Business Insight Authoring

Getting Started Guide

ImageNow Version: 6.7.x

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Overview

Perceptive Software introduces Business Insight, which includes the authoring tools Query Studio and Report Studio. This guide introduces how to use Business Insight so that you can begin working with reports. This guide is divided into five sections.

- The “Welcome to Business Insight” section enables you to understand the Business Insight author role and how the author interacts with ImageNow, and the differences between the report authoring programs.
- The “Business Insight for report authors” section introduces the report author to the roles, terminology, and responsibilities he or she should be familiar with.
- The “Authoring reports in Query Studio section introduces the report author to the Business Insight Query Studio and outlines the initial report authoring procedures.
- The “Authoring reports in Report Studio” section introduces the report author to the Business Insight Report Studio and explains how to create reports in this advanced authoring tool.
- The reference section contains tables of toolbars and toolbar buttons associated with the Business Insight authoring programs.

More specialized topics about working with Business Insight reports are provided on the Perceptive Software website, in the Customer Portal, on the Product Documentation tab.

Note This guide is designed specifically for the report author. It does not cover the getting started procedures for the ImageNow owner, manager, report manager, or report user. For information about getting started with Business Insight in one of these roles, refer to *Business Insight Getting Started Guide*, available on the Perceptive Software website.

Welcome to ImageNow Business Insight

In this section, you'll learn the benefits and features of Business Insight and gain an understanding of reports. You can also use this section to obtain answers to commonly asked questions about Business Insight.

What is Business Insight?

ImageNow Business Insight allows you to present your ImageNow data using a ready-to-run library of reports as well as the reports created by your Business Insight Author user. In Business Insight, you can view, run, schedule, and archive instances of the reports used in your enterprise. Flexible output allows you to run, view, and save instances of a report as an HTML page, a PDF document, a comma-separated file (CSV), an XML file, or as a Microsoft Excel spreadsheet. You can then distribute instances of the report instantly using e-mail, shared file locations, or FTP.

With Business Insight, high-level dashboards, self-service report tools, and other flexible options enable your organization to evaluate and improve the efficiency of content-related routines. Business Insight allows you to:

- Make more informed business decisions with dashboards regarding ECM-supported processes
- Improve process and workflow efficiencies through advanced analytic tools and reporting
- Expedite audits across your enterprise and provide nonintrusive system transparency
- Quickly identify deficiencies and discrepancies within your content and data repository
- Manage and measure productivity using standard and consistent reporting
- Provide all ImageNow users with the metrics they need for systemwide report access

What is a report?

Business Insight reports are reports you can run on demand, schedule to run on a specified interval, and deliver as viewable output to users in ImageNow Explorer. A report is a predefined set of data and parameters used to produce an instance of the report that uses the parameters to return a subset of data that can be distributed to your users and viewed in the ImageNow Explorer. A Business Insight license is required to use reports.

Frequently asked questions

The following table lists frequently asked questions about Business Insight.

Question	Answer
Are reports created by the report author visible to everyone?	Yes. The report manager assigns report-level viewing privileges for authored reports the same way he assigns privileges for the ImageNow report library.
I have the ImageNow report library, but I need a specific report. Can I create my own reports, or do I need to request a custom report?	You can create reports to supplement the ones in the ImageNow report library using data from your reporting database. You can also request a custom report by contacting your Perceptive Software representative.
How many ImageNow users can view and run Business Insight reports?	All ImageNow users can view and run the reports for which they have the necessary privileges.
How many report managers can I designate?	The report manager can specify as many as needed.
How many report authors can I designate?	You can specify as many report authors as you have Business Insight Author licenses.
Can report managers assign report level privileges to a group?	No. At this time, the report manager can only assign report-level privileges and management privileges to users. Only the Reports View privilege can be assigned to a group.
If I e-mail a report to someone who does not have the View privilege for the report, can the user see the report?	If you specify the option to include a link to the report, the user cannot see the report if he or she does not have the View privilege for the report. If you specify the option to attach the report, the user can see the report.
Can I create multiple schedules for a report?	No. Each report can only have one schedule. Copying the report allows you to define multiple schedules.
Does ImageNow automatically refresh the report list when the report author creates a new report?	No. You must exit ImageNow and log back in to see the new reports.
Does the author need to have SQL query knowledge to create reports?	No. With drag-and-drop authoring, any user can create reports.
Can I view reports in WebNow?	Yes. Users can view report instances in the WebNow Explorer the same way you view them in ImageNow Explorer, as long as a Business Insight license is installed.
Does the native viewing setting affect the way I view reports in WebNow?	No. You can view reports whether native viewing is enabled or disabled.

Business Insight for report authors

In this section, you'll gain an understanding of the Business Insight report author role, what qualifies an ImageNow user to be a report author, and understand the tasks the report author performs in the

Management Console. You'll also determine the correct scenarios for using the two Business Insight report authoring programs.

What does the report author do?

The Business Insight Author can perform the following actions for reports in your ImageNow system:

- Create new reports using the ImageNow Business Insight Query Studio or Report Studio programs.
- Create new reports using an ImageNow view or an XML specification file.
- Modify existing reports in Query Studio or Report Studio.
- Copy and rename reports.
- Delete reports from your ImageNow system. When you delete a report, the report, its schedule, and all saved instances of the report no longer exist.

Report authors can also perform all the functions a report manager and a report user can. For more information on the functions involved in these roles, refer to the *Business Insight Getting Started Guide*, available on the Perceptive Software website.

Who can be a report author?

You can configure the report author role for as many ImageNow users as you have available Business Insight Author licenses. If you want to change the report author from one user to another, you can do so by changing the author users in Management Console. If you are unsure of which user to grant the report author role to, you can use the following guidelines to determine a good candidate for this role.

The Business Insight report author should have:

- Working knowledge of the database schema of your ImageNow reporting database
- Some level of SQL query knowledge
- Familiarity with drag-and-drop report authoring programs

The Business Insight Author license is a concurrent use license that behaves like a per seat license. You can only configure the number of authors for which you have licenses.

For example, if you have three Business Insight Author licenses, you can only add three users to the Authors tab in the Reports area of Management Console. If you attempt to add a fourth user, the message "You cannot select more than 4 users because of license or volume limitations" appears.

Getting started with report authoring

Users with the report authoring role work in the ImageNow Management Console, the Business Insight Query Studio, and the Business Insight Report Studio to create reports for your enterprise. Before you can begin creating reports, a report manager must grant you the report authoring role. In the ImageNow Management Console, report authors perform the following tasks.

- Configure report authors
- Create a new report or query
- Modify existing reports
- Copy existing reports
- Rename existing reports
- Delete existing reports

Report authoring programs

Your ImageNow Business Insight suite includes two report authoring programs you can use to create reports:

- **Query Studio** allows you to create quick ad hoc reports using your ImageNow data
- **Report Studio** allows you to create professional reports with customizable layout using your ImageNow data.

Which authoring program do I use?

If you are unsure of which program you want to use to author a report, refer to the following guidelines:

I want to	Program to use
Build a simple, ad hoc report	Query Studio
Build a complex, professional report	Report Studio
Create a report I can preview with actual data while building	Query Studio
Build a report with multiple pages	Report Studio
Use SQL query data to generate report data	Report Studio
Create a report using existing queries	Query Studio
Create a template for building Query Studio reports	Report Studio
Use an existing template to create a quick report	Query Studio
Create a report with prompt pages the user completes each time he runs the reports	Report Studio
Define pixel-perfect layout for a report	Report Studio
Create a report that displays the data you need without configuring complex layout and formatting	Query Studio

Configure report authors

To begin authoring reports, a user with the Manage Reports privilege must configure the report author users.

1. In **Management Console**, in the left pane, click **Reports**.
2. In the right pane, on the **Authors** tab, check the number of author users you can add in the **Available Authors** area.
3. If authors are available, click **Add**.
    1. In the **Select Users** box, type all or part of a user name, first or last name, and then click **Search**.
    2. In the **Search results** list, select the user or users you want and click **OK** to return to the Management Console.

Create a report

As a report author, you can use the following procedure to begin a new report from ImageNow Management Console. Refer to the “Authoring reports in Query Studio” and “Authoring reports in Report Studio” sections of this guide for instructions on using the authoring programs

1. In **Management Console**, in the left pane, click **Reports**.
2. In the right pane, on the **Reports** tab, click **New** and then do one of the following actions:
    - To create a simple, ad-hoc report, click **Query**. This launches the Business Insight Query Studio.
    - To create a complex, professional report, click **Report**. This launches the Business Insight Report Studio.
3. In the **Select a package** dialog box, click the **Packages** folder and then do one of the following actions:
    - To create a workflow, task, document, or project report, select **Business Logic View**.
    - To create an administrative or retention report, select **Data Source View**.
4. In **Query Studio** or **Report Studio**, create the report.

Create a report from a file

As a report author, the following steps explain how to create a new report from an XML specification file in ImageNow Management Console. Refer to the “Authoring reports in Query Studio” and “Authoring reports in Report Studio” sections of this guide for instructions on using the authoring programs

1. In **Management Console**, in the left pane, click **Reports**.
2. In the right pane, on the **Reports** tab, click **New** and select **Report from file**.
3. In the **Create Report from File** dialog box, do the following actions:
    1. In **Select a report**, click the **Choose File** button, navigate to the file you want to import, and then click **Open**.
    2. In the **Report name** box, enter a name for the report.
    3. In the **Report folder** list, select the folder location.
    4. Click **OK**.
4. After the report imports, click **OK**.

Create a report from a view

As a report author, the following steps explain how to create a new report using the data defined in an ImageNow view. Refer to the “Authoring reports in Query Studio” and “Authoring reports in Report Studio” sections of this guide for instructions on using the authoring programs .

1. In **Management Console**, in the left pane, click **Reports**.
2. In the right pane, on the **Reports** tab, click **New** and select **Report from view**.
3. In the **Create Report from View** dialog box, do the following substeps:
    1. In the View type list, select **Document** or **Folder**.
    2. In the **Select a view** list, select the view to use for the report.
    3. In the **Report name** box, enter a name for the report.

       Note The name you specify appears as the default title on the report.
    4. In the **Report folder** list, select the folder for the report.
    5. Click **OK**.
4. The generated report opens in Report Studio. If prompted to close an Internet Explorer window, click **Yes**.

Modify a report

As a report author, the following steps explain how to to modify a report that appears in the Reports area of ImageNow Management Console in the program used the create the report.

