to work with data and how you want the data to appear.

The following modes are available:

- **Reading Mode**—Allows you to view the existing report, search its content, and monitor changes in the report.
- **Design Mode**—Allows you to add, delete objects in a report, apply conditional formatting, apply formulas in a report, create variables, and more.
- **Structure**—Allows you to view and modify only the structure of the report. All the changes that you make in this mode are applied to the server only when you populate the report with data.
- **Data**—Allows you to view and modify the report with its data displayed.

The Data mode contains two components: The Dataset view displays the dataset as a table or through facets. The Graph Panel displays a graph of the document's data sources, queries and cubes.

All the modifications applied in the report are automatically saved to the server. If you need to make extensive changes to an existing report, best practice is to make changes in Structure mode and then populate the report with data.



**Note** - For more information about the views available in Data mode, see the article [Viewing Data on the SAP Learning site](#).


## Switching Between Modes



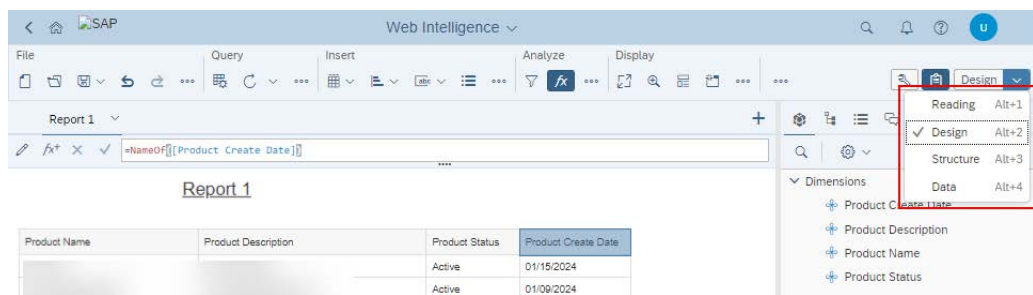
**Version** - Previously, Reporter opened existing Web Intelligence reports in Design mode by default. This behavior has changed in version 4.3, where existing reports are opened in Reading mode by default.

By default, Reporter opens any existing reports in Reading mode. If you want to edit the report in any way, you need to change to a different mode.

A report is opened in Design mode in the following scenarios:

- You are creating a new report.
- You are opening an existing report using the **Modify** option from the **More actions**  menu.

To switch from one mode to another, use the dropdown menu in the top right corner:





**Figure 2-6:** Choose the desired mode for the report.

## Displaying Contextual Commands for Managing Reports



**Version** - This topic briefly describes the new panes introduced in Reporter 4.3.

In each report, the **Build** and **Main** side panes contain contextual commands.

Click the relevant icons to display the **Build**  pane and **Main**  pane.

## Modifying the Report

The following section describes how to modify the Web Intelligence report as needed:

- [Modifying Report Elements](#)
- [Formatting Reports](#)
- [Adding Customized Variables](#)
- [Filters and Input Controls](#)
- [Adding Multiple Reports to a Document](#)

# Modifying Report Elements


This section helps you to insert cells and charts; to convert tables to charts, and view a query summary.

- Inserting Cells
- Inserting Charts
- Converting a Report to a Table or a Chart
- Modifying Charts
- Viewing a Query Summary

## Inserting Cells



### Task To insert a new cell in the report

1. In Design mode, in the **Insert** section of the toolbar, click the **Insert cell**  button or select a pre-defined cell in the drop-down menu.
2. Click on the report canvas to place the cell where you want it.
3. Optional: If you have inserted a blank cell, type the text or formula of the cell in the formula bar.




**Tip** - If you can't see the formula bar, click  in the **Analyze** section of the toolbar to display it.

The screenshot shows the 'revera' report editor interface. The 'Insert' menu is open, displaying options: Blank Cell, Comment, Document Name, Last Refresh Date, Drill Filter, Query Summary, Prompt, Report Filter Summary, Page Number, Page Number / Total Pages, Total Number of Pages, and Icon... The formula bar below the menu contains the text 'Type a formula'. Below the menu, a table titled 'ENT - Entitlement Lines Created in Last X Days' is visible. The table has columns for 'End Customer Account ID', 'End Customer Account Name', and 'Line ID'. The data rows include account IDs and names such as 'Account\_A1', 'swm\_Acc\_1\_1712108539', 'swm\_Acc\_A\_1712109280', 'swm\_Acc\_abc1712108816', 'swm\_Acc\_abc1712109638', 'swm\_Acc\_B\_1712109280', and 'swm\_Acc\_CUSTOMER\_1712109496'.

## Inserting Charts



### Task To insert a new chart in the report

1. In Design mode, in the **Insert** section of the toolbar, click the **Insert chart**  button. Select the desired chart category and chart from the drop-down menu.
2. Click in the report canvas to place the chart.
3. Optional: To change the chart type, in the **Data Feeding** pane, expand the **Turn Into...** section, click a chart category and select a chart.
4. Assign data to the chart: Right-click the chart, click **Assign Data** in the context menu, and drag and drop dimensions and measures from the **Objects** pane either directly on the chart, or in the **Data Assignment** section of the **Data Feeding** pane.



**Note** - If you're assigning data to a Geomap, make sure that every object you want to use is matched with a location. An object that hasn't been matched with a location can't be displayed on the chart.



**Note** - For information about formatting charts, see the topic [Formatting charts](#) in the SAP Help Portal.

## Converting a Report to a Table or a Chart



### Task To convert a report to a table or a chart

1. Open a report in Design mode and ensure that the **Build** pane is displayed.



**Note** - If the **Build** pane is not visible, click the  icon to display it.

2. Click any of the cells of the report.
3. In the **Build** pane, click the  icon to display the **Data Feeding** pane.
4. Click **Turn Into...** and select a table type and table, or a chart type and chart.

Reporter generates and displays the chart.



**Tip** - You can easily revert your changes by clicking the **Undo**  icon in the toolbar.

## Modifying Charts



### Task To modify a chart

Right-click the chart, and then select **Assign Data**.

You can add or delete an occurrence or edit its formula.

## Viewing a Query Summary



### Task To view the query summary of the report

1. In Design mode, in the **Insert** section of the toolbar, click the **Insert cell** button and select **Query Summary** from the drop-down menu.
2. Drag and drop the **Query Summary** input to the **Reports** screen.

The Query Summary is displayed.



## Formatting Reports

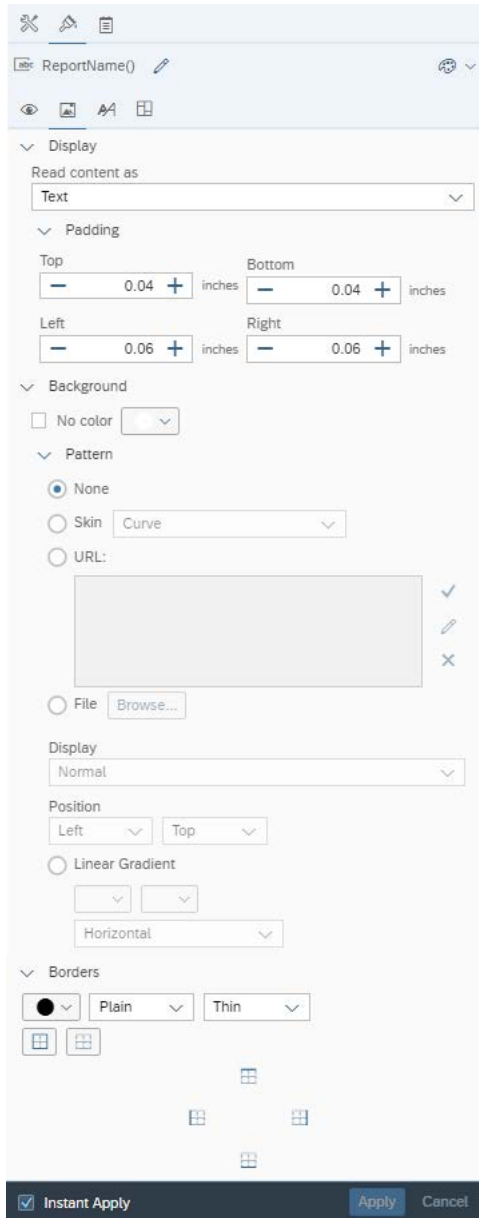
This section briefly describes how to format a table or chart by changing the font, border, or cell. It also covers how to align a table or chart, change styles, and apply headers and footers.



---

**Task**      **To format your report**

1. In Design mode, select the report, report header, report footer, table or cell.
2. Click the  icon to open the **Build** pane and click the  icon to open the **Format** pane.
3. Use the following tabs to format your report:
  - Use the **Appearance Settings** tab to change the background, borders, padding around text, and the appearance of hyperlinks.
  - Use the **Text Settings** tab to change settings such as font type, font size and text alignment.
  - Use the **Layout Settings** tab to adjust cell width, height and position.



**Figure 2-7:** Formatting options on the **Appearance Settings** tab






**Note** ▪ For more information, see the topic [Formatting reports and report elements](#) in the SAP Help Portal.

## Adding Customized Variables


This section describes how you can replace null values with a customized variable in a report.



**Task**      **To add a variable**

1. Open a report in Design mode and select a column or field with a null value.
2. Click the  icon to open the **Main** pane, if it is not already open.
3. Click the  icon to open the **Document Dictionary** pane, if it is not already open.
4. In the **Document Dictionary** pane, click the  icon to create a new variable. This opens the **Create Variable** screen.
5. Enter a name and select a qualification for the variable.
6. Optional: Enter a description.



