

IBM InfoSphere Information Server
Version 8 Release 7

Reporting Guide



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Note

Before using this information and the product that it supports, read the information in “Notices and trademarks” on page 69.

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Chapter 1. Overview

In IBM® InfoSphere® Information Server, you can create reports about specific activities in any component or administrative function across the suite.

Using InfoSphere Information Server reporting services, you can create reports to communicate summaries, data, details, or statistics with other members of your team. You can create reports in various formats, including DHTML, HTML, PDF, RTF, TXT, XLS, and XML. These report formats can be viewed both in the product and on computers where the products have not been installed. You can create product-module specific reports, for product modules such as IBM InfoSphere Information Analyzer or IBM InfoSphere DataStage®. You can create cross-product-module reports for logging, monitoring, scheduling, and security services.

You can also use access control lists to manage access to and permissions for the report templates, reports, and report results.

Reports can show information in multiple ways. For example, analysis results can be displayed as the actual data that the results refer to, or, they can be shown in a graph or chart. Graphs and charts display general information about an object such as the percentage of columns that have been analyzed in a data source. Graphs and charts also highlight issues that might otherwise be difficult to locate in the text of a standard report.

The following example shows an IBM InfoSphere FastTrack report. This report is a Mapping Specification report and it is a statistical summary of what the selected user has completed in mapping the sources and targets. This report can be shared outside of InfoSphere FastTrack as a PDF or HTML file. This report allows other users to see, in a single mapping specification, how much of the mapping has been completed.

Mapping Specification

Statistics Summary

| | |
|-------------------------------------|---------------------------------------|
| Project : | Test |
| Report Name : | Mapping Statistics Summary with links |
| Report Generated : | 2009-04-18 04:59:49 |
| User : | admin admin |
| Description : | mapping statistics summary |
| Mapping Specification Name : | Bank1 |
| Owner : | |
| Status : | In Progress |
| Mapping Specification Description : | |



| Source Tables | | 1 Tables |
|--|------------------|----------|
| TEST.BANKDEMO.BANK1.CHECKING | 9 of 10 columns | 90% |
| Total | 9 of 10 columns | 90% |
| Target Tables | | 1 Tables |
| TEST.BANKDEMO.BANK.CUSTOMERS | 13 of 13 columns | 100% |
| Total | 13 of 13 columns | 100% |
| Source Links | | 1 Links |
| SC5SingleOutputLink.ContainerOutputLink1 | 2 of 2 outputs | 100% |
| Total | 2 of 2 outputs | 100% |
| Status | | |
| Reviewed | | 7% |
| Ready for Review | | 7% |
| In Development | | 53% |
| No Status | | 30% |
| Candidate Terms | | |

You can create reports from a number of InfoSphere Information Server clients. The Web console provides more advanced reporting features. In the Web console, you can:

- Control access to reports and report results
- Publish your results in a wide variety of formats
- Create your own structure for saving folders

The following tasks show you how to work with reports in the Web console. To run reports in additional clients and consoles, refer to Chapter 10, “Using other clients to create and run reports,” on page 59.

To report on InfoSphere DataStage job logs, you must have the DataStage Administrator set the option to copy this logging information into the operational repository. For more information, refer to Enabling operational repository logging.

Chapter 2. Accessing reports in the IBM InfoSphere Information Server Web console

You access the IBM InfoSphere Information Server Web console by using either Microsoft Internet Explorer or Mozilla Firefox. Use the Reporting tab to access reports.

Before you begin

Configuring your Web browser to work with the IBM InfoSphere Information Server Web console

Important: If you use a pop-up blocker, you might need to disable the pop-up blocker or configure the pop-up blocker to allow pop-ups for the report to open.

Procedure

1. Open your Web browser and connect to `http://host_server:port`, where *host_server* is the name or IP address of the IBM InfoSphere Information Server Web console for the IBM InfoSphere Information Server host name that you want to connect to.
2. Type the user name and password for the IBM InfoSphere Information Server Web console, and click **Enter**.
3. Select the **Reporting** tab.

Example

For example:

- To connect to a server on your network named Andros, type `http://Andros:9080`.
- To connect to a server whose IP address is 666.555.44.333, type `http://666.555.44.333:9080`.

Chapter 3. Available reports and templates

In the Web console, there are a number of report templates to choose from. The types of available templates depend on the suite components that you installed. The following tables detail the roles, permissions, and result formats for all report templates.

Administration report templates

You can create reports for logging, scheduling, and security services across the suite.

These reports are available from the Administration folders and are available in all outputs. These reports are intended for system administrators as well as to communicate system administration functions to business users.

To report on IBM InfoSphere DataStage job logs, you must have the DataStage Administrator set the option to copy this logging information into the operational repository. For more information, refer to Enabling operational repository logging.

Table 1. IBM InfoSphere Information Server administration reports

| Template name | Description | Communicates | Roles: Permissions |
|--|--|---|--------------------|
| Task execution summary by date range | Report on task execution summary by topic, summary, and creator for a specified date and time range | A summary of tasks that were run. The parameters for these reports are component, topic, and task status. | SuiteAdmin: all |
| Task execution summary by elapsed time | Report on task execution summary by topic, summary, and creator for a specified elapsed amount of time | A summary of tasks that were run. The parameters for these reports are component, topic, and task status. | SuiteAdmin: all |
| Task schedules by date range | Report on task schedules by topic, and component for a specified date and time range | A list of task schedules by topic, such as Report Execution and Log Purging, and component, such as Common Services, IBM InfoSphere Information Analyzer. | SuiteAdmin: all |
| Task schedules by elapsed time | Report on task schedules by topic, and component for a specified elapsed amount of time | A list of task schedules by topic, such as Report Execution and Log Purging, and component, such as Common Services, InfoSphere Information Analyzer. | SuiteAdmin: all |
| Log messages by date range | Report on log messages by date range, category, and level for a specified date and time range | A list of the log messages associated with the specified log view. | SuiteAdmin: all |
| Log messages by elapsed time | Report on log messages by elapsed time, category, and level for a specified elapsed amount of time | A list of the log messages associated with the specified log view. | SuiteAdmin: all |

Table 1. IBM InfoSphere Information Server administration reports (continued)

| Template name | Description | Communicates | Roles: Permissions |
|---------------------------|---|---|--------------------|
| List of Users | Report on list of users by one or more criteria | <p>A list of users that match a specified criteria including:</p> <ul style="list-style-type: none"> • Role type, such as suite or product • Component, such as IBM InfoSphere Information Server or IBM InfoSphere Business Glossary • Role id, such as Suite Administrator or InfoSphere Information Analyzer User <p>Not all combinations of role type, component, and role id are valid. For example, there are no roles for role type 'Suite' and component 'Information Analyzer'.</p> | SuiteAdmin: all |
| Active users in a Session | Report on active users in a session by roles | The list of currently active users, by roles such as Business Glossary Administrator or FastTrack User. | SuiteAdmin: all |

InfoSphere Business Glossary report templates

With the IBM InfoSphere Business Glossary reports, you can report on the terms that are contained by a glossary category. You can also report on the IBM InfoSphere Information Server users who act as stewards for objects in the repository.

These report templates are listed in the Business Glossary folder. The **Roles: Permissions** for the IBM InfoSphere Business Glossary report templates is **SuiteAdmin: all**.

Table 2. IBM InfoSphere Business Glossary report templates

| Template Name | Description | Communicates | Type of users the report is intended for | Information provided in the report | Result formats |
|---------------|-------------------------------|--|--|------------------------------------|----------------|
| Categories | Report on Terms in a Category | <p>An alphabetic list of selected categories and their contained terms.</p> <p>Note: You must select categories to report on.</p> | Business users who are not interested in accessing the InfoSphere Business Glossary Browser or who do not have permission to access the Browser. | Term details | HTML, PDF |

Table 2. IBM InfoSphere Business Glossary report templates (continued)

| Template Name | Description | Communicates | Type of users the report is intended for | Information provided in the report | Result formats |
|---------------|-----------------------|--|--|--|----------------|
| Stewardship | Report on Stewardship | A list of selected stewards and their managed assets. Note: You must select stewards to report on. | The stewards manager or governance/compliance officer. | Assets managed by their stewards and basic asset details | HTML, PDF |

InfoSphere DataStage report templates

You can report on operational metadata that is produced when you run jobs in IBM InfoSphere DataStage.

To report on job runs, you must:

- Enable the generation of operational metadata in InfoSphere DataStage and QualityStage™
- Run one or more jobs
- Import the operational metadata into the metadata repository of IBM InfoSphere Information Server

All reports are available in PDF and HTML output.

Table 3. IBM InfoSphere DataStage report templates

| Template Name | Description | Communicates | Type of users the report is intended for | Information provided | Roles: Permissions |
|--|---|---|--|---|---|
| Job run information for selected job run | Report on job run information and its events information for a selected job run | The operational metadata of a single job runs as reported by InfoSphere DataStage. It reports actual lineage as scoped to a job during a run. Note: A job that uses a row generator as a data source generates an empty report because a row generator is not a physical data resource. | Any user who wants to view the information from a specific job run | The statistical information of a job run including: The read, write, lookup, or failure events that occurred during a job run on each link/stage The timestamp of the run and the number of rows that were read or written. | You need OMD administrator or analyst role to create a report and OMD user role to view a report. |

Table 3. IBM InfoSphere DataStage report templates (continued)

| Template Name | Description | Communicates | Type of users the report is intended for | Information provided | Roles: Permissions |
|-------------------------------|---|---|---|---|--------------------|
| Source and Target by Database | Report on Source and Target Details by Database | Design-time data lineage for a single database table column or columns either from a specific source perspective or from a specific target perspective. | A data analyst looking for a report on lineage for a particular table and its columns. | This information is related to the columns of a table in a database that has a particular database schema. Ensure that the metadata (table schema) is in the repository. The report provides the following information: List of jobs where a specific column is used Details of a source and target field depending on the option chosen (either source to target or target to source). | SuiteAdmin: all |
| Source and Target by Job | Report on Source and Target Details by Job | Design-time data lineage for a single job either from a specific source database or from a specific target database by job. | A data analyst to document lineage for a particular column or columns as it flows through a selected job. | This information is related to the source and target columns of a particular stage in a job and its various changes. | SuiteAdmin: all |

InfoSphere FastTrack report templates

You can use IBM InfoSphere FastTrack report templates to provide details about column mappings and table and column mappings to job developers and data analysts.

The **Roles: Permissions** for the InfoSphere FastTrack report templates is **FT user: all**. The report results are formatted in HTML, PDF, or RTF.

Table 4. InfoSphere FastTrack report templates

| Template Name | Description | Communicates | Type of users the report is intended for | Information provided in the report |
|--|---|--|---|---|
| Mapping Specification Documentation Details | Mapping specification and column mapping details | Provides column mapping details for all column mappings in a single mapping specification. Also allows you to sort and filter out some of the mapping column details based on selected properties. | Both job developers and data analysts. This report can be shared outside of InfoSphere FastTrack so the user does not need to either open the product or have it installed. | The details of each column mapping. |
| Mapping Specification Implementation Details | Mapping specification, table mapping, column mapping, and looking details | Provides column mapping details for all column mappings in a single mapping specification. Also includes table mapping details like source table joins, lookups, switch, aggregations. Column mappings maybe sorted and filtered based on selected properties. | Both job developers and data analysts. This report can be shared outside of InfoSphere FastTrack so the user does not need to either open the product or have it installed. | The details of the table and column mappings. |
| Mapping Statistics Summary | Mapping statistics summary | A statistical summary of what the user has completed in mapping the sources and targets. | Both job developers and data analysts. This report can be shared outside of InfoSphere FastTrack so the user does not need to either open the product or have it installed. | Shows, in a single mapping specification, how much of the mapping has been completed. |

InfoSphere Information Analyzer report templates

A wide variety of templates are available for information analysis. For example, you use these templates to create reports with column summary details. You can create reports that summarize the foreign keys in your data after a foreign key analysis job runs.