1. In **Management Console**, in the left pane, click **Reports**.
2. In the right pane, on the **Reports** tab, select the report and then click **Modify**.
3. In **Query Studio** or **Report Studio**, modify the report.

Note For instructions on using the authoring programs, refer to the “Authoring reports in Query Studio” and “Authoring reports in Report Studio” sections of this guide.

Copy a report

The following steps explain how to create a specialized copy of a report. A copy of the report is created in the report folder.

1. In **Management Console**, in the left pane, click **Reports**.
2. In the right pane, on the **Reports** tab, select the report and then click **Copy**.

Rename a report

After you copy a report, you must perform this procedure to rename the report.

1. In **Management Console**, in the left pane, click **Reports**.
2. In the right pane, on the **Reports** tab, select the report and then click **Rename**.
3. In the **Rename Report** dialog box, type a new name for the report and then click **OK.**

Delete a report

As a report author, you can delete a report from your ImageNow system. When you delete a report, all saved instances of the report and schedules assigned to the report are also deleted.

1. In **Management Console**, in the left pane, click **Reports**.
2. In the right pane, select the report and then click **Delete**.
3. In the **Delete Report** dialog box, click **Yes**.

Authoring reports in Query Studio

In this section, you'll learn the fundamentals of creating simple, ad-hoc reports in Business Insight Query Studio and gain an understanding of the functionality available in Business Insight Query Studio.

What is Query Studio?

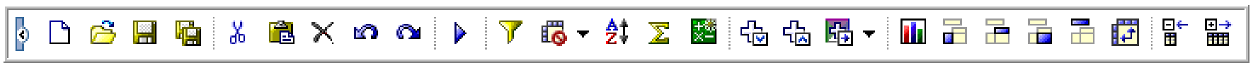
The Query Studio module of ImageNow Business Insight enables you to create simple, on-demand queries and reports using the data in your existing business intelligence database model. With Query Studio, you can easily create and modify reports without extensive database schema or SQL query knowledge. When you access Query Studio from the ImageNow Management Console, the items in your reporting database appear as tree objects in the navigation menu. From there, you can drag and drop objects into the Query Studio workspace to create ad hoc reports. Using this reporting tool, you can perform the following actions:

- Transform information in your business intelligence data source into report items
- Use the data source report items to create reports you can save for future use
- Create new reports based on existing queries
- Compare and analyze data using filters, summaries, and calculations
- Use charts and other layout tools to visually present your report data

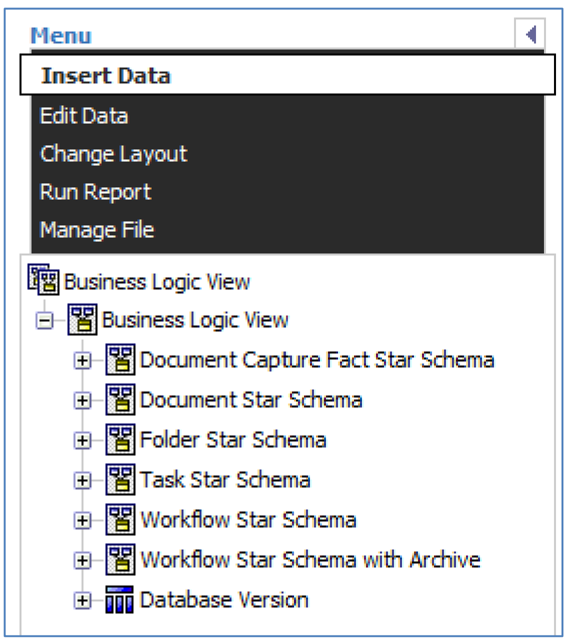
Navigating in Query Studio

The Query Studio interface consists of the Query Studio toolbar, the style toolbar, the Menu pane, and the workspace.

The toolbars allow you to perform quick tasks in your report. For more information about the Query Studio and style toolbar functions, refer to the “Reference” section of this guide. You can hide and show the toolbars as necessary.



The Menu pane allows you to view the data in your reporting database that you can use to build your reports, edit the data in your report, change the formatting and layout of the report, preview the report, and manage the report file. You can hide and show the menu pane as necessary.



The workspace allows you to design and build the report. To build your report, you drag items from the Menu pane to the workspace. When you access Query Studio, the workspace includes a title area and an empty list.

Getting started with Query Studio

New reports created in Query Studio contain no data. When you add report items to the report, the items appear as columns in the workspace. When you add a report item by double-clicking or using the Insert button, Query Builder automatically inserts the new report item in a list column immediately following the last inserted report item. When you drag a report item from the Menu pane to the workspace, you can determine its column position.

For more information about the different types of report items, refer to the “Reference” section of this guide. In Query Studio, you can create a list report, a crosstab report, or a chart.

This guide only presents a limited subset of the procedures you can use to build reports in Query Studio. For more information about building reports in Report Studio, refer to ImageNow Business Insight Query Studio Help, available on the Perceptive Software website.

Common procedures in Query Studio

The following procedures enable you to create a quick report using Business Insight Query Studio, add data to the report, apply some basic layout formatting to the report, and then save it in ImageNow.

- Create a new Query Studio report from ImageNow Management Console
- Define a title for the Query Studio report
- Add and remove data in columns to the report
- Save the report for future use in ImageNow

Report items appear as columns in the report in the order in which you add them. Typically, data gets more granular with each column to the right. For example, from left to right, a report's columns include Workflow Process, Workflow Queue, and Item Count.

Start a new report

You can use this procedure to begin a new report from ImageNow Management Console and then open the Query Studio authoring program.

1. In **Management Console**, in the left pane, click **Reports**.
2. In the right pane, click **New** and then point to **Query**.
3. In the select a package page, under **List of all packages**, click the **Packages** folder and then select **Business Logic View** or **Data Source View**.

Define a report title

You can use this procedure to add a title and subtitle to the report.

1. In the **Menu** pane, click the **Change Layout** tab and then click **Edit Title Area**.
2. In the **Edit title area** dialog box, do the following actions:
    1. In the **Title** box, type the title you want to appear on the report.
    2. Optional. In the **Subtitle** box, type a subtitle. The subtitle appears directly below the title in the report.
    3. If you want filters defined in the report to appear in the title area, select the **Show filters** check box and leave the **Subtitle** box blank.
    4. If you want sorting defined in the report to appear in the title area, select the **Show sorts** check box.
    5. If you want suppressed objects such as empty cells defined in the report to appear in the title area, select the **Show suppression** check box.
3. Click **OK**.

Add report columns

In Query Studio, you can add columns to the report, specify whether to add additional columns to the left or right, and add multiple columns.

To add a column to the report

1. On the **Menu** pane, click the **Insert Data** tab and expand the data source tree.
2. Select the report item you want to add to the report.
3. Click **Insert**.

   Note You can also drag the item from the **Menu** pane to the workspace.

To add a column to the right

1. If any columns are selected in the workspace, click anywhere outside the list to clear the selection.
2. On the **Menu** pane, click the **Insert Data** tab and expand the data source tree.
3. Select the report item you want to add to the report.
4. Click **Insert**.

   Note You can also drag the item from the **Menu** pane to the right of the column in the workspace.

To add a column to the left

1. Click the column heading of the column for which you want to insert a column to the left.
2. On the **Menu** pane, click the **Insert Data** tab and expand the data source tree.
3. Select the report item you want to add to the report.
4. Click **Insert**.

   Note You can also drag the item from the **Menu** pane to the left of the column in the workspace.

To add multiple columns

1. In the workspace, do one of the following actions:
   - To add multiple columns to the right of the list, click outside the list to clear any selections.
   - To add multiple columns to the left of a column, click the column heading.
2. On the **Menu** pane, click the **Insert Data** tab and expand the data source tree.
3. Use the CTRL key to select the report items you want to add to the report, in the order you want to add them.
4. Click **Insert**.

Move a column

In Query Studio, you can move columns around by cutting and pasting them.

1. In the workspace, click the column heading of the report item you want to move.
2. In the **Query Studio** toolbar, click the **Cut** button. The report item appears dimmed and unavailable.
3. In the workspace, click the column heading of the report item you want to follow the cut item. To move the report item to the last column position (the farthest to the right) in the report, do not select a column heading before pasting the cut report item.

4. In the **Query Studio** toolbar, click the **Paste** button. The report item precedes the one you selected in this step.

Delete a column

1. In the workspace, click the column heading of the report item you want to delete.

   Note You can use the CTRL key and SHIFT key to select multiple report items.

2. In the **Query Studio** toolbar, click the **Delete** button.

Save the report

1. On the **Query Studio** toolbar, click the **Save** button.
2. In the **Save As** dialog box, type the name of the report in the **Name** box and enter an optional description of the report.

   Note The name does not have to match the title of the report, but the report is easier to identify if the name and title match.

3. Under **Location**, click **Select another location** and then, in the **Select a location** dialog box, click **Public Folders** in the folder navigation string, and then select the report folder you want to save the report.

   Note Reports saved in the **Packages**, **Jobs**, or **My Folders** directory do not appear in ImageNow.

4. In the **Save As** dialog box, click **OK**.

Advanced procedures in Query Studio

The following procedures enable you to customize a report using Business Insight Query Studio, by grouping and ungrouping the report data, sorting the report data, filtering the report data, creating sections in the report, and creating a chart from the report list.

- Group report data in the list into a single cell and summarize data in the footer for each group
- Filter the report data to display only the information you need
- Divide the report into sections based on high-level data, such as a section for each task type
- Use the data in the report list to create a chart

Group and sort report data

You can use this procedure to group rows of data in the list into a single cell, summarize data in the footer, and sort the data.

To group a column

1. In the workspace, click the column heading of the report item you want to group.
2. In the **Query Studio** toolbar, click the **Group** button.

To ungroup a column

1. In the workspace, click the grouped report item.
2. In the **Query Studio** toolbar, click the **Ungroup** button.

To sort a column

1. In the workspace, click the column heading of the report item you want to sort.
2. In the **Query Studio** toolbar, click the **Sort** button. This sorts the column in ascending order.
3. Optional. To sort the column in descending order, click the **Sort** button again.

Filter data in the report

In Query Studio, you can use a filter to specify a subset of data that appears on the report. You can filter textual, numeric, or date and time data and apply the filter to details, summaries, or individual report items, if the report item is a measure.