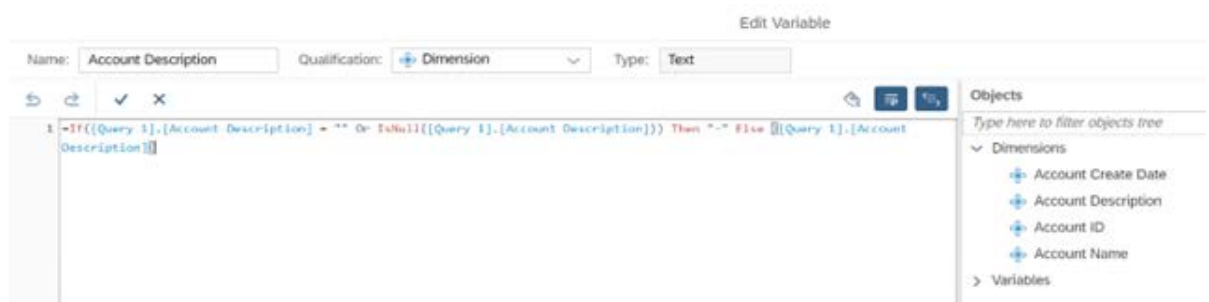
**Note** ▪ The description field is hidden by default. To show or hide the description text field, click the  toggle button.

7. Define the formula for the given variable by selecting one or more objects, functions and operators.



**Note** ▪ For detailed information on building formulas, including a syntax reference to the available functions and operators, refer to the [Using functions, formulas and calculations in Web Intelligence](#) guide from the SAP Help Portal.

The following screenshot shows the setup for creating a new variable that replaces null values with a hyphen (-):



8. Click **OK** to complete creating a new variable.



**Note** ▪ For more information about variables, see the topic [Using variables to simplify formulas](#) in the SAP Help Portal.



# Filters and Input Controls

This section describes how you can add a filter to a report or to an individual block in a report. It is grouped into the following subsections:

- Adding Filters
- Creating Input Controls

## Adding Filters

This section describes two different ways to filter the data in a report:




- To filter data using the Build pane
- To filter data using the Add Filter option from the context menu



**Note** - For more information, see the topic [Filtering](#) in the SAP Help Portal.



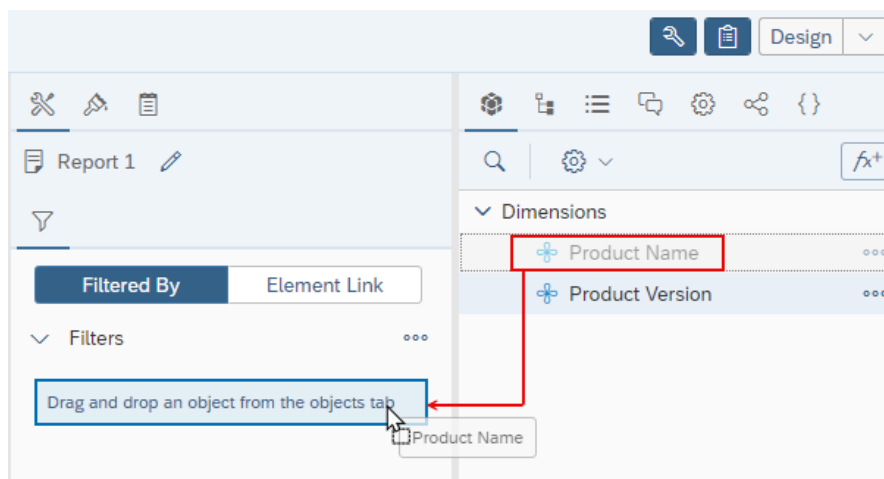
### Task To filter data using the Build pane

1. In Design mode, click the  icon to open the **Build** pane and click the  icon to open the **Filters** pane.
2. In the **Main** pane, click the  icon to open the **Document Dictionary** pane.



**Note** - Click the  icon to open the **Main** pane, if it is not already open.

3. From the **Main** pane, under **Dimensions**, drag and drop the required fields into the **Filters** section.



Reporter applies the filter to the selected report. In the **Build** pane, the **Filtered By** section shows the filter that you added.



---

**Task**      **To filter data using the Add Filter option from the context menu**

1. In Design mode, select a block in the report.
2. Right-click the selected block and select **Data > Add Filter**. The **Select Values for [column name]** opens.
3. Select the values that you want to filter for, or enter them manually.
4. Click **OK**.

Reporter applies the filter to the selected report block. In the **Build** pane, the **Filtered By** section shows the filter that you added.

For a report with multiple blocks, repeat steps 1 through 4 to create a filter for other report blocks.


## Creating Input Controls

Input controls help you filter and analyze report data.



---

**Task**      **To create an input control**

1. In Design mode, in the **Analyze** section of the toolbar, click the  button to display the filter bar with the **Manage Filters** icon:



2. Click the **Manage Filters** icon and select **New Input Control**. The **New Control** dialog opens.
3. In the **New Control** dialog, select the report object, assign a name and (optionally) enter a description for the input control.
4. Under **Current Target**, select **Document** or **Current report** to define the type of input control you want to create.
5. Under **Input Control Properties**, select an input control type and set the input control properties.
6. Click **OK**.

Reporter creates the new input control and displays it in the filter bar.



---

**Note** - For more information, see [Filtering data using input controls](#) in the SAP Help Portal.

New Control

Object: Product Version

Name: \* Product Version

Description: 1.0

Current Target

Document

Current report

▼  Report 1

- Header
- Body
  - Block 1
- Footer

Input Control Properties

Type: Multi-List

Operator: In List

Use restricted list of values:  OFF  ON [+ Select values](#)

Sort list of values: None

Allow selection of all values:  ON  OFF

Allow selection of null values:  OFF  ON

Reset on refresh:  OFF  ON

Default value(s):

OK Cancel

## Adding Multiple Reports to a Document

A document can contain multiple reports. This section describes how you can add reports to a document.



### **Task** To add multiple reports to a document

In Design mode, do one of the following:

- Right-click the existing report tab and select **New**.
- Directly above the report in the corner on the right side, click the **+** icon.

Reporter adds a new blank report tab to the document.

## Viewing the History of Reports

Reporter saves a history for 90 days for every time a report runs if the option **Keep instance in history** is selected when scheduling. You can view the historical instances of a report on the **History** page.



---

**Task**      *To view a report's history*

In the **More actions**  menu, select **History**. The menu is available from several locations:

- In the **Folders** page, on the right side, or from the context menu.
- In the **Documents** page, on the right side, or from the context menu.
- On the **Home** page, on each tile in the **Favorites**, **Recent Documents**, and **Recently Run** sections.

Reporter displays the **History** page.


## Refreshing Reports

You can manually refresh a report as needed or specify that a report is refreshed by default every time it is opened.



---



**Task**      *To refresh a report manually*

In the **Query** section of the toolbar, click the Refresh  icon (available in all modes).



---

**Task**      *To specify whether a report should be refreshed when it is opened*


1. Open the report in Design mode and click the  icon to open the **Main** pane, if it is not already open.
2. In the **Main** pane, click the  icon.
3. Under **Data Options**, select the desired setting for **Refresh on open**.

## Exporting Reports in Different Formats and Purpose

You can export a complete document or multiple reports to a text file, a PDF, an Excel spreadsheet, a CSV file, or a CSV archive. If you want to export raw data, only the .CSV format is available. You can select whether you want to export all data or just the data for specific queries. Except for the text file format, each file type has several settings available when you are in the **Export** dialog box.




**Task**      **To export a report**

1. In the **File** section of the toolbar, click the **Export**  icon to export the reports. Reporter opens the **Export to** dialog.



**Note** - In Design, Structure and Data mode, the **Export** option is available from the **More** menu.

2. In the **Export to** dialog, select the file format and specify any export options.

Format	Purpose
Excel	<ul style="list-style-type: none"> <li>● This format is useful if you want to combine the information in the Web Intelligence document with other data in an Excel spreadsheet.</li> <li>● Select the scope of the exported data: <ul style="list-style-type: none"> <li>● Select <b>Reports</b> to export the reports' data, and select the reports you want to export.</li> <li>● Select <b>Data</b> to export the document's raw data, and select the queries you want to export.</li> </ul> </li> <li>● If your document contains several reports, you can export all of them or explicitly select the ones to export. Each report is saved as a spreadsheet in the Excel file. You can select between two options: <ul style="list-style-type: none"> <li>● Select <b>Prioritize the formatting of the document</b> to keep the formatting in the .XLSX file.</li> <li>● Select <b>Prioritize ease data processing in Excel</b> to avoid merging multiple cells into Excel cells as much as possible and benefit from the data processing features of Excel.</li> </ul> </li> <li>● Unlike Web Intelligence documents, the Excel files are not connected to the database. You cannot refresh the data in the Excel file. To display up-to-date data in Excel format, refresh the Web Intelligence document and then save it as a new Excel file.</li> <li>● This format does not include the header and footer displayed in the Web Intelligence report.</li> <li>● The charts are converted to images, not actual charts.</li> <li>● If you have used drill functionality, cross-launch and hyperlinks inside the report, export to Excel may not work as expected. The formatting and grouping of the Web Intelligence report is not retained in the Excel worksheet.</li> </ul> <p></p> <p><b>Version</b> - In version 4.2, you could choose between export to .XLS and .XLSX. In version 4.3, documents are exported to .XLSX only.</p>

