FlexNet Operations LLM

Reporter User Guide

Legal Information

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FlexNet Operations LLM Reporter User Guide (UAT)

***Important ▪** Use this FlexNet Operations LLM Reporter User Guide (UAT) as a reference for the FlexNet Operations Reporter 4.3 that is currently available in UAT. For information about FlexNet Operations Reporter 4.2, refer to the FlexNet Operations LLM 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
Getting Started	Explains how to access the Reporter, terminology used in this guide, and product support resources.
Managing Web Intelligence Reports	Covers concepts and common tasks of running Web Intelligence reports in Reporter.
Reporter Standard Reports	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
- Accessing Help

- 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 **Reporter** in the **Resources** menu, as shown below:

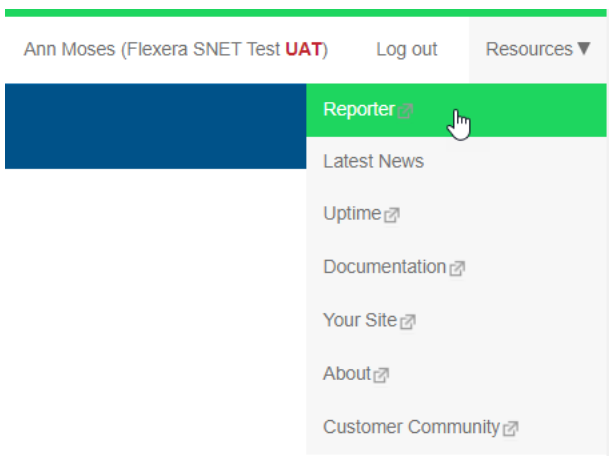


Figure 1-1: Reporter Selection on the **Resources** Menu

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 daily for FlexNet Operations LLM. 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.*

Accessing Help

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.*

Data Refresh Intervals

Universes are refreshed on a daily basis between 8:00 A.M. and 1:00 P.M. Coordinated Universal Time (UTC).

Important ▪ *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 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:

- Revenera Product Documentation
- Revenera Community
- Revenera Learning Center
- Revenera Support

Revenera Product Documentation

You can find documentation for all Revenera products on the Revenera Product Documentation site:

https://docs.revenera.com

Revenera Community

On the Revenera 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 Revenera's product solutions, you can access forums, blog posts, and knowledge base articles.

https://community.revenera.com

Revenera Learning Center

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

https://learning.revenera.com

Revenera 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 Revenera Community and then making selections on the **Get Support** menu, including **Open New Case** and other options.

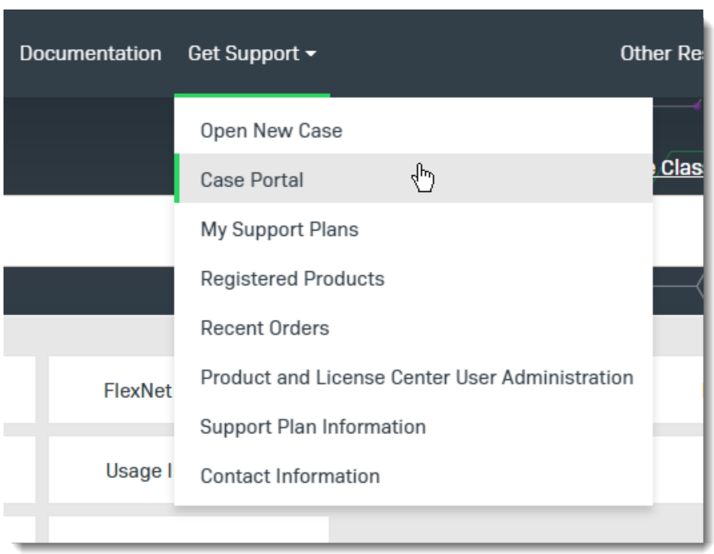


Figure 1-2: Get Support Menu of Revenera Community

Contact Us

Revenera 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.revenera.com

You can also follow us on social media:

- Twitter

- Facebook
- LinkedIn
- YouTube
- Instagram

2

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.

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

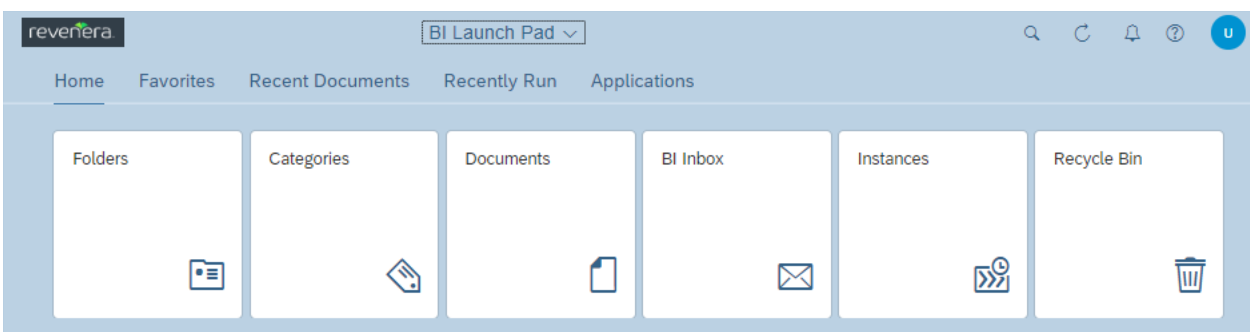


Figure 2-1: Tiles on the **Home** tab

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.

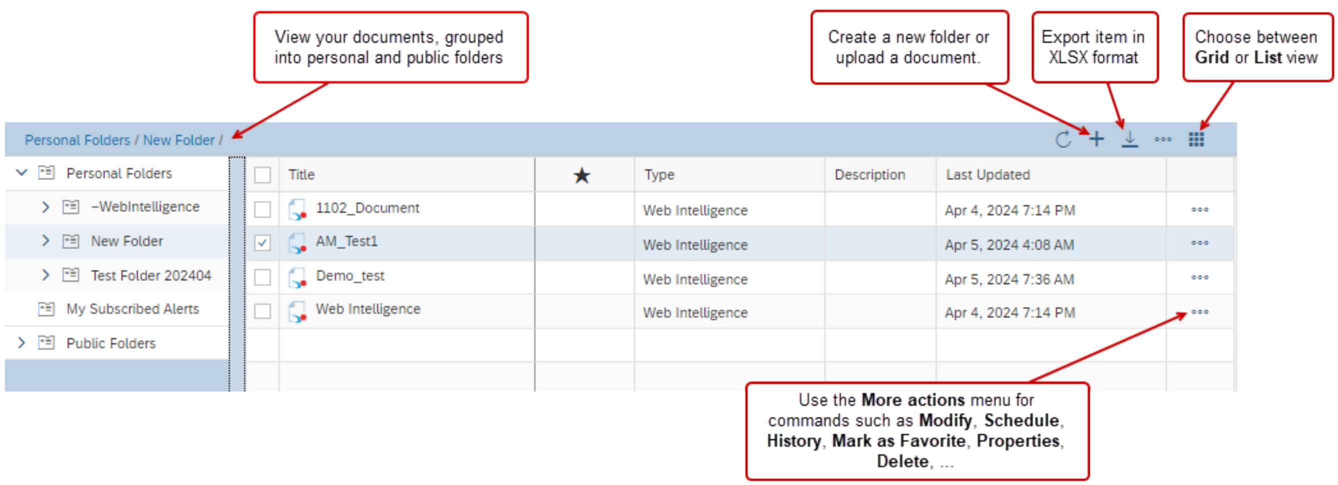


Figure 2-2: Actions in the **Folders** view

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:

- **Standard Reports**—This folder contains sample documents created by Revenera for LLM.
- **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.

Creating a Folder

You can create additional folders to organize your objects.

***Note** ▪ You cannot add folders in the **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 **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.

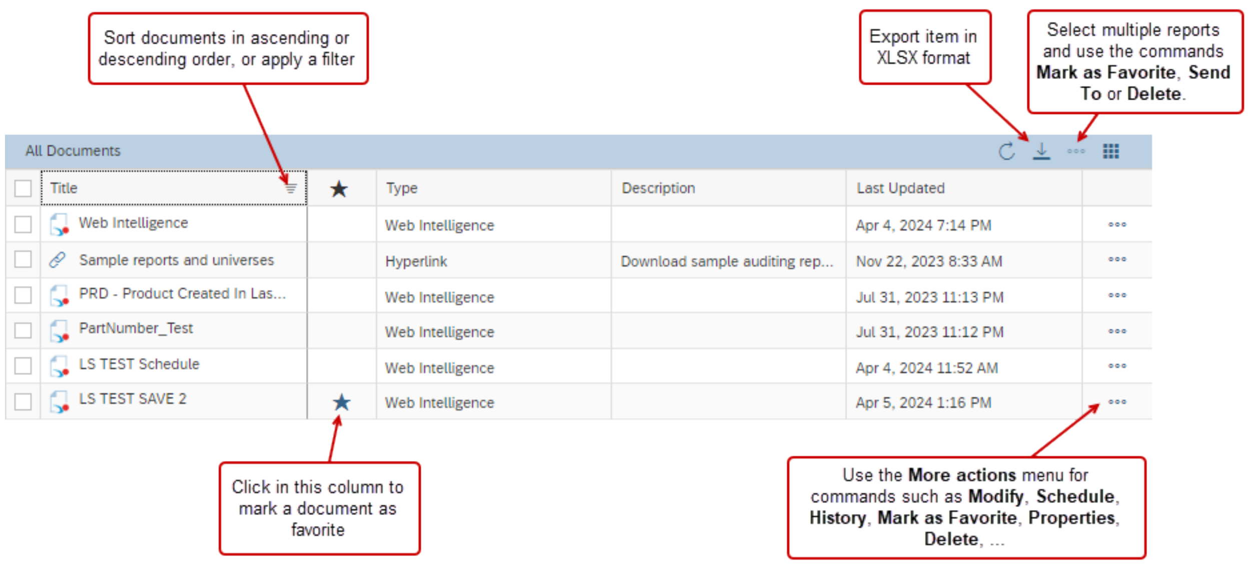


Figure 2-3: Actions in the **Documents** view

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.