To filter date and time data

1. In the workspace, click the report item heading you want to filter and then, in the **Query Builder** toolbar, click the **Filter** button.
2. In the **Filter** dialog box, do one of the following actions:
   - To filter on a range between two dates, do the following substeps:
     1. In the **Operation** box, select **Range**.
     2. Under **From**, specify the beginning date you want to use or select **Earliest date** to use the first available date.
     3. Under **To**, specify the ending date you want to use or select **Latest date** to use the last available date.
     4. Optional. In the **Time** boxes, specify a **From** time and a **To** time.
   - To filter on a number of days before today, do the following substeps:
     1. In the **Operation** box, select **Last number of days**.
     2. To select items that will appear in the report, in the **Condition** box, select **Show only the following**, or to select items that will not appear in the report, click **Do not show the following (NOT)**.
     3. In the **Number of days before today** box, type the number of previous days you want to include in the filter.
3. Under **Missing values**, select the option you want to use to handle missing values in the report:
   - If you want to include missing values, click **Include missing values**.
   - If you do not want to include missing values, click **Leave out missing values**.
   - If you want to see only missing values, click **Show only missing values**. If you select this option, all other options in the **Filter** dialog box appear dimmed and unavailable.
4. To filter on individual values in the data source, select the **Apply the filter to individual values in the data source** check box.
5. In the Filter dialog box, click **OK**.

To filter text data

1. In the workspace, click the report item heading you want to filter and then, in the **Query Builder** toolbar, click the **Filter** button.
2. In the **Filter** dialog box, do one of the following actions:
   - To select the records to include in or exclude from a list, do the following substeps:
     1. To select items that will appear in the report, in the **Condition** box, select **Show only the following**, or to select items that will not appear in the report, click **Do not show the following (NOT)**.
     2. Select the check boxes of the values you want to specify for the filter.
   - To search for the records to include or exclude, do the following substeps:
     1. Click **Search for values**.
     2. Under **Keywords**, type the keywords you want to search for and then click **Search**.

        Note You can expand the **Options** menu to select additional keyword search options.
     3. In the **Results** box, select the values you want to use for the filter and then click **Insert**.
   - To type the records you want to include or exclude, do the following substeps:
     1. Click **Type in values**.
     2. In the **Operation** box, click the operation you want to use.
        - If you select **Exactly Matches** or **Match SQL Pattern**, type the value you want to use and then click **Insert**.
        - If you select **Starts With**, **Ends With**, or **Contains**, in the **Value** box, type a value.
        - If you select **Is In Range**, specify the **From** and **To** values or use the **Beginning of alphabet** and **End of alphabet** options.
3. Under **Missing values**, select the option you want to use to handle missing values in the report:
   - If you want to include missing values, click **Include missing values**.
   - If you do not want to include missing values, click **Leave out missing values**.
   - If you want to see only missing values, click **Show only missing values**. If you select this option, all other options in the **Filter** dialog box appear dimmed and unavailable.
4. To filter on individual values in the data source, select the **Apply the filter to individual values in the data source** check box.

5. In the **Filter** dialog box, click **OK**.

To filter numeric data

1. In the workspace, click the report item heading you want to filter and then, in the **Query Builder** toolbar, click the **Filter** button.
2. In the **Filter** dialog box, under **From**, type the value you want to use or select **Lowest value**.
3. Under **To**, type the value you want to use or select **Highest value**.
4. Under **Missing values**, select the option you want to use to handle missing values in the report. If set to **(Default)**, missing values are left out if you defined a range filter. If you did not define a range filter, missing values are included.
    - If you want to include missing values, click **Include missing values**.
    - If you do not want to include missing values, click **Leave out missing values**.
5. If you want to see only missing values, click **Show only missing values**. If you select this option, all other options in the **Filter** dialog box appear dimmed and unavailable.
6. To filter on individual values in the data source, select the **Apply the filter to individual values in the data source** check box.
7. In the **Filter** dialog box, click **OK**.

To filter measurable data

1. In the workspace, click the report item heading you want to filter and then, in the **Query Builder** toolbar, click the **Filter** button.
2. In the **Filter** dialog box, under **From**, type the value you want to use or select **Lowest value**.
3. Under **To**, type the value you want to use or select **Highest value**.
4. Under **Apply this filter to**, select the appropriate option.
    - To filter details in the report, click **Values in the report.**
    - To filter group summaries in the report, click **Group summaries in the report** and click the report item you want.
    - To filter on individual values in the data source, click **Individual values in the data source**.
5. In the **Condition** box, select the appropriate option:
    - To select items that will appear in the report, select **Show only the following**.
    - To select items that will not appear in the report, click **Do not show the following (NOT)**.

6. Under **Missing values**, select the option you want to use to handle missing values in the report. If set to **(Default)**, missing values are left out if you defined a range filter. If you did not define a range filter, missing values are included.
    - If you want to include missing values, click **Include missing values**.
    - If you do not want to include missing values, click **Leave out missing values**.
    - If you only want to see missing values, click **Show only missing values**. If you select this option, all other options in the **Filter** dialog box appear dimmed and unavailable.
7. In the **Filter** dialog box, click **OK**.

To delete a filter

1. In the workspace, click the column heading with the filter you want to remove.
2. In the **Menu** pane, select **Edit Data** and then click **Combine Filters**.
3. In the **Combined filters** dialog box, click the **Detail** tab to view the individual value filters or the **Summary** tab to view the report filters.
    - To delete all filters on the current tab for the report item, click **Delete all**.
    - To delete one or more filters on the current tab for the report item, click the **Select line** icon for the filters and then click **Delete**.
4. Click **OK**.

Divide the report into sections

In Query Studio, you can use an existing column to divide the report into sections. For example, you can create a section for each ImageNow drawer or workflow process.

1. In the workspace, click the heading of the report item you want to use to divide the report into sections.
2. In the **Query Studio** toolbar, click the **Create Sections** button.

Creating report charts

In Query Studio, charts allow you to graphically represent the data you added to the report columns.

To create a chart

1. In the **Query Studio** toolbar, click the **Chart** button. The Chart dialog box appears.
2. Under **Chart type**, do the following substeps:
    1. Select the chart type you want to use from the list.
    2. Click the button for the configuration to use for the selected chart type.
3. Click **OK**.

To show only the chart

1. In the **Query Studio** toolbar, click the **Chart** button.
2. In the Chart dialog box, under **Show the following in the report**, select **Chart only**, and then click **OK**.

To delete a chart

1. In the **Query Studio** toolbar, click the **Chart** button.
2. In the Chart dialog box, under **Chart type**, select **None**, and then click **OK**.

Authoring reports in Report Studio

In this section, you'll learn how to begin building reports in Business Insight Report Studio, a professional report authoring program that allows you to create reports using customized queries and use pixel-perfect layout.

This guide only presents a limited subset of the procedures you can use to build reports in Report Studio. For more information about building reports in Report Studio, refer to *ImageNow Business Insight Report Studio Help*, available on the Perceptive Software website.

What is Report Studio?

The Report Studio module of ImageNow Business Insight allows you to create complex reports that include multiple pages and queries using your existing business intelligence database model. With Report Studio, you can create the reports your organization needs by utilizing a combination of multiple databases. To use Report Studio, you must be familiar with the database and SQL query creation and have report author user privileges.

When you access Report Studio from the ImageNow Management Console, the items in your reporting database appear as objects in the Insertable Objects pane. From there, you can drag objects into the Report Studio workspace to create complex reports. Using this reporting tool, you can perform the following actions:

- Transform information in your business intelligence data source into report items.
- Use the data source report items to create reports you can save for future use.
- Create queries to use and reuse in reports.
- Compare and aggregate data using filters, summaries, and calculations.
- Use charts and other layout tools to visually present your report data.
- Build sophisticated, multiple-page, multiple-query reports against multiple databases.
- Create prompt pages that users must complete each time they run the report.
- Create invoices, statements, weekly sales, and inventory reports.

Navigating in Report Studio

This section explains the use of the various panes and other interface tools you use to build reports in Report Studio. For more information about the toolbars in Report Studio, refer to the “Reference” section of this guide.

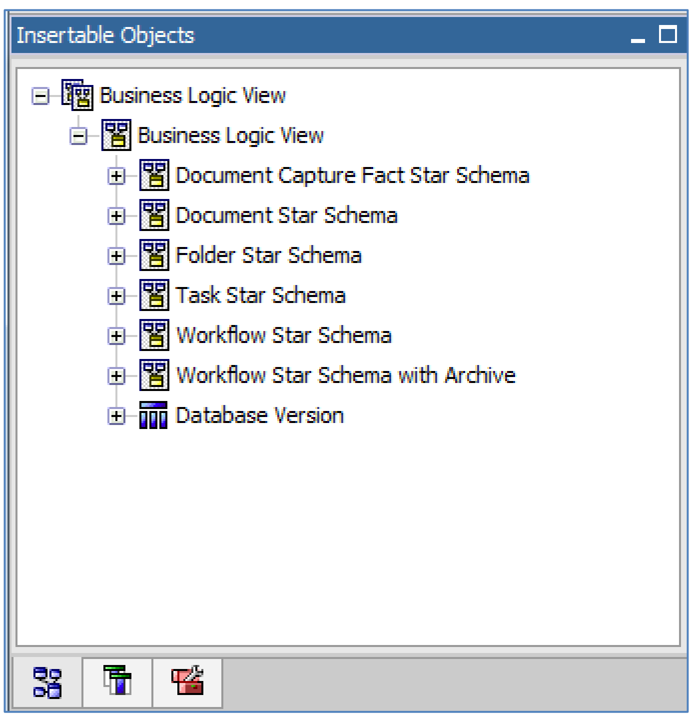
The Insertable Objects pane

The Insertable Objects pane in Report Studio contains all the different types of report items you can add to the work area of the report. The Insertable Objects pane uses the three tabs to organize the type of data you can add.

Source tab

Report items displayed on the Source tab represent records in your ImageNow reporting database that you can add to the report. The contents of your reporting database appear in a tree format on the Source tab of the Insertable Objects pane. The Source tab is visible when you have a specific report page open in the Page Explorer or a specific query open in the Query Explorer. The types of report items that appear in the tree that you can add to the report depend on your data source.