Format	Purpose
PDF	<ul style="list-style-type: none"><li>• This format is useful to provide the document in a printable format.</li><li>• The page layout and formatting of the Web Intelligence report is retained in the PDF file.</li><li>• The PDF file is the exact copy of the document/report and can be shared to other users (non-BO users) via email, shared location.</li><li>• Use the <b>Options</b> section to fine-tune the range to be exported, the image quality and set whether to include bookmarks.</li></ul>
HTML	<ul style="list-style-type: none"><li>• If your document contains several reports, you can export all of them or explicitly select the ones to export.</li></ul>
TXT	<ul style="list-style-type: none"><li>• The groupings and columns of the Web Intelligence report is retained in the text file. Text formatting is not kept (for example: Header row color).</li><li>• In page mode, the report elements are exported page by page.</li><li>• The separator used is a tab space.</li><li>• Charts and images are not exported.</li><li>• If several reports are selected, they are appended one after another in the same text file.</li></ul>
CSV	<ul style="list-style-type: none"><li>• Select the scope of the exported data:<ul style="list-style-type: none"><li>• Select <b>Reports</b> to export the reports' data, and select the reports you want to export.</li><li>• Select <b>Data</b> to export the document's raw data, and select the queries you want to export.</li></ul></li><li>• The formatting and grouping of the Web Intelligence report is not retained in the CSV file.</li><li>• Under <b>Options</b> you can configure the following properties:<ul style="list-style-type: none"><li>• Text qualifier</li><li>• Column Delimiter (You can also directly type in a custom character you want to use, such as the pipe ( ).)</li><li>• Charset</li></ul></li></ul>

3. Click **Export**.

## Scheduling Reports

The following topics describe how to schedule a report:

- [Scheduling a Report](#)
- [Events Options for a Scheduled Report](#)

- [Destination Options for a Scheduled Report](#)
- [Delivery Rules for Scheduled Documents](#)
- [Deleting a Report's Schedule](#)
- [Pausing a Report's Schedule](#) If the start date and time of the scheduled report are in the past, the report runs immediately. Otherwise, the report will run as per its scheduled date and time.

## Scheduling a Report



**Version** - The interface for scheduling reports has changed significantly in version 4.3.


You can schedule a report from the **More actions**  menu. The menu is available from several locations:

- In the **Folders** page, on the right side, or from the context menu.
- In the **Documents** page, on the right side, or from the context menu.
- On the **Home** page, on each tile in the **Favorites**, **Recent Documents**, and **Recently Run** sections.



### Task

#### To schedule a report

1. In the **More actions**  menu, click **Schedule**. Reporter opens the **Schedule** page.
2. Enter a title for the instance that you are scheduling.
3. Under **Destinations**, click **Add** to specify one or more destinations. Reporter opens the **Destinations** dialog. Select one or more of the following destinations:

Destination	Description
<b>BI Inbox</b>	Sends the object to the user's BI launchpad inbox.
<b>Email</b>	Sends the object to the user's email.
<b>FTP Server</b>	Sends the object to an FTP server location.
<b>SFTP Server</b>	Sends the object to an SFTP server location.



**Important** - Ensure that **Default Enterprise Location** is not selected as a destination.

4. The **Destination** dialog lists the selected destination(s) on the left side. For each destination, specify the delivery details and other information, as appropriate. For more information, see [Destination Options for a Scheduled Report](#).



**Version** - In version 4.3 you must specify a destination for a report to run. In version 4.2, if the destination was not set, then by default the report ran as scheduled, but was only viewable as an instance on the report's **History** page.

5. If you want Reporter to save a history of each instance, select **Keep instance in history**.



**Tip** - Clearing the **Keep instance in history** check box will save space on the system.

6. Under **Recurrence**, open the **Run Report** menu and select the desired option:
  - **Now**—The report is run immediately.
  - **Once**—Allows you to set a date and time when the report should run.
  - **Recurring**—Allows you to schedule a report to run in specified intervals.



**Version** - Version 4.3 introduces a new scheduling feature, which allows for periodic schedules within the hours you set as business hours.



**Note** - The daily refresh of the universes (with the exception of the universes listed above) finishes at 5:00 AM Pacific Time. It is recommended that you do not schedule a report to run between 00:00 and 5:00 AM Pacific Time, to avoid conflicts between the scheduled report running and the refresh. See [Data Refresh Intervals](#).

7. Also under **Recurrence**, set the **Allow Retries** option as desired. Bear in mind that allowing retries might have a negative impact on system performance.
8. Under **Events**, specify if you want the report to be triggered by an event. In this case, the date when the report runs depends on the timing of the event. See [Events Options for a Scheduled Report](#).
9. Under **Scheduling Server Group**, accept the default options.
10. Under **Notification**, enable email notifications as required.
11. Click **Schedule**.

## Events Options for a Scheduled Report

Event-based scheduling gives you additional control over when a report runs. Reporter offers the following options for event-based scheduling: **Wait for** and **Trigger**:

- **Wait for** ensures that the job waits for an event to be fulfilled before executing.
- **Trigger** immediately executes the job when the specified event occurs.

The only event that is available in this implementation is Daily Data Refresh, which occurs each day between 00:00 and 5:00 A.M. Pacific Time (equivalent to 8:00 A.M. and 1:00 P.M. UTC).





---

**Task**      **To specify an event for a scheduled report**

1. Schedule the report as described in [Scheduling a Report, Step 1](#) through [Step 7](#).
2. In [Step 8](#), under **Events**, select **Wait For** or **Trigger**.
3. In the **Select Events** dialog, use the **Trigger** drop down to select the event that triggers the publication, or the **Wait For** drop down to select the event to trigger when the publication job has run.
4. Also in the **Select Events** dialog, select **UAT Daily Data Refresh** and click **Add**.
5. Continue to schedule the report.

## Destination Options for a Scheduled Report

The destination options for a scheduled report are:

- [Default Enterprise Location](#)
- [BI Inbox](#)
- [Email](#)
- [FTP Server](#)
- [SFTP Server](#)



---

**Note** ▪ The most common destinations are [BI Inbox](#) and [Email](#).

### Default Enterprise Location

The scheduled job will run on the Output File Repository Server (FRS). You do not need to set additional options for this destination. Historical instances are saved to the default Enterprise server but not to any other destination.

### BI Inbox

Sends the object to a user's BI Inbox.



---

**Note** ▪ You must know the Personnel ID of the recipient to use this destination.

The following table describes the BI Inbox options.

**Table 2-2** - BI Inbox options

Option	Description
<b>Keep an instance in the history</b>	<p>Saves a copy of this instance in the document's history. This option is enabled by default.</p> <p>If you want the BI platform to automatically delete the instance from the Output FRS to minimize the number of instances on the server, clear the option.</p> <p>Even when this option is cleared, the history keeps the instances of scheduled documents that weren't sent because they failed to meet a delivery rule.</p>
<b>Use default settings</b>	<p>The report runs as scheduled but is not sent to any recipients.</p> <p>If you want to select the recipients, leave this option unselected and specify the intended recipients using the options in <b>Available Recipients</b> (see below).</p>
<b>Recipients</b>	<p>In the <b>Available Recipients</b> section, select users or user groups to send the instance to. You can manually find the recipients or search recipients by using the search function.</p> <p>To search the recipients, use the Personnel ID.</p>
<b>Target Name</b>	<p>To use a system-generated file name for the instance, select <b>Use Automatically Generated Name</b>.</p> <p>To choose a file name for the instance, select <b>Use Specific Name</b>, and enter a name or select variables for the file name from the <b>Add placeholder</b> list. You can select from several types of variables: Title, ID, Owner, DateTime, (your) Email Address, and (your) User Full Name, and File Extension.</p>
<b>Send As</b>	<p>To send a shortcut to the instance to recipients, select <b>Shortcut</b>.</p> <p>To send a copy of the instance to recipients, select <b>Copy</b>.</p>

## Email

Sends the object to a user's email address.



**Important** - Before you can schedule or send a report instance to this destination, you must enable and configure the email (SMTP) destination on the Adaptive Job Server.

The following table describes the Email options.

**Table 2-3** • Email options



Option	Description
<p><b>Keep an instance in the history</b></p>	<p>Saves a copy of this instance in the document's history. This option is enabled by default.</p> <p>If you want the BI platform to automatically delete the instance from the Output FRS to minimize the number of instances on the server, clear the option.</p> <p>Even when this option is cleared, the history keeps the instances of scheduled documents that weren't sent because they failed to meet a delivery rule.</p>
<p><b>Use default settings</b></p>	<p>Select this check box to use the default Adaptive Job Server values for email.</p> <p>If you do not want to use the default Adaptive Job Server values, clear this check box and specify the intended recipients using the options in <b>System Details</b> (see below).</p>
<p><b>System Details</b></p>	<p>Provide the following information:</p> <ul style="list-style-type: none"> <li>● <b>From</b>—Enter a return email address.</li> <li>● <b>To</b>—Enter the email address of each recipient to send the instance to.</li> <li>● <b>Cc</b>—Enter the email address of each recipient to send a copy of the email and instance to (optional).</li> <li>● <b>Bcc</b>—Enter the email address of each undisclosed recipient to send a copy of the email and instance to (optional).</li> <li>● <b>Reply to</b>—Enter the email address to reply to (optional).</li> <li>● <b>Subject</b>—Enter the subject of the email.</li> <li>● <b>Message</b>—Customize your message content using the rich text editor.</li> </ul> <div style="border: 1px solid black; width: 20px; height: 20px; margin: 5px 0; display: flex; align-items: center; justify-content: center;">  </div> <p><b>Important</b> • If you leave the <b>From</b> field blank, the object will be sent from the login of the user who is currently logged on. Using a <b>From</b> email other than one from the flexnetoperations.com domain may result in email being flagged as spam.</p> <div style="border: 1px solid black; width: 20px; height: 20px; margin: 5px 0; display: flex; align-items: center; justify-content: center;">  </div> <p><b>Note</b> • Instead of typing in email addresses, you can also select variables from the <b>Add placeholder</b> list. The available variables are Title, ID, Owner, DateTime, (your) Email Address, and (your) User Full Name, and Date. Click a variable to add it. Separate email addresses with a semicolon (;).</p>

Table 2-3 ▪ Email options

Option	Description
<b>Target Name</b>	<p>Select the <b>Add Attachment</b> check box if you want to add an attachment to the email message containing the instance.</p> <p>To use a system-generated file name for the instance, select <b>Use Automatically Generated Name</b>.</p> <p>To choose a file name for the instance, select <b>Use Specific Name</b>, and enter a name or select variables for the file name from the <b>Add placeholder</b> list. Under <b>File Name</b>, it is recommended that you select <b>Use Specific Name</b> and add the placeholder "Title". Otherwise, an auto-generated string of characters will be appended to the file name.</p>

## FTP Server

Sends the object to an FTP (File Transfer Protocol) server location. The following table describes the FTP Server options.

