System Administration

Report Administration

Software Version: 13.01

Manual Version: P1

Manual Published: 7/26/2021

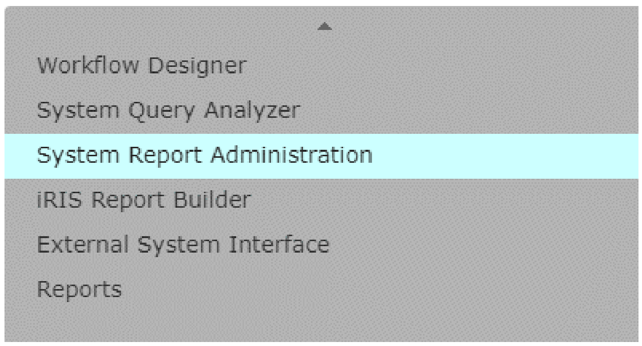
Contents

System Reports Administration

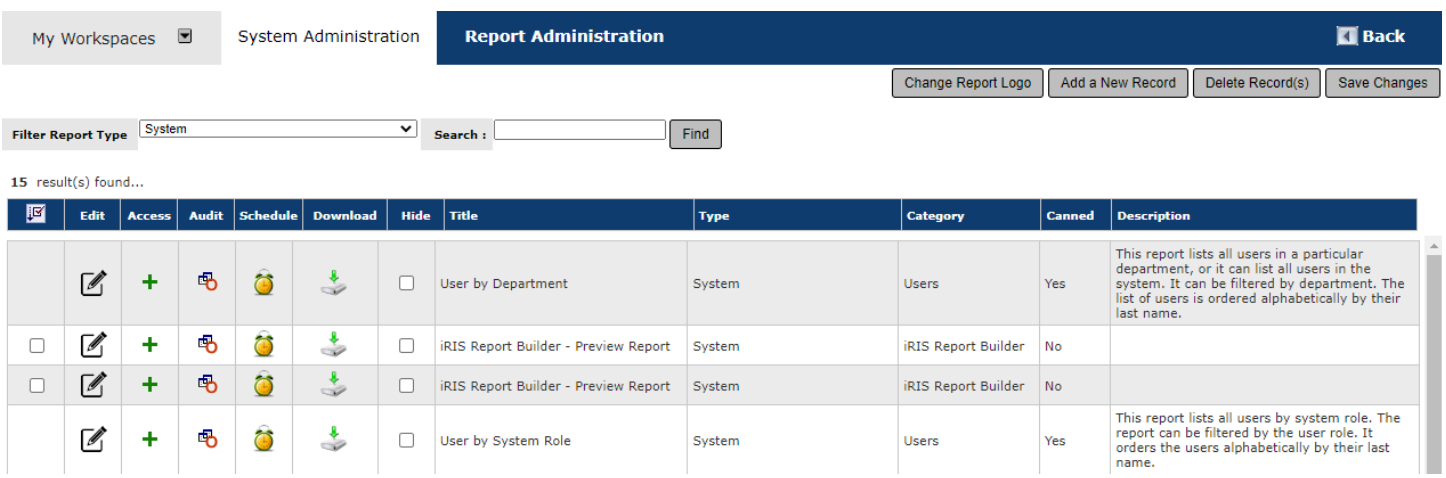
Introduction

This manual will guide the user through the operation of the System Report Administration tool located in the System Administration section of iRIS™. Only users with a Full System Administrative role have access to this item.

Using this tool, Full System Administrators can control where the reports will display in the system, configure scheduling for specific reports, and audit when reports were run either by the system or manually.

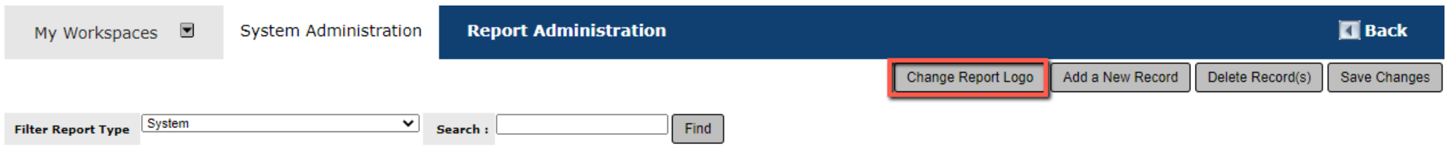


Clicking on the **System Report Administration** link in the menu or icon from the home screen will navigate the user to the screen shown below.



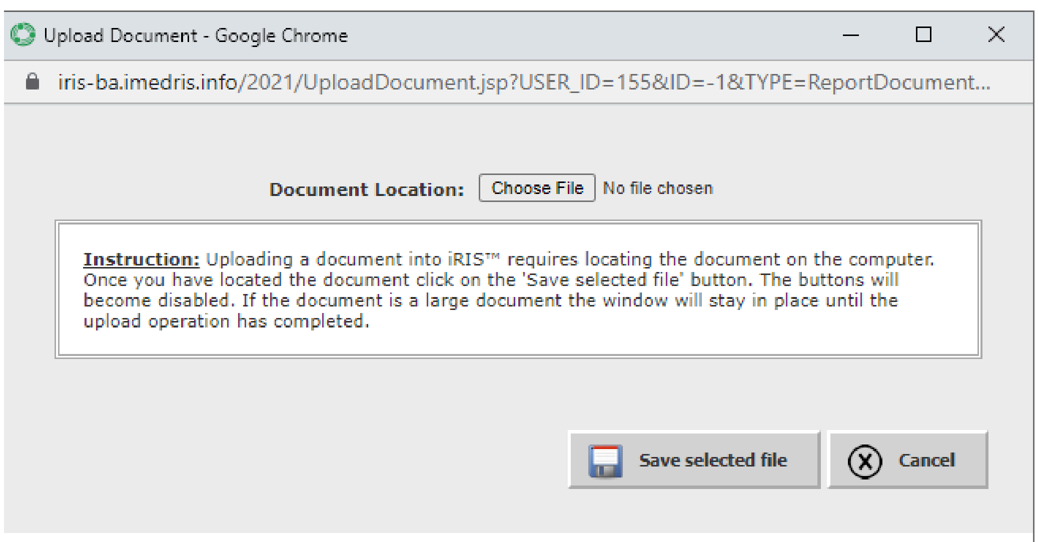
Note: Options displayed in the screen above may differ depending on your system configuration. The properties used to control these options are discussed later in this manual.

Change Report Logo



Click this button to change the report logo that appears on the top left corner of your reports (when the reports are run on a user's end). Any logo that you have already uploaded will display next to the Current Logo label. To upload a different logo, click the **Upload Report Logo** button.

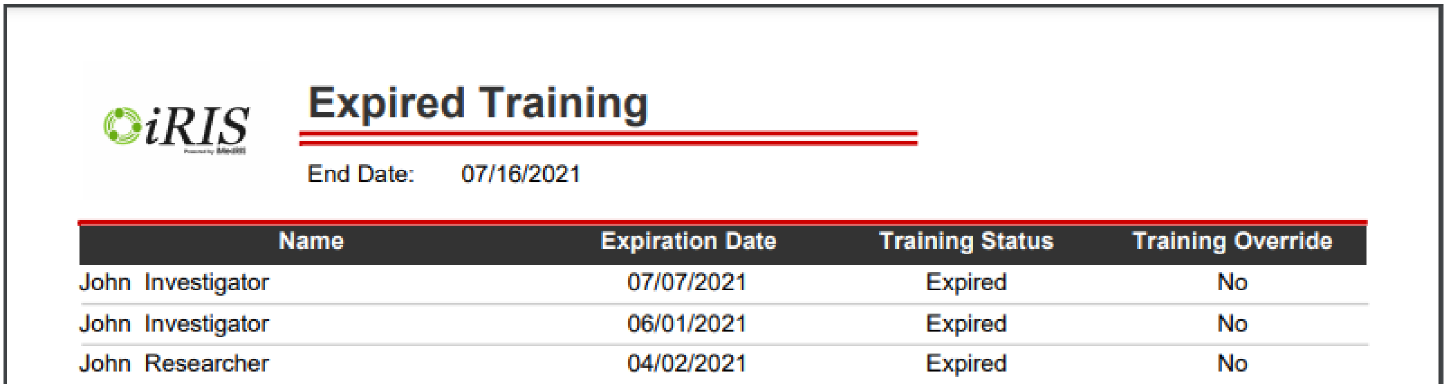
Clicking this button will display the popup below allowing you to browse your local files and choose the image to upload.