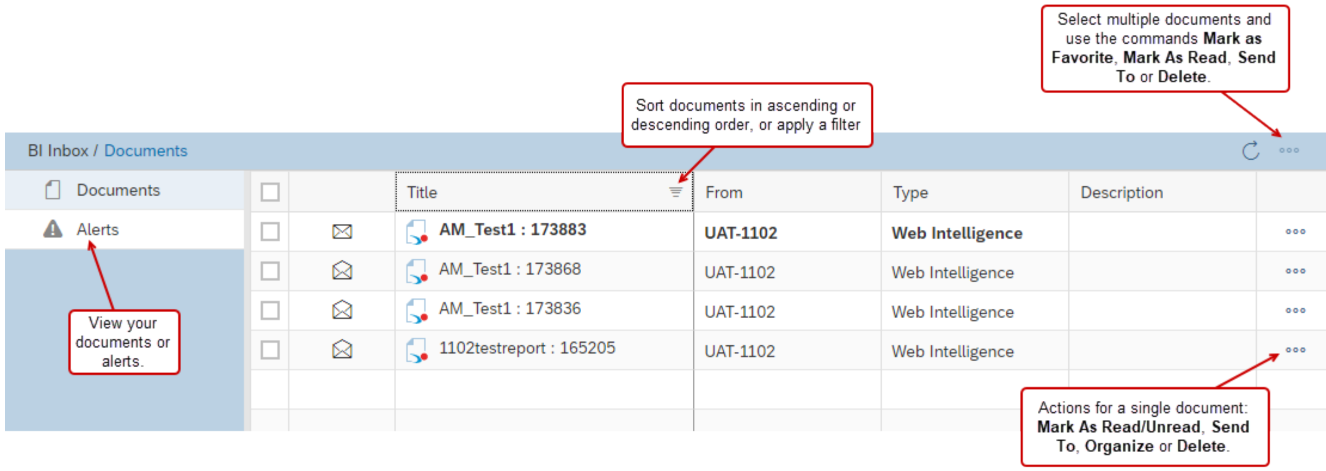


Figure 2-4: Actions in the **BI Inbox** view

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.

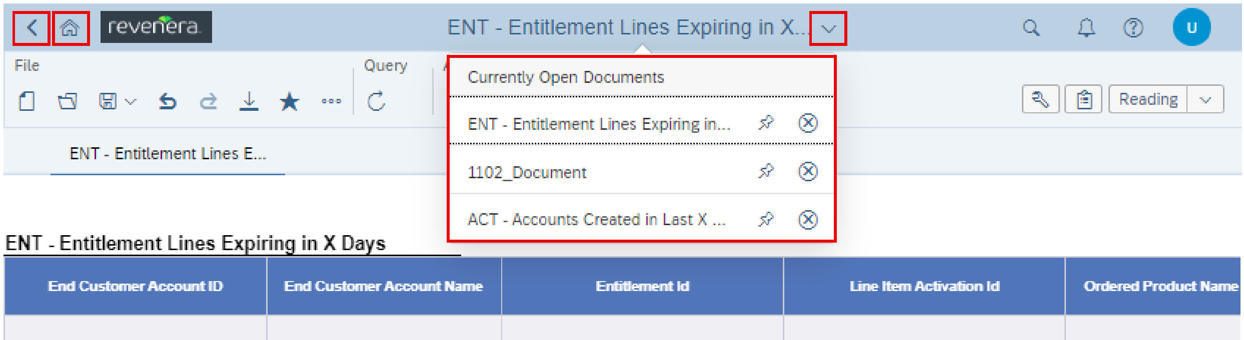


Figure 2-5: Buttons for navigating in Reporter 4.3

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 **Standard Reports** to view a list of available standard reports.
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

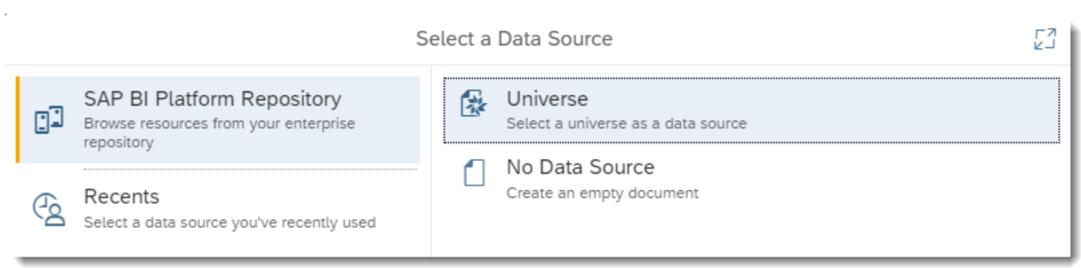
The following procedure creates a Web Intelligence report once you open FlexNet Operations Reporter. The report is based on information currently in the Reporting data warehouse.

- 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**.

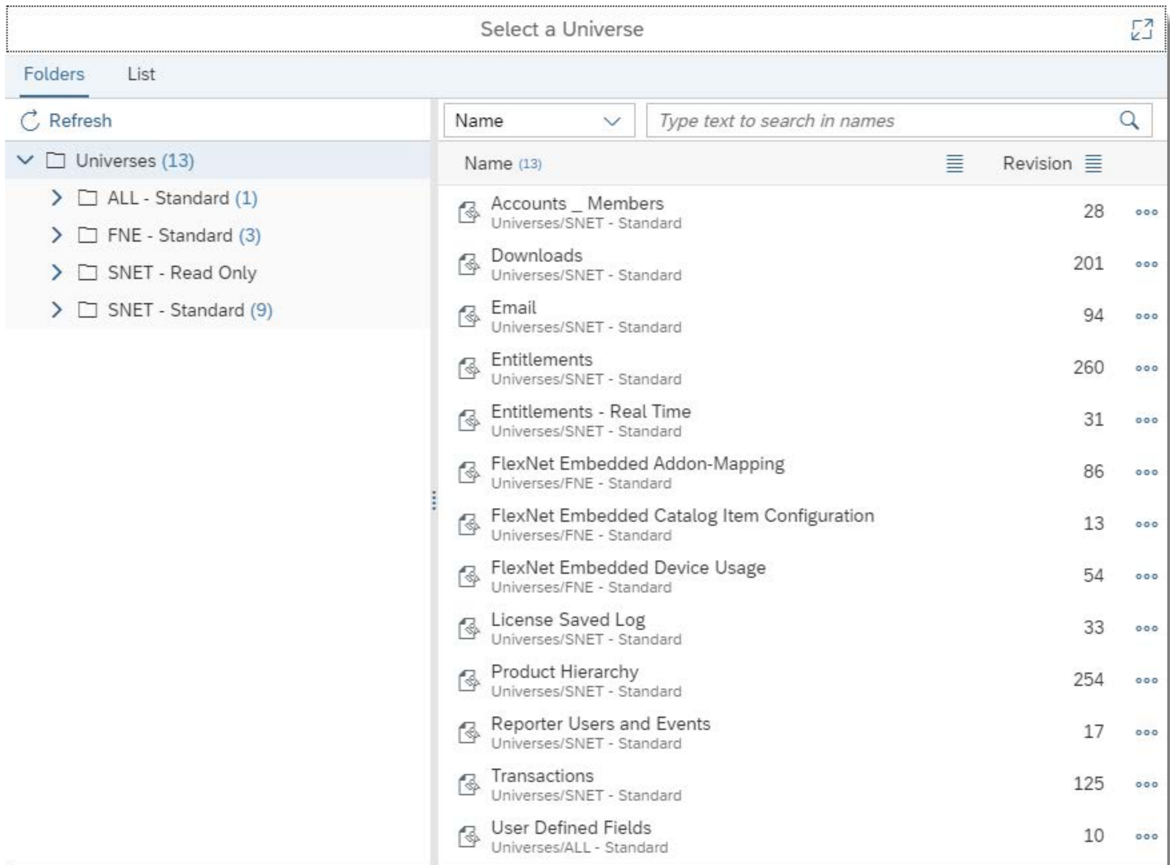


Note *▪ The options **Recents** and **No Data Source** are not supported in this implementation.*

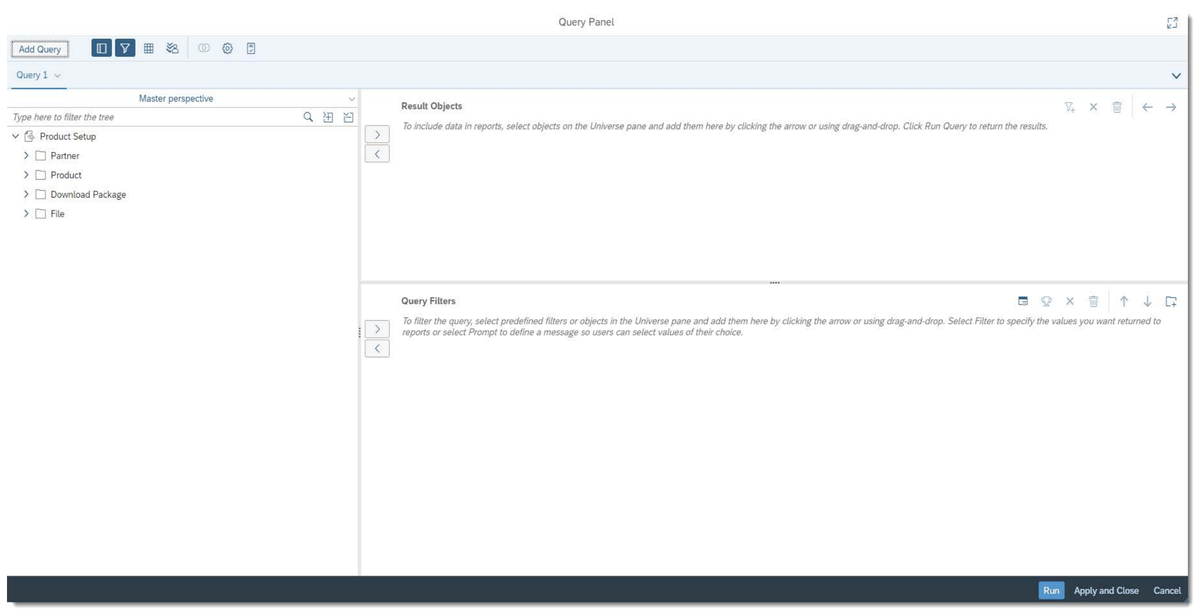
3. From the **Universe** dialog box, select a universe on which to create the report, and click **OK**.