Table 2-4 ▪ FTP Server options

Option	Description
<b>Keep an instance in the history</b>	<p>Saves a copy of this instance in the document's history. This option is selected by default.</p> <p>If you want the BI platform to automatically delete the instance from the Output FRS to minimize the number of instances on the server, clear the <b>Keep an instance in the history</b> check box.</p>
<b>Use default settings</b>	<p>Uses the default Adaptive Job Server values for FTP Servers.</p> <ul style="list-style-type: none"> <li>• If you do not want to use the default Adaptive Job Server values, clear the check box, and set the destination recipient options that appear.</li> <li>• You can change the values in the Servers area of the CMC. For more information, refer to the <i>SAP BusinessObjects Business Intelligence Platform Administrator Guide</i>.</li> </ul>
<b>Host</b>	Enter the IP address of the FTP server host computer where you want to send the instance.
<b>Port</b>	Enter the port of the FTP server where you want to send the instance. The default is 21.
<b>User Name</b>	Enter a user name with access rights to upload the object to the FTP server.
<b>Password</b>	Enter the password required to access the FTP server.

**Table 2-4** ▪ FTP Server options

Option	Description
<b>Account</b>	<p>Enter the account required to access the FTP server.</p> <p>The account is part of the standard FTP protocol but is rarely implemented. Enter an account only if your FTP server requires it.</p>
<b>Directory</b>	<p>Enter the path to the FTP directory where you want to send the instance.</p>
<b>File Name</b>	<p>To use a system-generated file name for the instance, select <b>Use Automatically Generated Name</b>.</p> <ul style="list-style-type: none"> <li>To select the file name for the instance, select <b>Use Specific Name</b>, and enter a name or select variables for the file name from the <b>Add Placeholder</b> list. You can select from several types of variables: <b>Title</b>, <b>ID</b>, <b>Owner</b>, <b>DateTime</b>, (your) <b>Email Address</b>, (your) <b>User Full Name</b>, and <b>File Extension</b>.</li> <li>Select <b>Add File Extension</b> to automatically add the file extension to the instance file name. If you do not add a file extension, you might be unable to open the document.</li> </ul>

## SFTP Server

SFTP protocol is a computing network protocol for accessing and managing files on remote file systems, similar to FTP. SFTP encrypts commands and data both, preventing passwords and sensitive information from being transmitted in the clear over a network. The advantages of having SFTP is that it allows secure transmission of data using Fingerprint authentication.



**Important** ▪ The destination has to be enabled in CMC on the Adaptive Job Server. Contact your administrator to enable FTP/SFTP in CMC.

The following table describes the SFTP Server options.

**Table 2-5** ▪ SFTP Server options

Option	Description
<b>Keep an instance in the history</b>	<p>Select this check box to retain a copy of this instance in the object's history. This check box is selected by default.</p> <p>Clear this check box if you want the BI platform to automatically delete the instance from the Output FRS to minimize the number of instances on the server.</p>

**Table 2-5** ▪ SFTP Server options

Option	Description
<b>Use default settings</b>	<p>Select this check box to use the default Adaptive Job Server values for FTP servers.</p> <p>If you do not want to use the default Adaptive Job Server values, clear this check box, and set the destination recipient options that appear.</p> <p>You can change the values in the Servers area of the CMC. For more information, see the <i>SAP BusinessObjects Business Intelligence Platform Administrator Guide</i>.</p>
<b>Host</b>	Enter the IP address of the FTP server host computer where you want to send the instance.
<b>Port</b>	Enter the port of the FTP server where you want to send the instance. The default is 21.
<b>User Name</b>	Enter a user name with access rights to upload the object to the FTP server.
<b>Password</b>	Enter the password required to access the FTP server.
<b>Account</b>	<p>Enter the account required to access the FTP server.</p> <p>The account is part of the standard FTP protocol but is rarely implemented. Enter an account only if your FTP server requires it.</p>
<b>Directory</b>	Enter the path to the FTP directory where you want to send the instance.
<b>File Name</b>	<p>To use a system-generated file name for the instance, select <b>Use Automatically Generated Name</b>.</p> <p>To choose the file name for the instance, select <b>Use Specific Name</b>, and enter a name or select variables for the file name from the <b>Add placeholder</b> list. The available variables are Title, ID, Owner, DateTime, (your) Email Address, (your) User Full Name, Document Name, Date, and File Extension.</p> <p>Select the <b>Add File Extension</b> check box to automatically add the file extension to the instance file name. If you do not add a file extension, you may be unable to open the document.</p>
<b>Fingerprint</b>	Enter your fingerprint. For more information on how to enter your fingerprint, refer to the <i>SAP BusinessObjects Business Intelligence Platform Administrator Guide</i> .

## File System

The **File System** destination type is not supported in this implementation.

## File Formats for Scheduled Documents

When you schedule a report, you can specify the output format on the **Schedule** page under **Report Features**. Choose from the following options:

- Web Intelligence
- Microsoft Excel - Data
- Microsoft Excel - Reports
- Adobe Acrobat
- Comma Separated Values (CSV) - Data
- Comma Separated Values (CSV) Archive - Reports
- Plain Text
- HTML Archive



---

**Version** - The output format Microsoft Excel - Data has been added in version 4.3.

## Delivery Rules for Scheduled Documents

Prevent the sending of erroneous or empty documents by setting delivery rules for scheduled documents. Define a status for the documents that fail to meet the rules so you can identify them and reschedule them, change the connection details, or take other, appropriate action.

You define delivery rules on the **Schedule** page under **Report Features**.

You define conditions that the document must meet for it to be sent to the following destinations:

- BI Inbox
- Email
- FTP server
- SFTP server

When the document fails to meet those conditions, it is not sent. You can choose one or both of the following conditions for a document:

- **The scheduled content has been successfully refreshed and is not partial. If this condition is not met, return the following status.**—The document is sent only when all the data providers for the document have been successfully refreshed. A document that contains data from incomplete results isn't sent.
- **The scheduled content contains data. If this condition is not met, return the following status.**—The document is sent only when at least one report in the document contains data. An empty document isn't sent.

When you select a condition, you can also define the status that is displayed in the history for a document that fails to meet the condition, as follows:

- **Warning**

- **Failed**

The default status is **Warning**.

When you select both conditions for the sending of the document and the status of one condition is **Warning** and the status of the other condition is **Failed**, the history shows **Failed**.

## Deleting a Report's Schedule


If you no longer require a report, you can delete the scheduled report instance. This will also remove the history of the report (including the scheduler and past results).

If you only want to stop the report temporarily to revisit it later, you can pause the report instead (see [Pausing a Report's Schedule](#)).



---

**Task**      **To delete a report's schedule**

1. Open the report's **History** window.
2. Click the **More actions**  menu for the instance and click **Delete**. The **Delete confirmation** window is displayed.
3. Click **OK**.


## Pausing a Report's Schedule

Pausing enables you to temporarily stop a scheduled report instance from running and resume it later.



---

**Task**      **To pause a report's schedule**


1. Open the report's **History** window.
2. Click the **More actions**  menu for the latest instance and click **Pause**.
3. From the **History** page, select the report instance that you want to pause.

The History window shows the status as "Paused".



---

**Task**      **To resume a paused report**

1. Open the report's **History** window.
2. Click the **More actions**  menu for the paused instance and click **Resume**.

If the start date and time of the scheduled report are in the past, the report runs immediately. Otherwise, the report will run as per its scheduled date and time.



# Reporter Standard Reports

FlexNet Operations Reporter includes a number of predefined, standard reports. This chapter describes each standard report, the prompts you can use to modify its output, and the attributes included in the report.

- [Before You Begin](#)
- [Standard Reports](#)



---

**Tip** • Reporter also allows users to create and share custom reports. For more advanced instructions see the Business Objects document, “Building Reports Using the Web Intelligence HTML Report Panel”, or click the help link in Reporter.

## Before You Begin

Standard reports are available to producers who have access to Reporter. The following sections identify the permissions required to view reports and explain how to launch Reporter.

### Producer Permissions for Reporter

Producers who are assigned to roles that have the **View Reports** permission can start Reporter. For more information about managing a user’s roles and permissions, see [Managing Accounts and Users](#) in the [FlexNet Operations User Guide](#).

### Starting Reporter

Producers with the **View Reports** permission can start Reporter from the Producer Portal.



---

#### Task

#### To start Reporter

In the Producer Portal, click **System > Reports**. The Producer Portal opens Reporter in a new window.

Standard reports are available in Reporter in the **Folders** drawer in the **ALM Standard Reports** folder (in the **Public Folders** directory). See the next section for details about each standard report. Double-click a report to configure its prompts and run it.

## Standard Reports

This chapter describes the standard reports included for all producers and available to producer users with the required permissions to use Reporter.

