Infor PLM Accelerate 11

Self-Service Reporting Administrator Guide

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Contents

Intended audience 4

Related documents 4

Contacting Infor 4

Chapter 1. Overview 5

End user functionality overview 5

Administrative control 5

Chapter 2. License Policy 6

Requesting a feature license 6

Installing the license 6

Chapter 3. Self-Service Report Settings 7

Editing preferences 7

Chapter 4. Import / Export Report Definitions 8

Chapter 5. Connection Settings 9

About this guide

This document provides information on how to install, configure and logging into the Infor PLM Accelerate software.

Intended audience

This guide is intended for system administrators. This document assumes that you have at least some knowledge in:

- System architecture and function for your Infor system
- SQL Server database

For the most up-to-date list of software and hardware requirements for Infor products, see the documentation for your system.

Related documents

You can find the documents in the product documentation section of the Infor Xtreme Support portal, as described in the "Contacting Infor" section below.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at www.infor.com/inforxtreme.

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1. Overview

Self-Service Reporting is a capability within Infor PLM Accelerate that enables users to create, save, and share reports. Reports can include various charts and graphs, calculations, and pivot tables

This *Administratior Guide* assumes a basic knowledge of configuration, including ItemTypes, Lifecycle States, Permissions and Methods. For more information on these topics, please see the Just Ask Innovator documentation which can be accessed from within Infor PLM Accelerate by clicking **Help --> Just Ask Innovator**.

It is recommended that all administrators of Self-Service Reporting also read the *Self-Service Reporting User Guide*, as it explains what the users are able to do through the user interface.

End user functionality overview

Using Self-Service Reporting, end users can perform the following functions:

- **Create Reports:** End users can create report templates from the Infor PLM Accelerate user interface without needing administrative privileges. End users can simply select an ItemType and then select RelationshipTypes (Tabs) and Item Properties (links) to report on. The reports can include charts and graphs, and perform aggregation functions such as Count, Min, Max, and Group.
- **Save Reports:** End users can save report templates, so that they can be retrieved quickly again.
- **Share Reports:** End users can share reports with other groups of users (Identities) giving them full and/or limited access.
- **Run Reports:** End users can run reports from templates that they created or that were shared with them. They can also apply run-time filters on the reports.
- **Export Reports:** End users can export reports into various formats including PDF, Excel, Word, CSV and XML.

Administrative control

There are several system-wide preferences that can be set by an administrator to control availability of top-level items as well as properties. A report designer may see a top-level ItemType but not be able to display any data because of security permissions on that ItemType. To help users only see what is available to them in an installation, ItemTypes can be selected by an administrator as "Featured" allowing users of a specific identity to choose the top level ItemType in the report designer.

An administrator can also provide controls on what properties a user is allowed to select from and see in a running report and in the report designer.

Note: Even if a user can create a report using any ItemType and its Related Items, when the user runs the report, only Items that s/he has permissions to are shown.

Details of how these can be controlled are covered in the Self-Service Report Settings section.

Chapter 2. License Policy

The Self-Service Reporting requires a Feature License in order to run. To check whether a valid Feature License exists in Infor PLM Accelerate:

1. Log into Infor PLM Accelerate as an administrator.
2. Go to **Administration** --> **Feature Licenses**.
3. If a feature license is found for Aras.SelfServiceReporting, check the expiration date to confirm that the license is still active.

Requesting a feature license

Enter Infor's support portal at www.infor.com/inforxtreme to request a license key and to download any related installation documentation.

Installing the license

Once you have the activation key, install the feature license as follows:

1. Log into Infor PLM Accelerate as an administrator.
2. From the main menu, select **Tools** --> **Admin** --> **Licenses** --> **Activate Feature**.

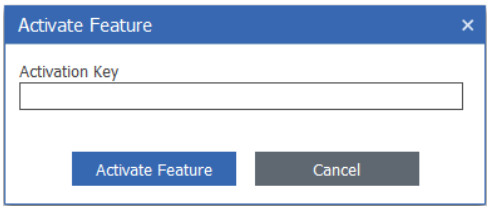

Figure 1.

3. Paste the acquired activation key and click **Activate Feature**.

   A success message should pop up similar to the one shown below.

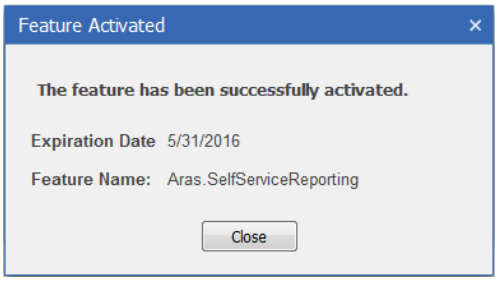

Figure 2.

Chapter 3. Self-Service Report Settings

Self-Service Report Settings allow an Administrator to control access to ItemTypes and Properties by various identities when using the Report Builder.

Editing preferences

To edit Self-Service Reporting setting, do the following:

1. Go to **Administration\Preferences** and open the **World** Preference item for editing.
2. Select the Self-Service Report Settings tab and open the Self-service Report Settings item for editing.
3. Right-click on the **Feature Setting** you wish to edit, and select **View "Feature Setting"**.