IBM InfoSphere Information Analyzer reports produce report results in HTML, XML, RTE, and PDF formats.

The IAUser role has all permissions in the access control list for InfoSphere Information Analyzer templates. In addition, the following project-level roles are required in InfoSphere Information Analyzer to grant the following levels of permission:

IAUser
All permissions

IADataSteward
Read permission

IABusinessAnalyst
All permissions

Table 5. InfoSphere Information Analyzer report templates

| Folder | Template Name | Description | Communicates | Type of users the report is intended for |
|--|---|--|---|--|
| Information Analyzer > Analysis Publication | Publication Summary | Summary of all tables in a selected set of Data Schemas. | Provides a summary of the publication of selected tables. Publication information includes last publication date and the user who published it. | Data Analyst, Project Admin |
| Information Analyzer > Baseline Analysis | Baseline Content - Current to Prior Variances | Shows content changes from one analytical instance to the next. | The baseline content – current to prior. Variances provide insight into the changes in column content from one analytical instance to the next. The report summarizes content changes across all columns and then for specific columns. | Data Analyst |
| Information Analyzer > Baseline Analysis | Baseline Structure - Current to Prior Variances | Structural changes from one analytical instance to the next | Provides insight into the changes in column structure from one analytical instance to the next. The report summarizes structural changes across all columns and then details specific columns in a table. | Data Analyst |
| Information Analyzer > Column Classification | Data Classifications | Data class representation for all selected columns sorted on data classification | A presentation of data class representation for all columns selected. The information is sorted based on column and highlights both inferred and selected data classes. | Data Analyst |
| Information Analyzer > Column Classification | Summary | Defined classifications of a group of columns in a table | A summary that provides insight into the inferred classifications for the columns in a table that is grouped by the selected data class. | Data Analyst |
| Information Analyzer > Column Domain | Completeness and Validity Summary | Summary of the current completeness and validity for the included tables and columns | A summary report that shows levels of incomplete and invalid data for each column in a table. When initially run, all values are reported as new. On runs following subsequent column analysis execution, only the summary of those values that were not previously reported are listed as new. | Data Analyst |

Table 5. InfoSphere Information Analyzer report templates (continued)

| Folder | Template Name | Description | Communicates | Type of users the report is intended for |
|---|------------------------|---|--|--|
| Information Analyzer > Column Domain | Domain Analysis Detail | The detail domain classification of each domain value selected for the report (such as default, invalid, minimum, maximum, and so on) | <p>A configurable report that allows the inclusion or exclusion of default, invalid, or valid values; sorting by value, count, or domain indicator either ascending or descending.</p> <p>The report graphically shows, by column, the percent of values that are Valid, Incomplete, and Invalid. For the domain indicators included, the report lists the detail values in the indicated sort order.</p> | Data Analyst |
| Information Analyzer > Column Domain | Domain Value Profile | Categorization profile of each domain value (such as default, invalid, minimum, maximum, and so on) | A configurable report that allows the inclusion or exclusion of default, invalid, or valid values; sorting by value, count, or domain indicator either ascending or descending. | Data Analyst |
| Information Analyzer > Column Frequency | Frequency By Frequency | The most commonly occurring values presented in text with a cumulative frequency total | <p>The data values for the selected columns in descending order by frequency.</p> <p>This report includes the value, the frequency of the value, and the cumulative frequency of values in the report by line. You can enter an optional frequency cutoff value to reduce the values generated. The cumulative percentage only includes the total percent through the values displayed in the report. Summary includes the total record count as well as the total records included in the report.</p> | Data Analyst |
| Information Analyzer > Column Frequency | Format Violations | Format Violations, including representative example values | Summary of formats for the chosen column. Summary information includes format status, format, count, total rows percentage, and an example. | Data Analyst |
| Information Analyzer > Column Frequency | Most Frequent Formats | The most commonly occurring formats presented graphically and in text, including representative example values | The most frequent formats for selected columns. Formats are shown graphically and in text for up to 200 formats including a set number of examples. | Data Analyst |

Table 5. InfoSphere Information Analyzer report templates (continued)

| Folder | Template Name | Description | Communicates | Type of users the report is intended for |
|---|---|---|---|--|
| Information Analyzer > Column Frequency | Most Frequent Values | The most commonly occurring values presented graphically and in text | The distribution of most frequent values for the specified columns. | Data Analyst |
| Information Analyzer > Column Inferred | Constant Value Difference Only | Differences in constant value between defined, inferred, and chosen values | All columns where the inferred and chosen Constant Flags differ. | Data Analyst |
| Information Analyzer > Column Inferred | Constant, Unique, and Null Properties (Defined/Inferred/Chosen) - All | Differences in constant, uniqueness, and nullability between defined, inferred, and chosen values | For all selected columns, shows the inferred and chosen constant and uniqueness flags and the defined, inferred, and chosen Nullability Flags. | Data Analyst |
| Information Analyzer > Column Inferred | Data Type Difference Only | Differences in data types between defined, inferred, and chosen values | All columns where the defined, inferred, or chosen data types differ. | Data Analyst |
| Information Analyzer > Column Inferred | Length Difference Only | Differences in length between defined, inferred, and chosen values | All columns where the defined, inferred, or chosen lengths differ. | Data Analyst |
| Information Analyzer > Column Inferred | Nullability Difference Only | Differences in nullability between defined, inferred, and chosen values | All columns where the defined, inferred, or chosen Nullability Flags differ. | Data Analyst |
| Information Analyzer > Column Inferred | Precision Difference Only | Differences in precision between defined, inferred, and chosen values | All columns where the defined, inferred, or chosen precision are different. The report contains similar information as the Length Difference Only report, but has differing inclusion criteria. | Data Analyst |
| Information Analyzer > Column Inferred | Type and Length Properties (Defined/Inferred/Chosen) - All | Differences in data type and length between defined, inferred, and chosen values | For all selected columns, shows the defined, inferred, and chosen data type, length, precision, and scale. The report contains similar information to the Data Type or Length Difference reports, but has differing inclusion criteria. | Data Analyst |
| Information Analyzer > Column Inferred | Uniqueness Difference Only | Differences in uniqueness between defined, inferred, and chosen values | All columns where the inferred and chosen Uniqueness Flags are different. The report appears the same as the Nullability Difference Only report, but has differing inclusion criteria. | Data Analyst |

Table 5. InfoSphere Information Analyzer report templates (continued)

| Folder | Template Name | Description | Communicates | Type of users the report is intended for |
|--|-----------------------------|---|--|--|
| Information Analyzer > Column Properties | Column All Data Types | Data type representation for only selected columns with ambiguous representations | The distribution of inferred (candidate) data types for each column. The first page is a summary for the table. Subsequent pages detail the specific distribution for each column noting record count and percent. | Data Analyst |
| Information Analyzer > Column Properties | Column Ambiguous Data Types | Data type representation for all selected columns, including ambiguous representations | The distribution of inferred (candidate) data types for all columns with multiple inferred (ambiguous) data types. The first page is a summary of the table. Subsequent pages detail the specific distribution for each column noting record count and percent. | Data Analyst |
| Information Analyzer > Column Properties | Column Storage Utilization | Defined length versus value length for all selected columns and effective field utilization | <p>The defined length compared to the maximum or average length to identify how effectively columns are defined from a standpoint of storage utilization.</p> <p>The table summary indicates the sum of defined lengths for a given row. The table summary also indicates the sum of both maximum and average bytes used in a given row. The column summary indicates the percent of null and constant values (equal if null is the most common 'constant' value). The total of null and constant bytes is equal to the number of equivalent values for each times the defined length.</p> | Data Analyst |
| Information Analyzer > Column Properties | Definition Summary | Definition Summary | The defined information for each column as established through the importing of metadata. | Data Analyst |
| Information Analyzer > Column Summary | Column Structural Summary | Line-by-line structural details showing statistics of the columns in each data collection | Provides structural details for the column that includes primary key flag, number of inferred data types, length, precision, scale, unique values, uniqueness percentage, distinct format count, distinct format percentage, null percentage, incomplete percentage, invalid percentage, maximum value, and minimum value. | Data Analyst |

Table 5. InfoSphere Information Analyzer report templates (continued)

| Folder | Template Name | Description | Communicates | Type of users the report is intended for |
|--|--|---|--|--|
| Information Analyzer > Column Summary | Column Structural Summary with Inferred Data Types | Line-by-line structural details showing statistics of the columns in each data collection, including data type variations | Structural details for the column which includes defined primary key flag, number of data types, Length (Min, Max, and Avg), Precision (Min, Max), Scale (Min, Max), Unique Values, Uniqueness percentage, distinct format count, distinct format percentage, null percentage, incomplete percentage, invalid percentage, maximum value and minimum value. After these statistics, the column is summarized by inferred datatypes and its count. | Data Analyst |
| Information Analyzer > Column Summary | Summary Statistics | Key structural and content summary statistics of a column | A general summary of the structure of the analyzed data provided on a column-by-column basis for selected tables and columns. The report breaks out, in sections, the summaries of the column contents, domain assessment, defined structure, and inferred structure. | Data Analyst |
| Information Analyzer > Column Summary | Column Profile Status | Line-by-line showing the profiling status details of the columns in each data collection | A summary of the profiling status of a selected column. | Data Analyst |
| Information Analyzer > Column Summary | Notes Details | Display notes for the data collection | A summary of all notes for the selected tables and columns. | Data Analyst |
| Information Analyzer > Cross Table Domain Analysis | Common Domains | Overlap of values for columns in multiple tables | The commonality between the selected base table or column and a paired table or column. It shows the total cardinality for each column, the intersection count, and the percentage overlap in each direction. | Data Analyst |
| Information Analyzer > Cross Table Domain Analysis | Common Domains Same Name | Overlap of values for columns in multiple tables with the same name | The commonality between the selected base table or column and a paired table or column where the columns have the same name. The report shows the total cardinality for each column, the intersection count, and the percentage overlap in each direction. | Data Analyst |

Table 5. InfoSphere Information Analyzer report templates (continued)

| Folder | Template Name | Description | Communicates | Type of users the report is intended for |
|--|---|--|---|--|
| Information Analyzer > Cross Table Domain Analysis | Domains Compared - Above Threshold | Overlap of values that occur above a common domain threshold for columns in multiple tables | Domain relationships between a base table and corresponding paired tables above a selected threshold value. The report notes the base table/column, the paired table/column, the cardinality of distinct values in each column, and the intersection of values. | Data Analyst |
| Information Analyzer > Cross Table Domain Analysis | Domains Compared - Redundant Value Detail | Overlap of values that occur above a common domain threshold for columns in multiple tables marked redundant | Highlights domain relationships between a base table and corresponding paired tables that indicate either that there was no common data about the defined common domain threshold or that there was a level of commonality. The report also shows the percent of records in common in each direction. | Data Analyst |
| Information Analyzer > Cross Table Domain Analysis | Domain Column Quality Assessment - Summary | Summary of quality and the column profile that is associated with a specific database or table and its columns | A summary, at the column level, of general quality including total records, percent records complete or incomplete, total records with null or constant data, total bytes allocated, and maximum/average bytes used. Graph indicates percent records classified as valid versus invalid. | Data Analyst |
| Information Analyzer > Cross Table Domain Analysis | Overlap of values for columns in multiple tables Cross Domain Detail Value Discrepancies | Value discrepancies that occur above a common domain threshold for columns in multiple tables | Discrepancies between paired and base table columns above a set domain threshold. | Data Analyst |