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.

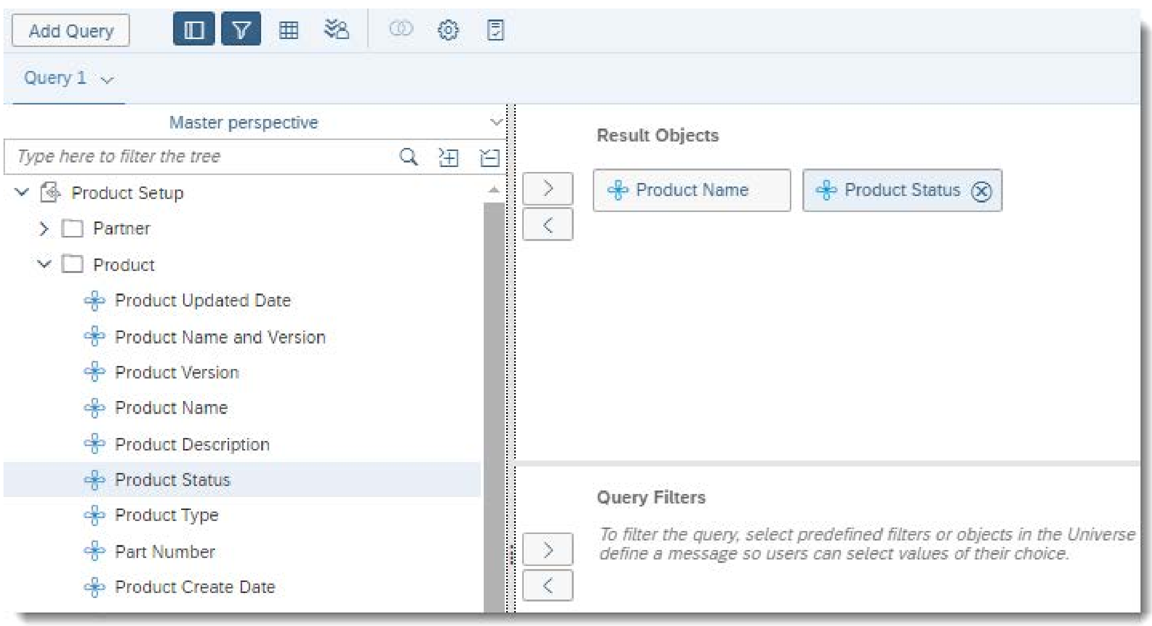
Building a Query

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

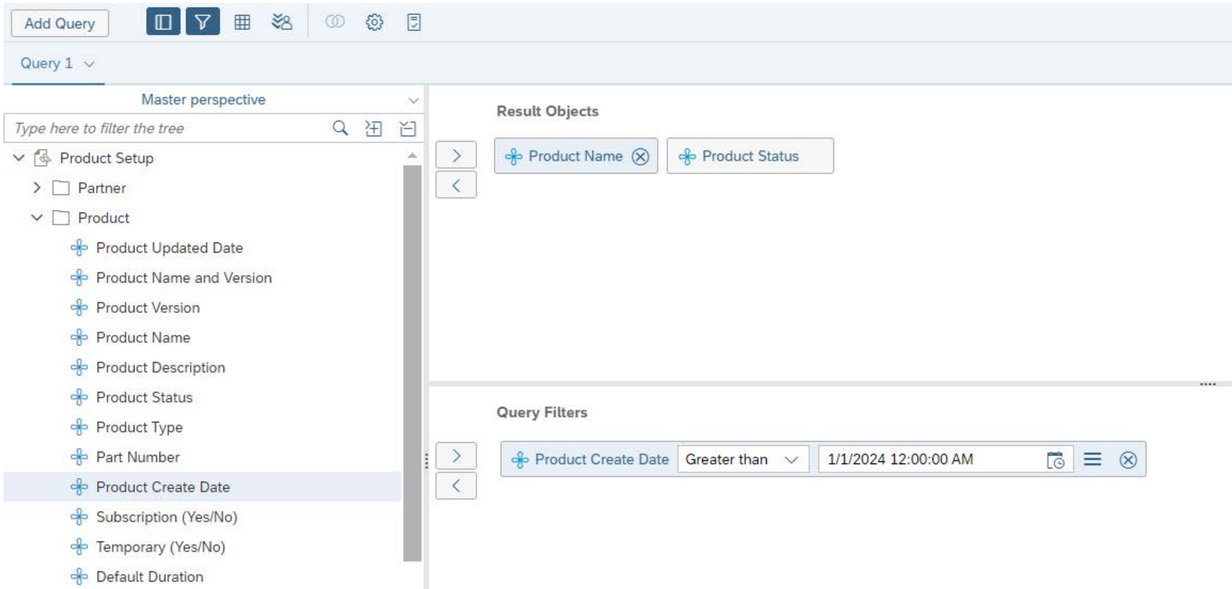
Task ***To build a query using the selected universe***

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.



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



3. 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, the 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**.

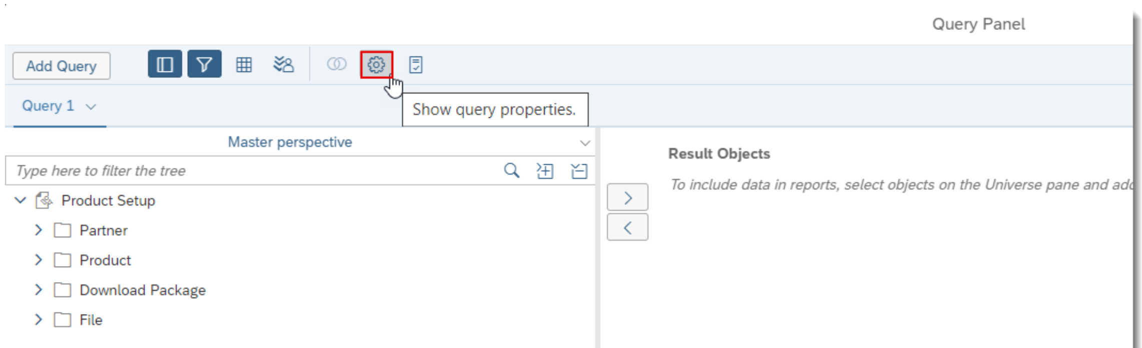
Controlling the Retrieval of Duplicates

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

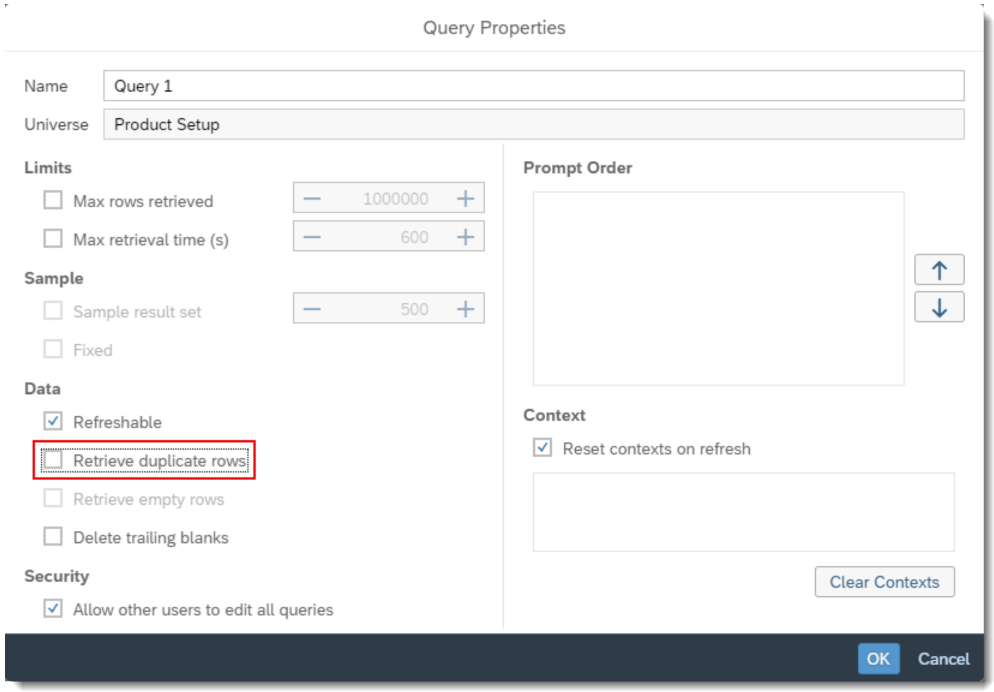
Task ***To disable the retrieval of duplicate records for a report***

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:

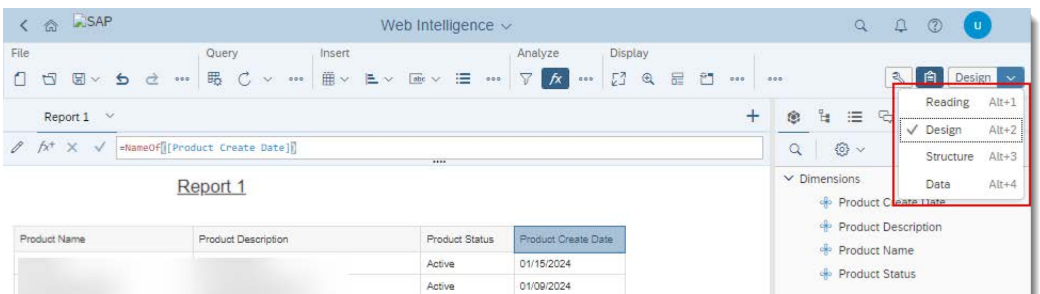


Figure 2-6: Choose the desired mode for the report.

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.