The following settings control ItemType and Property exclusion:

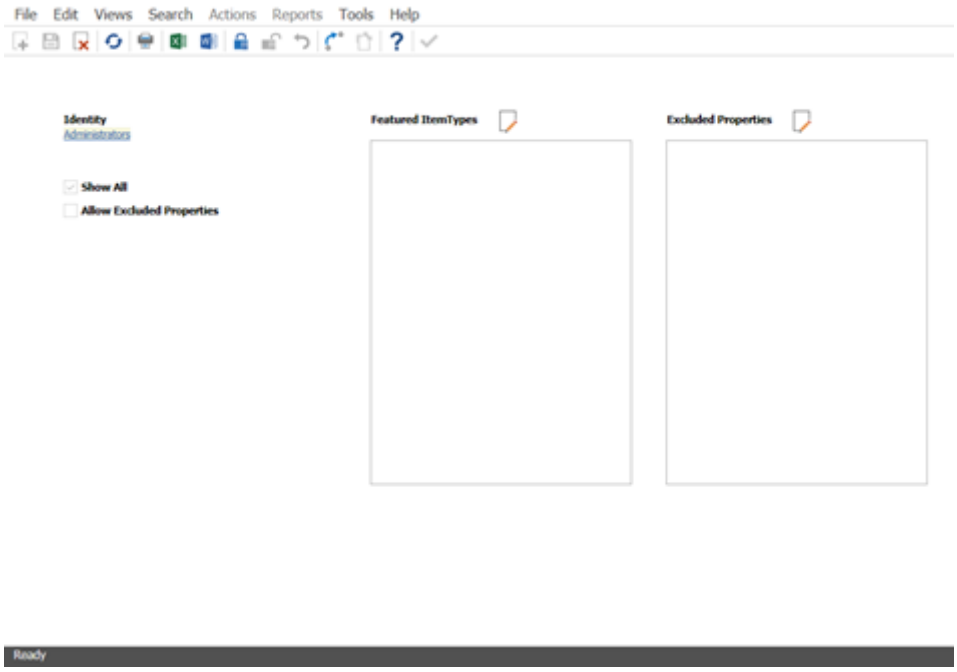

Figure 3.

- **Identity:** Identity specifies who will be controlled by the preference.
- **Show All:** Controls if the **All** tab in the **Report Designer** will be displayed to members of this identity. If the setting is unchecked, this identity can only select from **Featured** ItemTypes.
- **Allow Excluded Properties:** Controls if members of OTHER identities can see excluded properties.
- **Featured ItemTypes:** A list of ItemTypes that a member of this identity is allowed to select from in the **Featured** section **o**f the ItemType tab in the report designer.
- **Excluded Properties:** A list of properties (by ItemType) that are excluded for members of this Identity.

Chapter 4. Import / Export Report Definitions

Self-Service Reports may be imported and exported using the Import/Export tool. For more information on using the Import/Export tool, refer to the *Infor PLM Accelerate 11.0 - Package Import Export Utilities* guide.

Chapter 5. Connection Settings

For the Self-Service Reporting application, the connections to Infor PLM Accelerate and databases are defined in the **SelfServiceReportConfig.xml** file, typically found at the root of the Infor PLM Accelerate code tree installation. Just as it possible to connect multiple databases to an Infor PLM Accelerate instance, it is possible to connect multiple databases to the Self-Service Reporting application.

The **SelfServiceReportConfig.xml** file consists of the following settings:

```
<configuration>
  <appSettings>
    <add key="inn_server_url"
value="<Innovator_URL>/Server/InnovatorServer.aspx"/>
  </appSettings>
  <connectionStrings>
    <add connectionString="Data Source=<SQLServerName>;Initial
Catalog=<DatabaseName>;Persist Security Info=True;Pooling=False;User
ID=<DatabaseUserName>;Password=<DatabaseUserPassword>;"
         name="<InnovatorSolutions>" />
  </connectionStrings>
</configuration>
```

Example:

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <appSettings>
    <add key="inn_server_url"
value="http://localhost/InnovatorServer/Server/InnovatorServer.aspx"/>
  </appSettings>
  <connectionStrings>
    <add connectionString="Data Source=(local);Initial Catalog=InnovatorSolutions;Persist Security
Info=True;Pooling=False;User ID=innovator;Password=innovator;"
         name="InnovatorSolutions" />
  </connectionStrings>
</configuration>
```

In order to connect to additional databases, new `add` tags should be added inside the `connectionStrings` structure. Each `connectionString` should match the `DB-Connection` tag in the **InnovatorServerConfig.xml** file as mapped below.

InnovatorServerConfig.xml	SelfServiceReporting.xml
<DB-Connection (id)	<add (name)
<DB-Connection (database)	<add (connectionString/Initial Catalog)
<DB-Connection (server)	<add (connectionString/Data Source)
<DB-Connection (uid)	<add (connectionString/User Name)
<DB-Connection (pwd)	<add (connectionString/Password)