Table 5. InfoSphere Information Analyzer report templates (continued)

| Folder | Template Name | Description | Communicates | Type of users the report is intended for |
|--|--|---|---|--|
| Information Analyzer > Cross Table Domain Analysis | Redundant Column Value Commonality Details | Detail view of cross domain comparisons of columns that are marked Redundant | Summarizes the details of paired column value overlaps (or commonality). The report is based on the common domain threshold selected. The first page contains the report headings only—subsequent pages contain the detail of each set of paired columns. The detail pages indicate the base and paired tables/columns, the number of distinct values (cardinality) for each column, and the intersection of distinct values. The second and third lines show column details for both the base and paired column. The cardinality details indicate total records and distinct values for base, paired, and value overlap including relevant flags. | Data Analyst |
| Information Analyzer > Cross Table Domain Analysis | Same Name Value Commonality Details | Commonality details above a common domain threshold for columns of same name in multiple tables | The specific values that exist in one column in a base table but not in a second column of the same name in a paired table. Parameters allow you to control the common threshold percent, as well as the number of values, from both the base and the paired tables, to display that are discrepancies. | Data Analyst |
| Information Analyzer > Cross Table Domain Analysis | Cross Domain Value Commonality Details | Commonality details above a common domain threshold for columns in multiple tables | Summarizes the details of paired column value overlaps (or commonality). The report is based on selected common domain threshold selected. The first page contains the report headings only—subsequent pages contain the detail of each set of paired columns. | Data Analyst |
| Information Analyzer > Cross Table Domain Analysis | Same Name Detail Value Discrepancies | Detailed view of cross domain comparisons where view is restricted to columns of same name | Highlights, up to a selected number, value discrepancies between selected base tables and analyzed paired tables. The report shows value discrepancies in both directions, if they exist. | Data Analyst |
| Information Analyzer > Data Rule Exception | Data Rule Exception | Provides an output of rows that are associated with a specific Data Rule exception | Provides a list of the row values for each column (rule variable) found in the data rule exception tables. | Business Analyst and Data Analyst |

Table 5. InfoSphere Information Analyzer report templates (continued)

| Folder | Template Name | Description | Communicates | Type of users the report is intended for |
|---|--|--|--|--|
| Information Analyzer > Data Rule Exception | Data Rule Exception Table Chart Summary | Provides a graphical output of rows that are associated with a specific Data Rule Exception Table and Column. | Provides a list of the row values for each column (rule variable) found in the data rule exception tables – Graphical view using charts. | Business Analyst and Data Analyst |
| Information Analyzer > Data Rule Summary | Data Rule Execution History Summary | Execution History summary for selected data rules. | Provides Data Rule Name, Definition and Execution details which include Execution Start and End Dates, Trend Chart of Execution History, Validity measures, and Benchmark setting with pass or fail status and variance. | Business Analyst and Data Analyst |
| Information Analyzer > Data Rule Summary | Data Rule Summary Project List | List of Data Rule Definitions, Data Rules, or both. | Provides Data Rule Name, Definition and creation or modification dates and user IDs with folder category to which the data rules belong. | Business Analyst and Data Analyst |
| Information Analyzer > Domain Quality Summary Domain Column Quality Assessment - Summary | Domain Table Quality Assessment - Summary | Summary of quality and the table profile that is associated with a specific database and its underlying tables and columns | A summary, at the table level, of general quality including total records, percent records complete or incomplete, total fields across all columns with null or ambiguous (mixed data type) data, and total record length allocated and inferred in bytes. The graph indicates the percent records classified as valid versus invalid. | Data Analyst |
| Information Analyzer > Domain Quality Summary | Defined Foreign Key Candidate and Chosen Summary | Foreign key detail information with defined, candidate, and chosen values | Candidate and selected Foreign Keys for tables where Foreign Key analysis has been completed. If referential integrity has not been completed, that is noted in the report. | Data Analyst |
| Information Analyzer > Foreign Key Analysis | Defined Foreign Key Referential Integrity Exceptions | Orphan foreign key values for a given table that violate the defined referential Integrity relationship | Exceptions in Referential Integrity for defined Foreign Keys only. The Foreign Key must be defined in the database source. If no defined foreign key exists, the report indicates that. Where a defined foreign key exists with referential integrity exceptions, the specific exception values are shown. | Data Analyst |
| Information Analyzer > Foreign Key Analysis | Defined Foreign Key Summary | Summary of the defined foreign keys in a table | Defined foreign keys and the associated/referenced table and column. This report indicates any totals for nulls, defaults, and invalid values as well as any referential integrity violations. | Data Analyst |

Table 5. InfoSphere Information Analyzer report templates (continued)

| Folder | Template Name | Description | Communicates | Type of users the report is intended for |
|---|--------------------------------------|---|---|--|
| Information Analyzer > Foreign Key Analysis | Referential Integrity Detail | Referential integrity detail between primary key and foreign key values | <p>Foreign key values (orphans) in one table with no corresponding parent (primary key) values in a second table.</p> <p>Options allow control over the number of referential integrity violations returned from the foreign key source as well as whether to include all possible foreign keys, or limit it to defined, candidate, or chosen keys.</p> <p>Where referential integrity has been selected, the foreign key to primary key referential integrity and the primary key to foreign key coverage is summarized. Details of specific integrity violations (orphans) are shown if they exist. A graph shows the overlap distribution.</p> | Data Analyst |
| Information Analyzer > Foreign Key Analysis | Primary Keys without Children Detail | Parent keys without child references between primary key and foreign key values | <p>Foreign key values (orphans) in one table with no corresponding parent (primary key) values in a second table.</p> <p>Options allow control over the number of referential integrity violations returned from the foreign key source as well as whether to include all possible foreign keys, or limit it to defined, candidate, or chosen keys.</p> <p>Where referential integrity has been selected, the foreign key to primary key referential integrity and the primary key to foreign key coverage is summarized. Details of specific integrity violations (orphans) are shown if they exist. A graph shows the overlap distribution.</p> | Data Analyst |
| Information Analyzer > Metadata Summary | Database Profile | Summary of all data schemas within a selected set of Databases | A summary of dataschemas for the selected tables including the schema information and selected table information with number of records, and number of columns as displayed. | Data Analyst |

Table 5. InfoSphere Information Analyzer report templates (continued)

| Folder | Template Name | Description | Communicates | Type of users the report is intended for |
|---|---|---|--|--|
| Information Analyzer > Metadata Summary | Table Profile | Summary of all tables within a selected set of Data Schemas | Summary of tables. For the selected table, all selected columns are shown with the column position, number of distinct values, cardinality percentage, data type (defined and selected), length (defined and selected), scale (defined and selected), number of records, and number of columns as displayed. | Data Analyst |
| Information Analyzer > Metric Summary | Metric Execution History Summary | Execution History summary for the selected data metric. | Provides Metric name and Execution details that include Execution Start and End Dates, Trend Chart of Execution History, Validity measures and Benchmark setting with pass or fail status and variance. | Business Analyst and Data Analyst |
| Information Analyzer > Project Status | Analysis and Review Summary | Summary of analysis and review status for data sources within a project | The status of analysis and review of the selected project. | Data Analyst |
| Information Analyzer > Project Status | Project Summary by Notes Status | Summary of notes status for data sources within a project | Summarizes the notes for a selected project and the selected levels down to the Table level. The report identifies total columns, total columns not annotated, a breakdown of notes by note status, and a summary of notes. | Data Analyst |
| Information Analyzer > Project Status | Project Summary by Notes Type | Summary of notes types for data sources within a project | Summarizes the notes for a selected project and the selected levels down to the Table level. The report identifies total columns, total columns not annotated, a breakdown of notes by note type, and a summary of notes. | Data Analyst |
| Information Analyzer > Project Status | Project Summary | Summary of a selected project. | The summary of objects that are associated with the selected project. The summary includes the data source summary, schema details, user and group summary. | Data Analyst, Project Admin |
| Information Analyzer > Project Status | Defined, Selected and Candidate Summary | Defined, selected and candidate primary keys in a table based on a completed analysis | Defined and candidate primary keys (single or multi-column) including their length, total null and duplicate values, and uniqueness across total rows. | Data Analyst |
| Information Analyzer > Project Status | Multi Column Key Assessment Summary | The multicolumn key assessment summary of a table | The multi-column key assessment summary that includes primary key (candidate or selected), foreign key (selected or defined), data class, data type, length, unique %, null % and duplicate %. | Data Analyst |

Table 5. InfoSphere Information Analyzer report templates (continued)

| Folder | Template Name | Description | Communicates | Type of users the report is intended for |
|---|--|---|---|--|
| Information Analyzer > Project Status | Single Column Key Assessment Summary | The single column key assessment summary of a table | The column key assessment summary that includes primary key (candidate or selected), foreign key (selected or defined), data class, data type, length, unique %, null % and duplicate %. | Data Analyst |
| Information Analyzer > Table Primary Key Analysis | Candidate Duplicate Exceptions | The duplicate primary key values for a given table, including any defined primary keys and candidate primary keys identified through primary key analysis | Candidate primary keys and potential duplicate exceptions for those keys. Where multiple candidates exist, the selected key is indicated with an 'S', other candidate keys with a 'C'. If no duplicates are found, that is indicated for the key. If there are no candidate keys, that is indicated. Otherwise, specific duplicate key values are identified. | Data Analyst |
| Information Analyzer > Table Primary Key Analysis | Defined and Candidate Summary | Defined and candidate primary keys in a table based on a completed analysis | Defined and candidate primary keys (single or multi-column) including their length, total null and duplicate values, and uniqueness across total rows. | Data Analyst |
| Information Analyzer > Table Primary Key Analysis | Defined Primary Key - Duplicate Exceptions | The duplicate primary key values in a table | Specific value duplicate exceptions for any defined primary key. | Data Analyst |
| Information Analyzer > Table Primary Key Analysis | Defined Primary Key - Summary | The defined primary keys in a table | Defined Primary Keys including totals of null, default, and duplicate data out of total rows. If no primary key is defined in the data source (as with flat files), that is noted in the report. Defined multi-column primary keys are shown with column data in italics. | Data Analyst |
| Information Analyzer > Rule Set Summary | Rule Set Execution History Statistics | Run history summary for selected Rule Sets. | Provides Rule Set Name, Definition and Execution details which include Execution Start and End Dates, Trend Chart of Execution History, Validity measures, and Benchmark setting with pass or fail status and variance. | Business Analyst and Data Analyst |
| Information Analyzer > Rule Set Summary | Rule Set Summary Project List | List of Rule Set Definitions, Rule Sets, or both. | Provides Rule Set Name, Definition, and creation or modification dates and user IDs with folder category to which the rule sets belong. | Business Analyst and Data Analyst |

InfoSphere QualityStage report templates

You can use IBM InfoSphere QualityStage report templates to provide statistical-level feedback about jobs and details about match specification and its input to business analysts, job developers, and sales engineers.