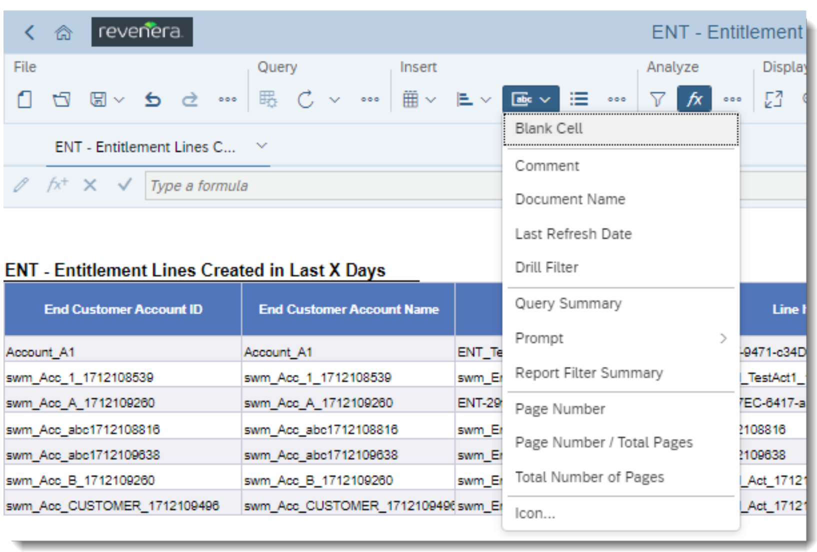
- Inserting Cells
- Inserting Charts
- Converting a Report to a Table or a Chart
- Modifying Charts
- Viewing a Query Summary

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.*



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.

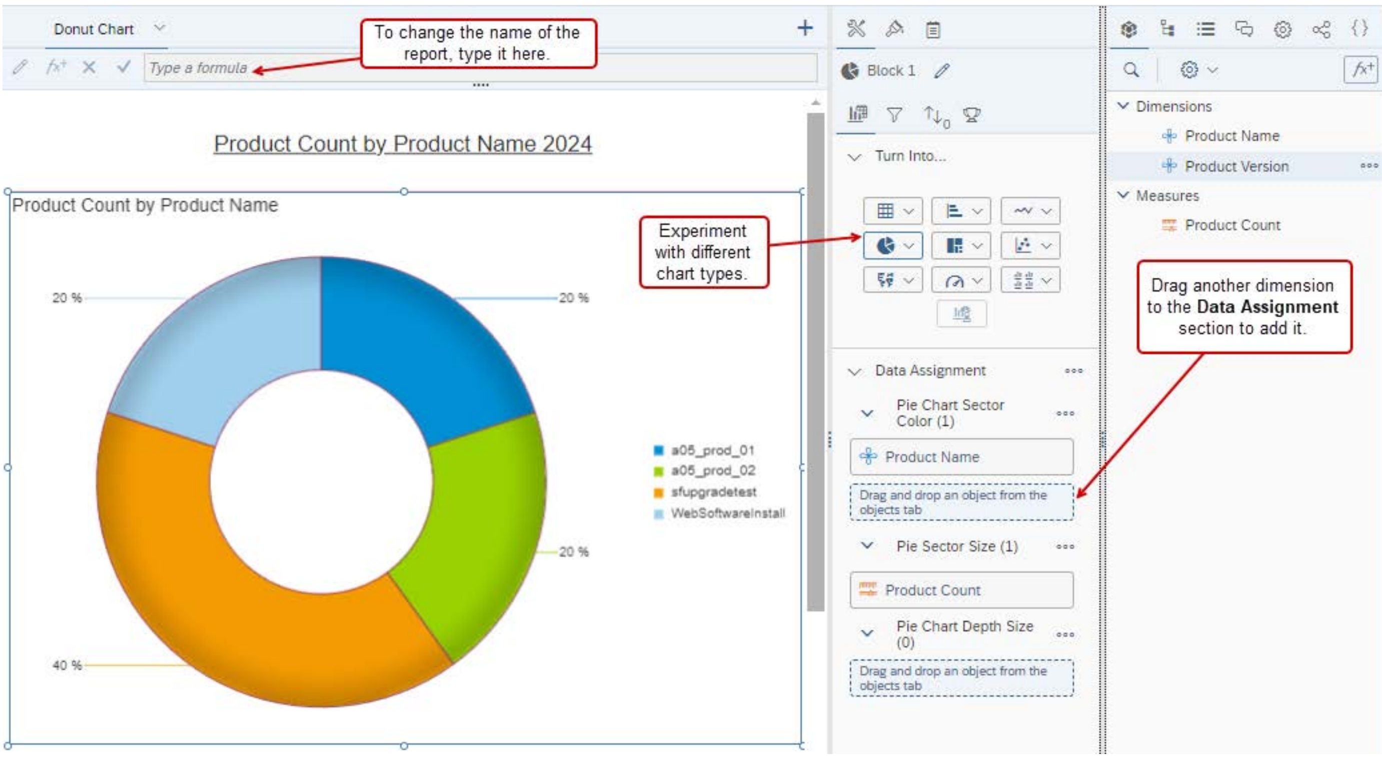
Reporter generates and displays the chart.

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.

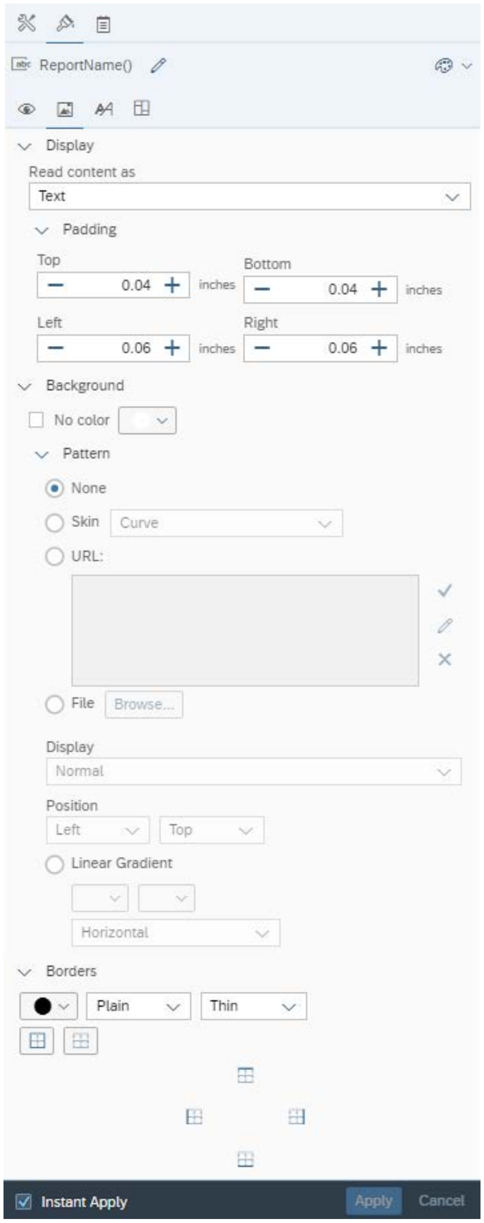


Figure 2-7: Formatting options on the **Appearance Settings** tab

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***

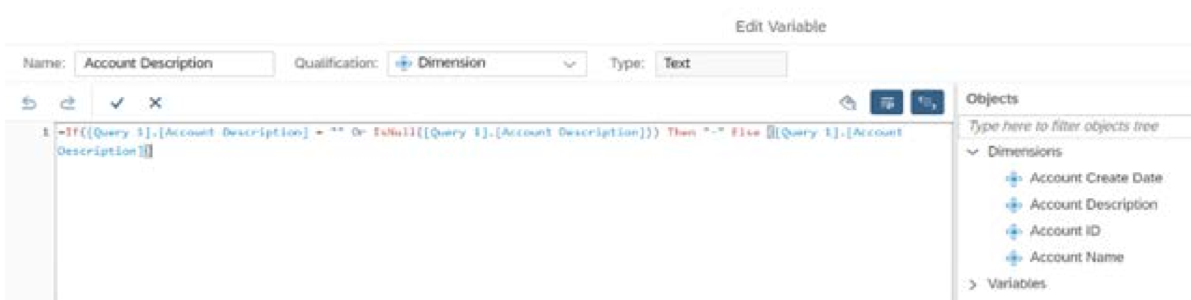
1. Open a report in Design mode and select a column or field with a null value.
2. Click the icon to open the **Main** pane, if it is not already open.
3. Click the icon to open the **Document Dictionary** pane, if it is not already open.
4. In the **Document Dictionary** pane, click the icon to create 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

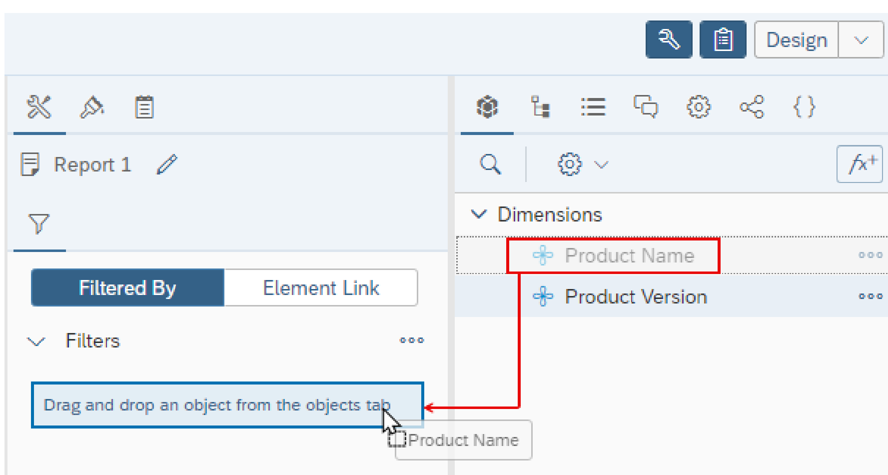
Note ▪ *For more information, see the topic Filtering in the SAP Help Portal.*