For each report, you will find

- The name of the standard report and a description of its content and purpose
- A list of report filter prompts with prompt text and valid values
- A table of report output attributes and descriptions of those attributes
- A report output sample

To learn about a standard report's purpose, prompts, and attributes, see the section for that report.

**Table 3-1** ▪ Standard Reports

Section	Description
<b>ACT-Accounts Created in Last X Days</b>	Shows all accounts created within the time range you specify.
<b>ENT-Entitlement Lines Created in Last X Days</b>	Shows all entitlement lines created within the time range you specify.
<b>ENT-Entitlement Lines Expiring in X Days</b>	Shows all entitlement lines expiring in the time range you specify.
<b>ENT-Maintenance Expiring in Next X Days</b>	Shows all maintenance lines expiring in the time range you specify.
<b>FUL-Fulfillments Created in Last X Days</b>	Shows all fulfillments created within the time range you specify.
<b>FUL-Fulfillments with Returns/Rehosts/Reinstallations</b>	Shows all fulfillments that were subject to return, rehost, and reinstall operations along with counts related to those operations. This report has prompts for you to specify the time range and, optionally, the account name on which to report.
<b>PRD-Product Created in Last X Days</b>	Shows all products created for the product name and version you identify and in the time range you specify.



**Tip** ▪ Reporter also allows users to create and share custom reports. For more advanced instructions see the *Business Objects* document, *Building Reports Using the Web Intelligence HTML Report Panel*, or click the *help* link in Reporter.

# ACT-Accounts Created in Last X Days

The Accounts Created in Last X Days report shows recently created accounts with information about their account type, creation date, description, address, and number of users.

## Report Prompts

This report has only one prompt to filter reports by their create date.

Prompt	Description
<b>Account created between today - ? days and yesterday</b>	Enter the number of days to set the date range for the report. For example, if you set the prompt to 365, the report returns a list of accounts created in the last year (between yesterday and the 365 days prior). Default: 100 days.

## Report Attributes

The table, below, lists the attributes included in the Accounts Created in Last X Days report.

Attribute	Description
<b>Account ID</b>	A unique identifier of an organization’s account as defined in FlexNet Operations. (For example, Stark International Enterprises.)
<b>Account Name</b>	A display name for an organization’s account as defined in FlexNet Operations. (For example, Stark.) The Account Name is what FlexNet Operations displays on most of the Producer Portal and End-User Portal pages.
<b>Account Type</b>	The account type distinguishes between regular customer accounts (CUSTOMER), self-registered accounts (SELF_REGISTERED), channel partner accounts (CHANNEL_PARTNER), and producer accounts (PUBLISHER). Accounts without a standard account type are shown as UNKNOWN.
<b>Account Create Date</b>	The date the account was first created.
<b>Account Description</b>	The description associated the account.
<b>Account Address Line 1</b>	The first line of the optional street address of the account.
<b>Account Address Line 2</b>	The second line of the optional street address of the account.
<b>Account City</b>	The city for the address associated with the account.
<b>Account Country</b>	The country code for the account.

Attribute	Description
<b>Account Region</b>	The region where the account is situated. For instance, EMEA or APAC. Region is an optional field in the account-creation process and can contain any region designation the user enters.
<b>Parent Account ID</b>	The account ID of the parent account, if any.
<b>Parent Account Name</b>	The account name of the parent account, if any.
<b>User Count</b>	Number of users on the account.

### Report Sample

The image, below, shows a sample of the Accounts Created in Last X Days report.

**ACT - Accounts Created in Last X Days**

Account ID	Account Name	Account Type	Account Create Date	Account Description	Account Address Line 1	Account Address Line 2	Account City	Account Country	Account Region	Parent Account ID	Parent Account Name	User Count
AACMidwest	AACMidwest	SELF_REGISTE	01/09/2018						UNKNOWN			1
AACWest	AACWest	SELF_REGISTE	01/10/2018						UNKNOWN			1
ABCAccount	ABCAccount	CUSTOMER	12/07/2017	TestAccount				US	UNKNOWN			1
ABTTestAccount	ABTTestAccount	CUSTOMER	12/07/2017	TestAccount				US	UNKNOWN			0
ABU SALIMA EL LIBI	ABU SALIMA EL LIBI	CUSTOMER	01/25/2018					US	UNKNOWN			1
AC4	AC4	PUBLISHER	01/19/2018						UNKNOWN	MYORG	My Organiza	0
ACC1-FEB031	ACC1-FEB031	CUSTOMER	02/03/2018					US	UNKNOWN			1
ACC1-FEB032	ACC1-FEB032	CUSTOMER	02/03/2018					US	UNKNOWN			1
ACC1-FEB033	ACC1-FEB033	CUSTOMER	02/03/2018					US	UNKNOWN			1
Acc1_V_18Jan	Acc1_V_18Jan	CUSTOMER	01/18/2018					US	UNKNOWN			2
Acc2_V_18Jan	Acc2_V_18Jan	CUSTOMER	01/18/2018					US	UNKNOWN			2
ACC_ESD_DEC4	ACC_ESD_DEC4	CUSTOMER	12/04/2017					US	UNKNOWN			0
Acc_ID	Acc_Name	CUSTOMER	01/08/2018					US	UNKNOWN			0
AccIDPublisher_V_5Jan	AccPublisher_V_5Jan	PUBLISHER	01/19/2018						UNKNOWN	MYORG	My Organiza	0

Figure 3-1: ACT-Accounts Created in Last X Days Report

## ENT-Entitlement Lines Created in Last X Days

The Entitlement Lines Created in Last X Days report shows recently created entitlement lines with information about their owner, entitlement ID, activation ID, product name and version, as well as the entitlement lines' creation, expiration, and maintenance end dates.

## Report Prompts

This report includes only one prompt with which you can set the number of passed days to look for created entitlement lines.

Prompt	Description
<b>Line Item created between today - ? days and yesterday</b>	Enter the number of days to set the date range for line items in the report. For example, if you set the prompt to 365, the report returns a list of line items created in the last year (between yesterday and the 365 days prior). Default: 100 days.

## Report Attributes

The table, below, lists the attributes included in the Entitlement Lines Created in Last X Days report.

Attribute	Description
<b>End Customer Account ID</b>	The account ID for the end user (customer) account that owns the entitlement.
<b>End Customer Account Name</b>	A display name for the end user (customer) account that owns the entitlement.
<b>Entitlement ID</b>	The unique identifier of the entitlement as defined by FlexNet Operations.
<b>Line Item Activation ID</b>	The unique identifier of the entitlement line item as defined in FlexNet Operations.
<b>Ordered Product Name</b>	The name of the product or suite as defined in FlexNet Operations.
<b>Ordered Product Version</b>	The version of the product or suite as defined in FlexNet Operations.
<b>Extended Seat Count</b>	A count of the activated licenses. This count includes the number of copies of a given product purchased on its own as well as those copies included in a suite.
<b>Line Item Created Date String</b>	The date the entitlement line was created.
<b>Line Item Expiration Date String</b>	The expiration date of the entitlement line. If the entitlement line does not expire, <b>Line Item Expiration Date String</b> is <b>PERMANENT</b> .
<b>Line Item Maintenance End Date</b>	The expiration date of the maintenance line. This attribute may be blank if the maintenance line has no end date (permanent) or if the line item has not maintenance.

## Report Sample

The image, below, shows a sample of the Entitlement Lines Created in Last X Days report.

ENT - Entitlement Lines Created in Last X Days										
End Customer Account ID	End Customer Account Name	Entitlement Id	Line Item Activation Id	Ordered Product Name	Ordered Product Version	Extended Seat Count	Line Item Created Date String	Line Item Expiration Date String	Line Item Maintenance End Date	
aaarshi.chatterjee@yahoo.com	trialOrg	ENT-56c5-ad6B-2Cfd-061	Act-ENT-56c5-ad6B-2Cfd-061-1	PJAN10AA	1.0	1	01/10/2018	04/20/2018		
Aberdeen	Aberdeen Golf	A-47dc-c40A-4E73-061	ACT-952d-c4A6-1573-061	UAT-Test-Prod	1.0	100	12/08/2017	PERMANENT		
ABU SALIMA EL LIBI	ABU SALIMA EL LIBI	ABUSALIMAELLIBI-37f9-92AF-58f2-161	ACT-f22a-929F-D1f2-161	AS-ESDProduct-12131	1.0	1	01/25/2018	12/31/2019		
ACC1-FEB031	ACC1-FEB031	E-FEB031	E-FEB031-LNM1	EDEC161	1.0	100	02/03/2018	02/28/2019		
ACC1-FEB032	ACC1-FEB032	E-ACC2-FEB032	E-ACC2-FEB032-LNM1	EC2	1.0	100	02/03/2018	02/28/2019		
ACC1-FEB033	ACC1-FEB033	E-ACC3-FEB033	E-ACC3-FEB033-LNM1	ECFEB021	1.0	100	02/03/2018	02/28/2019		
ACC_ESD_DEC4	ACC_ESD_DEC4	ENT_ESD_DEC4	ACT_LS_DEC4	product_dec41	1.0	100	12/04/2017	01/05/2019		
Acc_ID	Acc_Name	AID-26b4-5a16-404d-061	ACT-65d4-5a12-AE4d-061	P1_PRODUCT	1.0	1,000	01/08/2018	01/31/2019		
ACC_LS1_DEC14_BEYOND	ACC_LS1_DEC14_BEYOND	ENT_LS_DEC14_BEYOND_LOOKAHEAD	ACT_LS_DEC14_BEYOND_LOOK_AHEAD	Prod_ls_dec6	1.0	100	12/14/2017	11/29/2018		
ACC_LS1_DEC14_PERMANENT	ACC_LS1_DEC14_PERMANENT	ENT_LS1_DEC14_PERM	ACT_LS_DEC14_PERM	Prod_ls_dec6	1.0	100	12/14/2017	PERMANENT		
ACC_LS_DEC5_1	ACC_LS_DEC5_1	ENT_LS_DEC5_1_AUTOPROVISION	ACT_LS_DEC5_AUTOPROV	prod_ls_autoprovision_de	1.0	100	12/05/2017	12/25/2017		
ACC_LS_DEC5_MUL	ACC_LS_DEC5_MUL	ENT_DEC5_MUL	ACT_LS_MUL1_DEC5	prod_ls_fc	1.0	100	12/05/2017	12/25/2017		

Figure 3-2: ENT-Entitlement Lines Created in Last X Days Report

## ENT-Entitlement Lines Expiring in X Days

The Entitlement Lines Expiring in X Days report shows expiring entitlement lines with information about their owner, entitlement ID, activation ID, product name and version, as well as the entitlement lines' expiration and maintenance end dates.