You can access the following report templates in the **QualityStage** folder. The **Roles: Permissions** for the InfoSphere QualityStage report templates is **DataStageUser: all**.

Column frequency report template for InfoSphere QualityStage

Table 6. Column frequency report template

| Description | Communicates | Type of users the report is intended for | Information provided in the report | Results format |
|--|--|---|--|--------------------------------------|
| Describes statistical-level feedback about the values for a specific column of an Investigation job. | <p>Details regarding the values for a selected column of an Investigation job. This report presents information about frequency values by using statistical analysis.</p> <p>You create the data for this report by running a Character Discrete Investigate stage job or Character Concatenate Investigate stage job.</p> | Business Analyst, Subject Matter Expert, Job Developer, and Sales Engineers | <p>A table that represents Column Details (Column Name, Cardinality, and Total Rows)</p> <p>Column Pattern Summary Bar Chart (Pattern = x-axis, Count of Values = y-axis)</p> <p>Detailed Column Pattern Summary Table (Columns: Pattern Value, Count, Percent, Cumulative %, and Sample Data)</p> | DHTML, HTML, PDF, RTF, TXT, XLS, XML |

Frequency pattern report template for InfoSphere QualityStage

Table 7. Frequency pattern report template

| Description | Communicates | Type of users the report is intended for | Information provided in the report | Results format |
|--|--|---|--|--------------------------------------|
| Describes statistical-level feedback about the patterns for a specific column of an Investigation job. | <p>Details regarding the patterns for a selected column of an Investigation job. This report presents pattern information for a specific column by using statistical analysis.</p> <p>You create the data for this report by running a Word Pattern Investigate stage job.</p> | Business Analyst, Subject Matter Expert, Job Developer, and Sales Engineers | <p>A table that represents Column Details (Column Name, Cardinality, and Total Rows)</p> <p>Column Pattern Summary Bar Chart (Pattern = x-axis, Count of Values = y-axis)</p> <p>Detailed Column Pattern Summary Table (Columns: Pattern Value, Count, Percent, Cumulative %, and Sample Data)</p> | DHTML, HTML, PDF, RTF, TXT, XLS, XML |

Frequency word report template for InfoSphere QualityStage

Table 8. Frequency word report template

| Description | Communicates | Type of users the report is intended for | Information provided in the report | Results format |
|---|---|---|--|---|
| <p>Describes the most commonly-occurring word values for a specific column of an Investigation job. This report is prepared only for word investigations.</p> | <p>Details regarding the word values for a selected column of an Investigation job. This report presents the most commonly occurring word values from columns that are analyzed for patterns.</p> <p>You create the data for this report by running a Word Token Investigate stage job.</p> | <p>Business Analyst, Subject Matter Expert, Job Developer, Sales Engineer</p> | <p>A table that represents Column Details (Column Name, Cardinality, and Total Rows)</p> <p>Column Pattern Summary Bar Chart (Pattern = x-axis, Count of Values = y-axis)</p> <p>Detailed Column Pattern Summary Table (Columns: Pattern Value, Count, Percent, Cumulative %, and Sample Data)</p> | <p>DHTML, HTML, PDF, RTE, TXT, XLS, XML</p> |

Standardization Quality Assessment (SQA) report template for InfoSphere QualityStage

Table 9. Standardization Quality Assessment (SQA) report template

| Description | Communicates | Type of users the report is intended for | Information provided in the report | Results format |
|---|--|--|---|---------------------------------|
| <p>Describes summary-level feedback of the processed output of a Standardization job.</p> | <p>A snapshot summary to assess the results of standardization. Based on the findings, you might want to investigate further and run "SQA Record Examples" Report which shows actual record examples organized by output composition sets.</p> | <p>Business Analyst, Subject Matter Expert, Job Developer, and Sales Engineers</p> | <p>Introduction information about SQA Reports, and a list of terms that are used throughout the reports and their definitions.</p> <p>Standardized Summary - A pie chart and percentages of standardized record breakdown.</p> <p>Frequency of Records by Populated Dictionary Field - A Bench Chart that shows the percentage of records that populate each individual category. This section might be useful in determining abnormalities in the data based on unexpected distribution results.</p> <p>A table that shows groups of records that have the same standardized output pattern. These groups are called Composition Sets. The table shows the Dictionary Fields in the first column followed by a column for each set. The additional columns have columns headers with the Set number and the percentage of records contained in the set. A page can contain up to 10 sets per page.</p> | <p>HTML, PDF, RTF (MS Word)</p> |

The annotated results of the standardization process to be reviewed:

- Ensure that the company's self set threshold for data quality has been reached (for example, 95% or standardized data results). There is a difference between data that has been processed by a Rule Set and quality results. The summary report only shows the results that have been processed and are handled. It is up to the subject matter expert to decide if these handled results meet the criteria to be called standardized results.
- Ensure that processed data are meeting the criteria for standardized data. This is determined by the Subject Matter Expert who must manually determine if the data terms has been associated with the proper dictionary field.

- If data were not handled correctly or enough data were not standardized, the knowledge holder must notify the InfoSphere QualityStage technician how the data should look in its standardized form.
- For data that were not processed by the Rule Set (full or partial records), identify which data should have been handled and how it should have been handled (versus OK not to handle).
- Ultimately sign off that the quality objective has been achieved -- that data are being handled correctly by the standardization process.

Standardization Quality Assessment (SQA) Record Examples report template for InfoSphere QualityStage

Table 10. Standardization Quality Assessment (SQA) Record Examples report template

| Description | Communicates | Type of users the report is intended for | Information provided in the report | Results format |
|--|---|---|--|----------------|
| Describes statistical-level feedback of the processed output of a Standardization job. | <p>A detailed business-level review of standardization results for the data that have been processed through a Rule Set and assessed by the SQA stage.</p> <p>The business user or knowledge holder can use this report to determine the quality of the results by examining a representative sample of record examples and viewing how they are standardized. Results are organized by Composition Sets.</p> | Business Analyst, Subject Matter Expert, Job Developer, and Sales Engineers | <p>Provides example records, in a table format, to better analyze the quality of the results summarized in the SQA report.</p> <p>The table is built out horizontally. The first column shows the input record. The columns to the right are dictionary fields. Each record example exists in its own row.</p> | XLS (MS Excel) |

Match specification report template for InfoSphere QualityStage

Table 11. Match specification report template

| Description | Communicates | Type of users the report is intended for | Information provided in the report | Results format |
|--|---|--|--|--------------------------|
| Presents the contents of a match specification that was created in the Match Designer. | Details regarding the selected match specification and its input. In addition to illustrating the content and matching criteria of a Match Specification, the report also displays information about the active test passes that comprise the match, as well as any special handling or overrides used to temper match results. | Business user who might not be familiar with the Match Designer application but whose expertise is critical to the definition of a successful match. | <p>Glossary of terms that are used throughout this report.</p> <p>Match Specification</p> <p>Match Passes Section</p> <p>Data Table Definition Section</p> <p>Reference Table Definition</p> | HTML, PDF, RTF (MS WORD) |

Match Statistics report template for InfoSphere QualityStage

Table 12. Match Statistics report template

| Description | Communicates | Type of users the report is intended for | Information provided in the report | Results format |
|--|--|--|---|-----------------------|
| <p>Presents summary-level statistics about the matching results and statistics about the matching process for each match pass.</p> | <p>A summary of the results of a one- or two-source matching process. The report also includes details about the distribution of weights for each match pass and statistics about the records and blocks in each match pass.</p> <p>You create the data for this report by running a job that has an Unduplicate Match or Reference Match stage.</p> | <p>Business Analyst, Subject Matter Expert, Job Developer, and Sales Engineers</p> | <p>An executive summary with statistics about input and output records and a glossary of terms that are used in the report.</p> <p>For each match pass, statistics about the records and blocks in the pass and a histogram that shows the distribution of weights.</p> | <p>HTML, PDF, RTF</p> |

Chapter 4. Creating and managing reports

In the Web console, you use report templates to create reports. Then, you run reports to produce report results. Finally, you manage the report results.

1. Select a report template

Report templates are templates from which you create reports. A report template has required and optional parameters that you can specify values for when you create or edit the report, or when you run the report. The parameter values determine what information is searched for and returned when you run the report.

You can use report templates to create reports on logging activity, scheduling, and security. You can also use report templates to create reports on activities and objects that are controlled by the installed components. For example, if IBM InfoSphere DataStage is installed, you can view reports and report results on InfoSphere DataStage activities and objects, and you can create reports on operational metadata and the sources and targets of columns. If IBM InfoSphere Business Glossary is installed, you can create reports on categories and terms and on stewards of objects that are stored in the repository of IBM InfoSphere Metadata Server.

2. Create a report

Reports are executable objects that you create from report templates. Reports contain the parameter values that you specify in the report templates.

3. Run a report

You run reports to produce report results. You can schedule reports or run them manually. When you run them manually, you can enter values for parameters at runtime. You can create multiple reports from the same report template by using different values for the parameters in the template.

4. Manage the report results

You can view, delete, and control access to report results. You can customize the Home tab of the IBM InfoSphere Information Server Web console to display a list of the latest report results.

Selecting a report template to work with

You must first select a report template to work with. You can select a report template to manage access control, create reports, and view reports that are created from the template.

Before you begin

Your user name, group, or role must be on the access control list for the template.

Procedure

1. In the Navigation pane of the Reporting tab, select **Contents**.
2. Expand **Report Templates** to view the folders that contain templates.
3. Expand a template folder and click **View Report Templates** to view a list of templates that the folder contains.
4. Select a template from the list.

What to do next

You can click the name of any task in the task list to perform the task.

Creating reports

You can use a report template to create reports.

Before you begin

You must have read permission in the access control list for the template.

About this task

You can create a report by using the **New Report** menu option or from a template.

Procedure

1. Select **Contents > New Report**.
2. Select a report template and click **Next**.
3. In the New Report pane, specify parameters and other settings:
 - Optional: Change the default name and description of the report. The name and description are inherited from the report template that the report is created from.
 - Optional: Select a folder to save the report in. By default, reports are saved in the root Reports folder.
 - Optional: Select **Add to Favorites** to include this report on your favorites list.
 - Specify values for parameters or leave one or more parameter values unspecified, depending on whether you plan to run the report manually or use a schedule.
 - Specify the output format of the report results. Different templates can offer different output formats.
 - Specify the time period after which each report result expires, or specify that report results do not expire. Report results are deleted at midnight on the expiration date.
 - Specify whether to overwrite each report result with the newest version, or to save a specified number of report results for the report.
4. Save the report. You can also select **Run Now**, **Save and Run Now**, or **Save and Close**.

Results

You can run the report to create report results.

Selecting a report to work with

You can select a report to control access to the report, to run, schedule or delete the report, and to view results that are created from the report.

Before you begin

Your user name, group, or role must be on the access control list of the report.

Procedure

1. In the Navigation pane of the Reporting tab, select **Contents**.
2. Expand **Reports**.
3. Optional: Expand one or more subfolders in the Reports folder.
4. Click **View Reports** to view a list of reports that the folder contains.
5. Select a report from the list.

What to do next

You can click any task in the task list to perform the task. You must have the required permission for the task.

Viewing and modifying reports

You can view reports and change parameter values and other settings.

Before you begin

- To view the report, you must have read permission in the access control list for the report.
- To modify the report, you must have update permission in the access control list for the report.