Note: The uploaded image must be either .jpg, .gif., or .png format.

Choose the desired image and press the **Save Selected File** button to save the file and upload it into the system. Press **Cancel** to cancel the upload. Once the file is uploaded click the **Save** button at the top of the Report Image screen.

When uploaded, the Report Logo will appear similar to the image below, for reports displayed in PDF format:



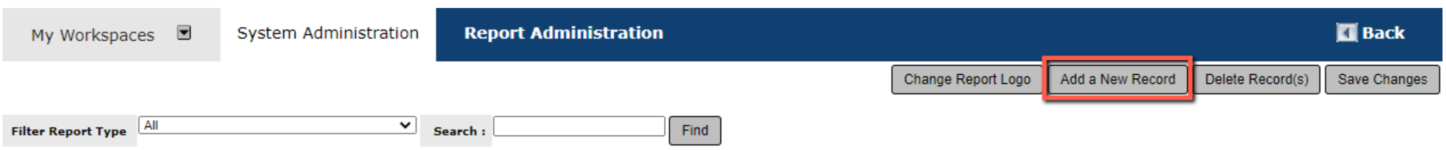
Expired Training

End Date: 07/16/2021

Name	Expiration Date	Training Status	Training Override
John Investigator	07/07/2021	Expired	No
John Investigator	06/01/2021	Expired	No
John Researcher	04/02/2021	Expired	No

Logos will not display on any .xls or .csv files.

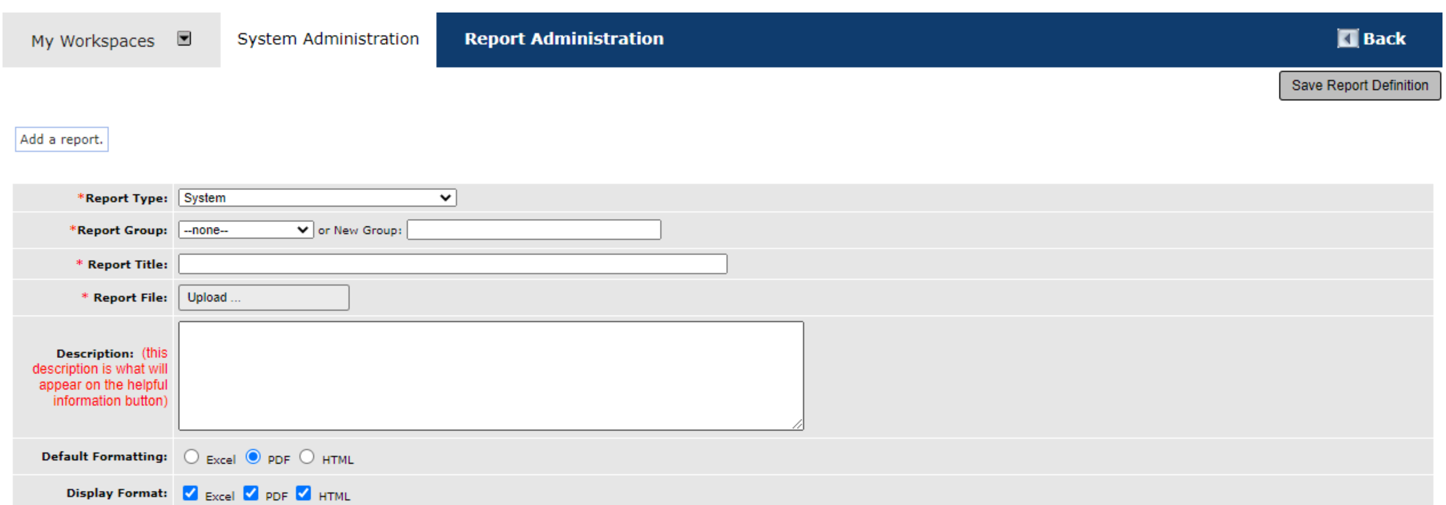
Add New Record



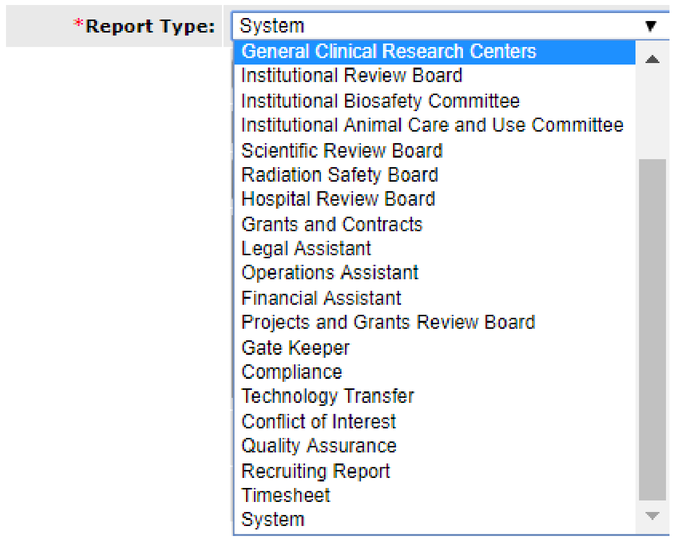
To add a new report, click the **Add a New Record** button**.** This will allow you to upload a previously downloaded report into the master list.

Note: It is recommended that you understand how iRIS Reports Builder works before adding new records to this screen. To learn more about iRIS Reports Builder see the System Administration – Report Builder manual.

When this button is clicked, the following screen will display, prompting the user for basic information on the report they are adding.



Report Type – This specifies the location of the report in your system (System or Module). Notice how this list corresponds to the **Filter Report Type** list on the previous screen:

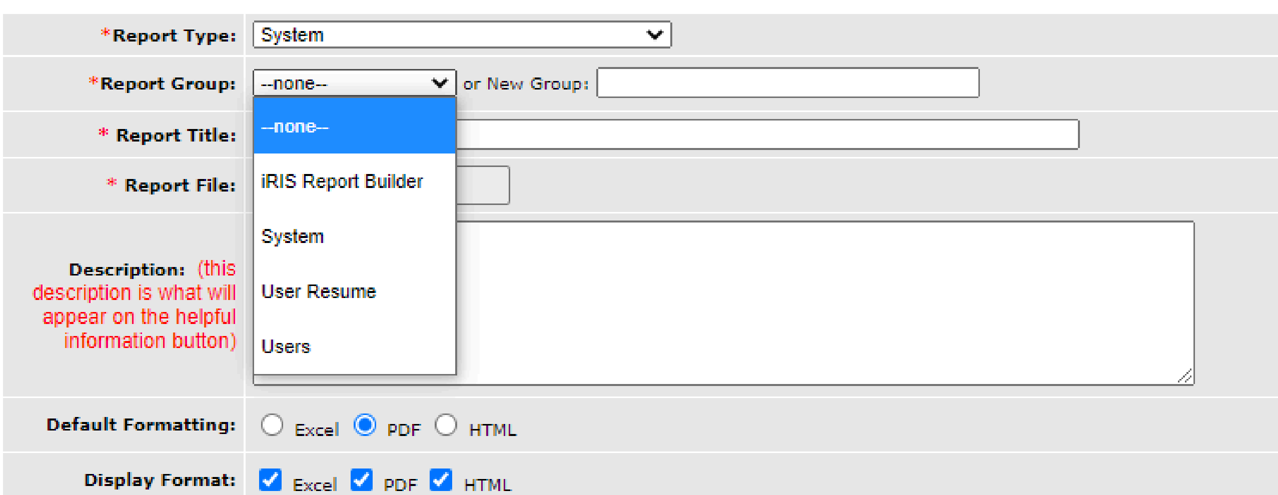


The most used areas for reports include:

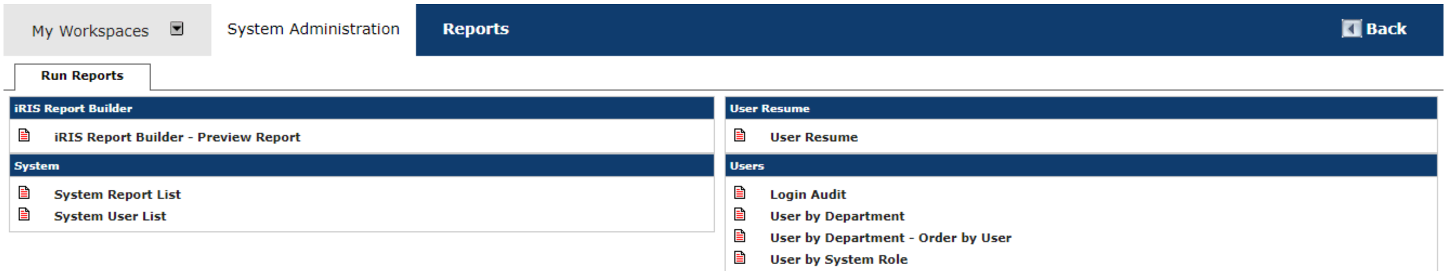
- **Study Assistant – Department** – Located under Study Assistant in the Department Reports menu item.
- **Study Assistant – All Department** – Located under Study Assistant in the All Department Reports menu item.
- **Review Board Reports** – Depending on which review boards have been set up in your system, there will be a place for adding reports to the Reports menu item under each review board.
- **System** – Located under System Administration in the Reports menu item.

Report Group – Depending on which Report Type you select; this list will populate with the groups associated within that screen (or you can choose to add a New Group).

For this example, we will select System to place this report in the *System Administration > Reports* area. The report group will populate with the following groups shown in the screen shot below:



If we examine the Reports screen in System Administration, notice that the same groups display. If all reports are hidden under a specific Report Group or no reports are assigned to a group, that Report Group will not display on the Reports screen.



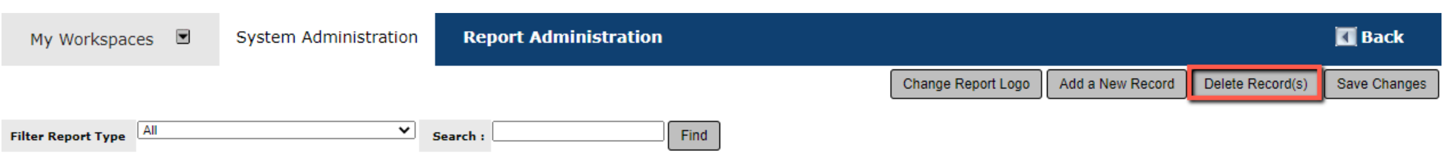
Report Title – Enter the title of the report you are adding in this text box. The title will be the actual text identifying your report in the system. It is recommended that you create a concise title that will convey to the user what that report will do and if it will be useful for them.

Report File – Here the user can click the **Upload** button to browse their files and pull in the report file. The report file should have a .jasper extension.

Description – The information entered within the **Description** will display to users within the **Helpful Information** button during the process of running a report, as seen below.

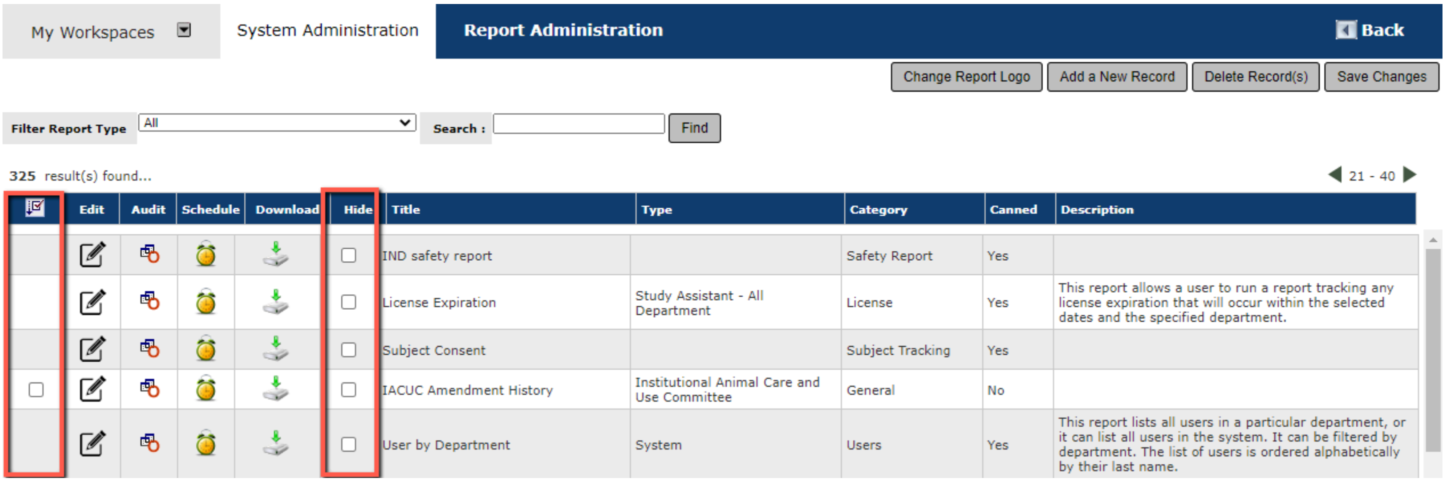
When you have finished entering all information for the new report, click the **Save Report Definition** button. To leave this screen without saving, click the **Back** button.

Delete Record

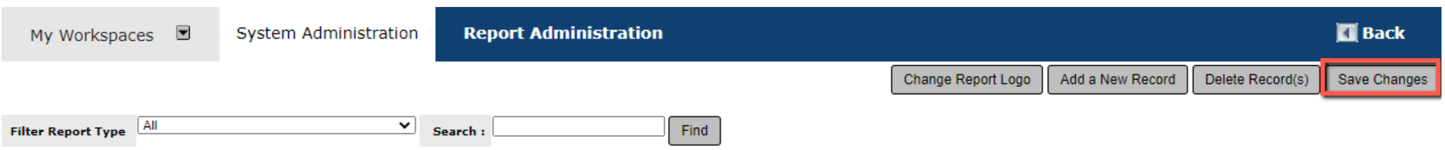


To delete a report, click the checkbox next to the desired report and click the **Delete Record(s)** button.

*Note: Many of the reports in your system are pre-canned reports and cannot be deleted. However, reports can be “hidden” from users by selecting the **Hide** checkbox next to the pertinent record.*

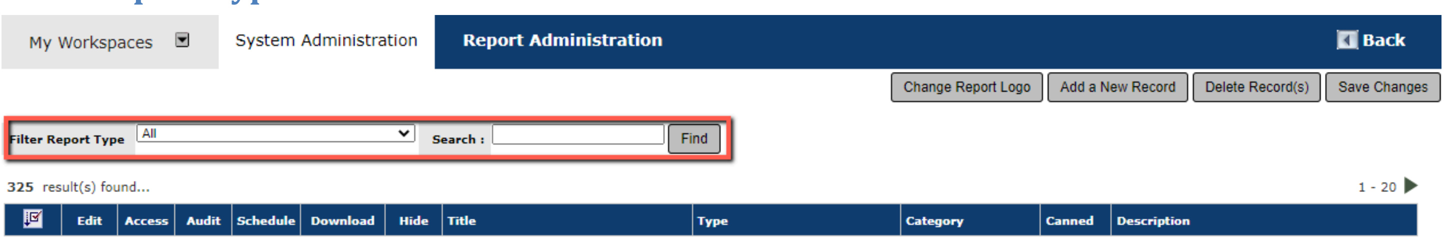


Save Changes



When any boxes are checked on this screen, make sure you click the **Save Changes** button to enforce the desired changes.

Filter Report Type & Search Filter



Many different reports will be listed in this screen. As you can see in the screenshot above, there are 325 reports in the system, most of which are pre-canned. You can navigate to different pages to find your report by clicking the arrow under the **Save Changes** button. You may also locate the report by using either the **Search** field or the **Filter Report Type** drop down list to filter the list of reports.