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***

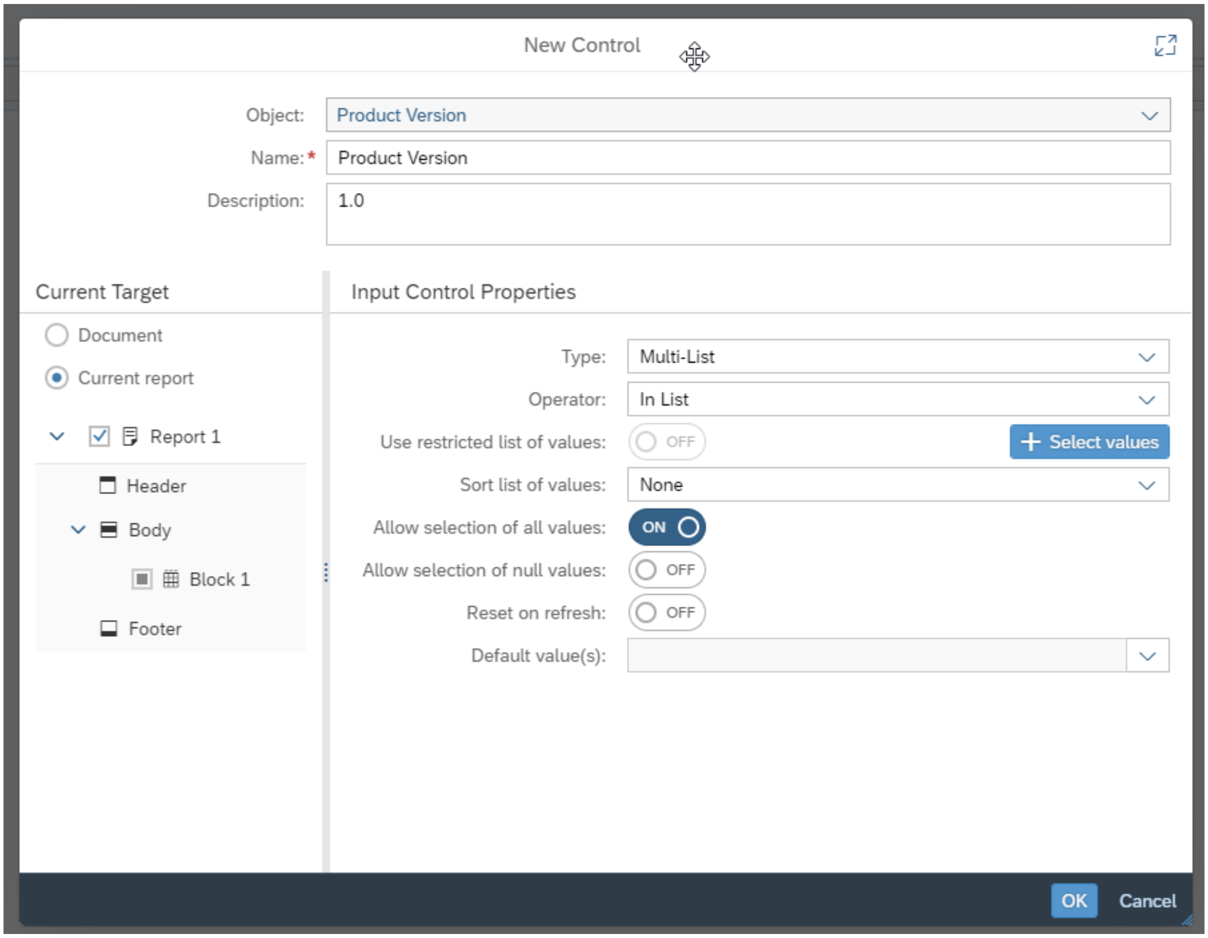
1. In Design mode, in the **Analyze** section of the toolbar, click the button to display the filter bar with the **Manage Filters** icon:

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.*

7. 

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 every time a report runs. 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	• This format is useful if you want to combine the information in the Web Intelligence document with other data in an Excel spreadsheet.
	• Select the scope of the exported data:
	    • Select **Reports** to export the reports’ data, and select the reports you want to export.
	    • Select **Data** to export the document’s raw data, and select the queries you want to export.
	• 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:
	    • Select **Prioritize the formatting of the document** to keep the formatting in the .XLSX file.
	    • Select **Prioritize ease data processing in Excel** to avoid merging multiple cells into Excel cells as much as possible and benefit from the data processing features of Excel.
	• 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.
	• This format does not include the header and footer displayed in the Web Intelligence report.
	• The charts are converted to images, not actual charts.
	• 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.
	
	***Version** ▪ In version 4.2, you could choose between export to .XLS and .XLSX. In version 4.3, documents are exported to .XLSX only.*

Format	Purpose
PDF	• This format is useful to provide the document in a printable format. • The page layout and formatting of the Web Intelligence report is retained in the PDF file. • 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. • Use the **Options** section to fine-tune the range to be exported, the image quality and set whether to include bookmarks.
HTML	• If your document contains several reports, you can export all of them or explicitly select the ones to export.
TXT	• 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). • In page mode, the report elements are exported page by page. • The separator used is a tab space. • Charts and images are not exported. • If several reports are selected, they are appended one after another in the same text file.

CSV	• Select the scope of the exported data:
	  ◦ Select **Reports** to export the reports' data, and select the reports you want to export.
	  ◦ Select **Data** to export the document's raw data, and select the queries you want to export.
	• The formatting and grouping of the Web Intelligence report is not retained in the CSV file.
	• Under **Options** you can configure the following properties:
	  ◦ Text qualifier
	  ◦ Column Delimiter (You can also directly type in a custom character you want to use, such as the pipe (|).)
	  ◦ Charset

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 ScheduleIf 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 ore more destinations. Reporter opens the **Destinations** dialog. Select one or more of the following destinations:

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

When you schedule a report with an event, the report runs after the specified event occurs.

The date when the report runs depends on the timing of the event. The only event that is available in this implementation is Daily Data Refresh, which occurs each day at 05:00 AM PST. When you schedule a report to be triggered by the Daily Data Refresh, you must schedule the report to run before 05:00 AM PST for the report to run on the same day. If you schedule the report to run after 05:00 AM PST, the report will run on the following day.

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** or both. In the **Select Events** dialog, select **UAT Daily Data Refresh** and click **Add**.
3. 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 2-1 ▪ BI Inbox options

Option	Description
Keep an instance in the history	Saves a copy of this instance in the document's history. This option in enabled by default. 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. 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.
Use default settings	The report runs as scheduled but is not sent to any recipients. If you want to select the recipients, leave this option unselected and specify the intended recipients using the options in **Available Recipients** (see below).
Recipients	In the **Available Recipients** 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. To search the recipients, use the Personnel ID.
Target Name	To use a system-generated file name for the instance, select **Use Automatically Generated Name**. To choose a file name for the instance, select **Use Specific Name**, and enter a name or select variables for the file name from the **Add placeholder** list. You can select from several types of variables: Title, ID, Owner, DateTime, (your) Email Address, and (your) User Full Name, and File Extension.
Send As	To send a shortcut to the instance to recipients, select **Shortcut**. To send a copy of the instance to recipients, select **Copy**.

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 2-2 ▪ Email options

Option	Description
Keep an instance in the history	Saves a copy of this instance in the document's history. This option in enabled by default. 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. 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.
Use default settings	Select this check box to use the default Adaptive Job Server values for email. 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 **System Details** (see below).

Table 2-2 ▪ Email options

Option	Description
System Details	Provide the following information: ● **From**—Enter a return email address. *Important ▪ A known issue exists in UAT. Leave the **From** field blank.* ● **To**—Enter the email address of each recipient to send the instance to. ● **Cc**—Enter the email address of each recipient to send a copy of the email and instance to (optional). ● **Bcc**—Enter the email address of each undisclosed recipient to send a copy of the email and instance to (optional). ● **Reply to**—Enter the email address to reply to (optional). ● **Subject**—Enter the subject of the email. ● **Message**— Customize your message content using the rich text editor. *Important ▪ If you leave the **From** field blank, the object will be sent from the login of the user who is currently logged on. Using a **From** email other than one from the flexnetoperations.com domain may result in email being flagged as spam.* *Note ▪ Instead of typing in email addresses, you can also select variables from the **Add placeholder** 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 (;).*
Target Name	Select the **Add Attachment** check box if you want to add an attachment to the email message containing the instance. To use a system-generated file name for the instance, select **Use Automatically Generated Name**. To choose a file name for the instance, select **Use Specific Name**, and enter a name or select variables for the file name from the **Add placeholder** list. Under **File Name**, it is recommended that you select **Use Specific Name** and add the placeholder “Title”. Otherwise, an auto-generated string of characters will be appended to the file name.

FTP Server

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

Table 2-3 ▪ FTP Server options

Option	Description
Keep an instance in the history	Saves a copy of this instance in the document's history. This option in selected by default. 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 **Keep an instance in the history** check box.
Use default settings	Uses the default Adaptive Job Server values for FTP Servers. • 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. • You can change the values in the Servers area of the CMC. For more information, refer to the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.
Host	Enter the IP address of the FTP server host computer where you want to send the instance.
Port	Enter the port of the FTP server where you want to send the instance. The default is 21.
User Name	Enter a user name with access rights to upload the object to the FTP server.
Password	Enter the password required to access the FTP server.
Account	Enter the account required to access the FTP server. The account is part of the standard FTP protocol but is rarely implemented. Enter an account only if your FTP server requires it.
Directory	Enter the path to the FTP directory where you want to send the instance.
File Name	To use a system-generated file name for the instance, select **Use Automatically Generated Name**. • To select the file name for the instance, select **Use Specific Name**, and enter a name or select variables for the file name from the **Add Placeholder** list. You can select from several types of variables: **Title**, **ID**, **Owner**, **DateTime**, (your) **Email Address**, (your) **User Full Name**, and **File Extension**. • Select **Add File Extension** 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.