Procedure

1. Select a report.
2. Click **Open Report Settings**.
3. To modify the report, in the Open Report Settings pane, specify parameters and other settings:
 - Change the name and description of the report.
 - Select a folder to save the report in. By default, reports are saved in the root Reports folder.
 - Specify values for parameters or leave one or more parameter values unspecified, depending on whether you plan to run the report manually or by using a schedule.
 - Specify the output format of the report results that are created from the report. Different templates can offer different output formats.
 - Specify the time period after which each report result expires, or specify that report results do not expire. Report results are deleted at midnight on the expiration date.
 - Specify whether to overwrite each report result with the newest version, or to save a specified number of report results for the report.
4. Save your changes.

Deleting reports

You can delete reports that were created from a report template. This deletes from the repository the reports and all the report results that were created from the reports.

Before you begin

- You must have delete permission for the reports.
- You must have delete permission for all report results of reports you delete.

Procedure

1. Select one or more reports.
2. Click **Delete**.

Report parameters

You can specify values for report parameters when you create or modify a report, and when you run a report manually.

Different templates can have different parameters. Required parameters are indicated by an asterisk (*) in the template.

Parameters that you specify values for when you create or modify a report are *bound* parameters. Parameters that you do not specify values for when you create or modify a report are *unbound* parameters. The choice to use bound or unbound parameters, or both, depends on whether you want to run the report manually or by using a schedule.

Running reports manually

You can use unbound parameters when you want to run a report manually with different parameter values at different times. When you create or modify the report, you do not need to specify values for required or optional parameters. When you run the report, you must specify values for required parameters that are unbound, and you can specify values for other unbound parameters. You cannot change bound parameters when you run the report.

Running reports by using a schedule

You cannot specify values for parameters when you run a report by using a schedule. When you create or modify the report, you must specify values for all required parameters and for any unrequired parameters that you want to use in the report.

Logging categories

If you select certain reports, such as Log messages by data range, you are asked which logging categories you want to include in the report. The following table includes a list of available categories and their descriptions.

Category names are hierarchical with a “-” separating levels. For example, IBM InfoSphere Information Analyzer defines the following categories: IBM-IA, IBM-IA-SERVER, IBM-IA-CLIENT, IBM-IA-HANDLER.

Table 13. Logging categories

| Application | Categories | Notes |
|----------------------|---|--|
| Operational Metadata | ASCL-OMD-MATCHING ASCL-OMD-MATCHING-BUSINESS ASCL-OMD-MATCHING-MONITORING ASCL-OMD-PURGE ASCL-OMD-PURGE-BUSINESS ASCL-OMD-PURGE-MONITORING ASCL-OMD-RUNTIME ASCL-OMD-RUNTIME-BUSINESS ASCL-OMD-RUNTIME-MONITORING | Describes the events and processes that occur and the objects that are affected when you run an IBM InfoSphere DataStage and QualityStage job. |

Table 13. Logging categories (continued)

| Application | Categories | Notes |
|--|---|---|
| IBM InfoSphere Business Glossary | GLOSSARY GLOSSARY-WEB | N/A |
| InfoSphere Information Analyzer | IBM-IA IBM-IA-SERVER IBM-IA-CLIENT IBM-IA-HANDLER | N/A |
| Agent | ISF-AGENT ISF-AGENT-APP ISF-AGENT-CONFIG ISF-AGENT-RA ISF-AGENT-HANDLER ISF-DS4J | Provides a means of sending requests from the Server to remote systems where the ASB Agent is located. |
| Common Access Services | ISF-CAS ISF-CAS-CLIENT ISF-CAS-SERVER ISF-CAS-HANDLER ISF-CAS-NATIVE | Connects IBM InfoSphere Information Server products to various databases when using ODBC or native libraries. |
| Reporting Service | ISF-REPORTING ISF-REPORTING-ENGINE ISF-REPORTING-REPOSITORY ISF-REPORTING-CC ISF-REPORTING-CONSOLE | N/A |
| Scheduling Service | ISF-SCHEDULING ISF-SCHEDULING-REPOSITORY ISF-SCHEDULING-SCHEDULER ISF-SCHEDULING-TASK | N/A |
| Security Service | ISF-SECURITY ISF-SECURITY-ACL ISF-SECURITY-AUTH ISF-SECURITY-DIRECTORY | N/A |
| Web Administration Console | ISF-WEB ISF-WEB-REPOSITORY ISF-WEB-ADMIN ISF-WEB-REPORTING | N/A |
| IBM InfoSphere Information Services Director | WISD WISD-ADMIN WISD-DESIGN WISD-ENGINECONFIG WISD-METADATA WISD-GENERATOR WISD-CREDENTIALS WISD-QUERY WISD-HANDLER-DS WISD-HANDLER-TX WISD-HANDLER-WII | N/A |
| InfoSphere Information Services Director Cataloging Services | WISD-CATALOG-SERVICECATALOG WISD-CATALOG-SERVICECATALOG-ADMIN WISD-CATALOG-SERVICECATALOG-WEB | Conveys information about deployed services. |
| General internal services | ISF-CACHING ISF-LICENSING ISF-REGISTRATION | N/A |

You can ignore the following categories:

- IIS-DSTAGE-RUN
- IIS-DSTAGE-REPOS
- ISF-MONITORING
- ISF-MONITORING-ADMIN
- ISF-MONITORING-DESIGN
- ISF-MONITORING-QUERY
- ISF-MONITORING-EXTENSION
- ISF-MONITORING-INITIALIZATION
- ISF-MONITORING-REPOSITORY
- ISF-MONITORING-MONITOR
- ISF-MONITORING-MONITORABLE
- ISF-MONITORING-TOOL

Output options for report results

You can specify additional output options for report results that you create in HTML, PDF, text, XLS, and XML format. The RTF and DHTML formats do not have additional options.

HTML output options

You can customize the format of HTML report results when you create or modify a report.

You can specify values for the following fields:

Text Overflow

Specify whether to hide or show text that overflows a bounding area.

Hidden

Text that overflows is represented by an ellipsis. The reader can click the ellipsis in the report result to view the text.

Visible

Text is allowed to overflow the bounding area.

Relative font size

The font size can be adjusted in a Web browser.

Single File

Generates a single HTML file instead of multiple HTML files. You can also specify whether to omit hyperlinks and page numbers.

PDF output options

You can customize the format of PDF report results when you create or modify a report.

You can specify values for the following fields:

Default Full Compression

Compresses the document to the maximum compression level that can be achieved without reducing the quality of the output.

Image Compression

Compresses images in the report to a percentage of their original size. Type a number to specify the percentage. This option can decrease file size but can also reduce the quality of the images. Select this option if the report is

composed of many complex chart images rather than text data, and if it is necessary to reduce the file size further than is possible with default full compression.

Encrypt

Encrypts the PDF file. Type the password required for readers.

Simulated Printing

The PDF file is processed as a graphic, and the results are written page-by-page to the file.

Standard Mode

The PDF file is processed as a data set. Standard mode provides shorter processing time, reduced file size, and the ability to create bookmarks.

Bookmarks

Creates bookmarks that can be used as a table of contents in the PDF file.

Language of Data

Select the language of the data that you are generating the report on.

Text output options

You can customize the format of text report results when you create or modify a report.

You can specify values for the following fields:

End-of-line in Windows Convention

Uses the Windows end-of-line characters <CR><LF> to terminate a line. Otherwise, the UNIX end-of-line character <LF> is used.

Compress

Eliminates space between columns when a row contains no data.

Standard Data Format

Select to specify the format for the following options:

Header and Footer

Select to include headers and footers. Otherwise, the exported file contains only data.

Quote Fields are marked with quotation marks.

CSV Format

Commas separate fields.

Tab Delimited

Tabs separate fields.

Delimiter

Type the delimiter that you want to use to separate fields.

XLS output options

You can customize the format of XLS report results when you create or modify a report. XLS output generates a Microsoft Excel file.

You can specify values for the following fields:

Word Wrap

Select one of the following options to control word wrap.

Keep Existing

Uses the existing options for word wrap for all objects.

All Disabled

Disables word wrap for all objects.

All Enabled

Enables word wrap for all objects.

Microsoft Excel 2000

Produces a file that is compatible with Microsoft Excel 2000.

Include Shapes in Export

Includes shapes and charts in the report results.

XML output options

You can customize the format of XML report results when you create or modify a report.

You can specify values for the following fields:

Data Only

Includes only data in the XML output. Elements that are controlled by formulas are not included.

Schema File Name

Type the name and path of a schema file (XSD) to apply to the XML output. Otherwise, a new schema file is created in the same directory as the XML file.

Running reports

You can run reports manually or by using a schedule. When you run a report, you create a report result.

Running reports manually

You can run reports without using a schedule. You can also run scheduled reports manually at other than their scheduled times.

Before you begin

You must have run permission in the access control list for the reports.

About this task

You can select and run multiple reports at the same time if the reports do not have unbound parameters. You can select and run only one report at a time that has unbound parameters. You must specify values for any unbound parameters that are required parameters.

Procedure

1. Select one or more reports.
2. Click **Run Now**. Reports that do not have unbound parameters run with no further prompting. If you select multiple reports that have unbound parameters, none of the reports with unbound parameters run.
3. If you select one report, and the report has unbound parameters, in the **Set Run Parameter Values** pane, specify values for unbound parameters, and click **Run Now**. The report runs.

What to do next

You can track the progress of runs in the **View Run Details** pane, which appears when a single report runs. If you are running multiple reports, you can view information for all the runs. When a run finishes, you can view the report results.

Running reports by using a schedule

You can schedule reports to run at specific times or intervals of time. You can set custom frequency patterns for the reports, and specify when the schedule starts and stops.

Report schedules

You can create a separate schedule to run each report. You can schedule any report that has specified values for all of its required parameters.

A report schedule contains values for the following fields, which comprise the timer of the schedule:

Start Date

The date and time from which the intervals or specified times for running a report are calculated. The first scheduled run of a report occurs on or after the start date value, depending on the value that you specify and the frequency that you specify. You can specify a start date that is in the past.

End Date

An optional date and time that the schedule ends. If no end date is specified, the schedule continues until the specified number of runs in the **Repeat** field is completed, or until the schedule is stopped.

Frequency

An interval at which to run the report, or a custom frequency that can include intervals, specific times, and specific days, months, or years. For example, you can specify that the report runs at an interval of every four hours.

Custom frequencies allow for complex scheduling. For example, you can create a custom frequency that runs the report every four hours at the 13th and 36th minute of the hour on Sundays, Mondays, and Tuesdays in the months of November and December every two years.

Repeat

For most frequency choices, the total number of times to run the report. For example, if you specify that the report runs once a week and specify a repeat number of 10, the report runs once a week for 10 weeks.

If you do not specify a number, or if you specify 0, the schedule runs until the schedule is stopped, until the runs finish for all specified execution dates, or until the end date is reached. If the end date is reached before the number of runs that is specified in the **Repeat** field is reached, the schedule stops at the end date.

However, if you choose a custom frequency with the Time (Simple) option and specify times instead of an interval, the repeat number indicates the total number of days that the report will run at the specified times. For example, if you specify times of 14:00 and 16:00 with a repeat number of 10, the report runs at 14:00 and 16:00 on 10 consecutive days, for a total of 20 runs.

The *timer* of a report schedule determines when and how often a report runs according to the schedule. The timer starts either when the schedule is saved, or at the start date, whichever comes later. The timer ends at the end date, when the schedule is stopped, or when the total number of repeats has been reached, whichever comes first.

