

CentraSite

Working with Reports and Report Templates

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Working with Reports and Report Templates

Whether you need to document or present information about your objects, you can use predefined or custom reports to do so. You can also print, copy and save, or export reports.

This document describes how to create report templates, upload the report templates to CentraSite and run the reports.

The content is organized under the following sections:

Introduction	Gives an overview of the report template.
About Report Templates	Contains an overview of the system and custom report templates in CentraSite.
Objects for Which You Can Generate Reports	Lists the objects for which you can generate reports.
Who Can Generate Reports?	Describes the permissions needed to generate reports.
Who Can Create and Manage Report Templates?	Describes the permissions needed to create, edit or delete a report template.
Adding a Custom Report Template	Describes how to create a report template.
Associating a Report Template with an Object Type	Describes how to associate a report template with one or more object type(s).
Setting Permissions on a Report Template	Describes how to set instance-level permissions on a report template.

1 Introduction

Reports provide a way for you to view, share and print information derived from the objects you have created.

CentraSite Reports can be used to register BIRT (Business Intelligence and Reporting Tools) reports. Such reports can be created, for example, using the Eclipse plug-ins delivered with CentraSite. For information about installing and starting the plug-ins, refer to the section *Setting up the Eclipse Plug-Ins* in the document *Post Installation and Additional Uninstallation Steps for CentraSite*. Documentation describing how to create BIRT reports is contained in the Eclipse online help that is delivered with the plug-ins.

The data model that UDDI CentraSite uses to store the metadata of a BIRT report complies with the best practices given in the technical note entitled "Using BPEL4WS in a UDDI Registry", available on the OASIS web site at <https://www.oasis-open.org/committees/uddi-spec/doc/tn/uddi-spec-tc-tn-bpel-20040725.htm>.

For general information about the BIRT technology, see the description of the BIRT project in the **Projects** section of the Eclipse site at <http://www.eclipse.org/birt/>.

2 About Report Templates

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A report template contains instructions for gathering metadata from CentraSite Business UI or the CentraSite registry/repository for one or more assets, and formatting it into an asset-specific report. The template lets you create detailed reports for your assets containing data that you have specified. Using the Report Designer, you can also create report templates that have the exact content and presentation that you need.

Report templates can be constructed to represent a framework of formatted object-specific data references that will generate different reports, depending on the object-specific data being referenced. Depending on the object types that you include, a report template can be run against different objects to generate results specific to each object.

A report template is also an efficient way to create multiple reports that contain the specific information that you want to display. For example, if every report you create requires your organization name, address and the date that the report was generated, you want to be able to include that information on each report automatically, rather than adding it to each individual report that you generate. A report template enables you to define your required information once, and then generate it as many times as you want.

CentraSite provides a variety of predefined report templates that you can use to generate reports based on your objects. In addition, you can design your own report templates using the Eclipse-based Business Intelligence Reporting Tools (BIRT) Report Designer.

The BIRT Report Designer creates a ".rptdesign" file, which is also referred to as the "Template File" and which describes a predefined *rptdesign* layout that is used for creating the report templates. Using the BIRT reporting engine you can create report templates and generate reports for any object. For example, you might want a report that lists all of the unused assets in your organization. Or you might want a report that lists the most recent changes for a specified asset in the catalog.



Note: A report template could either be used stand-alone or associated with one or more CentraSite objects.

System Report Templates

CentraSite provides a variety of predefined report templates that you can use to obtain, view and share information from your objects. To access data and display the report on an object, you use one of the following report templates.

Report Template Name	Description
Asset Change History	This report lists all changes that have occurred on a specific asset.
Asset Changes Since Date	This report lists all changes that have occurred on the assets of the specific organization since selected date.
Asset Dependencies	This report lists the incoming and outgoing relationships for a specific asset.
New Assets Since Date	This report lists all new assets that were created in the specific organization since selected date.
Policy Compliance	This report displays the policy log for a selected object. If you configured CentraSite to log only failed policy executions, the log will contain only failed policy executions for the selected object. If you configured CentraSite to log successful and failed policy executions, this report will list all policy executions for the selected object.
Run-time Asset Error	This report provides details about the runtime asset errors for that particular day.
Run-time Asset Quality of Service	This report displays the quality of service information about runtime assets.
Run-time Asset Usage	This report provides details about the selected asset (or all assets) usage over the selected period.
Run-time Consumer Usage	This report provides details about the usage by each consumer over the selected period.
Run-time Policy Errors	This report displays policy violation errors for that particular day.
Run-time Services	This report displays the summary level information about virtual services.
Service Details	This report displays the details of services in CentraSite.
SLA Violations	This report provides details about the SLA violations reports over the selected period.
SOA Maturity	For each month in the current and previous year this report calculates the number of services available per month with the total number of usage references for those services.
Top Ten Consumers	This report displays the top ten consumers in the SOA infrastructure.
Top Ten Services	This report displays the top ten services in the SOA infrastructure.
Unreferenced Assets	This report shows all assets that have no incoming relationships.