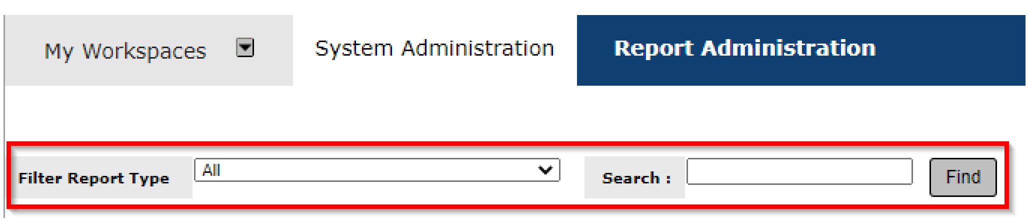
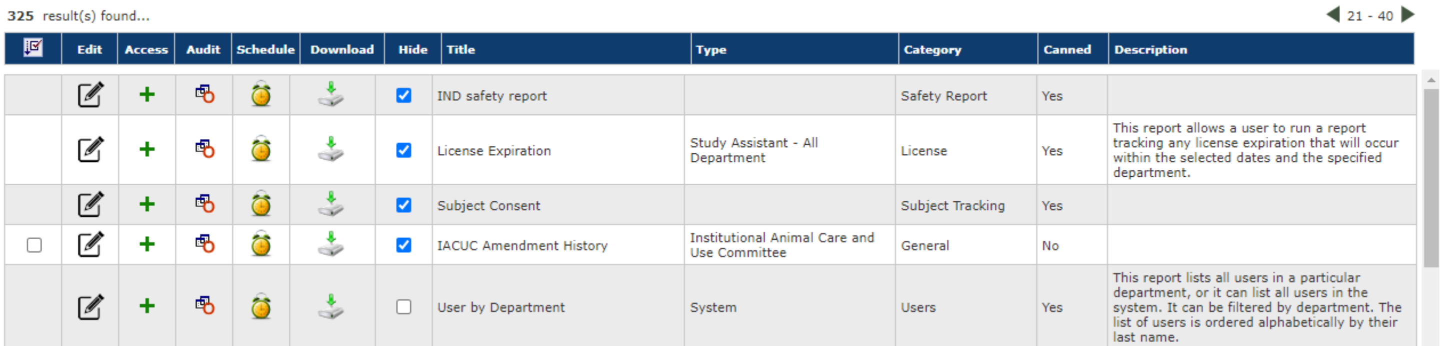


Table Columns

All of the items in the table are either pre-canned reports that come with your system or are reports that have been created and published in iRIS Reports Builder.

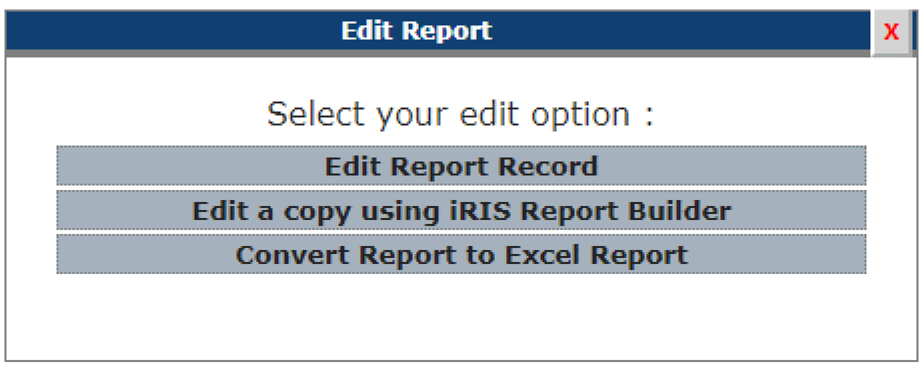


325 result(s) found... 21 - 40

	Edit	Access	Audit	Schedule	Download	Hide	Title	Type	Category	Canned	Description
						☑	IND safety report		Safety Report	Yes	
						☑	License Expiration	Study Assistant - All Department	License	Yes	This report allows a user to run a report tracking any license expiration that will occur within the selected dates and the specified department.
						☑	Subject Consent		Subject Tracking	Yes	
☐						☑	IACUC Amendment History	Institutional Animal Care and Use Committee	General	No	
						☐	User by Department	System	Users	Yes	This report lists all users in a particular department, or it can list all users in the system. It can be filtered by department. The list of users is ordered alphabetically by their last name.

Edit

When you click the Edit icon next to a report record, a small window will display three options.



Edit Report Record – This opens up details about the report such as the type, group, title, and description. The description of a report will now appear in the report's Helpful Information link. For more information on any of these fields please see the Add a New Record section, previously described in this manual.

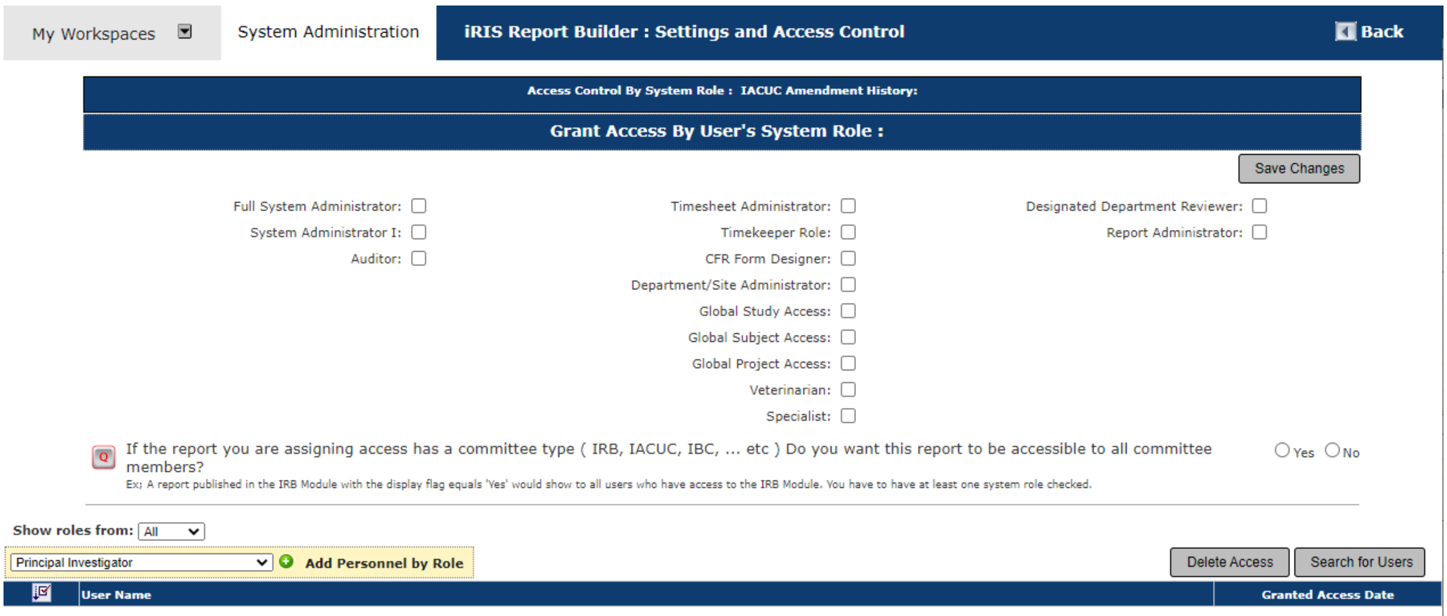
Edit a copy using iRIS Report Builder – This will allow you to edit a **copy** of the report using the Report Builder tool. See the Report Builder manual for additional details.

Convert Report to Excel Report – This option automatically takes a copy of the report and converts it to an Excel format. This will create a new report with almost the same title of the selected report except with the "xls" suffix added on. It also places the Excel report in the same location in the system as the selected report.

Note: Reports created using this tool will need to be assigned role/user access as this does not carry over from the original report. In addition, Excel output may already be an option for users depending on the report properties configured when the report was created.