SFTP Server

SFTP protocol is a computing network protocol for accessing and managing files on remote file systems, similar to FTP. SFTP encrypt 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 2-4 ▪ SFTP Server options

Option	Description
Keep an instance in the history	Select this check box to retain a copy of this instance in the object's history. This check box is selected by default. 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.
Use default settings	Select this check box to use the default Adaptive Job Server values for FTP servers. 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. You can change the values in the Servers area of the CMC. For more information, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.
Host	Enter the IP address of the FTP server host computer where you want to send the instance.
Port	Enter the port of the FTP server where you want to send the instance. The default is 21.
User Name	Enter a user name with access rights to upload the object to the FTP server.
Password	Enter the password required to access the FTP server.
Account	Enter the account required to access the FTP server. The account is part of the standard FTP protocol but is rarely implemented. Enter an account only if your FTP server requires it.
Directory	Enter the path to the FTP directory where you want to send the instance.

Table 2-4 ▪ SFTP Server options

Option	Description
File Name	To use a system-generated file name for the instance, select **Use Automatically Generated Name**. To choose the file name for the instance, select **Use Specific Name**, and enter a name or select variables for the file name from the **Add placeholder** list. The available variables are Title, ID, Owner, DateTime, (your) Email Address, (your) User Full Name, Document Name, Date, and File Extension. Select the **Add File Extension** 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.
Fingerprint	Enter your fingerprint. For more information on how to enter your finger-print, refer to the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

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.

3

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 **Resources** > **Reporter**. The Producer Portal opens Reporter in a new window.

Standard reports are available in Reporter from the **Folders** tile in the **Standard Reports** folder (in the **Public Folders** directory). See the next section for details about each standard report. 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

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

Table 3-1 ▪ Standard Reports

Folder	Section	Description
Account and Member	**MBR001 – Member Detailed Report**	Provides detailed member information.
	MBR002 – Account Detail Report	Shows account information and member count by status.
	MBR003 – Changed Email History	Provides email address information that has changed by member.
	MBR004 – Producer Portal Permission	Provides list of Producer Portal permissions on a member level.
Download	**DNLD001 – Product Download Summary by Product Line**	Presents measures of download activity at Product Line level
	DNLD002 – Download Summary by Region	Provides information about the geographical distribution of download activity at the product level.
	DNLD003 – Download Detail	Provides highly detailed information regarding non-summarized download activity records.

Table 3-1 ▪ Standard Reports

Folder	Section	Description
Email	**EMAIL001 – Bounced Email Detailed Report**	Presents detail DSN email bounces grouped by email type.
	EMAIL002 – Bounced Email Summary Report	Presents counts of DSN email bounces grouped by sent date and email subject.
	EMAIL003 – Update Notification Email Detailed Report	Presents detailed update notification email information.
	EMAIL004 – Update Notification Email Summary Report	Presents summary update notification email information.
Entitlement	**ENTL001 – Account Entitlement Summary by Product Line**	Provides an account level summary of entitlement information, grouped by Catalog Item Product Line.
	ENTL002 – Account Entitlement Detailed Report	Provides detailed entitlement information at the account level.
	ENTL003 – Member Entitlement Summary by Product Line	Provides a member level summary of entitlement information, grouped by Catalog Item Product Line.
	ENTL004 – Member Entitlement Detailed Report	Provides detailed entitlement information on a member level.
	ENTRT001 – Entitlements Created Today Detail	Provides real-time detailed entitlement information on a member level for entitlements created today.
Product Hierarchy	**PRD001 – Product Hierarchy**	Provides Catalog Item, Product and File hierarchy.
Reporter Users & Usage	**REP001 – Reporter Current User List**	Provides list of current Reporter users access rights.
	REP001 – Reporter User Activity Details	Shows detail about actions of a user in Reporter. For example: logins, failed logins and document refreshes.
Transaction	**TRX001 – Transaction Summary by Month**	Provides transaction summary data by month processed, type, submission method and status.
	TRX002 – Transaction Detail	Provides transaction detail data at the single transaction level.

Table 3-1 ▪ Standard Reports

Folder	Section	Description
User Defined Fields	**UDF User Defined Field List**	

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.

Account and Member Standard Reports

The folder **Account and Member** contains the following standard reports:

- MBR001 – Member Detailed Report
- MBR002 – Account Detail Report
- MBR003 – Changed Email History
- MBR004 – Producer Portal Permission

MBR001 – Member Detailed Report

Provides detailed member information.

Report Filter Prompts

Prompt Text	Type	Valid Values
Account Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Account Status (Active, Inactive, or * for all) Enter or select a value: *, Active, Inactive	Single Value In List	*, Active, Inactive
Email Address Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
First Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Last Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Member Status (Active, Inactive, or * for all)	Single Value In List	*, Active, Inactive
Create Date Begin (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
Create Date End (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format

Report Attributes

Report Attribute	Description
Member ID	Unique identifier that your company's internal systems may use to identify end users within your customers
Last Name	Member’s last name
First Name	Member’s first name
Email Address	Member’s email address
System Member ID	Unique value generated by Flexera Software to identify a member
Account ID	Unique identifier that your company’s internal systems may use to identify your customers
Account Name	Descriptive name that your company uses to identify customers
System Account ID	Unique identifier created by Flexera Software when the account was set up on FlexNet Operations Producer Portal
Account Status	Account status: **Active** or **Inactive**
Address Line 1	Address information line 1
Address Line 2	Address information line 2
City	City
State	Standard abbreviation for the U.S. state or Canadian province in which the user is located
Postal Code	Member’s postal code
Country Name	Name of the country in which the member is located
Phone	Member’s phone number
Account Administrator (Yes/No)	Allowed to manage the associated account?
Download Software (Yes/No)	Allowed to download software?
Member Create Date	Date member was created
Member Creation Source	Creation source of a member: *End User Portal*, *Producer Portal*, *Self-Registration*
Member Status	The member's status: **Active** or **Inactive**

MBR002 – Account Detail Report

Shows account information and member count by status.

Report Filter Prompts

Prompt Text	Type	Valid Values
Account Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Account Status (Active, Inactive, or * for all)	Single Value In List	*, Active, Inactive
Member Status (Active, Inactive, or * for all)	Single Value In List	*, Active, Inactive
Begin Account Created Date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
End Account Created Date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format

Report Attributes

Report Attribute	Report Attribute Description
Account ID	Unique identifier that your company's internal systems may use to identify your customers
Account Name	Descriptive name that your company uses to identify customers
System Account ID	Unique identifier created by Revenera when the account was set up on FlexNet Operations Producer Portal
Account Status	Account status: **Active** or **Inactive**
Active Member Count	Number of active members
Inactive Member Count	Number of inactive members

MBR003 – Changed Email History

Provides email address information that has changed by member.

Report Filter Prompts

Prompt Text	Type	Valid Values
Account Status (Active, Inactive, or * for all)	Single Value In List	*, Active, Inactive
Beginning Date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
Ending Date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
Member Status (Active, Inactive, or * for all)	Single Value In List	*, Active, Inactive
New Email Address Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Old Email Address Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any

Report Attributes

Report Attribute	Description
Member ID	Unique identifier that your company's internal systems may use to identify end users within your customers
Last Name	Member's last name
First Name	Member's first name
System Member ID	Unique value generated by Revenera to identify a member
Current Email Address	Member’s current email address
Account ID	Unique identifier that your company’s internal systems may use to identify your customers
Account Name	Descriptive name that your company uses to identify customers
System Account ID	Unique identifier created by Revenera when the account was set up on FlexNet Operations Producer Portal
Old Email Address	Email address prior to change, null for original email address
New Email Address	New email address
Email Address Change Date/Time	Date and time the email address was changed

MBR004 – Producer Portal Permission

Provides list of Producer Portal permissions on a member level.

Report Filter Prompts

Prompt Text	Type	Valid Values
Account Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Account Status (Active, Inactive, or * for all)	Single Value In List	*, Active, Inactive
Last Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Login ID Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Member Status (Active, Inactive, or * for all)	Single Value In List	*, Active, Inactive

Report Attributes

Report Attribute	Description
Account ID	Unique identifier that your company's internal systems may use to identify your customers
Account Name	Descriptive name that your company uses to identify customers
System Account ID	Unique identifier created by Revenera when the account was set up on FlexNet Operations Producer Portal
Account Status	Account status: **Active** or **Inactive**
Last Name	Member's last name
First Name	Member's first name
Email Address	Email address
System Member ID	Unique value generated by Revenera to identify a member
Member Status	The member's status
Producer Portal Admin	If **Yes**, member is able to grant and revoke the FlexNet Operations Producer Portal user permissions listed in this table.
Basic View Access	If **Yes**, member is able to see all of the information in FlexNet Operations Producer Portal. With this permission, a user can also resend Welcome and Order Notification emails.
UAT Access	If **Yes**, member is able to use the FlexNet Operations UAT environment.
Account & Member Management	If **Yes**, member is able to add and edit all account and member information, and activate or reactivate accounts and members.
Entitlement Management	If **Yes**, member is able to enter new entitlements, change existing entitlements, and inactivate or reactivate entitlement lines.
Product Management	If **Yes**, member is able to add and edit all catalog-related information, such as catalog items, products, files, product lines, manufacturers, license groups, and agreements.
Deliver to Account	If **Yes**, member is able to add a file, upload an image, and restrict the file to an account, so files for custom code or hot fixes can be distributed to specific accounts.
Create Email Notifications	If **Yes**, member is able to create Update Notification Email messages that are sent to all members who have access to a specific file or product.