Notes:

1. The use of run-time report templates is not supported if you are using a CentraSite Community Edition license.
2. In the eclipse-based BIRT Report Designer there is an option to create the ".rptdesign" file (also referred to as "Template File"), and which describes a predefined *rptdesign* layout. However, this "Template File" should not be confused with the system report templates this document refers to.

For more information about generating reports, see [Generating a Report](#).

Custom Report Templates

By creating and designing report templates, you can produce detailed reports that have the specific content and format that you require.

The report templates that you create will be stored in the CentraSite data store.

After you create a custom report template, you can use it to generate reports as many times as you want.

For information about creating a custom report template and generating custom reports, see [Adding a Custom Report Template](#).

3

Objects for Which You Can Generate Reports

You can generate reports on the following objects by either of the following ways:

- In CentraSite Control, click the **Generate Report** icon to right of the report template you want to use for report generation. Additionally, you can choose the **Generate Report** item from the context menu of the report template or **Actions** menu of that template.
- In CentraSite Control, choose the **Generate Report** item from the context menu of the corresponding object. Additionally, for assets, you can choose the **Generate Report** item from the **Actions** menu of that object.

The objects for which you can generate reports are:

Object	Description
Organization	An object that represents an organization in CentraSite. For more information about adding and maintaining organizations, see the document <i>Managing Organizations</i> .
Taxonomy	An object that represents a classification system in CentraSite. For more information about creating and maintaining taxonomies, see the document <i>Taxonomies</i> .
Asset Type	An object that identifies a set of profiles which are collections of attributes. For more information about adding and maintaining asset types, see the document <i>Object Type Management</i> .
Asset	An object that represents an entry in the asset catalog. For more information about adding and maintaining assets, see the document <i>Using the Asset Catalog</i> .
Policy	An object that identifies a set of actions that are executed when a specified event occurs to a specified object. For more information about adding and maintaining policies, see the documents <i>Working with Design/Change-Time Policies</i> and <i>Working with Run-Time Policies</i> .

4 Who Can Generate Reports?

All CentraSite users have implicit (and irrevocable) view permission on report templates. This permission enables you to generate reports from any report template that exists in the registry/repository.

CentraSite Control provides several ways in which you can generate reports. To generate a report from a particular page, you must have permission to access the area of the user interface to which the page belongs. For example, to generate a report from the Report Templates page, you must have the "Use the Reports UI" permission. For more information about the areas from which you can generate reports, see [Generating Reports](#). For more information about UI permissions, see the section *About Roles and Permissions* in the document *Users, Groups, Roles and Permissions*.

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Who Can Create and Manage Report Templates?

To create report templates, you must belong to a role that has the "Manage Report Templates" permission. Besides allowing you to create report templates, this permission allows you to edit and delete any report template in the registry/repository (except certain predefined reports installed by CentraSite). By default, users in the CentraSite Administrator role or the Operations Administrator role have this permission, although an administrator can grant this permission to other roles.

If you do not belong to a role that includes the "Manage Report Templates" permission, you can edit and delete a report template if:

- You have the appropriate instance-level permissions (i.e., Modify or Full permission) on the template.

—AND—

- You belong to a role that includes the "Use Reports UI" permission.

For more information about permissions, see the section *About Roles and Permissions* in the document *Users, Groups, Roles and Permissions*.

6 Adding a Custom Report Template

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CentraSite reports are designed using the BIRT (Business Intelligence and Reporting Tools), an open source, Eclipse-based reporting system that comprises an Eclipse-based report designer and a runtime component, i.e. a viewer. Report template are deployed as BIRT report design files (*.rptdesign*). To create a custom report template, you must perform the following high-level steps:

1. **Create a new *rptdesign* template file using the BIRT Report Designer.**

During this step, you create a new *rptdesign* template file, wherein you specify the query for generating a report and, select the fields and layout by which you would like to expose the report. For procedures, see [Creating a New RPTDESIGN Template File](#).