Access

The **Access** button brings you to the screen shown below and allows you to give users access to the specific report as needed.

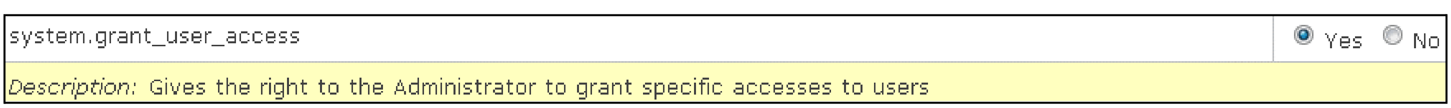


There are two main access types:

- Access By User's System Role
- Access based on User Name

Granting access by System Role enables an administrator to allow users with a specific role(s) in the system to have access to a particular Report SQL Template.

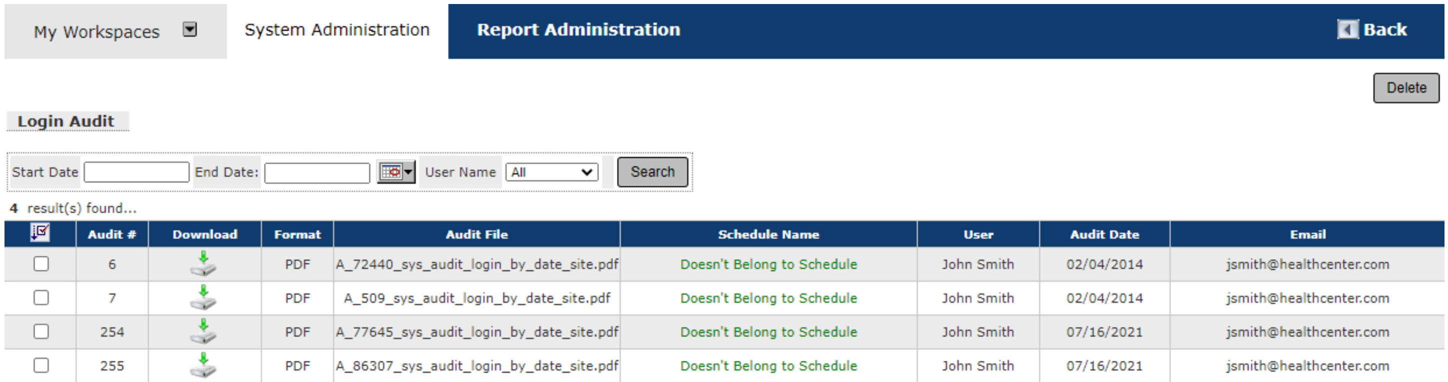
Granting access by user name allows System Administrators to only allow key individuals to have access to a particular Report SQL Template. ***Important Note:*** *This option is only displayed with the following System Property set to "Yes".*



This property can be found from the Home Screen > System Administration > System Configuration > Reports Administration.

Audit

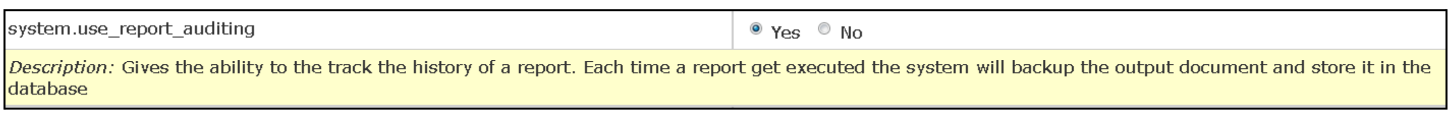
Clicking on the Audit icon will direct you to the following screen. You will have the ability to **Audit** the reports that have previously been ran or scheduled in iRIS™ (scheduling reports is covered in the next section).



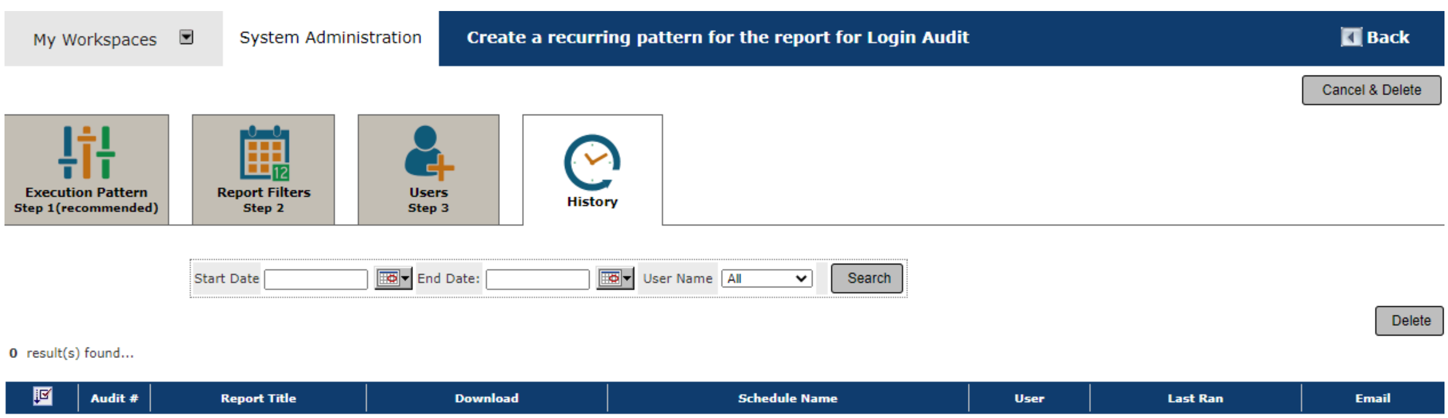
	Audit #	Download	Format	Audit File	Schedule Name	User	Audit Date	Email
	6		PDF	A_72440_sys_audit_login_by_date_site.pdf	Doesn't Belong to Schedule	John Smith	02/04/2014	jsmith@healthcenter.com
	7		PDF	A_509_sys_audit_login_by_date_site.pdf	Doesn't Belong to Schedule	John Smith	02/04/2014	jsmith@healthcenter.com
	254		PDF	A_77645_sys_audit_login_by_date_site.pdf	Doesn't Belong to Schedule	John Smith	07/16/2021	jsmith@healthcenter.com
	255		PDF	A_86307_sys_audit_login_by_date_site.pdf	Doesn't Belong to Schedule	John Smith	07/16/2021	jsmith@healthcenter.com

You also have the ability to search by Date Range and User Name to filter the results displayed.

Important Note: *this option is only displayed with the following System Property set to "Yes". This property can be found from the Home Screen > System Administration > System Configuration > Reports Administration.*



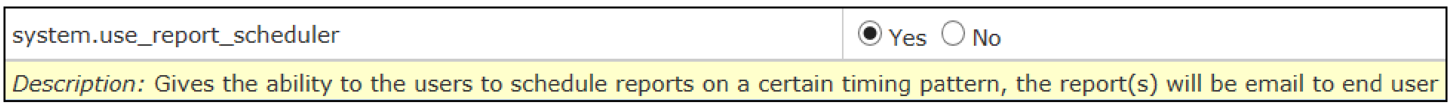
When this property is set to "Yes" the History tab will be available in the Report Scheduler, as seen in the image below.



Schedule

Clicking the Schedule icon  will enable users to schedule reports to be sent to you or other users on a recurring basis. Please see the Schedule Reports section at the end of this manual to learn more about the steps in scheduling reports.

Important Note: *this option is only displayed with the following System Property set to "Yes". This property can be found from the Home Screen > System Administration > System Configuration > Reports Administration.*



Download

When you select the Download icon  a copy of the report can be downloaded for future use. This feature is much like the Import/Export feature of the System Forms Designer. A copy can be downloaded and saved to your desktop and uploaded by selecting **Add a New Record** in the System Report Administration main screen.

Hide

Selecting the **Hide** checkbox will allow you to completely hide a report from users altogether, regardless of their access. This is very helpful, as there are many pre-canned reports that come with your iRIS™ system. The Hide feature allows you to only display the reports that are applicable to your needs.

Title

This displays the title of the report.

Type

This displays the type of the report.

Category

This displays the category of the report.