When you save a schedule, the schedule starts. The timer for the schedule does not start until the specified start date. When the timer starts, the report runs automatically at the specified intervals or times. You can stop the schedule and restart the schedule.

If you modify a scheduled report by changing one or more parameter values, the report results for that report reflect the modification the next time that the schedule runs the report.

Creating report schedules

You can schedule when, how often, and for how long a report runs.

Before you begin

- You must have run permission in the access control list for the report.
- The report cannot have required parameters that are unbound.

Procedure

1. Select a report.
2. Click **Open Report Schedule**.
3. Specify a start date for the report schedule.
4. Optional: Specify an end date for the report schedule.
5. From the **Frequency** list, select an interval to specify how often to run the report, or select **Custom** and specify custom frequency options.
If you select **Custom**, select one or more scheduling options from the **Category** list, specify values for each, and add them to the list of custom frequencies.
When you type multiple values, separate the entries with commas.
6. Optional: In the **Repeat** field, type the total number of times to run the report. If you leave this field blank or type 0, the report runs at the frequency that you specify and stops running at the end date, if you specify an end date. If you choose a custom frequency and specify discrete times in the Times (Simple) category, the repeat number indicates the number of days that the report runs at the specified times.
7. Save the schedule.

Results

The schedule starts when you save it.

Custom frequencies for report schedules

You can specify a custom frequency at which to run a scheduled report. The frequency can combine years, months, weeks, days, hours, and minutes.

When you specify a custom frequency, you choose from the following options:

Time (Simple)

An interval of hours or minutes, or one or more specified times per day to run the report.

Time (Advanced)

A combination of intervals of hours and minutes or specified hours and minutes.

Monthly

An interval of months, or specified months of a year.

Yearly An interval of years, or specified years.

Day of Week

One or more days of the week on which to run the report in the months that you specify.

Day of Month

An interval of days or one or more specified days of the month on which to run the report in the months that you specify.

You can combine the options, but you can use only one of the time options and one of the day options.

The custom frequency options combine with the values that you specify in the **Start Date** field on the Schedule Settings pane to create the report schedule.

The schedule for the report starts at the start date and time that you specify in the **Start Date** field, but the date and time at which the report first runs depends on the options that you specify in the Custom Frequency section of the pane. If you specify a start date that is in the past, the schedule begins immediately and the report runs at the first scheduled date and time. Each division of time in the **Start Date** field is used to determine the start date and time, unless you specify a different value as a custom scheduling option.

In the report schedule, values that you specify for smaller units of time interact with any values that you specify for larger units of time. For example, if you specify that the report runs every four hours, and you do not specify a value for days, the report runs every four hours on every day in the schedule months and years. However, if you specify that the report runs every four hours, and you specify Mondays and Fridays, the report runs every four hours on Mondays and Fridays during the months and years that you specify. If you do not specify values for months and years, the report runs every four hours on Mondays and Fridays until the end date, or until the report is stopped.

If you do not specify a custom value for hours, minutes, or seconds, the report uses the corresponding values from the **Start Date** field to determine when the report runs within each scheduled day, hour, or minute. For example, if you schedule the report to run every day at hours 16 and 20, and you do not specify a value for minutes and seconds, the report uses the values for minutes and seconds from the **Start Date** field. If you specify 15:30 for minutes and seconds in the **Start Date** field, the report runs every day at 16:15:30 and at 20:15:30.

Example of custom frequency

In the IBM InfoSphere Information Server Web console, you can combine custom frequency options to create a complex schedule for running reports.

The start date value is used as the starting point of custom frequency intervals. For example, for a start date value of 2006-10-05 14:10:30 and a custom frequency of every 2 hours, the interval starts at the 14th hour of each day.

For the following example, the start date is July 1, 2007, and the schedule is repeated every three years, from 18:00 until midnight for intervals of every 2 hours and every 15 minutes during those hours, every 10 days during the months of February, July, and December.

To create this custom schedule, you specify the following information in the Schedule Settings pane:

- Set the **Start Date** field to 2007-07-01 18:00:00.
- Set the **Frequency** field to **Custom**.
- For the **Time (Advanced)** category, specify every 2 hours and every 15 minutes.
- For the **Monthly** category, specify months 2, 7 and 12 (February, July, and December).
- For the **Yearly** category, specify every 3 years.
- For the **Day of the Month** category, specify every 10 days.

Because the start date is in July, the report does not run in February 2007.

This combination of options produces the following forecast of task executions for 2007:

```
1 2007-07-01 18:00:00
2 2007-07-01 18:15:00
3 2007-07-01 18:30:00
4 2007-07-01 18:45:00
5 2007-07-01 20:00:00
6 2007-07-01 20:15:00
7 2007-07-01 20:30:00
8 2007-07-01 20:45:00
9 2007-07-01 22:00:00
10 2007-07-01 22:15:00
11 2007-07-01 22:30:00
12 2007-07-01 22:45:00
13 2007-07-11 18:00:00
14 2007-07-11 18:15:00
15 2007-07-11 18:30:00
16 2007-07-11 18:45:00
17 2007-07-11 20:00:00
18 2007-07-11 20:15:00
19 2007-07-11 20:30:00
20 2007-07-11 20:45:00
21 2007-07-11 22:00:00
22 2007-07-11 22:15:00
23 2007-07-11 22:30:00
24 2007-07-11 22:45:00
25 2007-07-21 18:00:00
26 2007-07-21 18:15:00
27 2007-07-21 18:30:00
28 2007-07-21 18:45:00
29 2007-07-21 20:00:00
30 2007-07-21 20:15:00
31 2007-07-21 20:30:00
32 2007-07-21 20:45:00
33 2007-07-21 22:00:00
34 2007-07-21 22:15:00
35 2007-07-21 22:30:00
36 2007-07-21 22:45:00
37 2007-07-31 18:00:00
38 2007-07-31 18:15:00
39 2007-07-31 18:30:00
40 2007-07-31 18:45:00
41 2007-07-31 20:00:00
42 2007-07-31 20:15:00
43 2007-07-31 20:30:00
```

44 2007-07-31 20:45:00
 45 2007-07-31 22:00:00
 46 2007-07-31 22:15:00
 47 2007-07-31 22:30:00
 48 2007-07-31 22:45:00
 49 2007-12-01 18:00:00
 50 2007-12-01 18:15:00
 51 2007-12-01 18:30:00
 52 2007-12-01 18:45:00
 53 2007-12-01 20:00:00
 54 2007-12-01 20:15:00
 55 2007-12-01 20:30:00
 56 2007-12-01 20:45:00
 57 2007-12-01 22:00:00
 58 2007-12-01 22:15:00
 59 2007-12-01 22:30:00
 60 2007-12-01 22:45:00
 61 2007-12-11 18:00:00
 62 2007-12-11 18:15:00
 63 2007-12-11 18:30:00
 64 2007-12-11 18:45:00
 65 2007-12-11 20:00:00
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 68 2007-12-11 20:45:00
 69 2007-12-11 22:00:00
 70 2007-12-11 22:15:00
 71 2007-12-11 22:30:00
 72 2007-12-11 22:45:00
 73 2007-12-21 18:00:00
 74 2007-12-21 18:15:00
 75 2007-12-21 18:30:00
 76 2007-12-21 18:45:00
 77 2007-12-21 20:00:00
 78 2007-12-21 20:15:00
 79 2007-12-21 20:30:00
 80 2007-12-21 20:45:00
 81 2007-12-21 22:00:00
 82 2007-12-21 22:15:00
 83 2007-12-21 22:30:00
 84 2007-12-21 22:45:00
 85 2007-12-31 18:00:00
 86 2007-12-31 18:15:00
 87 2007-12-31 18:30:00
 88 2007-12-31 18:45:00
 89 2007-12-31 20:00:00
 90 2007-12-31 20:15:00
 91 2007-12-31 20:30:00
 92 2007-12-31 20:45:00
 93 2007-12-31 22:00:00
 94 2007-12-31 22:15:00
 95 2007-12-31 22:30:00
 96 2007-12-31 22:45:00

Then the same pattern begins three years after the year of the start date. The pattern starts in February:

97 2010-02-01 18:00:00

Modifying report schedules

You can change the settings of a report schedule.

Before you begin

You must have run permission in the access control list for the report.

Procedure

1. Select a report.
2. Click **Open Report Schedule**.
3. Modify one or more of the following fields:
 - **Start Date**.
 - **End Date**.
 - **Frequency**. If you select **Custom**, select one or more scheduling options from the **Category** list, specify values for each, and add them to the list of custom frequencies. When you type multiple values, separate the entries with commas.
 - **Repeat**. Type the total number of times to run the report. If you leave this field blank or type 0, the report runs at the frequency that you specify and stops running at the end date, if you specify an end date. If you choose a custom frequency and specify discrete times in the Times (Simple) category, the repeat number indicates the number of days the report runs at the specified times.
4. Save the schedule.

Stopping and restarting report schedules

You can stop a report schedule at any time, and start the schedule after it is stopped.

Before you begin

You must have execute permission in the access control list for the report.

Procedure

1. Select a report.
2. Click **Open Report Schedule**.
3. On the Edit Schedule pane, stop or start the schedule.

Viewing information about the runs of reports

You can view the status of a report schedule and the list of completed, in-progress, and future report runs.

Before you begin

You must have run permission in the access control list for the report.

Procedure

1. Select a report.
2. Click **Open Report Schedule**. The Run Detail Summary pane of the report schedules lists the numbers of runs that are completed, running, and scheduled for the future, and displays the status of the schedule.
3. To view details about runs of the report, click **View Run Details**.
4. From the **Detail View** list, select **Completed**, **Running**, or **Forecast**, and click **View**.

Managing report results

You can view, delete, and control access to report results. You can customize the Home tab of the IBM InfoSphere Information Server Web console to display a list of the latest report results.

Specifying global reporting preferences

You can set defaults for retaining report results and you can specify the maximum number of results that are saved for each report. Users can override the default values when they create reports.

Before you begin

You must have the role of Suite Administrator.

Procedure

1. In the Navigation pane of the Reporting tab, select **Contents** and click **Preferences**.
2. On the Specify Global Reporting Preferences pane, specify preferences:
 - In the **Maximum Result History Limit** field, type the maximum number of results to retain for each report that a user runs. Users cannot specify a higher value than this value when they create reports.
 - Specify the default expiration policy for report results.
 - Specify default settings for replacing or retaining old report results, and the maximum number of results to retain for each report.
3. Click **Save**.

Viewing report results

You can view the latest result for a report or select the result of a previous run.

Before you begin

You must have read permission in the access control list for the report result.

Procedure

1. Select a report.
2. View the latest report result or select from a list of all report results:

| Option | Description |
|---|---|
| To view the latest report result: | In the task list, click View Report Result . |
| To select a report result from a list of all results for this report: | <ol style="list-style-type: none">1. In the task list, click Open Report Result History.2. In the Open Report Result History pane, click View. |

Deleting report results

You can delete the results that were created from a report. The report results are deleted from the repository.

Before you begin

You must have delete permission in the access control list for the report result.

Procedure

1. Select a report.
2. Click **Open Report Result History**.
3. In the Open Report Result History pane, select one or more report results, and click **Delete**.

Customizing the logo for report results

You can display a logo image in the header of report results.

Before you begin

- You must have the role of Suite Administrator.
- You must be able to specify the name and path of an image file no larger than 21 mm wide and 12 mm high.