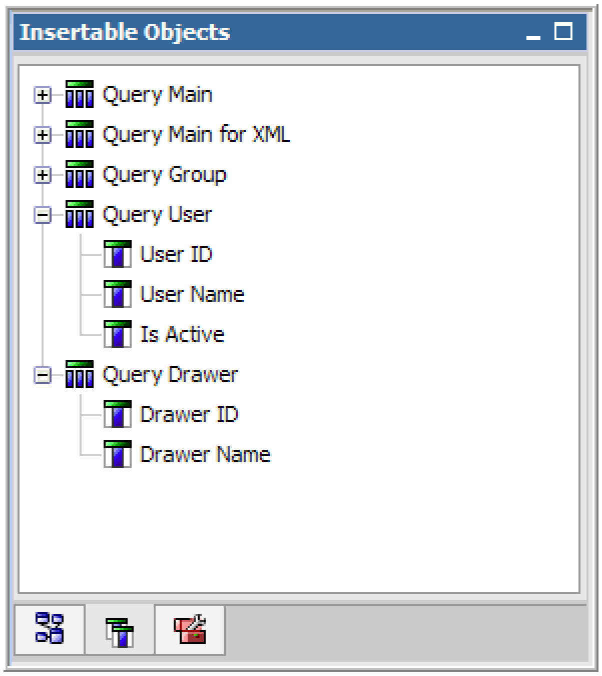
For more information about what types of data the icons on the Source tab represent, refer to the “Reference” section of this guide.



Data Items tab

Report items on the Data Items tab represent the report items added to the report as queries and report items within the queries. The queries and their associated report items appear in a tree format on the Data Items tab of the Insertable Objects pane. The Data Items tab is visible when you have a specific report page open in the Page Explorer or when you have the Report Pages feature open in the Page Explorer. You can add queries and query report items only to data containers that include report items that use the same query.

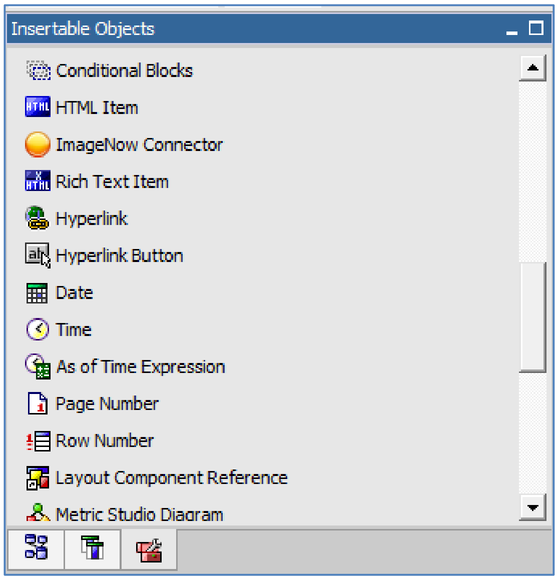
For more information about what types of query data the icons on the Data Items tab represent, refer to the “Reference” section of this guide.

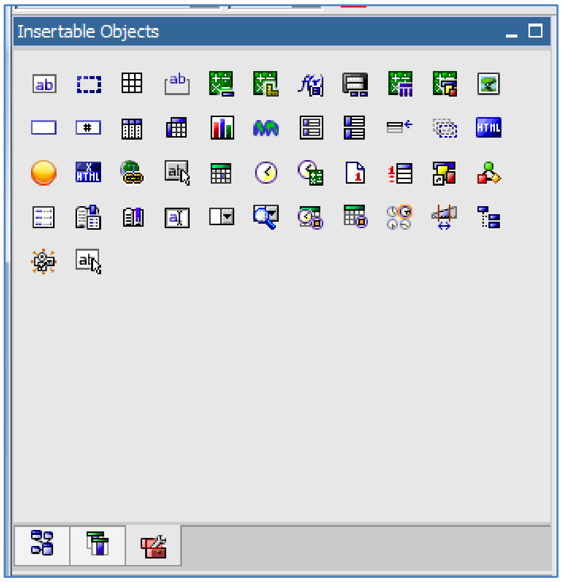


Toolbox tab

Report items on the Toolbox tab represent layout components that you can use to organize how to display data in your report. The report items that appear on the Toolbox tab are specific to the explorer displayed in the workspace and appear in a list. The Toolbox tab is visible regardless of the selected explorer, but the report items available change depending on the panes open in the workspace.

You can view the toolbox report items as a list or as icons. For more information about the report items that appear on the Toolbox tab, refer to the "Reference" section of this guide.



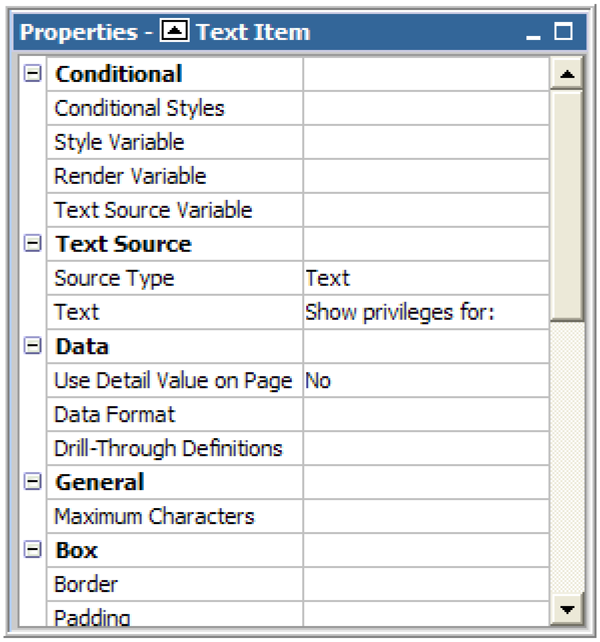


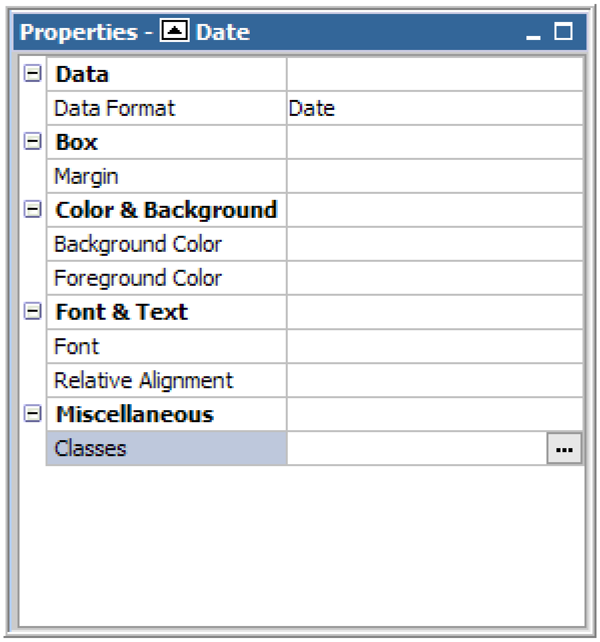
The Properties pane

The Properties pane in Report Studio allows you to modify the data and layout properties of all report items you can add to a report. When you select a report item in the workspace, the name of the type of report item you selected appears in the title bar of the properties pane. In the title bar, you can click the ancestor button to view and select a parent report item.

For example, if you want to change a property that applies to an entire list, you can click in the list in the workspace, and then, in the Properties pane, click the ancestor button and select List to highlight the entire list. After the entire list is selected, any properties you modify apply to the entire list.

In the Properties pane, the properties you can modify for a report item are divided into categories. The categories and properties that appear depend on the report item selected.

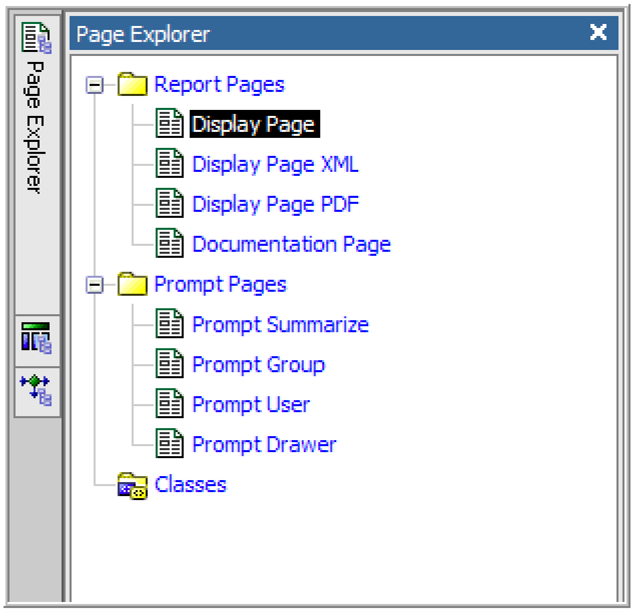




The Page Explorer pane

The Page Explorer pane allows you to divide the report into multiple pages and to add report items to assist with report navigation. With multiple report pages, you can simplify navigation in complex reports. For example, you can use multiple pages to create a report that begins with an introductory page, followed by a page with list data, and ends with a dashboard page that summarizes the list data.

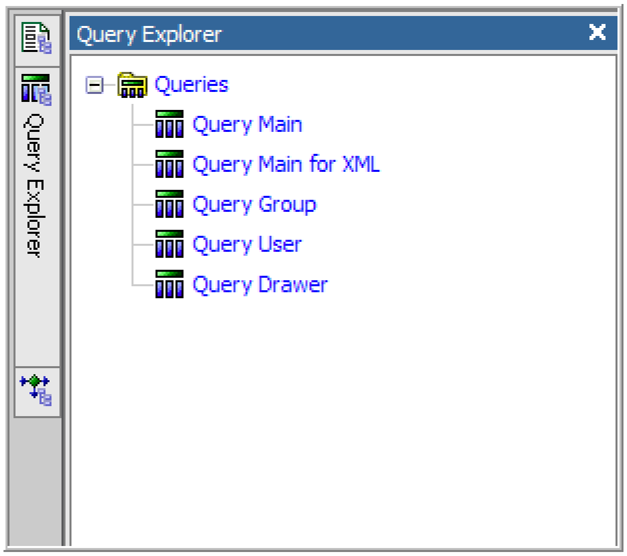
For more information about using the Page Explorer to build your report, refer to the “Getting started with pages in Report Studio” section in this guide.



The Query Explorer pane

The Query Explorer pane enables you to create, modify, and delete queries in your report. By default, queries run sequentially. You can create a union query to combine two or more queries into one result set using a union, intersect, or except operation. To combine two queries, both queries must have the same number of report items, the report items must have compatible types and appear in the same order, and date data types must match exactly.