Canned

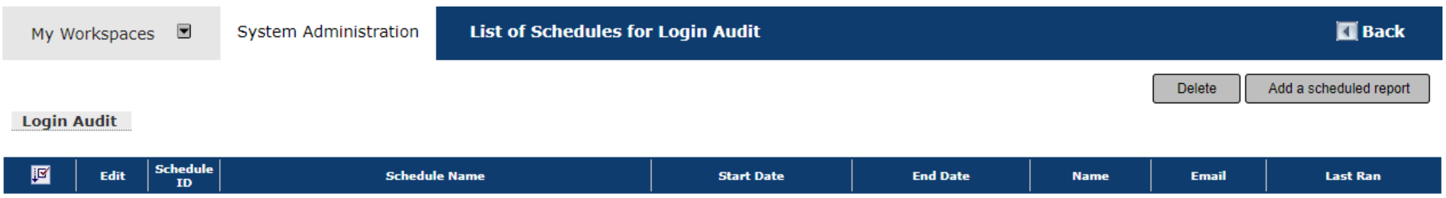
This displays whether the report is pre-canned. A pre-canned report is a report that is built into iRIS™ by our development team for your convenience. Pre-canned reports have limitations to the content that can be edited. Also, pre-canned reports cannot be deleted from your system, they can only be hidden.

Description

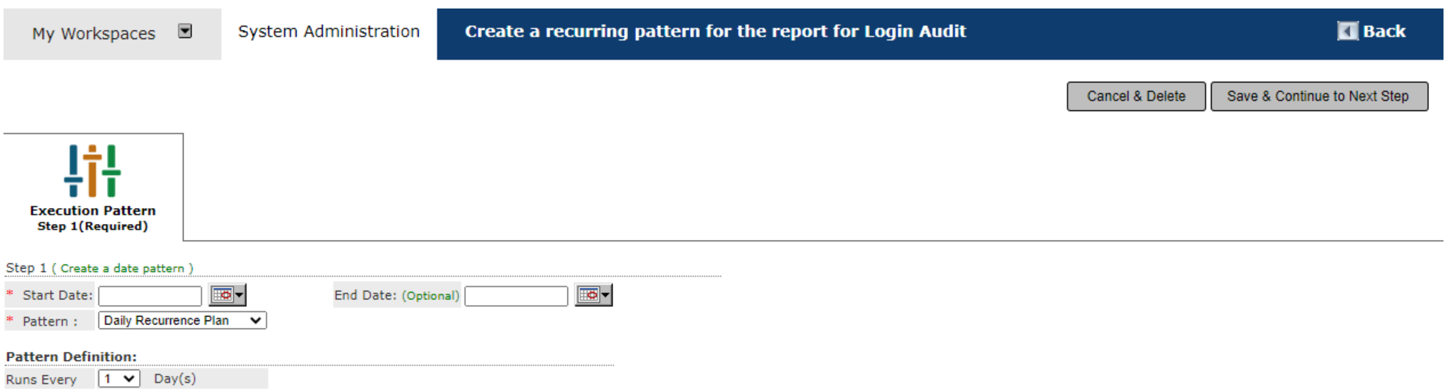
This displays the description of the report. This description will appear in the Helpful Information button seen by the user when the report is used.

Scheduling Reports

To schedule a report to run automatically, click on the icon next to the report you want to scehdule. The system will take you to the screen show below.



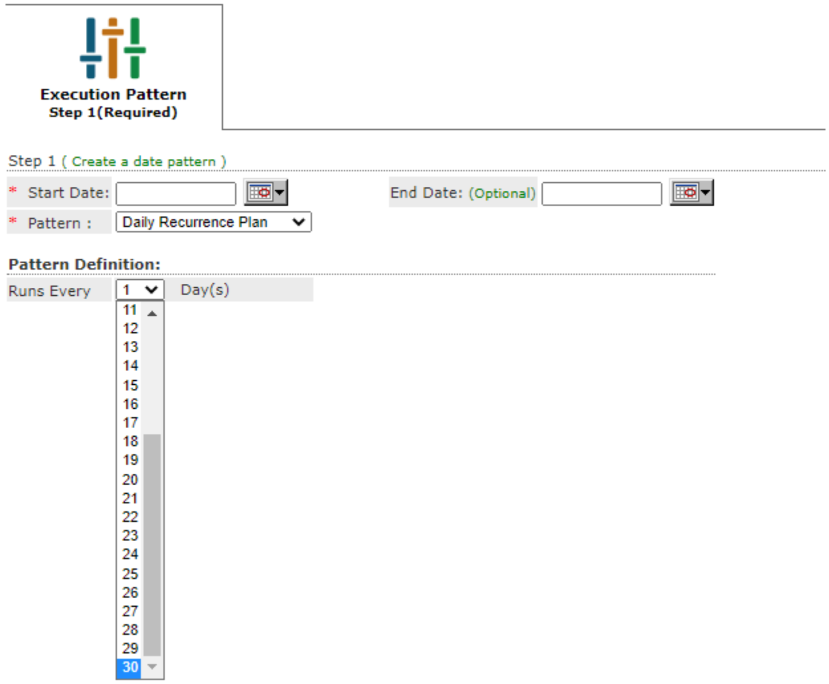
To add a schedule to this report, click on the **Add a scheduled report** button. This will open the page shown below.



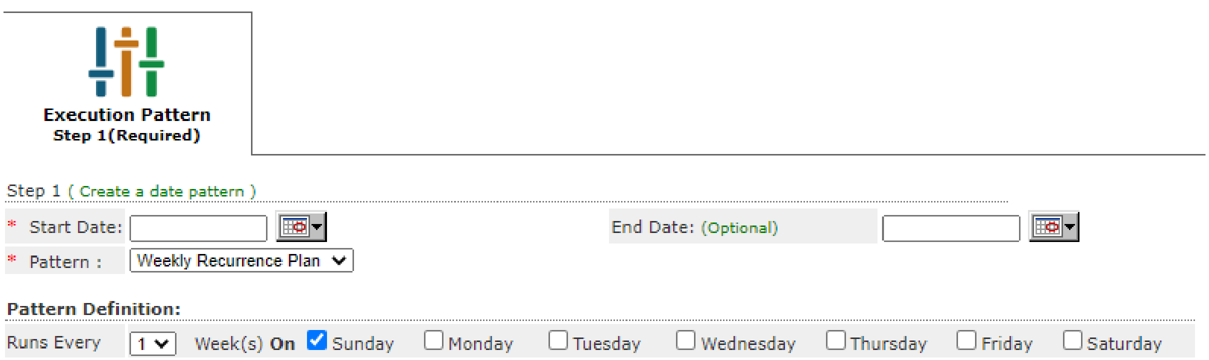
Scheduling STEP 1: Execution Pattern

From this screen you can select the Execution Pattern for your report. The date pattern is set up by choosing a **Start Date**, an **End Date** (optional), and selecting a **Pattern** for recurrence from the drop-down box. If you are uncertain how long a period you want the report to run, you do not have to select an end date. By leaving this open, your report will continue its scheduled pattern indefinitely. You can choose to have your report run on one of the following Recurrence Patterns: Daily, Weekly, Monthly, or Yearly.

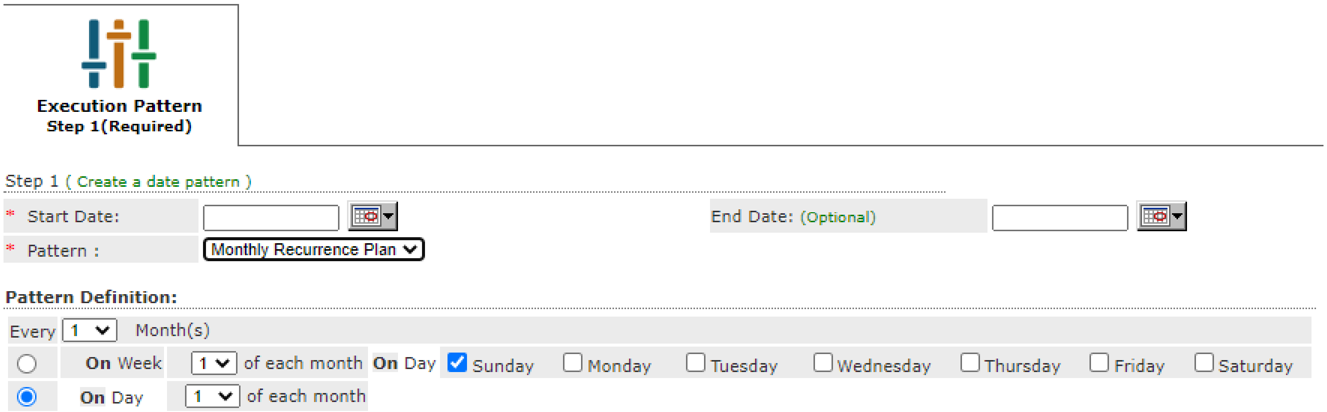
Daily – When choosing the Daily Recurrence Pattern, you have the option to run your report every day, every 2 days, 3 days, and so on: up to 30 days (as shown below).