Report Attribute	Description
Queue Email	If **Yes**, member is able to send emails that are created in FlexNet Operations Producer Portal to a queue to be printed at a specified time.
Edit Unsent Emails	If **Yes**, member is able to change email content and distribution lists for unsent (draft status) emails. Users with this permission can also copy the email content and distribution lists of existing email messages.
Submit XML Transactions	If **Yes**, member is able to submit XML transactions from the Upload Transaction File option in the Producer Portal, or through an XML feed.
Maintain Email Templates	If **Yes**, member is able to edit the content of email templates.
Maintain UDF Values	If **Yes**, member is able to add additional values to the drop-down list that appears for existing user defined fields (UDFs).
Maintain HTML Content	If **Yes**, member is able to update all of the documentation that is displayed as content on the FlexNet Operations site.
Create Trial Entitlements	If **Yes**, member is able to approve trial entitlement requests.
View as End User	If **Yes**, member is able to log into FlexNet Operations site as the end user in read-only mode.
Reset Member Password	If **Yes**, member is able to generate a new password for a FlexNet Operations end user without exposing the generated password.
Limited Account and Member Management	If **Yes**, member is able to add, edit, activate, reactivate account and members, but is unable to re-identify or update login without additional permissions.
Merge Accounts	If **Yes**, member is able to merge accounts.
Licensing Support	If **Yes**, member is able to maintain licensing functionality.
Device Management	Add and edit all device- and server-related information, such as devices, servers, mapping and removing add-ons, as well as generating capability responses.
Discovery License Management	
Download File Images	Download file image in the Producer Portal.
Manage FlexNet Secret Keys	View and download FlexNet Embedded binary identity files, edit FlexNet Embedded license models, view or upload FlexNet Embedded publisher.xml files, create or view FlexNet Publisher trusted configurations.

Report Attribute	Description
Transfer, Split and Move Entitlements	Allow a Producer Portal user to transfer, split and move an entitlement on behalf of a customer.
Move Device/Host	Allow a Producer Portal user to move devices and or hosts on behalf of a customer.
Bypass Password Expiration	Exempts the user from the Producer Portal password reset policy.
Reporter Access (Yes/No)	Access the Reporter tool. For UAT, if set with the UAT permission, it also allows access to the UAT Reporter user for that customer.
Send Welcome Email (Yes/No)	Send Welcome email from the View Member page without requiring the Account and Member Management permission (ACMR).

Download Standard Reports

The folder **Download** contains the following standard reports:

- DNLD001 – Product Download Summary by Product Line
- DNLD002 – Download Summary by Region
- DNLD003 – Download Detail

DNLD001 – Product Download Summary by Product Line

Presents measures of download activity at Product Line level.

Report Filter Prompts

Prompt Text	Type	Valid Values
Product Product Line Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Download Begin Date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
Download End Date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format

Report Attributes

Report Attribute	Description
Total Download Records	Sum of total completed downloads plus total incomplete downloads
Total MBytes Downloaded	Total number of megabytes downloaded (1 MByte = 1,048,576 bytes)
Total Download Duration (minutes)	Total time used by download thread(s) to complete download
Throughput (MBytes/Minute)	Megabytes per minute download rate (1 MByte = 1,048,576 bytes)

DNLD002 – Download Summary by Region

Provides information about the geographical distribution of download activity at the product level.

Report Filter Prompts

Prompt Text	Type	Valid Values
Product Product Line Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card.	Any
Download Begin date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
Download End date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format

Report Attributes

Report Attribute	Description
Country	Name of the country in which the member is located
Download Status	Indicates whether the image/segment was successfully downloaded: **Complete** or **Incomplete**
Geographic Region	Geographic region in which the member's country is located
Geographic Sub-Region	Geographic sub-region in which the member's country is located
Throughput (MBytes/Minute)	Megabytes per minute download rate (1 MByte = 1,048,576 bytes)
Total Download Duration (minutes)	Total time used by download thread(s) to complete download
Total Download Records	Sum of total completed downloads plus total incomplete downloads
Total MBytes Downloaded	Total number of megabytes downloaded (1 MByte = 1,048,576 bytes)

DNLD003 – Download Detail

Provides highly detailed information regarding non-summarized download activity records.

Report Filter Prompts

Prompt Text	Type	Valid Values
Account Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Account Status (Active, Inactive, or * for all)	Single Value In List	*, Active, Inactive
Download Status (Complete, Incomplete, or * for all)	Single Value In List	*, Complete, Incomplete
First Name Matches (* is wild card)	Case Insensitive Matches	Any
First Name Matches (* is wild card)	Case Insensitive Matches	Any
Login ID Matches (* is wild card)	Case Insensitive Matches	Any
Member Status (Active, Inactive, or * for all)	Single Value In List	*, Active, Inactive
Download Begin date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
Download End date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format

Report Attributes

Report Attribute	Description
Account ID	Unique identifier that your company’s internal systems may use to identify your customers
Account Name	Descriptive name that your company uses to identify customers
Catalog Item ID	Your company's unique identifier for this item, often this is a sales catalog or price list ID. The **Catalog Item ID** is displayed on the FlexNet Operations Order History page.
Catalog Item Name	Short description of the catalog item, e.g. *Product X with one year maintenance*. The **Catalog Item Name** is displayed on the Order History page and can be used in the Order Notification email.
City	Member’s city
Country Name	Name of the country in which the member is located
Download End Date/Time	Date and time the download ended
Download Method	Indicates whether the user used FTP or HTTP or FASP as the download method

Report Attribute	Description
Download Start Date/Time	Date and time the download started
Download Status	Indicates whether the image/segment was successfully downloaded: **Complete** or **Incomplete**
File ID	Unique value by which your company identifies individual files
File Name	Name of the file
File Size	Size of the file, in bytes
First Name	Member's first name
Full/Partial	If **Full**, the user attempted to download the entire file. Otherwise, the Segment ID indicates which 10 Mbyte segment was downloaded.
Geographic Sub-Region	Geographic sub-region in which the member's country is located
Last Name	Member's last name
Login ID	ID used to login to FlexNet Operations site
Member ID	Unique identifier that your company's internal systems may use to identify end users within your customers
Order Date	Reference date for entitlement
Order ID	Order ID related to entitlement
Postal Code	Member's postal code
Product ID	Unique name or code that your company uses to identify this particular product
Product Name	A user friendly name for the product. The product description is displayed and used as navigation on the FlexNet Operations site.
State	Standard abbreviation for the U.S. state or Canadian province in which the user is located
Total Download Records	Sum of total completed downloads plus total incomplete downloads
Total MBytes Downloaded	Total number megabytes downloaded (1 MByte = 1,048,576 bytes)
Total Download Duration (minutes)	Total time used by download thread(s) to complete download
Throughput (MBytes/Minute)	Megabytes per minute download rate (1 MByte = 1,048,576 bytes)

Email Standard Reports

The folder **Email** contains the following standard reports:

- EMAIL001 – Bounced Email Detailed Report
- EMAIL002 – Bounced Email Summary Report
- EMAIL003 – Update Notification Email Detailed Report
- EMAIL004 – Update Notification Email Summary Report

EMAIL001 – Bounced Email Detailed Report

Presents detail DSN email bounces grouped by email type.

Report Filter Prompts

Prompt Text	Type	Valid Values
Email Address Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Sent Beginning Ddate (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
Sent Ending Date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format

Report Attributes

Report Attribute	Description
Account ID	Unique identifier that your company’s internal systems may use to identify your customers
Account Name	Descriptive name that your company uses to identify customers
System Account ID	Unique identifier created by Revenera when the account was set up on FlexNet Operations Producer Portal
Email Event Name	General name for the purpose of the email, e.g. *Update Notification Email*, *Welcome Email*, *Password Finder*, etc.
Email Address	Email address to which the email is sent
Email Bounced Date	Date the email was returned

EMAIL002 – Bounced Email Summary Report

Presents counts of DSN email bounces grouped by sent date and email subject.

Report Filter Prompts

Prompt Text	Type	Valid Values
Email Address Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Sent Beginning Date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
Sent Ending Date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format

Report Attributes

Report Attribute	Description
Email Sent Date	Date email was sent
Subject Text	Subject of the email
Email Address Count	Number of emails sent

EMAIL003 – Update Notification Email Detailed Report

Presents detailed update notification email information.

Report Filter Prompts

Prompt Text	Type	Valid Values
Email Address Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Sent Beginning Date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
Sent Ending Date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format

Report Attributes

Report Attribute	Description
Scheduled Email Sent Date	Date email was scheduled to be sent
Member ID	Unique identifier that your company's internal systems may use to identify end users within your customer
Email Address	Email address
Last Name	Member's last name
First Name	Member's first name
System Member ID	Unique number assigned by Revenera to identify a member
Account ID	Unique identifier that your company's internal systems may use to identify your customers
Account Name	Descriptive name that your company uses to identify customers
System Account ID	Unique identifier created by Revenera when the account was set up on FlexNet Operations Producer Portal
State	Member's state
Country Name	Member's country
Failed Indicator (Yes/No)	Indicates whether email had DSN failure: **Yes** or **No**

EMAIL004 – Update Notification Email Summary Report

Presents summary update notification email information.

Report Filter Prompts

Prompt Text	Type	Valid Values
Email Address Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Sent Beginning date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
Sent Ending date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format

Report Attributes

Report Attribute	Description
Email Address Count	Number of email addresses to which this email will be sent
Failed Indicator (Yes/No)	**Yes** if the email was returned by the receiving mail server, otherwise **No**
Scheduled Email Send Date	Date the email was scheduled to be sent
Subject Text	Subject of the email

Entitlement Standard Reports

The folder **Entitlement** contains the following standard reports:

- ENTL001 – Account Entitlement Summary by Product Line
- ENTL002 – Account Entitlement Detailed Report
- ENTL003 – Member Entitlement Summary by Product Line
- ENTL004 – Member Entitlement Detailed Report
- ENTRT001 – Entitlements Created Today Detail

ENTL001 – Account Entitlement Summary by Product Line

Provides an account level summary of entitlement information, grouped by Catalog Item Product Line.

Report Filter Prompts

Prompt Text	Type	Valid Values
Account ID Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Account Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Account Status (Active, Inactive, or * for all) Enter or select a value: *, Active, Inactive	Date	Any date: mm/dd/yyyy format
Catalog Item Product Line Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Entitlement Line Status (Active, Inactive, or * for all) Enter or select a value: *, Active, Inactive	Single Value In List	*, Active, Inactive
Entitlement Line Expiration Date Greater Than or Equal To (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format

Report Attributes

Report Attribute	Description
Account ID	Unique identifier that your company's internal systems may use to identify your customers
Account Name	Descriptive name that your company uses to identify customers
System Account ID	Unique identifier created by Revenera when the account was set up on FlexNet Operations Producer Portal
Catalog Product Line ID	Code used to identify a product line
Catalog Product Line	Identifier for a group of catalog items
Catalog System Product Line ID	Revenera's unique identifier for a product line
Number Of Entitlement Lines	Number of entitlement lines

ENTL002 – Account Entitlement Detailed Report

Provides detailed entitlement information at the account level.