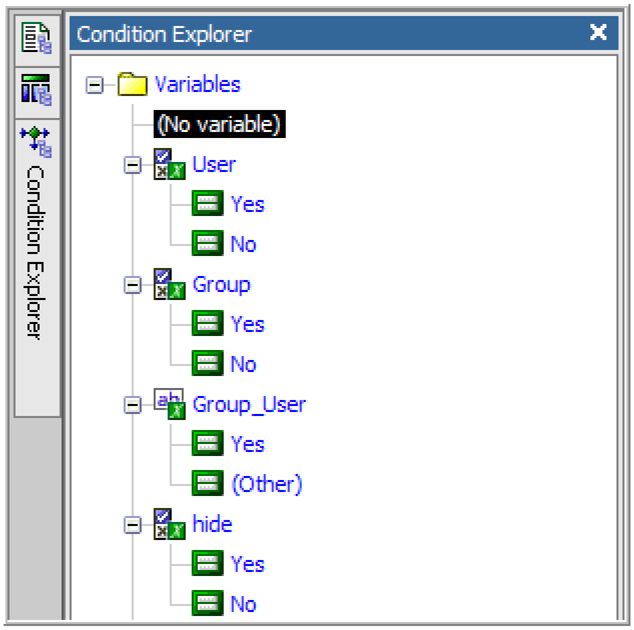
For information about using the Query Explorer to build a report in Report Studio, refer to the "Getting started with queries in Report Studio" section of this guide.



The Condition Explorer pane

The Condition Explorer pane displays all the variables defined for the report. When you open the Condition Explorer in the workspace, you can manage the variables and their corresponding values using the Variables and Values panes.

For more information about using the Condition Explorer to build a report in Report Studio, refer to the "Getting started with conditions in Report Studio" section of this guide.



The expression editor

The expression editor allows you to combine the report items in your data source and your report with constants, functions, operators, and other components to derive a single value. In Report Studio, you use the expression editor to create any of the following report items or objects:

- Filters
- Calculations
- Data items in a query

For more information about creating expressions in your report, refer to the “Getting started with expressions in Report Studio” section in this guide.

Available Components pane

The Available Components pane displays all the available report items and other components you can double-click or drag to the Expression Definition box to create your expressions. The following tabs are available in this pane. Depending on the type of expression you define, some tabs are hidden.

- The Source tab displays all the report items you can add from the data source to create the expression.
- The Data Items tab displays all the report items in the associated query that you can use to create the expression.
- The Queries tab displays all the report items in all queries you can use to create the expression.
- The Functions tab displays all the operators, constants, functions and other components you can use to create the expression.
- The Parameters tab displays all existing parameters in the report that you can use to create the expression.
- The Calculated items tab displays all existing calculated report items that you can use to create the expression.

Not all data sources support functions the same way. The Functions tab includes indicators that show the availability of each component in the context of the data source you use.

Expression Definition box

The Expression Definition box of the expression editor allows you to manage the syntax of an expression. When you double-click an item in the Available Components pane, Report Studio inserts the associated syntax at the cursor point in the Expression Definition box. If the cursor is not present, the syntax appears at the end of the Expression Definition box. You can also manually type the expression syntax in the Expression Definition box.

Information box

The Information box includes two tabs: Tips and Errors. The Tips tab displays helpful information about how to use the constants, operators, functions, and other operators available on the Functions tab. The Errors tab displays any syntax or logic errors detected in the report specification.

Workspace pane

The workspace pane allows you to lay out and build your report. You can drag report items from the Insertable Objects pane to the workspace and drag report items from one area of the workspace to another.

You can drop items in the workspace anywhere a flashing black bar or black box indicates a drop zone.

Getting started with Report Studio

Report authors can begin building reports in Report Studio as soon as the Business Insight Author license is installed and the necessary privileges are granted. The following procedures enable the report author to begin creating a report in Report Studio:

- Start a new report
- Create a list, crosstab, or chart and add data
- Save the report

Start a new blank report

You can use this procedure to begin a new report to build and design in Report Studio from ImageNow Management Console.

1. In **Management Console**, in the left pane, select **Reports**.
2. In the right pane, click **New** and then point to **Report**.
3. Select the package you want to use to create reports.

   Note Report Studio launches and loads the package into report items you can add to your report.
4. In the **Welcome** dialog box, click **Create a new report or template**.
5. In the **New** dialog box, select **Blank** and then click **OK**.

Working with data containers in reports

Before you can add any data to your report, you must add a data container, such as a list, crosstab, or chart. When you add a data container, Report Studio creates a query that is used for all report items in the data container. You can also add a crosstab data container, which uses both columns and rows to show report data, or a chart that graphically represents your data. After you create a data container, such as a list, in the report, you can begin adding data to the report.

To add a list to the report

1. In the **Insertable Objects** pane, click the **Toolbox** tab.
2. Drag **List** to a drop zone in the workspace.

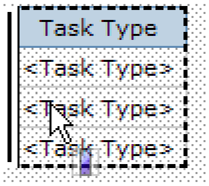
To add data to the list

1. In the **Insertable Items** pane, click the **Source** tab.
2. Expand the items in the tree until you find the items you want to add to the report.
3. Drag the first item to the list.

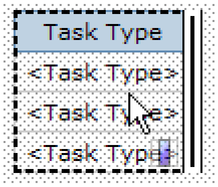
   Note Report items appear as columns in the report in the order in which you add them. Typically, data gets more granular with each column to the right. For example, from left to right, a report's columns include Task Type, Task Template, Task Assignee, and Task Count.

4. To add more columns, select the report item from the **Insertable Objects** pane, drag it to the workspace, and then do one of the following options:

   - To add a column to the left, release the mouse button with the pointer in the left half of the existing column. A flashing black bar indicates a drop zone to the left of the column.

   - To add a column to the right, release the mouse button with the pointer in the right half of the existing column. A flashing black bar indicates a drop zone to the right of the column.

5. Repeat the previous step for as many columns as you want to appear in the list.

To add a crosstab to the report

1. In the **Insertable Objects** pane, click the **Toolbox** tab.
2. Drag **Crosstab** to a drop zone in the workspace.

To add data to the crosstab

1. In the **Insertable Objects** pane, do one of the following actions:
   - To create a new query and use new report items in the crosstab, click the **Source** tab.
   - To use the same query and same report items you used in the list, click the **Data Items** tab and then do the following substeps:
     1. To select the crosstab, in the workspace, click in the **Measures** area of the crosstab.
     2. In the **Properties** pane, verify that **Crosstab** appears in the title bar, and then, under **Data**, select the query the list uses from the **Query** list.

        Note Both the list and the crosstab now use the same query. When two data containers in the same report use the same data, sharing queries improves report performance.
2. Add the columns to the crosstab. To do this, perform the following substeps:
   1. From the **Insertable Objects** pane, select the report item you want to appear as columns in the crosstab.
   2. Drag the report item to the **Columns** area of the crosstab in the workspace. A flashing black box in the **Columns** area indicates a drop zone for the report item.
3. Add the rows to the crosstab. To do this, perform the following substeps:
   1. From the **Insertable Objects** pane, select the report item you want to appear as rows in the crosstab.
   2. Drag the report item to the **Rows** area of the crosstab in the workspace. A flashing black box in the **Rows** area indicates a drop zone for the report item.
4. Add the cell data to the crosstab. This report item must be a measurable report item, such as Task Count or Workflow Item Count. To do this, perform the following substeps:
   1. From the **Insertable Objects** pane, select the report item you want to appear as cells in the crosstab.
   2. Drag the report item to the **Measures** area of the crosstab in the workspace. A flashing black box in the **Measures** area indicates a drop zone for the report item.

      Note The name of the report item measured in the crosstab appears in the corner. The measurable data appears in the cells of the crosstab.

To add a chart to the report

1. In the **Insertable Objects** pane, click the **Toolbox** tab.
2. Drag **Chart** to a drop zone in the workspace.
3. In the **Insert Chart** dialog box, under **Chart group**, select the chart group, and then, under **Chart type**, select the chart type and click **OK**.

To add data to the chart

1. In the **Insertable Objects** pane, do one of the following actions:
   - To create a new query and use new report items in the chart, click the **Source** tab.
   - To use the same query and same report items you used in the list or crosstab, click the **Data Items** tab and then do the following substeps:
     1. In the workspace, select the entire chart.
     2. In the **Properties** pane, verify the chart type appears in the title bar, and then, under **Data**, select the query that the list uses from the **Query** list.

        Note Both the chart and list or crosstab now use the same query. When two data containers in the same report use the same data, sharing queries improves report performance.
2. To add the report item to display on the horizontal x-axis, perform the following substeps:
   1. From the **Insertable Objects** pane, select the report item you want to appear on the x-axis.
   2. Drag the report item to the **Categories (x-axis)** area of the chart. A flashing black box indicates the drop zone in the **Categories** area.
3. To add the report item to display in the body of the chart, perform the following substeps:
   1. From the **Insertable Objects** pane, select the report item you want to appear in the chart body.
   2. Drag the report item to the **Series** area of the chart. A flashing black box indicates the drop zone in the **Series** area.
4. To add the report item you want to measure on the vertical, or y-axis of the chart, perform the following substeps. This report item must be a measurable report item, such as Task Count or Workflow Item Count.
   1. From the **Insertable Objects** pane, select the report item you want to measure in the chart.
   2. Drag the report item to the **Default measure (y-axis)** area of the chart. A flashing black box indicates the drop zone in the **Default measure** area.

To add a title to the chart

1. In the workspace, select the chart.
2. In the **Properties** pane, verify that the chart type appears in the title bar.
3. Under **Chart Titles**, set the **Title** property to **Show**.
4. In the workspace, double-click the chart title.
5. In the **Text** dialog box, type the chart title you want to use and then click **OK**.

Save a report

You can save the report to a folder that appears in ImageNow.

1. On the **Report Studio** toolbar, click the **Save** button.
2. In the **Save As** dialog box, select the location, type a **Name** for the report, and then click **Save**.

   Note Do not save reports to the **Packages** folder, **Jobs** folder, or the **My Folders** area. Reports saved in one of these folders do not appear in ImageNow.

Getting started with pages in Report Studio

In Business Insight Report Studio, you can define multiple pages in your report and order the pages the way you want them to appear in the report output. By default, pages are named according to the number in which they are added, which automatically includes Page 1. You can rename the pages to something more useful in describing the report page's contents.

Add a page to the report

1. In the **Page Explorer** pane, click **Report Pages**.
2. In the **Insertable Objects** pane, from the **Toolbox** tab, drag the **Page** icon to the **Report Pages** list in the workspace. You can insert it between existing pages.
3. To change the order of the page, drag the page above or below other pages.

Rename a report page

1. In the **Page Explorer** pane, click **Report Pages**.
2. In the **Report Pages** list, select the page to rename.
3. In the **Properties** pane, under **Miscellaneous**, set the **Name** property to the page name you want to use.