### Report Prompts

This report includes only one prompt with which you can set the number of days in the future to look for expiring entitlement lines.

Prompt	Description
<b>Line Item Expiration Date between today and days in the future</b>	<p>Enter the number of days to set the date range for line items in the report.</p> <p>For example, if you set the prompt to 365, the report returns a list of line items that expire in the next year (between today and the next 365 days).</p> <p>Default: 1 day.</p>

### Report Attributes

The table, below, lists the attributes included in the Entitlement Lines Expiring in X Days report.

Attribute	Description
<b>End Customer Account ID</b>	The account ID for the end-user (customer) account that owns the entitlement.
<b>End Customer Account Name</b>	A display name for the end-user (customer) account that owns the entitlement.
<b>Entitlement ID</b>	The unique identifier of the entitlement as defined by FlexNet Operations.
<b>Line Item Activation ID</b>	The unique identifier of the entitlement line item as defined in FlexNet Operations.

Attribute	Description
<b>Ordered Product Name</b>	The name of the product or suite as defined in FlexNet Operations.
<b>Ordered Product Version</b>	The version of the product or suite as defined in FlexNet Operations.
<b>Extended Seat Count</b>	A count of the activated licenses. This count includes the number of copies of a given product purchased on its own as well as those copies included in a suite.
<b>Line Item Expiration Date String</b>	The expiration date of the entitlement line.
<b>Line Item Maintenance End Date String</b>	The expiration date of the maintenance line.

## Report Sample

The image, below, shows a sample of the Entitlement Lines Expiring in X Days report.

ENT - Entitlement Lines Expiring in X Days								
End Customer Account ID	End Customer Account Name	Entitlement Id	Line Item Activation Id	Ordered Product Name	Ordered Product Version	Extended Seat Count	Line Item Expiration Date String	Line Item Maintenance End Date
24org	24org	CVSTEST-PERM-E1	CVSTEST-PERM-E1-UNLBRW	CVS-Borrow	1.0	10	02/28/2018	
ACC_LS_FEB3_CON_IN_HEALTHY	ACC_LS_FEB3_CON_IN_HEALTHY	ENT_LS_FEB3_CON_IN_HEALTHY	ACT_LS_FEB3_CON_IN_HEALTHY	PROD1_FEB3	1.0	100	02/28/2018	
ACC_LS_FEB3_CON_IN_WARNING	ACC_LS_FEB3_CON_IN_WARNING	ENT_LS_FEB3_CON_IN_WARNING	ACT_LS_FEB3_CON_IN_WARNING	PROD1_FEB3	1.0	100	02/28/2018	
ACC_LS_FEB3_REN_IN_HEALTHY	ACC_LS_FEB3_REN_IN_HEALTHY	ENT_LS_FEB3_REN_IN_HEALTHY	ACT_LS_FEB3_REN_IN_HEALTHY	PROD1_FEB3	1.0	100	02/28/2018	
ACC_LS_FEB3_REN_IN_RISK	ACC_LS_FEB3_REN_IN_RISK	ENT_LS_FEB3_REN_IN_RISK	ACT_LS_FEB3_REN_IN_RISK	PROD1_FEB3	1.0	100	02/28/2018	
ACC_LS_FEB3_STEP1	ACC_LS_FEB3_STEP1	ENT_LS_FEB3_STEP1	ACT_LS_FEB3_STEP1	PROD1_FEB3	1.0	100	02/28/2018	
ACC_LS_FEB3_STEP12	ACC_LS_FEB3_STEP12	ENT_LS_FEB3_STEP12	ACT_LS_STEP12_1	P_LS_1	1.0	100	02/28/2018	
ACC_LS_FEB3_STEP12	ACC_LS_FEB3_STEP12	ENT_LS_FEB3_STEP12	ACT_LS_STEP12_1	P_LS_2	1.0	100	02/28/2018	
ACC_LS_FEB3_STEP12	ACC_LS_FEB3_STEP12	ENT_LS_FEB3_STEP12	ACT_LS_STEP12_1	P_LS_3	1.0	100	02/28/2018	
ACC_LS_FEB3_STEP12	ACC_LS_FEB3_STEP12	ENT_LS_FEB3_STEP12	ACT_LS_STEP12_2	P_LS_1	1.0	1,000	02/28/2018	
ACC_LS_FEB3_STEP12	ACC_LS_FEB3_STEP12	ENT_LS_FEB3_STEP12	ACT_LS_STEP12_2	P_LS_3	1.0	1,000	02/28/2018	
ACC_LS_FEB3_STEP12	ACC_LS_FEB3_STEP12	ENT_LS_FEB3_STEP12	ACT_LS_STEP12_2	P_LS_2	1.0	1,000	02/28/2018	
ACC_LS_FEB3_STEP12	ACC_LS_FEB3_STEP12	ENT_LS_FEB3_STEP12	ACT_LS_STEP12_3	P_LS_3	1.0	1,000	02/28/2018	
ACC_LS_FEB3_STEP16	ACC_LS_FEB3_STEP16	ENT_LS_FEB3_STEP16	ACT_LS_CHILD_STEP16	prod_ls_child	1.0	0	02/28/2018	
ACC_LS_FEB3_STEP16	ACC_LS_FEB3_STEP16	ENT_LS_FEB3_STEP16	ACT_LS_PARENT_STEP16	prod_ls_parent	1.0	100	02/28/2018	
ACC_LS_FEB3_STEP16	ACC_LS_FEB3_STEP16	ENT_LS_FEB3_STEP16	nsbFC-5R31-07FD-12a5-161	prod_ls_child	1.0	0	02/28/2018	

Figure 3-3: ENT-Entitlement Lines Expiring in X Days Report

## ENT-Maintenance Expiring in Next X Days

The Maintenance Expiring in Next X Days report shows expiring maintenance lines with information about their owner, entitlement ID, activation ID, product name and version, as well as the entitlement lines' expiration and maintenance end dates.

## Report Prompts

This report includes only one prompt with which you can set the number of days in the future to look for expiring maintenance lines.

Prompt	Description
<b>Line Item Maintenance End Date between today and days in the future</b>	<p>Enter the number of days to set the date range for line items in the report. For example, if you set the prompt to 365, the report returns a list of maintenance line items that expire in the next year (between today and the next 365 days).</p> <p>Default: 100 days.</p>

## Report Attributes

The table, below, lists the attributes included in the Maintenance Expiring in Next X Days report.

Attribute	Description
<b>End Customer Account ID</b>	The account ID for the end user (customer) account that owns the entitlement.
<b>End Customer Account Name</b>	A display name for the end user (customer) account that owns the entitlement.
<b>Entitlement ID</b>	The unique identifier of the entitlement as defined by FlexNet Operations.
<b>Line Item Activation ID</b>	The unique identifier of the entitlement line item as defined in FlexNet Operations.
<b>Ordered Product Name</b>	The name of the product or suite as defined in FlexNet Operations.
<b>Ordered Product Version</b>	The version of the product or suite as defined in FlexNet Operations.
<b>Net Orders Seat Count</b>	The net copies available for the maintenance line. This count includes all new, upgrade, upsell, and renew orders, and excludes all upgraded, upsold, renewed, obsolete, and inactive orders for a maintenance line.
<b>Maintenance Activation ID</b>	The unique identifier of the maintenance line as defined in FlexNet Operations.
<b>Maintenance Start Date</b>	The date on which maintenance begins.
<b>Maintenance End Date</b>	The date on which maintenance ends.
<b>Maintenance Product</b>	The name of the maintenance product.
<b>Maintenance Part Number</b>	The part number to which the maintenance line is linked.



## Report Sample

The image, below, shows a sample of the Maintenance Expiring in Next X Days report.

ENT - Maintenance Expiring in Next X Days											
End Customer Account ID	End Customer Account Name	Entitlement Id	Line Item Activation Id	Ordered Product Name	Ordered Product Version	Net Orders Seat Count	Maintenance Activation Id	Maintenance Start Date	Maintenance End Date	Maintenance Product	Maintenance Part Number
24org	24org	S_15MEnt	S_15MEnt_1	S_15MP1	4	15	S_15MEnt_main	03/16/2017	03/28/2018	S_15Mm1	
customer123	customer123	S_3NEnt1	S_3NEnt1_1	S_3NPR1	2.0	100	S_3Nmaint2	11/03/2017	03/08/2018	S_3NMain1	
customer123	customer123	S_3NEnt1	S_3NEnt1_2	S_3NPR1	2.0	100	S_3Nmaint2	11/03/2017	03/08/2018	S_3NMain1	
customer123	customer123	S_3NEnt1	S_3NEnt1_2	S_3NPR1	2.0	100	S_3Nmaint4	11/03/2017	03/08/2018	S_3NMain1	S_3Npart
customer123	customer123	S_3Nent2	S_3Nent2_1	S_3NPR1	2.0	100	S_3Nmaint3	11/03/2017	03/08/2018	S_3NMain1	

Figure 3-4: ENT-Maintenance Expiring in Next X Days Report

## FUL-Fulfillments Created in Last X Days

The Fulfillments Created in Last X Days report shows recently created fulfillments with information about their owner, entitlement ID, activation ID, product name and version, as well as the entitlement lines' creation, expiration, and maintenance end dates.