Procedure

1. Run the following command in the folder IBM\InformationServer\ASBNode\bin on the drive where you installed IBM InfoSphere Information Server:

```
reportingadmin -user suite_admin_id -password suite_admin_password  
-modify -templates -file path_and_filename_of_image
```
2. Restart InfoSphere Information Server.

Results

The specified image is used in all report results that are created in the IBM InfoSphere Information Server Web console and in the IBM InfoSphere Information Server console. Note that after you upgrade InfoSphere Information Server, you must rerun the reporting command to customize the logo images in report results.

Chapter 5. Controlling access to templates, reports, and results

Access control lists determine access to templates, reports, and results. Creators of reports have full access to the reports that they create from templates.

Access control lists

You can assign access and specify permissions for templates, reports, and report results.

Each report template, report, and report result has an access control list. Access control lists specify which users, groups, or roles can create reports from templates, run reports, view and delete report results, and perform other actions. Each member of a list has specific permissions for the template, report, or report result that the list applies to. Each type of reporting object has a different set of permissions.

Report templates

Members of the access control list for a report template can have one or more of the following permissions.

Owner

Add members to the access control list and remove members from the list.

Read View the template and create reports from it.

Execute

Inherit permission to run reports that are created from the template.

Update

Inherit permission to update reports that are created from the template.
You cannot update a template.

Delete Inherit permission to delete reports that are created from the template. You cannot delete a template.

You cannot grant specific permissions for a report template. You can only add members to the access control list and remove members from the list. The permissions that are granted to each member depend on whether the member appears on the list by default or is added to the list after the suite or component is installed.

When the suite or suite component is installed, the access control list for each report template includes one or more roles. For example, if the suite administrator role is on the access control list, any user with that role can access the template. Different roles can have different permissions. Default permissions are shown in the list of IBM InfoSphere Information Server Web console report templates. In addition, the suite administrator user who installs the suite has owner permission for all templates, unless that user is deleted after install.

Users who have Owner permission for a template can add other members to the access control list. When a member is added to the access control list for a template, that member has owner, read and execute permission for the template.

Reports

Members of the access control list for a report can have one or more of the following permissions.

Administration

Add members to the access control list, remove members from the list, specify permissions for members. A user with Administration permission for a report also has all other permissions for the report.

Read View the report.

Run Run the report.

Update

Edit the report to change settings.

Delete Delete the report. To delete a report, the user must also have delete permission for each report result that was created from the report.

The user who created the report is the only member who has administration permission by default. The user who created the report also has all other permissions for it. This user can add other members to the access control list and grant administration and other permissions.

Members of the access control list for the report template also appear on the access control list for the report. These members inherit the permissions they had for the report template, except that owner permission is not inherited. Members who have execute permission for report templates inherit run permission for reports that are created from that template.

For example, a member who is added to the access control list for a report template has read, execute, and owner permission for the template. That member inherits read and run permission for all reports that are created from the template.

Run permission is not available for some imported reports.

Report results

Members of the access control list for a report result can have one or more of the following permissions.

Administration

Add members to the access control list, remove members from the list, and specify permissions for members. A user with Administration permission for a report result also has all other permissions for the report result.

Read View the report result.

Delete Delete the report result.

The user who created the report result is the only member who has administration permission by default. The user who created the report result also has read and delete permission for it. This user can add other members to the access control list and grant administration and other permissions.

Members of the access control list for the report also appear on the access control list for the report result. These members inherit the permissions that they had for the report, except that administration permission is not inherited and update and run permissions do not apply to report results.

For example, a user, group, or role that has read, run, update and delete permission for a report inherits read and delete permissions for all of the report results that are created from the report.

Managing access to report templates

You can grant and remove access to view and administer report templates, and to create reports from the templates.

Before you begin

You must have owner permission in the access control list for the template.

Procedure

1. Select a report template.
2. Click **Open Access Control**
3. In the Open Access Control pane, add or remove members, and grant permissions to members:
 - To add members to the list, click **Browse** to open the Select Users, Groups, or Roles window and select members for the list. Items that you select are added to the access control list and granted permission to view and administer the template, and to create reports from the template.
 - To remove one or more members from the list, select one or more members and click **Remove**.

Managing access to reports

You can grant and remove permission to administer, update, view, run, read, and delete reports.

Before you begin

You must have administration permission in the access control list for the report.

Procedure

1. Select a report.
2. Click **Open Access Control**.
3. In the Open Access Control pane, add or remove members, and grant permissions to members:
 - To add members to the list, click **Browse** to open the Select Users, Groups, or Roles window and select members for the list. Items that you select added to the access control list and granted read permission for the report.
 - To remove one or more members from the list, select one or more members and click **Remove**.
 - For any member of the list, grant or remove permission to update, delete, run, or administer the report.

Managing access to report results

You can grant and remove permission to administer, view, and delete report results.

Before you begin

You must have administration permission in the access control list for the report result.

Procedure

1. Select a report.
2. Click **Open Report Result History**.
3. In the Open Report Result History Pane pane, select a report result and click **Open Access Control**.
4. In the Open Access Control pane, add or remove members, and grant permissions to members:
 - To add members to the list, click **Browse** to open the Select Users, Groups, or Roles window and select members for the list. Selected users, groups, or roles are added to the access control list and granted read permission for the report result.
 - To remove one or more members from the list, select one or more members and click **Remove**.
 - For any member of the list, grant or remove permissions for the report result.

Searching for users, groups, or roles

You can search for users, groups, or roles to add them to access control lists for report templates, reports, and report results.

About this task

When you manage access to a report template, report, or report result, you use a search to add members to the access control list.

When you type text in a search field, you can use asterisks (*) as wildcards for multiple characters, and question marks (?) as wildcards for single characters. The text in the field, including wildcards, must match the exact text you are searching for. The search is case-sensitive by default but can be case-insensitive, depending on your database configuration.

Procedure

1. In the Search for Users, Groups, or Roles window, select **Users, Groups, or Roles** from the drop-down list.
2. Optional: Specify search criteria for users or groups:
 - Type the name of the user or group.
 - Expand **Additional Search Criteria** and specify additional information to identify the users or groups that you are searching for.
 - Click **Search**.
3. Select one or more users, groups, or roles in the list of items and click **OK**. The users, groups, or roles are added to the access control list.
4. Optional: Repeat steps 1-3 to add members of a different type. For example, if you searched for users, repeat the steps to search for groups or roles.

What to do next

After you add members to the access control lists for reports and report results, you can grant additional permissions to the new members.

Chapter 6. Searching for report templates, reports, and report results

You can find templates, reports, and report results by using simple or advanced searches.

About this task

When you type text in a search field, you can use asterisks (*) as wildcards for multiple characters, and question marks (?) as wildcards for single characters. The text in the field, including wildcards, must match the exact text that you are searching for. The search is case-sensitive by default but can be case-insensitive, depending on your database configuration.

Procedure

1. In the Navigation pane of the Reporting tab, click **Search**.
2. In the Search pane, choose the type of search, and enter search criteria.

| Option | Description |
|--|--|
| To find objects by using a simple search: | <ol style="list-style-type: none">1. In the Simple Search field, type the name, description, or owner of a template, report, or report result, or type an asterisk (*) to find all templates, reports, and report results.2. Click Search. |
| To find objects by using an advanced search: | <ol style="list-style-type: none">1. Expand Advanced Search.2. From the Type list, select the type of object to search for.3. Optional: Specify search criteria for the display name, description, or creator of the object.4. Click Search. |

The search results are listed in the Select an Item to Work With pane.

3. In the list of returned items, click the name of a template, report, or report result.

| Click name of ... | Displays |
|-------------------|---|
| Template | Open Reports pane, where you can select and work with a report that was created from the template |
| Report | Open Report Settings pane, where you can view and modify the report |
| Report result | Formatted report result |

Results

Chapter 7. Managing your reports

You use the **My Reporting** option to manage your reports.

You use the **My Reporting** option to do the following tasks:

- View reports that you created or recently modified
- View your favorite reports
- View the status of reports that you recently modified

Chapter 8. Managing report folders

Suite administrators can create a structure of folders to hold reports. Organizing the folder structure makes it easier to retrieve and work with reports.

Report folders

You can organize your reports in folders and subfolders under the root Reports folder on the Reporting tab.

Reports are always stored in folders. If you create a report and do not specify a folder to save the report in, the report is saved to the Reports folder, which is the root folder in the folder structure, and is the only reports folder until you create more folders.

You can organize reports by creating a structure of folders that are subfolders of the Reports folder. Any folder that you create can also have subfolders. You can create multiple folders and subfolders in a single task.

You can delete and rename selected folders. By default, you cannot delete a folder that contains reports, but you can choose to allow deletion of selected folders that contain reports. If you delete a folder that contains reports, the reports are also deleted. However, you must have delete permission on all reports in the folder before you can delete the folder.

You must have the Suite Administrator role to create, delete, or rename folders.

Creating report folders

You can create folders to store reports in under the root Reports folder on the Reporting tab.

Before you begin

You must have the role of Suite Administrator.

Procedure

1. In the Navigation pane of the Reporting tab, select **Contents > Folder Management**.
2. Select the parent folder that you want your new folder or folders to be subfolders of, and click **New**.
3. In the New Folders window, type a name for the new folder, or the name and path for a folder and its subfolders. Use a forward slash (/) to separate folder names. Use a separate line for each subfolder of the selected parent folder.
4. Optional: Click **Add More Folders** to add lines to the window.
5. Click **OK**.

Results

The folder or folders are added to the list of folders.

Deleting report folders

You can delete report folders and their subfolders. When you delete a report folder, its subfolders and any reports in the folder and subfolders are also deleted.

Before you begin

- You must have the role of Suite Administrator.
- To delete a folder that contains reports, you must have delete permission for all reports in the folder and for all reports in any subfolders of the folder.

Procedure

1. In the Navigation pane of the Reporting tab, select **Contents > Folder Management**.
2. In the **Select a Folder to Work With** pane, select the folder that you want to delete.
3. To delete folders or subfolders that contain reports, select **Allow deletion of report contents in folders**.
4. Click **Delete**.
5. In the Delete Folder window, click **Yes**.

Results

The folder, its subfolders, and any reports in the folder or subfolders are deleted.

Renaming report folders

You can change the names of folders in your report folder structure. You cannot change the name of the root Reports folder.

Before you begin

You must have the role of Suite Administrator.

Procedure

1. In the Navigation pane of the Reporting tab, select **Contents > Folder Management**.
2. Select the folder that you want to change the name of, and click **Rename**.
3. In the Rename window, type a new name and click **OK**.

Chapter 9. Managing favorite reports

You can create a list of favorite reports that you frequently work with. You can quickly access these reports by using the Favorites list and by displaying the list on the IBM InfoSphere Information Server Web console Home tab.

About this task

A Favorites list is specific to the user who creates it.

Adding reports to the Favorites list

You can add reports to the Favorites list so that you can access them quickly.

Before you begin

Your user name, group, or role must be on the access control list of the report.

Procedure

1. In the Navigation pane of the **Reporting** tab, select **Contents**.
2. Expand **Reports**.
3. Click **View Reports**.
4. Select one or more reports and click **Add to Favorites**.

Results

The reports are added to the Favorites list.

What to do next

You can customize the Home tab to display the Favorites list, so that you can open favorite reports as soon as you access the IBM InfoSphere Information Server Web console.

Selecting a favorite report to work with

You can select reports from the Favorites list and perform reporting tasks with the selected reports.

Procedure

1. In the Navigation pane of the **Reporting** tab, select **Contents > My Reporting**.
2. In the Select View pane, select **Favorites**.
3. In the Favorites pane, select one or more reports.