Report Filter Prompts

Prompt Text	Type	Valid Values
Account ID Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Account Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Account Status (Active, Inactive, or * for all) Enter or select a value: *, Active, Inactive	Date	Any date: mm/dd/yyyy format
Catalog Item ID Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Catalog Item Product Line Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Entitlement Line Status (Active, Inactive or * for all) Enter or select a value: *, Active, Inactive	Single Value In List	*, Active, Inactive
Entitlement Line Expiration Date Greater Than or Equal To (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format

Report Attributes

Report Attribute	Description
Account ID	Unique identifier that your company's internal systems may use to identify your customers
Account Name	Descriptive name that your company uses to identify customers
System Account ID	Unique identifier created by Revenera when the account was set up on FlexNet Operations Producer Portal
Catalog Item ID	Your company's unique identifier for this item, often this is a sales catalog or price list ID. The **Catalog Item ID** is displayed on the FlexNet Operations Order History page.
Catalog Item Name	Short description of the catalog item, e.g. *Product X with one year maintenance*. The **Catalog Item Name** is displayed on the Order History page and can be used in the Order Notification email.
System Catalog Item ID	Revenera's internal number used to track this catalog item
Order ID	Order ID associated with the entitlement

Report Attribute	Description
Order Date	Reference date for this entitlement
System Entitlement ID	Internal number used by Revenera to uniquely identify entitlement
Entitlement Line Effective Date	Effective date of entitlement line
Entitlement Line Expiration Date	Expiration date of entitlement line
Entitlement Line Quantity	Entitlement line quantity
Entitlement Line Status	Status of the entitlement line: **Active** or **Inactive**

ENTL003 – Member Entitlement Summary by Product Line

Provides a member level summary of entitlement information, grouped by Catalog Item Product Line.

Report Filter Prompts

Prompt Text	Type	Valid Values
Account ID Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Account Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Account Status (Active, Inactive, or * for all) Enter or select a value: *, Active, Inactive	Date	Any date: mm/dd/yyyy format
Catalog Item Product Line Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Email Address Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Entitlement Line Status (Active, Inactive, or * for all) Enter or select a value: *, Active, Inactive	Single Value In List	*, Active, Inactive
Entitlement Line Expiration Date Greater Than or Equal To (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
Last Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Member Status (Active, Inactive, or * for all)	Single Value In List	*, Active, Inactive

Report Attributes

Report Attribute	Description
Member ID	Unique identifier that your company's internal systems may use to identify end users within your customers
Last Name	Member’s last name
First Name	Member’s first name
Email Address	Member’s email address
System Member ID	Unique value generated by Revenera to identify a member
Account ID	Unique identifier that your company’s internal systems may use to identify your customers
Account Name	Descriptive name that your company uses to identify customers
System Account ID	Unique identifier created by Revenera when the account was set up on FlexNet Operations Producer Portal
Catalog Product Line ID	Code used to identify a product line
Catalog Product Line	Identifier for a group of catalog items
Catalog System Product Line ID	Revenera's unique identifier for a product line
Number Of Entitlement Lines	Number of entitlement lines

ENTL004 – Member Entitlement Detailed Report

Provides detailed entitlement information on a member level.

Report Filter Prompts

Prompt Text	Type	Valid Values
Account ID Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Account Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Account Status (Active, Inactive, or * for all) Enter or select a value: *, Active, Inactive	Date	Any date: mm/dd/yyyy format
Catalog Item ID Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Catalog Item Product Line Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Email Address Matches (* is wild card)	Case Insensitive Matches asterisk (*) is wild card	Any
Entitlement Line Status (Active, Inactive, or * for all) Enter or select a value: *, Active, Inactive	Single Value In List	*, Active, Inactive
Entitlement Line Expiration Date Greater Than or Equal To (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
Last Name Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any

Report Attributes

Report Attribute	Description
Member ID	Unique identifier that your company's internal systems may use to identify end users within your customers
Last Name	Member’s last name
First Name	Member's first name
Email Address	Member’s email address
System Member ID	Unique value generated by Revenera to identify a member
Account ID	Unique identifier that your company’s internal systems may use to identify your customers
Account Name	Descriptive name that your company uses to identify customers
System Account ID	Unique identifier created by Revenera when the account was set up on FlexNet Operations Producer Portal
Catalog Item ID	Your company's unique identifier for this item, often this is a sales catalog or price list ID. The **Catalog Item ID** is displayed on the FlexNet Operations Order History page.
Catalog Item Name	Short description of the catalog item, e.g., *Product X with one year maintenance*. The **Catalog Item Name** is displayed on the Order History page and can be used in the Order Notification email.
System Catalog Item ID	Revenera's internal number used to track this catalog item
Order ID	Order ID associated with the entitlement
Order Date	Reference date for this entitlement
System Entitlement ID	Internal number used by Revenera to uniquely identify entitlement
Entitlement Line Quantity	Entitlement Line Quantity
Entitlement Line Effective Date	Effective date of entitlement line
Entitlement Line Expiration Date	Expiration date of entitlement line
Entitlement Line Status	Status of the entitlement line. Active or Inactive.

ENTRT001 – Entitlements Created Today Detail

Provides real-time detailed entitlement information on a member level for entitlements created today.

***Note** ▪ Only available in production environment*

Filter Report Prompts

Report contains no prompts.

Report Attributes

Report Attribute	Description
Account Name	Descriptive name that your company uses to identify customers
Account ID	Unique identifier that your company's internal systems may use to identify your customers
System Account ID	Revenera's internal key for an account
Order ID	Order ID related to entitlement
System Entitlement ID	Internal number used by Revenera to uniquely identify entitlement
Order Date	Reference date for this entitlement
Entitlement Line #	Entitlement line number
Catalog Item ID	Your company's unique identifier for this item, often this is a sales catalog or price list ID. The **Catalog Item ID** is displayed on the FlexNet Operations Order History page.
Catalog Item Name	Short description of the catalog item, e.g., *Product X with one year maintenance*. The **Catalog Item Name** is displayed on the Order History page and can be used in the Order Notification email.
Entitlement Line Quantity	Entitlement line quantity
Entitlement Line Effective Date	Effective date of entitlement line
Entitlement Line Expiration Date	Expiration date of entitlement line
Entitlement Line Status	Status of the entitlement line: **Active** or **Inactive**

Product Hierarchy Standard Reports

The folder **Product Hierarchy** contains the following standard report:

- PRD001 – Product Hierarchy

PRD001 – Product Hierarchy

Provides Catalog Item, Product and File hierarchy.

Report Filter Prompts

Prompt Text	Type	Valid Values
Catalog Item ID Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Catalog Item ID Matches (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any
Catalog Item Status (Active, Inactive, or * for all)	Single Value In List	*, Active, Inactive

Report Attributes

Report Attribute	Description
Catalog Item ID	Your company's unique identifier for this item, often this is a sales catalog or price list ID. The **Catalog Item ID** is displayed on the FlexNet Operations Order History page.
Catalog Item Status	Catalog item status: **Active** or **Inactive**
File Description	Description of the file shown on the FlexNet Operations Download page
File Name	Name of the file
Product ID	Unique name or code that your company uses to identify this particular product
Product Name	A user friendly name for the product. The product description is displayed and used as navigation on the FlexNet Operations site.

Reporter Users & Usage Standard Reports

The folder **Reporter Users & Usage** contains the following standard reports:

- REP001 – Reporter Current User List
- REP001 – Reporter User Activity Details

REP001 – Reporter Current User List

Provides list of current Reporter users access rights.

Report Filter Prompts

Report contains no prompts.

Report Attributes

Report Attribute	Description
User Id	User's login ID to access Reporter
User Status	User's Reporter login status: **Active**, **Disabled**, or **Password Disabled**. **Password Disabled** means the account was automatically disabled after a user attempted to log in three times and failed.

REP001 – Reporter User Activity Details

This report is currently unavailable.

Transaction Standard Reports

The folder **Transaction** contains the following standard reports:

- TRX001 – Transaction Summary by Month
- TRX002 – Transaction Detail

TRX001 – Transaction Summary by Month

Provides transaction summary data by month processed, type, submission method, and status.

Report Filter Prompts

Prompt Text	Type	Valid Values
Transaction Status (Successful, Failed, Canceled, or * for all)	Single Value In List	*, Successful, Canceled, Failed
Begin Month	Single Value In List	Select from list
End Month	Single Value In List	Select from list

Report Attributes

Report Attribute	Description
Month Processed	Month the transaction was processed
Submit Method	Method used to submit the transaction
Transaction Count	Number of transactions
Transaction Status	Status of the transaction
Transaction Type	Transaction type

TRX002 – Transaction Detail

Provides transaction detail data at the single transaction level.

Report Filter Prompts

Prompt Text	Type	Valid Values
Beginning process date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
Ending process date (mm/dd/yyyy)	Date	Any date: mm/dd/yyyy format
Transaction Status (Successful, Failed, Canceled, or * for all)	Single Value In List	*, Successful, Canceled, Failed
Transaction Type Matches Prompt (* is wild card)	Case Insensitive Matches, asterisk (*) is wild card	Any

Report Attributes

Report Attribute	Description
System Transaction ID	Unique number assigned by Revenera to track a transaction
Transaction ID	Transaction identifier
Batch ID	Revenera assigns a unique batch ID to transactions submitted through the automated XML data feed or as part of an uploaded XML file. The **Batch ID** is applied to all of the transactions within a single XML document.
Processed Date/Time	Date and time the transaction was processed
Submitted By Email Address	Email address of the member who submitted the transaction
Transaction Status	Status of the transaction
Transaction Type	Transaction type
Submit Method	Method used to submit the transaction

User Defined Fields Standard Reports

The folder **User Defined Fields** contains the following standard report:

- UDF User Defined Field List

UDF User Defined Field List

Displays the **User Defined Field** labels for all defined UDF types.

Report Filter Prompts

Report contains no prompts.

Report Attributes

Report Attribute	Description
Account	Account information
Catalog Item	Catalog item
Entitlement	Entitlement information