### Report Prompts

This report includes only one prompt with which you can set the number of passed days to look for created fulfillments.

Prompt	Description
<b>Fulfillments created between today - ? days and yesterday</b>	Enter the number of days to set the date range for fulfillments in the report. For example, if you set the prompt to 365, the report returns a list of fulfillments created in the last year (between today and the prior 365 days).  Default: 1 day.


### Report Attributes

The table, below, lists the attributes included in the Fulfillments Created in Last X Days report.

Attribute	Description
<b>Account ID</b>	A unique name of an organization's account as defined in FlexNet Operations. (For example, Stark International Enterprises.)
<b>Account Name</b>	A display name for an organization's account as defined in FlexNet Operations. (For example, Stark.)
<b>Ordered Product Name</b>	The name of the product or suite as defined in FlexNet Operations.
<b>Ordered Product Version</b>	The version of the product or suite as defined in FlexNet Operations.

Attribute	Description
<b>Part Number</b>	The part number to which the fulfillment is linked, if any.
<b>Entitlement ID</b>	The unique identifier of the entitlement as defined by FlexNet Operations.
<b>Line Item Activation ID</b>	The unique identifier of the entitlement line item as defined in FlexNet Operations.
<b>Line Item Current State</b>	The state of the line item: Deployed, Inactive, or Obsolete.
<b>Fulfillment ID</b>	A unique identifier for the fulfillment record.
<b>Fulfillment Status</b>	The state of the fulfillment record: ACTIVE or OBSOLETE.
<b>Activation Type</b>	<p>The method of activation. Activation Type can be SHORTCODE, MANUAL, PROGRAMMATIC, CERTIFICATE, TRUSTED, EMBEDDED, or CUSTOM.</p> <ul style="list-style-type: none"> <li>● <b>SHORTCODE</b>—Trusted storage fulfillment records generated using short code activation.</li> <li>● <b>MANUAL</b>—Trusted storage fulfillment records generated using manual (or offline activation) processing of the request and response XML files.</li> <li>● <b>PROGRAMMATIC</b>—Trusted storage fulfillment records generated using regular online activation from the client.</li> <li>● <b>CERTIFICATE</b>—Certificate licenses.</li> <li>● <b>TRUSTED</b>—Legacy trusted storage fulfillment records which do not have specific information about how they were activated.</li> <li>● <b>EMBEDDED</b>—Licenses generated using FlexNet Embedded for hardware devices.</li> <li>● <b>CUSTOM</b>—Fulfillment records that belong to any non-FlexNet licensing technology.</li> </ul>

Attribute	Description
<p><b>Lifecycle Status</b></p>	<p>The lifecycle support action on the fulfillment record, if any. Lifecycle Status can be MASTER, DELETE, RETURN, REHOST, REPAIR, REINSTALL, RENEW, EMERGENCY, STOPGAP, TRANSFER, UPGRADE, UPSSELL, PUBLISHER_ERROR, or NULL (blank).</p> <ul style="list-style-type: none"> <li>● <b>MASTER</b>—A new fulfillment record. No support lifecycle operations have been performed on this fulfillment.</li> <li>● <b>RETURN</b>—A fulfillment record that has been returned.</li> <li>● <b>REHOST</b>—A fulfillment record that has been rehosted.</li> <li>● <b>REPAIR</b>—A fulfillment record that has been repaired.</li> <li>● <b>REINSTALL</b>—A fulfillment record that has been reinstalled.</li> <li>● <b>RENEW</b>—A fulfillment record that has been renewed to another fulfillment record.</li> <li>● <b>EMERGENCY</b>—A fulfillment record that was created as an emergency license.</li> <li>● <b>STOPGAP</b>—A fulfillment record that was created as a stop gap license.</li> <li>● <b>UPGRADE</b>—A fulfillment record that was upgraded to another fulfillment record.</li> <li>● <b>UPSSELL</b>—A fulfillment record that was upsold to another fulfillment record.</li> <li>● <b>DELETE</b>—A fulfillment that was deleted. Deleted fulfillments do not appear in the Producer Portal or the End-User Portal.</li> <li>● <b>PUBLISHER_ERROR</b>—A fulfillment flagged by the producer as an error.</li> <li>● <b>TRANSFER</b>—A fulfillment record that has been transferred to a different account.</li> </ul>
<p><b>Platform Type</b></p>	<p>The platform on which the license was activated, if available. Platform Type can be any of the supported platform types reported by the FlexNet client, such as i86n3 (Windows), i86re3 (Linux), Mac, and so forth. If the client did not report a platform type, this report shows UNKNOWN.</p>

Attribute	Description
<b>Fulfillment Source</b>	<p>The activation process used for fulfillment. Fulfillment Source can be ONLINE, APPLICATION, or LEGACY.</p> <ul style="list-style-type: none"> <li>● <b>ONLINE</b>—For fulfillment records generated using web services.</li> <li>● <b>APPLICATION</b>—For fulfillment records generated using the FlexNet Operations user interface.</li> <li>● <b>LEGACY</b>—Used for legacy fulfillment records that do not have information about how the fulfillment records were generated.</li> </ul>
<b>Host ID</b>	<p>The host on which the license was activated.</p> <ul style="list-style-type: none"> <li>● For certificate licenses, Host ID is the usual host identifier (such as INTERNET=64.0.0.1).</li> <li>● For trusted licenses, Host ID is UMN or Machine Identifier.</li> <li>● For non-FlexNet technologies, Host ID is the custom host identifier.</li> </ul>  <p><b>Note</b> - See <i>Special Host ID Types</i> in the <i>FlexNet Operations User Guide</i> for more information about host ID types.</p>
<b>Active Fulfillment Count</b>	The number of active fulfillments for a given ordered product.
<b>Obsolete Fulfillment Count</b>	The number of fulfillments that were changed to obsolete.
<b>Upgrade Fulfillment Count</b>	The number of fulfillments generated from upgrade licenses (purchased as an upgrade from another product version).
<b>Rehost Fulfillment Count</b>	The number of fulfillments of a given ordered product that were rehosted.
<b>Return Fulfillment Count</b>	The number of fulfillments of a given ordered product that were returned.
<b>Repair Fulfillment Count</b>	The number of fulfillments that had to be repaired. (FlexNet Operations supports the repair operation for both trusted and certificate licenses.)
<b>Reinstall Fulfillment Count</b>	The number of fulfillments that were reinstalled. (Reinstalls are relevant only for trusted storage licenses. A trust storage activation request coming from the same machine for the same activation ID is deemed a reinstall.)
<b>Upsell Fulfillment Count</b>	The number of fulfillments generated from upsell licenses (purchased as an upsell from another product).
<b>Stop Gap Fulfillment Count</b>	The number of fulfillments generated as stop gap licenses. (Stop gap fulfillments are supported only for certificate and custom licenses.)



Item State	Fulfillment Id	Fulfillment Status	Activation Type	Lifecycle Status	Platform Type	Fulfillment Source	Host Id	Active Fulfillment Count
YED	GCO-GECB-0193-52E0-7F15-161	ACTIVE	CERTIFICATE	EMERGENCY	UNKNOWN	APPLICATION	COMPOSITE=52	
YED	GCO-GECB-32c3-6277-9E15-161	OBSOLETE	CERTIFICATE	REHOST	UNKNOWN	APPLICATION	COMPOSITE=51	
YED	GCO-GECB-7eb7-42B7-E015-161	ACTIVE	CERTIFICATE	STOPGAP	UNKNOWN	APPLICATION	COMPOSITE=51	
YED	GCO-GECB-8ae5-22A4-3015-161	ACTIVE	CERTIFICATE		UNKNOWN	APPLICATION	COMPOSITE=50	2
YED	GCO-GECB-aa0a-52E0-C715-161	OBSOLETE	CERTIFICATE	RETURN	UNKNOWN	APPLICATION	COMPOSITE=51	3
YED	GCO-GECB-b43c-a48A-9915-161	ACTIVE	CERTIFICATE		UNKNOWN	APPLICATION	COMPOSITE=6	
YED	GCO-GECB-d55e-3246-5E15-161	OBSOLETE	CERTIFICATE	REPAIR	UNKNOWN	APPLICATION	COMPOSITE=51	3
YED	GCO-GECB-e11e-62AC-EE15-161	OBSOLETE	CERTIFICATE	UPGRADE	UNKNOWN	APPLICATION	COMPOSITE=6	
YED	GCO-GECB-ecbe-84F9-FF15-161	OBSOLETE	CERTIFICATE	UPSELL	UNKNOWN	APPLICATION	COMPOSITE=6	2
YED	GCO-GECB-edf1-a43A-4515-161	OBSOLETE	CERTIFICATE	RENEW	UNKNOWN	APPLICATION	COMPOSITE=6	
YED	GCO-GECB-bb1c-a46A-2A15-161	ACTIVE	CERTIFICATE		UNKNOWN	APPLICATION	COMPOSITE=6	
YED	TWORGID-TW-e35f-c750-9A33-161	ACTIVE	CERTIFICATE		UNKNOWN	APPLICATION	HOSTNAME=ASC	
YED	TWORGID-TW-f080-aaC3-91b9-161	ACTIVE	CERTIFICATE		UNKNOWN	APPLICATION	HOSTNAME=ASC	
YED	WILY-Sr-d821-c751-5C3e-f51	ACTIVE	CERTIFICATE		UNKNOWN	APPLICATION	COMPOSITE=54	
YED	WILY-Sr-80c3-b815-343e-f51	ACTIVE	CERTIFICATE		UNKNOWN	APPLICATION	COMPOSITE=9	
YED	WILY-Sr-12b3-58EE-113e-f51	OBSOLETE	CERTIFICATE	REPAIR	UNKNOWN	APPLICATION	COMPOSITE=7	8
YED	WILY-Sr-376b-7843-C53e-f51	ACTIVE	CERTIFICATE		UNKNOWN	APPLICATION	COMPOSITE=8	1
YED	WILY-Sr-4669-58D4-843e-f51	OBSOLETE	CERTIFICATE	REHOST	UNKNOWN	APPLICATION	COMPOSITE=9	
YED	WILY-Sr-6d65-b816-103e-f51	ACTIVE	CERTIFICATE		UNKNOWN	APPLICATION	COMPOSITE=7	