Results

You can click the name of any task in the task list to perform the task.

Removing reports from the Favorites list

You can remove reports from the list when you do not need quick access to them.

Procedure

1. In the Navigation pane of the **Reporting** tab, select **Contents > My Reporting**.
2. In the Select View pane, select **Favorites**.
3. In the Favorites pane, select one or more reports and click **Remove from Favorites**.

Results

The reports are removed from the Favorites list.

Chapter 10. Using other clients to create and run reports

You can create and view reports in the IBM InfoSphere Information Server Web console and the IBM InfoSphere Information Server console. Additionally, you can create reports directly in some clients, such as IBM InfoSphere FastTrack.

About this task

Both environments contain predefined parameters and templates that you use to generate a report. In the console, you can create reports and associate reports with a project:

- Create, run, and view a report without having to save the report in the repository
- Filter through projects to associate the report with a specific project

In the Web console, you can create a report, configure multiple aspects of the report, and complete other reporting tasks:

- Schedule a report to run at a specific time
- Configure a report to maintain a history of results
- Schedule a report to be removed automatically at a specific time
- Create reports in folders that you can name, modify, and delete
- Create a business logo in the report
- Configure security options for the report
- Configure details of output types

Comparison of the consoles for reporting

The IBM InfoSphere Information Server console and the IBM InfoSphere Information Server Web console have different reporting features.

The reporting features of the Web console are more extensive than those in the rich-client console because of the different uses of the two applications.

In the Web console you can perform administrative tasks, such as managing security, creating views of scheduled tasks, and managing log views. The Web console reporting features include support for the full set of reports on suite activities, administration, and components of the suite.

In the console, you can perform product-related tasks, such as profiling data and developing service-oriented applications. Because tasks in the console are usually not administrative, the console provides only a subset of the administrative reporting capability.

The following table lists the reporting tasks that you can perform in each console.

| Functionality | Web console | Console |
|---|-------------|---------|
| List reports | yes | yes |
| • List reports within the user-defined folder structure | yes | yes |

| Functionality | Web console | Console |
|---|-------------|---------------------------|
| • List reports within the report types or templates category structure | yes | no |
| Create reports | yes | yes |
| • Create reports with unbound parameters | yes | no |
| • Create and run reports from all IBM InfoSphere Business Glossary report templates | yes | no |
| Edit reports | yes | yes |
| • Edit reports created in the Web console | yes | yes |
| • Edit reports created in the console | yes | yes |
| • Edit reports that have unbound parameters | yes | no |
| • Create copies of reports | no | yes |
| Run reports (to produce report results) | yes | yes |
| • | yes | yes |
| • Run reports created in the Web console | | |
| • Run reports created in the console | yes | yes |
| • Run reports that have unbound parameters | yes | no |
| • Run reports without saving them | no | yes |
| • Run reports by using a schedule | yes | no |
| View report results | yes | yes |
| • View results from a history of runs | yes | only last run of a report |
| Delete reports and report results | yes | yes |
| Use all output formats | yes | yes |
| • Specify additional options for each format | yes | no |
| Control access to report templates, reports, and report results through access control list (ACL) | yes | no |
| Manage folders (administrator only) | yes | no |
| • Create, delete, and rename user-defined folders | yes | no |
| • Save reports in user-defined folders | yes | no |
| • Save reports in a predefined folder structure | no | yes |
| Search for reports | yes | yes |
| • Search by project, creation date and time | yes | yes |
| • Search by creator, report name, and description | yes | no |
| Set global reporting preferences | yes | no |
| Add reports to Favorites list | yes | yes |

Creating reports in the IBM InfoSphere Information Server console

You can create reports to display and capture details of an activity that has completed in the suite.

About this task

Reports are saved and can be accessed by authorized users. Users who are working with your data can use the information in the reports to help them complete their own tasks elsewhere in the suite. You can also create reports specific to the suite component that you are working in. For detailed information on these reports, refer to the documentation for that suite component.

Reports

You can create reports to summarize your analysis results and display details about your project. For example, reports can help you learn about the structure of your data so that you can make informed business decisions.

The type of reports that are available to you vary according to the suite component that you have installed. Each report corresponds to a task. There are also reports that display general information about the project that you are working in.

Reports can display information in a standard template form or in a graphical form. You can also choose the output format for the report such as DHTML, HTML, PDF, RTF, TXT, XLS, and XML.

Creating a report

You can create a report by selecting the type of report that you want to create. The details and organization of the report vary across report types.

Procedure

1. On the **Home** navigator menu, select **Reporting**.
2. In the Reporting workspace, click **New Report**.
3. In the Create New Report pane, select a report template to determine the type of report.
4. Click **Next**.
5. Optional: In the **Name** field, you can change the template generated name of the report.
6. Select a folder to save the report in. By default, reports are saved in the root Reports folder.
7. Optional: Check **Add to Favorites** to include this report on your favorites list.
8. In the **Output** field, specify the output format for the report.
9. Select **Save Report** to save your configurations. You can then run the report again using the settings that you assigned to this report.
10. Click **Finish** to run the report.

What to do next

After the report runs, you can view the report.

Running a saved report

After you create, configure, and save a report, you can run that report at a later time to display changes or updates in your information.

Procedure

1. On the **Home** navigator menu, select **Reports**.
2. In the Reports workspace, click **Saved Reports**.
3. Select the report that you want to run.
4. In the Tasks pane, click **Run**.

What to do next

After the report runs, you can view the updated report.

Marking a saved report as a favorite

For quick access to a report in the Favorite Reports content pane in the My Home workspace, you can mark a saved report as a favorite.

Procedure

1. On the **Home** navigator menu, select **Reports**.
2. In the Reports workspace, select **Saved Reports**.
3. Select the report that you want to mark as a favorite.
4. In the Tasks pane, click **Add To Favorites**.

What to do next

After you mark a report as a favorite, it appears in the Favorite Reports content pane in the My Home workspace.

Creating a new report from a saved report

To create a new report that is based on the configuration details of a saved report, you can create a copy of a saved report.

Procedure

1. On the **Home** navigator menu, select **Reports**.
2. In the Reports workspace, click **Saved Reports**.
3. Select the report that you want to copy.
4. In the Tasks pane, click **Create Copy**.
5. In the Steps to Complete wizard, modify the parameters and settings as needed.
6. Click **Next** to progress through the steps.
7. Click **Finish**.

What to do next

You can now view the report results.

Product accessibility

You can get information about the accessibility status of IBM products.

The IBM InfoSphere Information Server product modules and user interfaces are not fully accessible. The installation program installs the following product modules and components:

- IBM InfoSphere Business Glossary
- IBM InfoSphere Business Glossary Anywhere
- IBM InfoSphere DataStage
- IBM InfoSphere FastTrack
- IBM InfoSphere Information Analyzer
- IBM InfoSphere Information Services Director
- IBM InfoSphere Metadata Workbench
- IBM InfoSphere QualityStage

For information about the accessibility status of IBM products, see the IBM product accessibility information at http://www.ibm.com/able/product_accessibility/index.html.

Accessible documentation

Accessible documentation for InfoSphere Information Server products is provided in an information center. The information center presents the documentation in XHTML 1.0 format, which is viewable in most Web browsers. XHTML allows you to set display preferences in your browser. It also allows you to use screen readers and other assistive technologies to access the documentation.

IBM and accessibility

See the IBM Human Ability and Accessibility Center for more information about the commitment that IBM has to accessibility.

Accessing product documentation

Documentation is provided in a variety of locations and formats, including in help that is opened directly from the product client interfaces, in a suite-wide information center, and in PDF file books.

The information center is installed as a common service with IBM InfoSphere Information Server. The information center contains help for most of the product interfaces, as well as complete documentation for all the product modules in the suite. You can open the information center from the installed product or from a Web browser.

Accessing the information center

You can use the following methods to open the installed information center.

- Click the **Help** link in the upper right of the client interface.

Note: From IBM InfoSphere FastTrack and IBM InfoSphere Information Server Manager, the main Help item opens a local help system. Choose **Help > Open Info Center** to open the full suite information center.

- Press the F1 key. The F1 key typically opens the topic that describes the current context of the client interface.

Note: The F1 key does not work in Web clients.

- Use a Web browser to access the installed information center even when you are not logged in to the product. Enter the following address in a Web browser: `http://host_name:port_number/infocenter/topic/com.ibm.swg.im.iis.productization.iisinfo.home.doc/ic-homepage.html`. The `host_name` is the name of the services tier computer where the information center is installed, and `port_number` is the port number for InfoSphere Information Server. The default port number is 9080. For example, on a Microsoft® Windows® Server computer named `iisdocs2`, the Web address is in the following format: `http://iisdocs2:9080/infocenter/topic/com.ibm.swg.im.iis.productization.iisinfo.nav.doc/dochome/iisinfo_home.html`.

A subset of the information center is also available on the IBM Web site and periodically refreshed at `http://publib.boulder.ibm.com/infocenter/iisinfo/v8r7/index.jsp`.

Obtaining PDF and hardcopy documentation

- A subset of the PDF file books are available through the InfoSphere Information Server software installer and the distribution media. The other PDF file books are available online and can be accessed from this support document: `https://www.ibm.com/support/docview.wss?uid=swg27008803&wv=1`.
- You can also order IBM publications in hardcopy format online or through your local IBM representative. To order publications online, go to the IBM Publications Center at `http://www.ibm.com/e-business/linkweb/publications/servlet/pbi.wss`.

Providing feedback about the documentation

You can send your comments about documentation in the following ways:

- Online reader comment form: www.ibm.com/software/data/rcf/
- E-mail: comments@us.ibm.com

Links to non-IBM Web sites

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Contacting IBM

You can contact IBM for customer support, software services, product information, and general information. You also can provide feedback to IBM about products and documentation.

The following table lists resources for customer support, software services, training, and product and solutions information.

Table 14. IBM resources

| Resource | Description and location |
|----------------------------|---|
| IBM Support Portal | You can customize support information by choosing the products and the topics that interest you at www.ibm.com/support/entry/portal/Software/Information_Management/InfoSphere_Information_Server |
| Software services | You can find information about software, IT, and business consulting services, on the solutions site at www.ibm.com/businesssolutions/ |
| My IBM | You can manage links to IBM Web sites and information that meet your specific technical support needs by creating an account on the My IBM site at www.ibm.com/account/ |
| Training and certification | You can learn about technical training and education services designed for individuals, companies, and public organizations to acquire, maintain, and optimize their IT skills at http://www.ibm.com/software/sw-training/ |
| IBM representatives | You can contact an IBM representative to learn about solutions at www.ibm.com/connect/ibm/us/en/ |

Providing feedback

The following table describes how to provide feedback to IBM about products and product documentation.

Table 15. Providing feedback to IBM

| Type of feedback | Action |
|------------------|---|
| Product feedback | You can provide general product feedback through the Consumability Survey at www.ibm.com/software/data/info/consumability-survey |

Table 15. Providing feedback to IBM (continued)

| Type of feedback | Action |
|------------------------|---|
| Documentation feedback | <p>To comment on the information center, click the Feedback link on the top right side of any topic in the information center. You can also send comments about PDF file books, the information center, or any other documentation in the following ways:</p> <ul style="list-style-type: none"><li data-bbox="933 436 1414 495">• Online reader comment form: www.ibm.com/software/data/rcf/<li data-bbox="933 499 1414 531">• E-mail: comments@us.ibm.com |

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