2. **Create a new Report Template in CentraSite Control**

During this step, you specify the details of the template and upload the *rptdesign* file with which you would like to generate the report. For procedures, see [Creating a New Report Template](#).

Creating a New RPTDESIGN Template File

With the BIRT Report Designer, create a *rptdesign* file. This *rptdesign* file is referred to as the "Template File" in CentraSite Control.

Also, if the *rptdesign* file contains a parameter named "ROKEY", then CentraSite automatically adds the **Generate Report** item to the context menu of each instance of the linked object type(s). This ROKEY parameter retrieves the object-specific metadata from the CentraSite data store.

Documentation describing how to create BIRT reports is contained in the Eclipse online help that is delivered with the plug-ins.

For a more thorough introduction to BIRT, see:

- The [BIRT Project Page](#) on the Eclipse web site, including free download.
- The [BIRT FAQ](#) in the Eclipse Wiki.

Creating a New Report Template

You can add a report template to CentraSite Control, making it available to create new reports based on the template. Perform these steps to create a new report template and save it to CentraSite.

▶ **To create a report template**

- 1 In CentraSite Control, go to **Reports > Report Templates**.
- 2 Click **Add Report Template**.
- 3 In the **Add Report Template** dialog box, specify the following fields:

In this field...	Do this...
Template File	Click Browse to select and upload the <i>rptdesign</i> template file using which you want to generate the report. For details on creating the <i>rptdesign</i> template file, see Creating a New RPTDESIGN Template File .
Name	Enter a name for the new report template. A report template name can contain any character (including spaces). Note: A report template does not need to be unique within the organization. However, to reduce ambiguity, you should avoid giving multiple report templates the same name. As a best practice, we recommend that organizations adopt appropriate naming conventions to ensure the assignment of distinct report template names.
Description	<i>Optional.</i> Enter a description for the new report template. This description appears when the user displays a list of report templates in CentraSite Control.

- 4 Click **OK**. Now the name of the report template is visible in the list of report templates.
- 5 Display the detail page of the report template. You can do this by choosing **Details** from the report templates's context menu in the list of report templates.
- 6 Specify the object types that are allowed to use the template for report generation. To do this, choose the **Applicable to Object Types** tab and select the check boxes of the required object types. For information about associating object types to a template, see [Associating a Report Template with an Object Type](#).
- 7 To enable other users to view, modify and/or delete the report template that you have created, you must modify the template's permission settings. You do this by selecting the tab **Permissions** and making the appropriate entries there. For information about allowing other users to access a template, see [Setting Permissions on a Report Template](#).
- 8 Define one or more custom properties for this report template. To do this, choose the **Object-Specific Properties** tab and perform the following steps:
 1. Click the **Add Property** button.
 2. In the **Add Object-Specific Properties** dialog box, enter a property name and a value. You can add multiple values for a single property. You can optionally specify a namespace to fully identify the property.

The property name can contain any character (excluding spaces).
 3. Click **OK**.
- 9 Click **Save** to save the new template.

7

Associating a Report Template with an Object Type

You can associate a report template to multiple object types. When you do this, you can generate a report for each object belonging to the object type using the associated report template.

▶ **To associate a report template with an object type**

- 1 In CentraSite Control, go to **Report Templates > Reports**.
- 2 Click the name of the template to which you want to associate object types.
- 3 In the Report Template details page, display the **Applicable to Object Types** tab. Select the object types that you want to associate with the template.



Note: If you want to associate the report template with all of asset types (including new asset types that might be added to the registry in the future), enable the **All Asset Types** option. Note that this option associates the template with asset types only. It does not associate the template with non-asset types, such as Organizations, Users and Taxonomies, which can also be used with report templates.

- 4 Click **Save**.

8 Setting Permissions on a Report Template

By default, all CentraSite users can view (and generate reports from) the report templates that you create. However, only you (as the owner of the report template) and users who belong to a role with the "Manage Report Templates" permission are initially allowed to modify and delete the templates. To enable other users to modify and/or delete a template that you have created, you must modify the template's instance-level permission settings.

The following procedure describes how to set permissions on a report template. When setting permissions on report templates, keep the following points in mind:

- To set permissions on a report template, you must belong to a role that has the "Manage Report Templates" permission or have the Full instance-level permission on the template itself.
- You can assign permissions to any individual user or group defined in the CentraSite registry/repository.
- The groups to which you can assign permissions include the following system-defined groups:

Group Name	Description
Users	All users within a specified organization.
Members	All users within a specified organization and its child organizations.
Everyone	All users of the CentraSite registry/repository <i>including guest users</i> (if your registry/repository permits access by guests).