Getting started with customization in Report Studio

Each report item you add to your report, using either toolbar functions or setting the properties of the item, is highly customizable. In this section, you will learn to perform the following tasks:

- Group result cells in a list column and summarize the groupings
- Use a report item in a list, crosstab, or chart to divide the report into sections
- Create a summary line to aggregate the data for a report item
- Change the name that appears for a report item to use static text, an expression, data values, or a defined label
- Add a border to a report item
- Resize a report item based on pixels, inches, or percentages

Sorting, grouping, and creating sections

In Report Studio, sort any report item in a data container, such as a chart, list, or crosstab, create a grouping in a list, divide the report into sections, and create footer summaries.

To sort a column

1. In the workspace, select the report item.
2. On the **Report Studio** toolbar, click the **Sort** button and then click **Sort Ascending** or **Sort Descending**.

To group a column

1. In the workspace, in the list, select the column you want to group.
2. On the **Report Studio** toolbar, click the **Group** button.

To divide report into sections

1. In the workspace, select the report item you want to use to section the report.
2. On the **Report Studio** toolbar, click the **Section** button.

Creating summaries for a report item

You can add a summary function to a chart, list, or crosstab, such as a total, average, or count.

To summarize a column in a list

1. In the workspace, in the list, click the column to summarize.
2. On the **Report Studio** toolbar, click the **Aggregate** Σ button and then select the aggregate function you want to apply.

   Note The summarization appears as a summary footer row in the list.

To summarize a row or column in a crosstab

1. In the workspace, in the crosstab, click the row or column to summarize.
2. On the **Report Studio** toolbar, click the **Aggregate** Σ button and then select the aggregate function you want to apply.

   Note For a column, the summarization appears as a summary column to the right. For a row, the summarization appears as a summary footer row.

To summarize a report item in a chart

1. In the workspace, in the chart, select the data series or category to summarize.
2. On the **Report Studio** toolbar, click the **Aggregate** Σ button and then select the aggregate function you want to apply.

   Note For a data series, the summarization appears as a new series in the legend. For a category, the summarization appears as a new category on the x-axis.

Customizing data in the report

In Report Studio, you can change the name that appears for a report item, add borders, and resize report items to your liking.

To rename a report item

1. In the workspace, select the report item you want to rename.
2. In the **Properties** pane, under **Text Source**, do one of the following substeps:
   - To rename the report item to use a static text string, in the **Source Type** property, select **Text** and then set the **Text** property to the text string you want to appear for the report item.
   - To rename the report item to use the value of the item, in the **Source Type** property, select **Data Item Value**. For example, if the report item is “Queue Name,” selecting this option displays the name of the workflow queue.

- To rename the report item to use a label for the item in the query, in the **Source Type** property, select **Data Item Label** and then, under **Data Item**, set the **Label** property to the text you want to appear for the report item.
- To rename the report item to use an expression, in the **Source Type** property, select **Report Expression** and then set the **Report Expression** property to write the expression you want to use when displaying the report item. For more information about using expressions, refer to the "Getting started with expressions in Report Studio" section of this guide.

To add a border to a report item

1. In the workspace, select the report item.
2. In the **Properties** pane, under **Box**, double-click the **Border** property.
3. In the **Border** dialog box, define the border style, width, and color, and then click **OK**.

To resize a report item

1. In the workspace, select the report item.
2. In the **Properties** pane, under **Positioning**, double-click the **Size and Overflow** property.
3. In the **Size and Overflow** dialog box, set the height and width of the report item and then click **OK**.

Getting started with expressions in Report Studio

You use expressions define calculations, text items, filters, and many other elements of reports. An expression is any SQL syntax string comprised of a combination of operators, constants, functions, and other components to evaluate to a single value. In Report Studio, the expression editor allows you to combine the report items in your data source and your report with constants, functions, operators, and other components to derive a single value.

In this section, you'll learn how to use expressions in reports by completing the following tasks:

- Create a summary filter for a report item
- Create a calculation using constants and functions
- Define a text item that uses an expression to display dynamic text

Create a filter

1. In the workspace, select the report item you want to filter.
2. On the **Report Studio** toolbar, click the **Filter** button.
3. In the **Filters - *Query Name*** dialog box, click the **Summary Filters** tab and then click the **Add** button.
4. In the expression editor, define the expression for the filter by doing the following substeps:
    1. In the **Available Components** pane, double-click the components to use in the expression.
    2. In the **Expression Definition** box, verify the syntax of the expression and modify it if needed.
    3. Click the **Validate** button and then, in the **Information** box, verify that the message "No errors" appears.

For example, to filter out tasks completed before 1/1/2010, you can create an expression with the following syntax:

```
[Task Star Schema].[Task].[Completion Time] > 2010-01-01
```

5. Click **OK**.

Create a calculation

1. In the **Insertable Objects** pane, from the **Toolbox** tab, drag **Query Calculation** to the workspace.
2. In the **Create Calculation** dialog box, type a name for the calculation and then click **OK**.
3. In the expression editor, create the expression for the calculation by doing the following substeps:
    1. In the **Available Components** pane, double-click the components to use in the expression.
    2. In the **Expression Definition** box, verify the syntax of the expression and modify it if needed.
    3. Click the **Validate** button and then, in the **Information** box, verify that the message "No errors" appears.

       For example, to determine the average amount of time that elapsed between when a document was scanned and when it was linked to the application plan, you can create an expression with the following syntax:

       ```
       average ([Link Time] - [Scan Time])
       ```
4. Click **OK**.

Use a text item to create an expression

1. In the **Insertable Objects** pane, from the **Toolbox** tab, drag **Text Item** to the workspace.
2. In the **Text** dialog box, click **OK**, and then select the text item.
3. In the **Properties** pane, under **Text Source**, set the **Source Type** property to **Report Expression**.
4. Double-click the **Report Expression** property and then, in the expression editor, create the expression by doing the following substeps:
    1. In the **Available Components** pane, double-click the components to use in the expression.
    2. In the **Expression Definition** box, verify the syntax of the expression and modify it if needed.
    3. Click the **Validate** button and then, in the **Information** box, verify that the message "No errors" appears.

       For example, if you want to list the workflow queue values a user selected in a prompt, but you also want to display a text string if the user selects more than ten values, you can create an expression with the following syntax:

       ```
       if (ParamCount(ParamName('Queue'))>10)
       THEN ('More than 10 queues selected')
       ELSE
       (ParamDisplayValue('Queue'))
       ```
5. Click **OK**.

Getting started with conditions in Report Studio

You use conditions to add flexibility to your report. In this section, you'll learn how to begin using conditions by completing the following tasks:

- Create conditional styles for a range of numeric values, dates, or times and apply it to a report item.
- Create conditional styles for a text string and apply it to a report item.
- Create a boolean variable and apply it to a report item to determine whether the item is rendered. For example, you can use this condition to hide report items in PDF format.
- Create a boolean variable and apply it to a report item to determine one style for a TRUE value and another style for a FALSE value. For example, you can use this condition to show overdue tasks in red and show tasks not yet overdue in green.
- Create a string variable and apply it to a report item to determine how the item is rendered. For example, you can use this condition to show a pie chart for workflow queues with less than 10 items but show a column chart for workflow queues with more than 10 items.
- Create a string variable and apply it to a report item to style different values. For example, you can use this condition to highlight invoices greater than $10,000 but show invoices less than $1,000 in red.

Conditions and conditional styles

Conditional styles allow you to highlight key data in a report by applying a specific style to data values that meet the criteria you define. For example, if you want to highlight high performing and low performing revenue in a financial report, you can create a conditional style to apply boldface to revenues that exceed $1,000,000 and apply a red background to revenues below $10,000. To apply a conditional style to a report, you do not need to create a variable in the Condition Explorer.

Conditional rendering allows you to specify specific report items to display when you run the report. Unlike hiding or masking report items, where the report item remains on the report but is hidden from view, conditionally rendered report items do not exist on the report. To use conditional rendering, you must create a variable in the Condition Explorer.

A condition is a combination of a variable and its possible values. A variable is an element you can use to conditionally style a report or to conditionally render a report. Each variable contains a set of values that completes the condition. In Report Studio, you can define a report language variable that uses values that are different languages, a string variable that uses string-based values, or a boolean variable that uses TRUE and FALSE values. For string and boolean variables, you must also define an expression.

For example, suppose you want to create a variable to return a description of the number of items in workflow queues rather than the count value, according to the following rules:

- Item counts below 10 are low.

- Item counts above 10 are high.

First, you create the following expression in the expression editor:

```
if ([ItemCount]>10) then ('high') else ('low')
```

Then, you create two values for the string variable: **High** and **Low**.

When you create a boolean variable, Report Studio creates the Yes and No values automatically. You must define an expression that represents the TRUE value.

Creating conditional styles

In Report Studio, you can create a conditional style for a range of numbers, range of dates, range of times, text strings, and all other types of data.

To create a conditional style for a range of numbers, dates, or times

1. In the workspace, select the report item you want to format conditionally.
2. On the **Report Studio** toolbar, click the **Conditional Styles** button.
3. In the **Conditional Styles** dialog box, click the **New** button and then select **New Conditional Style**.
4. In the **New Conditional Style** dialog box, complete the following substeps:
    1. Under **Base it on the following data item**, select the data item for the conditional style.
    2. In the **Type of conditional style** list, select the type.
    3. Click **OK**.

    Note The data items that appear in the list include all elements that make up the report item you selected in the first step. For example, if you selected a chart, each item in the series and categories, as well as the measure, appears.
5. In the **Conditional Style - <*style type*>** dialog box, do the following substeps:
    1. In the **Name** box, type a name for the conditional style.
    2. Click the **New Value** button.
    3. In the **Threshold - Value** dialog box, type the value to define for the conditional style and click **OK**.
    4. Under **Range**, use the arrow to move the value above or below the average threshold.
    5. Under **Style**, select the indicator from the list associated with the value.
    6. Optional. To change the default style applied to the indicator, click the **Edit** button, and then, in the **Style** window, define the style you want to apply and click **OK**.

7. Repeat the previous steps for each value you want to define for the conditional style.

   Tip In the **Conditional Style** dialog box, you can move the pointer over the range bracket to preview the conditional style. To delete a value, click the **Delete** button associated with the value.