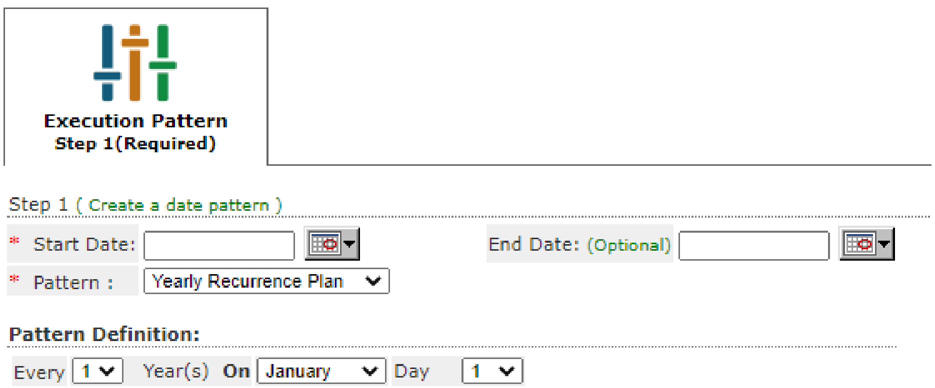
Weekly – The Weekly Recurrence Pattern lets you schedule reports in weekly increments, from every 1 to 5 weeks. You can also indicate the day(s) that you want the report to run.



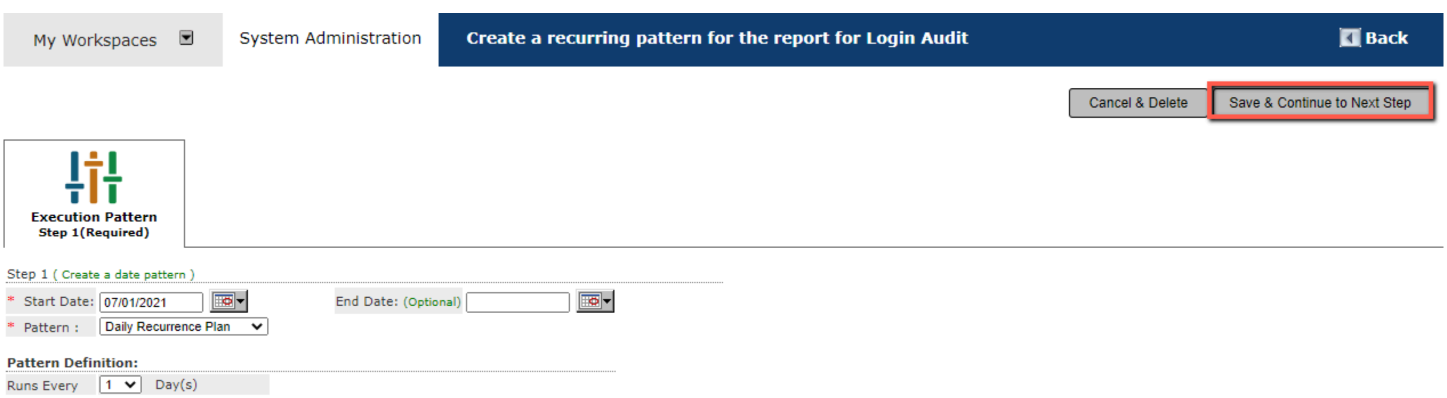
Monthly – The Monthly Recurrence Pattern allows you to schedule reports on a monthly basis, from every 1 to 11 months. This pattern also incorporates two different schedule patterns – by the week or by the day. First, you can choose a specific week of the month (1 to 4), in conjunction with a specific day or days of that week (Sunday through Saturday). The second pattern allows you to pick which day of the month the report is to run (the 1st through the 28th).



Yearly – The Yearly Recurrence Pattern lets you schedule your report every 1 to 2 years. The specific month and day the report is to run can be selected as well.

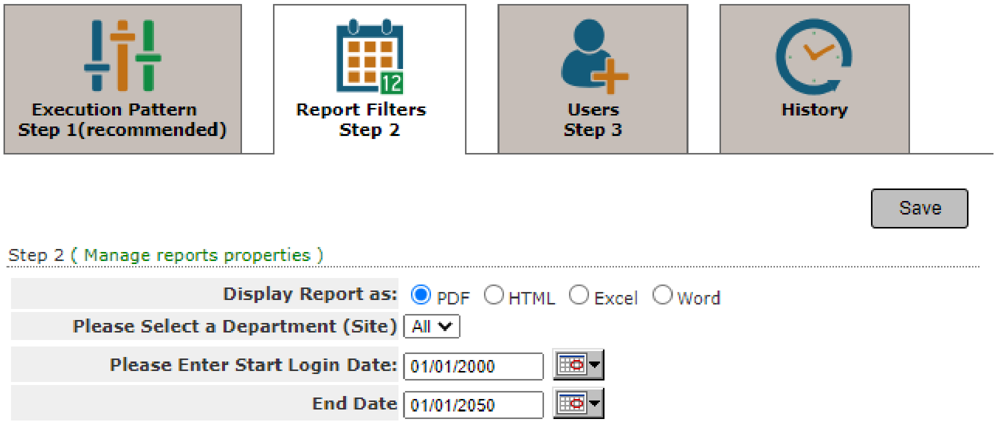


Once you have established your pattern, click **Save and Continue** in the upper right corner of screen.

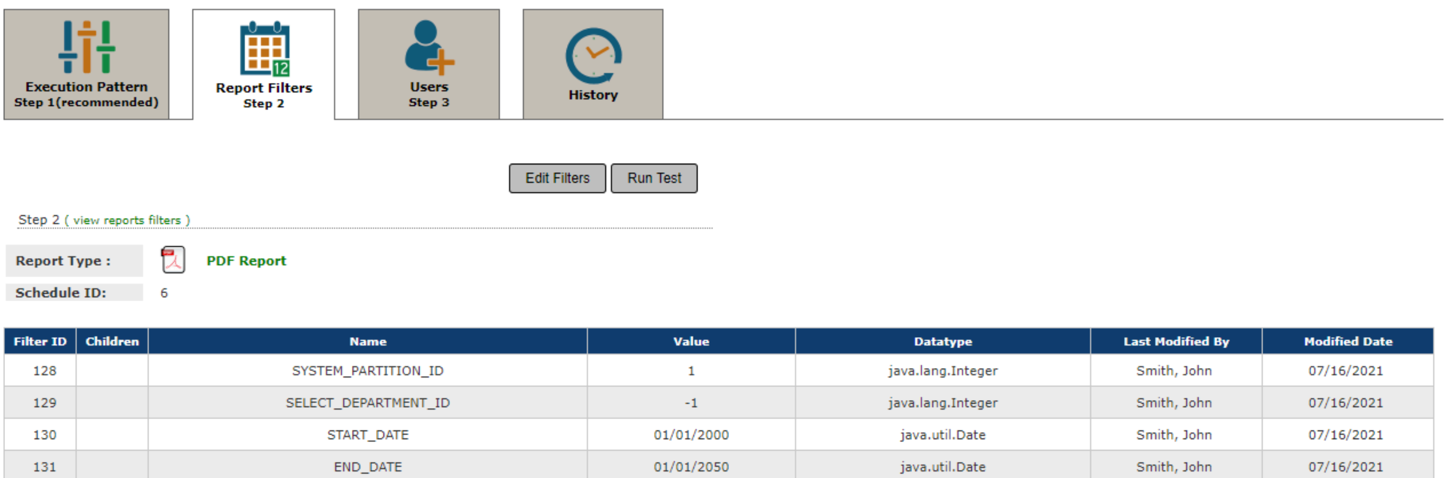


Scheduling STEP 2: Report Filters

Step 2 is where you manage report properties. These properties will vary depending on the report you are scheduling.