- If a user is affected by multiple permission assignments, the user receives the union of all the assignments. For example, if group ABC has Modify permission on a report template, and group XYZ has Full permission on the same template, users that belong to both groups will, in effect, receive Full permission on the template.

▶ **To assign permissions to a report template**

- 1 In CentraSite Control, go to **Reports > Report Templates**.
- 2 In the Report Templates page, select the template for which you want to assign permissions.
- 3 In the Report Template details page, choose the **Permissions** tab.
- 4 To add users or groups to the **Users / Groups** list, do the following:
 1. Click **Add Users / Groups**.
 2. Select the users and groups to which you want to assign permissions.

If you want to filter the list, type a partial string in the **Search** field. CentraSite applies the filter to the **Users/Groups** column.

String	Description
b	Displays names that contain "b"
bar	Displays names that contain "bar"
%	Displays all users and groups

3. Click **OK**.
- 5 To remove a user or group from the **Users / Groups** list, select the check box beside the group name or user ID, and click **Delete**.
- 6 Use the **View**, **Modify** and **Full** check boxes to assign specific permissions to each user and/or group in the **Users / Groups** list as follows:

Permission	Allows the selected user or group to...
View	View the report template and generate reports using the template. Note: Disabling this permission will not prevent a user from accessing the report template. CentraSite implicitly grants users view permission on all report templates. The implicit permission granted by CentraSite is not revoked by disabling the View permission on this tab.
Modify	View and edit the report template.
Full	View, edit and delete the report template. This permission also allows the selected user or group to assign instance-level permissions to the report template.

- 7 Click **Save** to save the new permission settings.

 **Note:** If you have given users Modify or Full permissions on the Report Template, and you want them to be able to work with the templates in CentraSite Control, be sure the users belong to a role that has the "Use the Reports UI" permission.

9 Viewing the Report Templates List

In CentraSite Control, go to **Reports > Report Templates**. The Report Templates page displays all of the report templates on CentraSite.

▶ **To view the report templates list**

- In CentraSite Control, go to **Reports > Report Templates**.

The report template list provides the following information about a template.

Column	Description
Name	The name assigned to the report template.
Description	Additional comments or descriptive information about the report template.
Organization	The organization to which the report template belongs.
Generate Report	The Generate Report icon to generate reports using the particular template.

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Generating a Report

Use the following procedure to generate a report.

▶ **To generate a report**

1 In CentraSite Control, you can generate reports in the following ways:

- From an object's context menu. (For assets, you can also choose the **Generate Report** item from the **Actions** menu.)



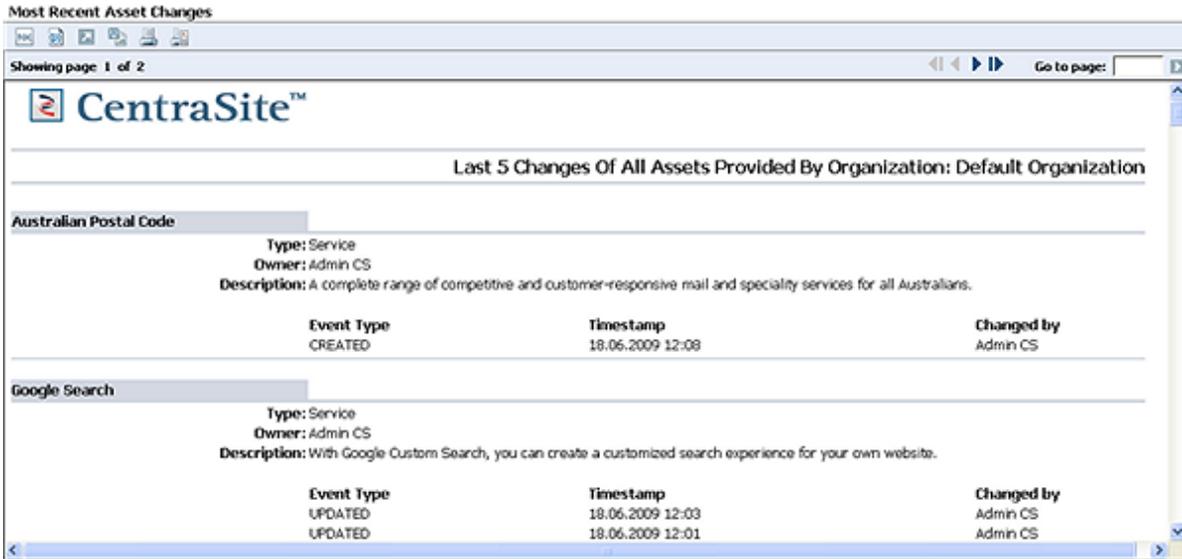
Note: Be aware that only if the *rptdesign* template file contains a parameter named "ROKEY", will you find the **Generate Report** item in the context menu of associated object type(s).