8. Click **OK**.

6. In the **Conditional Style** dialog box, select the style and then click **OK**.

To create a conditional style for a text string

1. In the workspace, select the report item you want to format conditionally.
2. On the **Report Studio** toolbar, click the **Conditional Styles** button.
3. In the **Conditional Styles** dialog box, click the **New** button and then select **New Conditional Style**.
4. In the **New Conditional Style** dialog box, complete the following substeps:
    1. Under **Base it on the following data item**, select the data item for the conditional style.
    2. In the **Type of conditional style** list, select **String**.
5. In the **Conditional Style - String** dialog box, do the following substeps:
    1. In the **Name** box, type a name for the conditional style.
    2. Click the **New Value** button and then select the appropriate option:
        - To use multiple values of the report item, click **Select Multiple Values**. In the **Select Multiple Values** dialog box, select the values, click the arrow button to move them to the **Selected values** list, and then click **OK**.
        - To type the specific values of the report item, click **Enter Values**. In the **Enter Values** dialog box, type the values, click the arrow button to move them to the **Selections** list, and then click **OK**.
        - To specify the criteria for the string, click **Enter String Criteria**. In the **Enter String Criteria** dialog box, select the operator, type the value in the **String** box, and then click **OK**.

          Note For example, if you want to highlight workflow queues that begin with AP, in the **Operator** list, select **Begins with** and then, in the **String** box, type **AP**.
    3. Under **String condition**, select the value for the conditional style.
    4. Under **Style**, select the indicator from the list associated with the value, such as excellent or poor.
    5. Optional. To change the default style applied to the indicator, click the **Edit** button and then, in the **Style** window, define the style to apply and click **OK**.
    6. Repeat the previous steps for each value you want to define for the conditional style.
    7. Optional. To define the order in which string conditions apply, use the **Move Up** and **Move Down** arrow buttons.

Tip In the **Conditional Style** dialog box, you can also define a style for all remaining values. To delete a value, click the **Delete** button associated with the value.

8. Click **OK**.

6. In the **Conditional Style** dialog box, select the styles to apply to the report item and then click **OK**.

Creating render variables

In Report Studio, you can specify that certain report items render a certain way depending on a true/false (boolean) condition or a string variable.

To create a boolean render variable

1. In the **Condition Explorer** pane, do the following substeps to create the variable:
    1. Click **Variables**.
    2. In the **Insertable Objects** pane, from the **Toolbox** tab, drag **Boolean Variable** to the **Variables** list in the workspace.
    3. In the expression editor, in the **Expression Definition** box, define an expression that describes the **TRUE** value and then click **OK**.
    4. Optional. To rename the variable, select it in the **Variables** pane and then, in the **Properties** pane, type the new name in the **Name** property.
2. In the workspace of the page that contains the report item to which you want to apply the variable, do the following substeps:
    1. Select the report item.
    2. In the **Properties** pane, under **Conditional**, double-click **Render Variable**.
    3. In the **<*Type*> Variable** dialog box, under **Variable**, select the variable.
    4. Under **Render for**, select the TRUE condition value.
    5. Click **OK**.

    Note If the condition returns the TRUE value, the report item appears in the report output. If the condition returns the FALSE value, the report item does not appear.

To create a boolean style variable

1. In the **Condition Explorer** pane, do the following substeps to create the variable:
    1. Click **Variables**.
    2. In the **Insertable Objects** pane, from the **Toolbox** tab, drag **Boolean Variable** to the **Variables** list in the workspace.
    3. In the expression editor, in the **Expression Definition** box, define an expression that describes the **TRUE** value and then click **OK**.
    4. Optional. To rename the variable, select it in the **Variables** pane and then, in the **Properties** pane, type the new name in the **Name** property.

2. In the workspace of the page that contains the report item to which you want to apply the variable, do the following substeps:
    1. Select the report item.
    2. In the **Properties** pane, under **Conditional,** double-click **Style Variable**.
    3. In the **Style Variable** dialog box, under **Variable**, select the variable to apply and then click **OK**.
3. In the **Condition Explorer** pane, set the style associated with the values of the condition by performing the following substeps:
    1. In the Condition Explorer, select the TRUE value for the condition.
    2. In the **Properties** pane, set the style properties, such as size, color, or border to apply when the condition evaluates to TRUE.
    3. In the Condition Explorer, select the FALSE value for the condition.
    4. In the **Properties** pane, set the style properties, such as size, color, or border to apply when the condition evaluates to TRUE.

To create a string style variable

1. In the **Condition Explorer** pane, do the following substeps to create the variable:
    1. Click **Variables**.
    2. In the **Insertable Objects** pane, from the **Toolbox** tab, drag **String Variable** to the **Variables** list in the workspace.
    3. In the expression editor, in the **Expression Definition** box, define an if-then expression that describes the condition of the values, and then click **OK**.
2. In the workspace of the page that contains the report item to which you want to apply the variable, do the following substeps:
    1. Select the report item.
    2. In the **Properties** pane, under **Conditional,** double-click **Style Variable**.
    3. In the **<*Type*> Variable** dialog box, under **Variable**, select the variable to apply and then click **OK**.
3. In the **Condition Explorer** pane, set the style associated with the values of the condition by performing the following substeps:
    1. In the Condition Explorer, select the first value for the condition.
    2. In the **Properties** pane, set the style properties, such as size, color, or border to apply when the condition evaluates to the value.

3. Repeat the previous substeps for each value associated with the condition.

Reference

This section of the Business Insight Authoring Getting Started Guide contains the following reference information.

- Reports toolbars
- Report terminology
- Report items
- Report privilege definitions

Reports toolbars

When Business Insight is installed on the ImageNow client computer, the Reports button appears on the ImageNow and WebNow toolbars.

Report toolbar

The following toolbar appears in the ImageNow and WebNow Explorer when viewing a report.

Tool	Name	Description
	Run	Allows you to run a report in any format you choose.
	Prior Versions	Allows you to view a previous version or format of a report.
	Import	Allows you to import a PDF or Excel version of a report as an ImageNow document.
	Report Help	Allows you to view the product help page for a report in the ImageNow library or custom help page for a custom report.

Query Studio toolbars

The Query Studio toolbar allows you to perform tasks for reports.

Tool	Function	Description
	New Report	Create a new report in Query Studio.
	Open	Open an existing report in Query Studio.
	Save	Save changes to the current report.
	Save As	Save changes to the current report as a new report in a different file location.
	Cut	Remove the selected report item and place it on the Windows Clipboard.
	Paste	Paste current Windows Clipboard report item to the selected location on the report.
	Delete	Remove the selected report item from the report.
	Undo	Undo the last performed action.
	Redo	Redo the last performed action.
	Run with All Data	Run the current report using the full data source.
	Filter	Create a filter to apply to the report data.
	Suppress	Hide the selected report item on the report.
	Sort	Sort the selected report item data in ascending or descending order.
	Summarize	Add a footer to summarize the selected report item data or change calculations for detail values.
	Calculate	Create new report items based on calculated data for the selected report item or items.
	Drill down	Open a view of the selected report item's source data. Drilling down involves navigating to more detailed information.
	Drill up	Navigate from a detailed level of data to a less detailed level.
	Go to	Navigate to another target in the report using a drill-through definition.
	Chart	Create a chart based on the selected report item or items.
	Group	Group identical records in the selected report item.

Tool	Function	Description
	Pivot	Create a crossbar on the horizontal axis of the report from the selected report item column.
	Ungroup	Ungroup records for a grouped report item.
	Create Sections	Use the selected report item to divide the report into sections.
	Swap	Swap the positions of the rows and columns in the report.
	Collapse Group	Collapse a grouped report item.
	Expand Group	Expand a grouped report item.

The following Formatting toolbar allows you to customize the look of your report in Query Studio.

Function	Description
Font Color	Change the color of the text of the selected report item.
Bold	Make the text of the selected report item bold.
Italic	Make the text of the selected report item italic.
Underline	Underline the text of the selected report item.
Background Color	Fill the background of the selected report item with color.
Text Alignment	Change the way the selected report item text aligns.
Change Font Styles	Change the font properties of the selected report item.
Change Border Styles	Change the border styles for the report.

Report Studio toolbars

The following Report Studio toolbar allows you perform tasks for reports.

Tool	Function	Description
	New	Create a new report in Report Studio.
	Open	Open an existing report in Report Studio.
	Save	Save changes to the current report.
	Cut	Remove the selected report item and place it on the clipboard.
	Copy	Copy the selected report item and place it on the clipboard.
	Paste	Paste the report item copied to the clipboard to the selected location on the report.
	Delete	Delete the selected report item.
	Undo	Undo the last performed action.
	Redo	Redo the last performed action.
	Validate Report	Validate your report against the data source to ensure that it contains no query errors.
XML	Show Specification	View the specification of the selected report item as an XML file.
	Run Report	Run the current report using the specified data method.
	Lock	Lock the selected report item to disallow any modification.
	Unlock	Unlock the selected report item to allow modifications.
	Visual Aids	Show the visual aids menu.
	Back	Go back to the previously selected workspace or Explorer.
	Forward	Go forward to the previously selected workspace or Explorer.

Tool	Function	Description
	Up	Go to the Explorer associated with the selected workspace. For example, if you are inserting objects in a report page, clicking this button takes you to the Page Explorer.
	Create Sets for Members	Toggle between adding individual members and creating sets for members.
	Insert Member	Show the member menu to select how members are added to the report.
	Filters	Create a filter to apply to the report data.
	Suppress	Show the Suppress menu to select how to suppress data.
	Sort	Show the Sort menu to select how to sort the selected report item.
	Sort Opposite Axis Sets by Value	Sort members in the sets on the opposite axis based on the value of a member or measure you select.
	Aggregate	Show the aggregation menu to select how to summarize data for the selected report item.
	Insert Calculation	Show the calculation menu to select the calculation method for the selected report item.
	Group/Ungroup	Group or ungroup identical records in the selected report item.
	Pivot List to Crosstab	Create a crossbar on the horizontal axis of the report from the selected list.
	Section	Use the selected report item to divide the report into sections.
	Swap Rows and Columns	Swap the positions of the rows and columns in the report.
	Headers and Footers	Create a header or footer for the selected report item, list, or page.
	Chart	Create a chart based on the selected report item or items.
	Build Prompt Page	Create a prompt page for the current report.
	Drill-Through Definitions	Create a drill-through definition for the selected report item.
	Help	Access the ImageNow Business Insight Report Studio Help

The following Style toolbar allows you to customize the style of your report in Report Studio.