Make your selections and then click **Save**. The following screen will appear, displaying your report type and the properties you selected.



Filter ID	Children	Name	Value	Datatype	Last Modified By	Modified Date
128		SYSTEM_PARTITION_ID	1	java.lang.Integer	Smith, John	07/16/2021
129		SELECT_DEPARTMENT_ID	-1	java.lang.Integer	Smith, John	07/16/2021
130		START_DATE	01/01/2000	java.util.Date	Smith, John	07/16/2021
131		END_DATE	01/01/2050	java.util.Date	Smith, John	07/16/2021

From this screen you can now do the following:

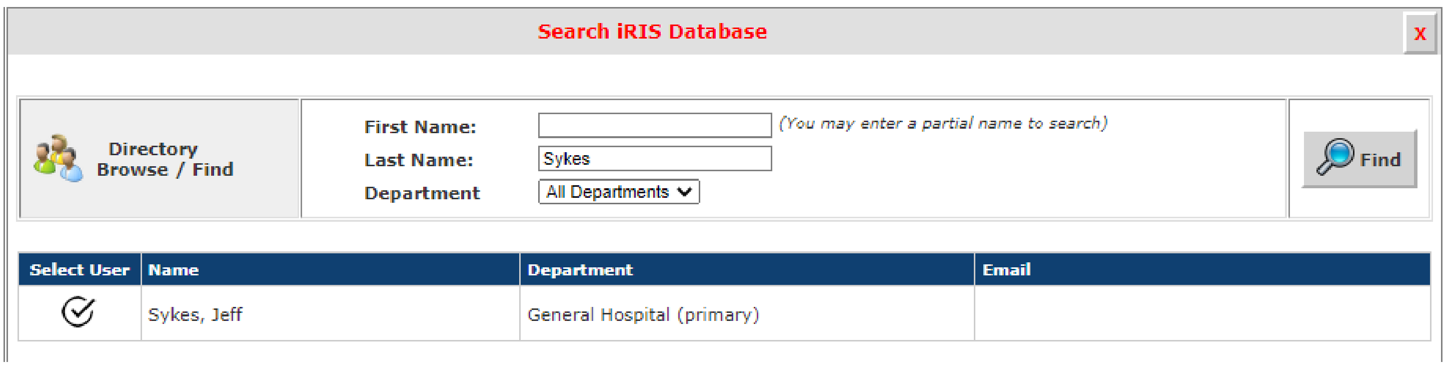
Edit Filters – Clicking this button will take you back to the previous screen where you can change your report property selections.

Run Test – Clicking this button will run a test of the report with the properties that you selected.

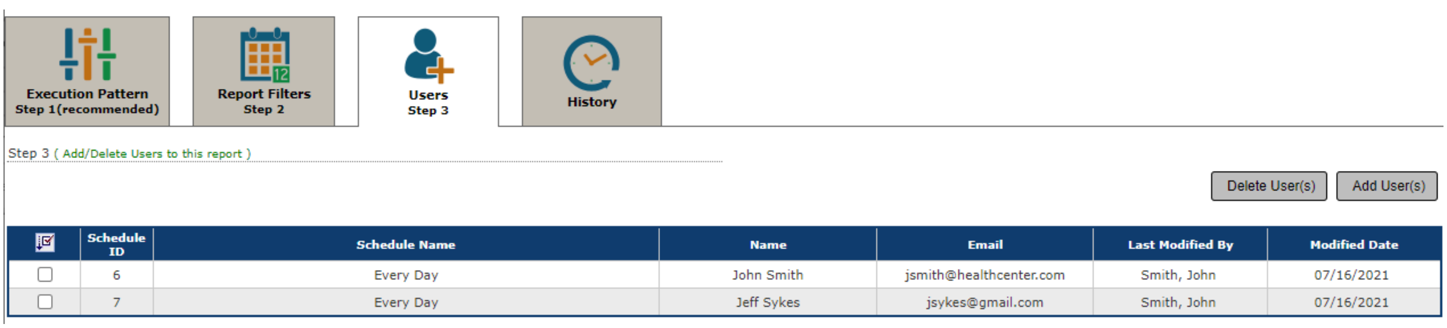
Scheduling STEP 3: Users

The user setting up the schedule will automatically receive the report based on the execution pattern. However, you can select additional iRIS™ users that the report should be sent to. You can also delete a user from this list at any time.

Add User(s) – When you click the **Add User(s)** button, a popup search window will appear. Enter either the first or last name of the user you would like to add to the report schedule. If you are unsure of the spelling, you can enter a portion of the first or last name. If you know the user's primary department you can also include that in your search criteria. Once you have entered your search criteria, click **Find**. Click the icon in the **Select User** column to add the user to the scheduled report.



After adding a selected user, their information becomes available under the **Users** tab in Step 3 (see screenshot below).



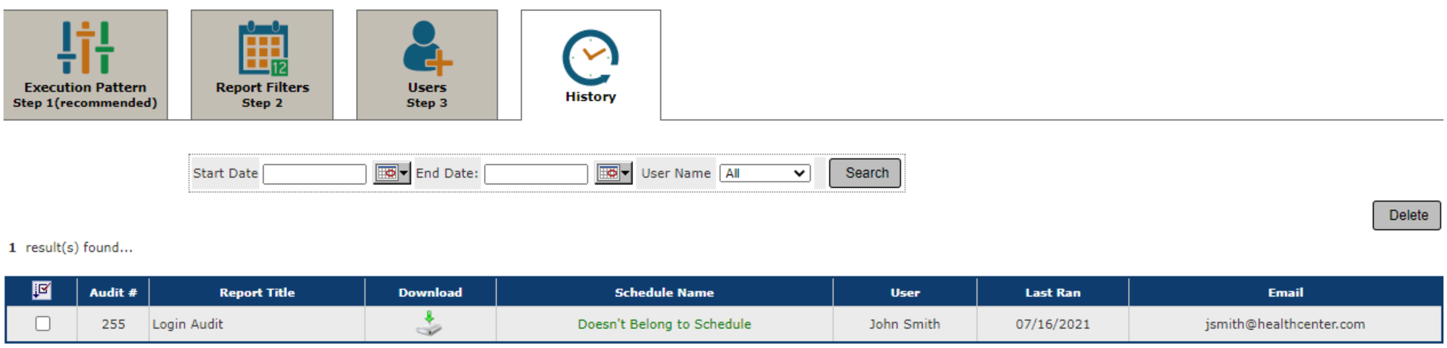
A checkbox will also become available in the first column for newly added users.

Delete User(s) – If you need to remove a user from this list, simply check the record to be deleted and click the **Delete User(s)** button at the top right-side of the screen.

When a user is added to a scheduled report, that user now has the ability to change the schedule through the System Report Administration, if they have appropriate access.

History

Within the **History** tab is a table that contains records for each time the report is run, including test runs, as shown in the screenshot below.



This table contains the following columns:

Audit # – Report Audit ID.

Report Title – Name of report.

Download – Clicking this icon will download the report in the format selected when scheduled.

Schedule Name – Gives a brief description of the schedule (how often it is set to run) if the report was executed by the system and not manually.

User – The name of the user that the report was sent to.

Last Run – The date the report last ran.

Email – The email address of the user listed.

Note: In order for the History Tab to be visible, set the system property system.use_report_auditing to "Yes". Find this property by navigating to System Administration > System Configuration > Reports Administration. This property (when *enabled) gives privileged users the ability to track the history of a report. Each time a report gets executed, the system will back up the output document and store it in the database.*

system.use_report_auditing	◉ Yes ○ No