- From the **Reports > Report Templates** page. The Report Templates page displays the list of report templates on CentraSite. Click the **Generate Report** icon to the right of the report template that you want to use for report generation. At the prompt, enter values for the required parameters.

From the **Generate Report** item in the context menu of a report template.

- Using the Report Template details page. The Report Template details page displays basic attributes of the report template you want to use for report generation. Click the **Generate Report** item from **Actions** menu to the right of the details page. At the prompt, enter values for the required parameters.

2 CentraSite Control generates report using the BIRT reporting engine and displays the generated report as a new task window **BIRT Report Viewer**.



3 In the **BIRT Report Viewer**, do the following:

Select this icon to...	Description
Toggle table of contents	Toggle the Table of Contents On and Off.
Run report	Switch the BIRT reporting engine to run mode display the report with data. The length of time it takes to run the report depends on the complexity of the report and how busy the reporting engine is.
Export data	Export the report data in Comma Separated Values (CSV) file format.
Export report	Export the report with data in one of the following formats: <ul style="list-style-type: none"> ■ Word (.doc) ■ PowerPoint (.ppt) ■ Portable Document Format (.pdf) ■ Postscript (.ps) ■ Excel (.xls)
Print report	Print and save the report with data on a local system folder. Note that the BIRT Report Viewer does not have a Save Report icon available for you to save a report to a PDF file. To save a BIRT report to a PDF file, you must install a generic, text-only printer, and then redirect the BIRT report to this printer.
Print report on the server	Print and save the report with data in the CentraSite registry/repository.

11 Viewing or Editing the Properties of a Report Template

You use the Report Template details page to examine and/or modify the properties of a template. When viewing or editing the properties of a report template, keep the following points in mind:

- Some attributes within a template are designed to be read-only and cannot be modified even if they appear in a template on which you have modify permission.
- Modifications that you make to a report template will take effect as soon as you save the template.

▶ **To modify the properties of a report template**

- 1 In CentraSite Control, go to **Reports > Report Templates**.

The **Report Templates** page lists all report templates in the CentraSite registry/repository.

- 2 In the **Report Templates** page, select the template's link whose details you want to modify.
- 3 Examine or modify the properties on the Report Template details page as required.

In this field....	Modify....
Name	The name of the report template. A template name can contain any character (including spaces). Note: A report template does not need to be unique within the organization. However, to reduce ambiguity, you should avoid giving multiple report templates the same name. As a best practice, we recommend that organizations adopt appropriate naming conventions to ensure the assignment of distinct report template names.
Description	Additional comments or descriptive information about the report template.
Created	<i>Read-only</i> The date on which the report template was added to CentraSite. CentraSite Control automatically sets this attribute when a user adds the report template to CentraSite.

In this field....	Modify....
Last Modified	<i>Read-only</i> The date on which the report template was last modified. CentraSite Control automatically updates this attribute when you modify any of the report template's attributes.
Organization	The owning organization of the report template.
Owner	<i>Read-only</i> The name of the user and the organization to whom this report template currently belongs.
Applicable to Object Types	This tab identifies the object types whose instance can make use of this report template. For information about associating object types to a template, see Associating a Report Template with an Object Type .
Permissions	This tab identifies the users who can view, modify and/or delete the report template. For information about setting the properties on this panel, see Setting Permissions on a Report Template .
Object-Specific Properties	This tab identifies the key properties of the report template.



Note: To view or edit the report template (.rptdesign) file, choose the **Download Template File** item from the context menu of the report template's link or **Actions** menu in the report template details page. Make the necessary changes and upload the template file using **Upload Template File** item of the same context menu.

- 4 If you have modified the settings on the Report Template details page, click **Save**.

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Deleting a Report Template

Use the following procedure to delete a report template.



Note: There are certain predefined templates that are system templates and cannot be deleted (not even if you belong to a role with "Manage Report Templates" permission).

▶ To delete a report template

- 1 In CentraSite Control, go to **Reports > Report Templates**.

The **Report Templates** page lists all templates in the CentraSite registry/repository.

- 2 Select the report templates that you want to delete.
- 3 Click **Delete**.