Tool	Function	Description
	Foreground Color	Set the text color for the selected report item.
	Bold	Create boldface text for the selected report item.
	Italic	Create italic text for the selected report item.
	Underline	Create underlined text for the selected report item.
	Left	Left align the text of the selected report item.
	Center	Center align the text of the selected report item.
	Right	Right align the text of the selected report item.
	Justify	Justify the text of the selected report item.
	Top	Position the text of the selected report item at the top of its container.
	Middle	Position the text of the selected report item in the center of its container.
	Bottom	Position the text of the selected report item at the bottom of its container.
	Background Color	Set the background color for the selected report item.
	Border Style	Set the style of border to apply to the selected report item.
	Border Color	Set the color of the border for the selected report item.
	Outside Borders	Apply the border line to the outside borders of the selected report item.
	All Borders	Apply the border line to all borders of the selected report item.
	Top Border	Apply the border line to the top border of the selected report item.
	Left Border	Apply the border line to the left border of the selected report item.
	Inside Horizontal Border	Apply the border line to the inside horizontal borders of the selected report item.
	Inside Borders	Apply the border line to the inside borders of the selected report item.
	Default Borders	Apply no border lines to the selected report item.
	Right Border	Apply the border line to the right border of the selected report item.

Tool	Function	Description
	Bottom Border	Apply the border line to the bottom border of the selected report item.
	Inside Vertical Border	Apply the border line to the inside vertical borders of the selected report item.
	Insert Table	Insert a table for the selected report item.
	Merge Cells	Merge the selected table cells into one cell.
	Split Cell	Split the selected table cell into two cells.
	Decrease Indent	Decrease the indentation of the selected report item.
	Increase Indent	Increase the indentation of the selected report item.
	Data Format	Set the format of the data for the selected report item.
	Pick Up Style	Copy the style properties of the selected report item.
	Apply Style	Apply the style properties of the copied report item to the selected report item.
	Conditional Styles	Define a conditional style for the report item.

Report terminology

The following table defines terms commonly used in Business Insight report authoring.

Term	Definition	Example
aggregation	Practice of grouping or summarizing report data within a crosstab, list, or chart.	Total, average, maximum, minimum
condition	An expression that yields a boolean value. You can use conditions in query expressions, query filters, and boolean report variables for conditional formatting, styles, data sources, layouts and blocks.	Show values, do not show values
data container	Any workspace container into which you can insert a data report item.	List, crosstab, chart, repeater table, singleton.
drop zone	Any workspace area where you can drag a report item from the Insertable Items pane and drop it on the workspace. A flashing black bar indicates a drop zone for the report item.	workspace, context filter box, page layer box
measure	A quantitative performance indicator. Its aggregate values are used to determine how well a business operates.	Profit margin percentage
non-measure	A qualitative data indicator, also called an identifier.	Name, address, country
package	A subset of the model available in ImageNow Business Insight from which users can create and run reports. In Business Insight, packages appear as blue folders.	Public Folders > Business View
query	A specification for a set of data retrieved from a data source. A report specification can contain one or more queries.	n/a
query subject	A type of object within a model that contains query items and represents a table in a database.	Any table or grouping of tables within your database
report item	The representation of an object within the data source of the package on the report in Query Studio.	Query subjects, query items, columns of measures, calculated items, dimensions
report specification	The definition of queries, prompts, layouts, and styles that make up a report. A report specification is combined with data by a run operation to create report outputs.	n/a
summary	Aggregate values that are calculated for all the values of a particular level or dimension.	total, average maximum, and minimum
workspace	The area within Query Studio or Report Studio that contains the report, analysis, query or agent currently being used.	n/a
x axis	The horizontal numeric axis for the chart, including labels, titles, range, and scale.	n/a
y axis	The vertical numeric axis for the chart, including labels, titles, range, and scale.	n/a

Term	Definition	Example
z axis	The third numeric axis for a three-dimensional scatter or combination chart, including labels, titles, range, and scale.	n/a

Report items

Use this section to determine the different kinds of items you can add to reports.

What is in a package?

The packages built for your Business Insight solution represent the contents of your business's data source. You can insert any of the following report items that represent records in your data source into a report. The following report items appear in the Menu pane when you select the Insert Data tab in Query Studio or the Source tab in the Insertable Objects pane in Report Studio.

Menu icon	Report item
	Package
	Namespace
	Query subject
	Query item
	Query item dimension
	Measure
	Measures folder
	Package or Model filter

Query report items

The following report items appear on the Data Items tab in Report Studio.

Menu icon	Report item
	Query item
	Measure or query calculation
	Aggregated report item
	Calculated report item

Toolbox report items

Report items on the Toolbox tab in Report Studio represent layout components that you can use to organize data in your report. The report items that appear on the Toolbox tab are specific to the explorer displayed in the workspace and appear in a list. The Toolbox tab is visible regardless of the selected explorer, but the report items available change depending on the explorer.

Page Explorer - Report Pages or Prompt Pages open in workspace

Icon	Report Item	Description
	Page	Add a single page to the report.
	Page Set	Add a page set to the report.

Page Explorer - Classes open in workspace

Icon	Report Item	Description
	Class	Add a class that you can assign to report items.

Page Explorer - any report page open in workspace

Icon	Report Item	Description
	Text Item	Add a text item to the report.
	Block	Add an empty block, which is a layout container in which you can insert other objects. This container is useful for controlling where objects appear.
	Table	Add a table, which is a layout container in which you can insert other objects. This container is useful for controlling where objects appear.
	Field Set	Add an empty block that has a caption. This container is similar to the Block object, but with a caption.
	Query Calculation	Add a calculated column.
	Layout Calculation	Add a calculation in the layout that includes runtime information, such as current date, current time, and user name.
	Image	Add an image file to the report.
	Crosstab Space	Insert an empty cell on a crosstab edge that enables insertion of non-data cells on an edge. Blank cells appear for the edge when you run the report.
	Crosstab Space (with fact cells)	Insert an empty cell on a crosstab edge that enables insertion of non-data cells on an edge. When you add a measure or specify the default measure, the contents of the fact cells for the edge appear.
	List	Add a list data container to the report.
	Crosstab	Add a crosstab data container to the report.
	Chart	Add a chart data container to the report.
	Map	Add a map data container to the report.
	Repeater Table	Add a repeater table to the report.
	Repeater	Add a repeater to the report.
	Singleton	Insert a single report item.
	Conditional Blocks	Add an empty block that you can use for conditional formatting.
	HTML Item	Add a container in which you can insert HTML code. HTML items can be anything that your browser will execute, including links, images, multimedia, tooltips, or JavaScript. HTML items appear only when you run the report in .html format.
	ImageNow Connector	Add an HTML item that can be used to create active document ID and folder ID hyperlinks that open the items in an ImageNow viewer.

Icon	Report Item	Description
	Rich Text Item	Insert an object that is used to render HTML in the layout. This object is similar to the HTML Item, except that rich text items also render in PDF output. Using rich text items is useful when you want to add annotations defined in a data source to a report. Rich text items only support a restricted set of well-formed XHTML.
	Hyperlink	Add a hyperlink so that users can jump to another place, such as a website.
	Hyperlink Button	Add a hyperlink in the form of a button.
	Date	Add a date container that displays the current date when you run the report.
	Time	Add a time container that displays the current time when you run the report.
	As of Time Expression	Add an As of Time Expression so that you can show data for a specific time period.
	Page Number	Insert page numbers that you can customize.
	Row Number	Add a row that numbers each row of data returned in a list or crosstab when you run the report.
	Layout Component Reference	Add a reference to another report item that is a layout component. Use this reference when you want to reuse a report item.
	Table of Contents	Create a table of contents that appears in the report output.
	Table of Contents Entry	Add a table of contents marker.
	Bookmark	Insert a bookmark so that users can move from one part of a report to another.
	Text Box Prompt	Add a prompt that uses a text box interface.
	Value Prompt	Add a prompt that uses a value selection interface.
	Select and Search Prompt	Add a prompt that uses a select and search interface.
	Date and Time Prompt	Add a prompt for a date and time.
	Date Prompt	Add a prompt for a date range.
	Time Prompt	Add a prompt for a time range.
	Interval Prompt	Add a prompt for a time interval.
	Tree Prompt	Add a prompt for values that users select from a list.
	Generated Prompt	Add a prompt control based on the data type of the data item.
	Prompt Button	Add a control button for the prompt pages.

Query Explorer - Queries open in workspace

Icon	Report Item	Description
	Query	Add a query.
	Join	Add a query join relationship.
	Union	Add a union operator.
	Intersect	Add an intersect operator.
	Except	Add an except (minus) operator.
	SQL	Add an SQL command.
	MDX	Add a multidimensional expression (MDX) query against an OLAP data source.

Query Explorer - any query open in workspace

Icon	Report Item	Description
	Data Item	Add an expression for a data item in your data source.
	Filter	Add a summary or detail filter.

Condition Explorer - Variables open in workspace

Icon	Report Item	Description
	Report Language Variable	Add a variable whose values are different languages.
	String Variable	Add a variable whose values are string-based.
	Boolean Variable	Add a variable that has only two possible values.

Report privilege definitions

In ImageNow, you assign privileges to control the actions that users can perform.

Report Privileges			
This table lists all of the privileges associated with reports. These privileges include the following privilege types: Reports, Manage, and Report Security. This table also lists the privilege definition, dependency information, and the privilege location.			
Type	**Definition**	**Dependency**	**Location**
Reports			
You can assign Reports privileges if you are a user with management privileges, a manager, or the owner. You can assign Reports privileges to a user or group.			
View	The user can access the Reports button on the ImageNow toolbar. The user can view and run instances of Business Insight reports to which the user has access in the ImageNow Explorer.	User must have the View privilege for at least one report before the Reports toolbar button is active.	This privilege is located in the Users or Groups pane, on the Security tab, in the Security Settings dialog box, on the Global Privileges pane.
Manage			
You can assign Manage privileges if you have the Manage Reports privilege. You can only assign Manage privileges to a user.			
Reports	User can assign users and privileges to reports and report folders, schedule reports, copy and rename reports, and delete reports and report folders.	This privilege has no dependencies. ImageNow managers are not implicitly granted this privilege.	This privilege is located on the Users pane, on the Security tab, in the Security Settings dialog box, in the Global Privileges pane.
Report Security			
You can assign Report Security privileges if you have the Manage Reports privilege. You can only assign Report Security privileges to a user. If a user has the Manage Reports privilege, the user also has all report-level privileges granted for all reports.			
Run	User can run the report from ImageNow or WebNow Explorer.	To view reports you run, you must have the View privilege for the report.	This privilege is located in the Security area of a report or a report folder.
View	The user can view aninstance of a report produced by a run or a schedule in the ImageNow or WebNow Explorer.	This privilege has no dependencies.	This privilege is located in the Security area of a report or a report folder.

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