Active Fulfillment Count	Obsolete Fulfillment Count	Upgrade Fulfillment Count	Rehost Fulfillment Count	Return Fulfillment Count	Repair Fulfillment Count	Reinstall Fulfillment Count	Upsell Fulfillment Count	Stop Gap Fulfillment Count	Emergency Fulfillment Count	Transferred Fulfillment Count	Obsoloted Fulfillment Count	Net Fulfillment Count
0	0	0	0	0	0	0	0	0	30	0	0	0
29	29	0	29	0	0	0	0	0	0	0	29	0
0	0	0	0	0	0	0	0	30	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	20
30	1	0	0	1	0	0	0	0	0	0	1	29
14	0	0	0	0	0	0	0	0	0	0	0	14
30	30	0	0	0	30	0	0	0	0	0	30	0
29	5	5	0	0	0	0	0	0	0	0	5	24
24	0	0	0	0	0	0	5	0	0	0	5	19
19	0	0	0	0	0	0	0	0	0	0	5	14
5	0	0	0	0	0	0	0	0	0	0	0	5
2	0	0	0	0	0	0	0	0	0	0	0	2
1	0	0	0	0	0	0	0	0	0	0	0	1
24	0	0	0	0	0	0	0	0	0	0	0	24
3	0	0	0	0	0	0	0	0	0	0	0	3
80	80	0	0	0	80	0	0	0	0	0	80	0
10	0	0	0	0	0	0	0	0	0	0	0	10
80	10	0	10	0	0	0	0	0	0	0	10	70
1	0	0	0	0	0	0	0	0	0	0	0	1

Figure 3-5: FUL-Fulfillments Created in Last X Days Report

## FUL-Fulfillments with Returns/Rehosts/Reinstallations

The Fulfillments with Returns/Rehosts/Reinstallations report shows the number of returns, rehosts, and reinstallations for each account's ordered products.

## Report Prompts

This report has prompts to limit the fulfillments in the report by their creation date and by their account name.

Prompt	Description
<b>Enter Earliest Fulfillment Create Date</b>	<p>Required.</p> <p>Click the Calendar button to set the date. In the Calendar popup, click <b>Today</b> to set to the current date.</p> <p>Default: 01 January 1970.</p>
<b>Enter Last Fulfillment Create Date</b>	<p>Required.</p> <p>Click the Calendar button to set the date. In the Calendar popup, click <b>Today</b> to set to the current date.</p> <p>Default: 31 December 9999.</p>
<b>Enter Account Name</b>	<p>Optional. The name or partial name for the account.</p> <p>Use % as a wildcard character.</p> <p>This prompt is not case sensitive.</p> <p>If you do not enter a value for the account name, Reporter does not restrict report content by account name.</p>

## Report Attributes

The Fulfillments with Returns/Rehosts/Reinstallations report includes eight attributes and shows rehost, return, and reinstall counts by account and product.

Attribute	Description
<b>Account ID</b>	A unique name of an organization's account as defined in FlexNet Operations. (For example, Stark International Enterprises.)
<b>Account Name</b>	A display name for an organization's account as defined in FlexNet Operations. (For example, Stark.)
<b>Ordered Product Name</b>	The name of the product or suite as defined in FlexNet Operations.
<b>Ordered Product Version</b>	The version of the product or suite as defined in FlexNet Operations.
<b>Rehost Fulfillment Count</b>	The number of fulfillments of a given ordered product that were rehosted.
<b>Return Fulfillment Count</b>	The number of fulfillments of a given ordered product that were returned.

Attribute	Description
<b>Reinstall Fulfillment Count</b>	The number of fulfillments that were reinstalled. (Reinstalls are relevant only for trusted storage licenses. A trust storage activation request coming from the same machine for the same activation ID is deemed a reinstall.)
<b>Total Return/Rehost/Reinstall</b>	The sum of fulfillments that were returned, rehosted, or reinstalled for a given ordered product.

### Report Sample

FUL - Fulfillments with Returns/Rehosts/Reinstallations							
Account ID	Account Name	Ordered Product Name	Ordered Product Version	Rehost Fulfillment Count	Return Fulfillment Count	Reinstall Fulfillment Count	Total Rehost / Return / Reinstall
UNKNOWN_ORG_	Information Not Available	test23	1.0	0	16,022	0	16,022
AS_Customer_01	AS_Customer_01	FNP_Trusted_ServerActivation	1.0	0	5,002	0	5,002
AS_Customer_01	AS_Customer_01	FNP_Trusted_ServerActivation_Windows	1.0	0	1,001	0	1,001
ACC_LS_FEB3_CC	ACC_LS_FEB3_CON_IN_HEAL	PROD1_FEB3	1.0	0	160	0	160
UNKNOWN_ORG_	Information Not Available	PR1	1.0	0	101	0	101
ACME	Software Corporation	FT3	1.0	0	100	0	100
ACC_LS_FEB3_RE	ACC_LS_FEB3_REN_IN_HEAL	PROD1_FEB3	1.0	0	80	0	80
ACC_LS_FEB3_RE	ACC_LS_FEB3_REN_IN_RISK	PROD1_FEB3	1.0	0	80	0	80
ACC_LS_FEB3_RE	ACC_LS_FEB3_REN_IN_WARN	PROD1_FEB3	1.0	0	50	0	50
ACC_LS_FEB3_ST	ACC_LS_FEB3_STEP7	PROD1_FEB3	1.0	0	50	0	50
Generic_Cust_Org	Generic_Cust_Org	Gen_SOAP_31Jan_Prod1	1.1	35	7	0	42

Figure 3-6: FUL-Fulfillments with Returns/Rehosts/Reinstallations Report

## PRD-Product Created in Last X Days

The Product Created in Last X Days report allows you to set a product-creation date range and a product name and version to show matching products with their current status and their actual creation dates.

### Report Prompts

This report has prompts to limit the products in the report by their creation date and by their account name.

Prompt	Description
<b>Products Created Between Today - ? Days and Yesterday</b>	Enter the number of days to set the date range for the report. For example, if you set the prompt to 365, the report returns a list of products created in the last year (between yesterday and the 365 days prior).  Default: 10 days.



Prompt	Description
<b>Product Name and Version Matches</b>	<p>Required. The name or partial name and version for the product.</p> <p>Use * as a wildcard character.</p> <p>To set a specific product name and version, enter <code>&lt;product_name&gt;::&lt;version&gt;</code>. For example, <code>PhotoPrint::1.0</code> or <code>Photo*</code>.</p> <p>Default: *</p>

## Report Attributes

The Products Created in Last X Days report shows only four attributes in the report output: Product Name, Product Name and Version, Product Status, and Product Create Date.

The report shows the products and versions that meet the criteria expressed in your report prompts along with their current status and creation date.

Attribute	Description
<b>Product Name</b>	The name of the product.
<b>Product Name and Version</b>	The combined product name and version in the format <code>productname::version</code> .
<b>Product Status</b>	<p>The current status of the product. A product's status can be Active, Inactive, or Missing.</p> <p>Products that are deleted have an Inactive value for Product Status.</p> <p>(Missing is a special value used to facilitate reporting on entire product categories and showing download packages that have no parent product.)</p>
<b>Product Create Date</b>	The month, day, and year in which the product was created.

## Report Sample

The image, below, shows a sample of the Products Created in Last X Days report.

PRD - Product Created In Last X Days			
Product Name	Product Name and Version	Product Status	Product Create Date
3STS_pro1	3STS_pro1::1.0	Active	02/20/2018
DELIVERS_ONE_COUNTED	DELIVERS_ONE_COUNTED::1.0	Active	02/27/2018
FNE_BASE_FOR_UPGRADE	FNE_BASE_FOR_UPGRADE::1.0	Active	02/27/2018
FNE_UPGRADE	FNE_UPGRADE::2.0	Active	02/27/2018
ksaurabh_1p	ksaurabh_1p::1.0	Active	02/26/2018
PRO_3Svr1	PRO_3Svr1::1.0	Active	02/20/2018
PRO_3Svr2	PRO_3Svr2::1.0	Active	02/20/2018
RF_SANITY_wsProd_1519283078457	RF_SANITY_wsProd_1519283078457::1.0	Active	02/21/2018
RF_SANITY_wsProd_1519284377041	RF_SANITY_wsProd_1519284377041::1.0	Active	02/21/2018
RF_SANITY_wsProd_1519695847296	RF_SANITY_wsProd_1519695847296::1.0	Active	02/26/2018
RF_SANITY_wsProd_1519698704888	RF_SANITY_wsProd_1519698704888::1.0	Active	02/26/2018
RF_SANITY_wsProd_1519868639818	RF_SANITY_wsProd_1519868639818::1.0	Active	02/28/2018

Figure 3-7: Products Created in Last X Days Report