

Reporting Suite

Reporting

Administrator Guide

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About this Guide

This Guide is intended for the Administrators of Reporting. The Administrator must possess intermediate computer using skills and an understanding of user and system administrating procedures in order to be able to use this document.

New in this release

No new information was added in this version of the document.

Reference materials

Use this document with the following Guides:

- *Reporting Viewer Guide*
- *Reporting CCaaS Management Guide* on Confluence
- *Reporting SSO with Keycloak and OIDC Configuration Guide*
- *Reporting Standard Reports Guide*

Guide conventions

This Guide uses the following text formats and notation conventions:

Text format

Bold text indicates a button, field, link, option name, or similar function requiring an action.

Italicized text indicates new terms, directory paths, or references to external documents.

Text in this font indicates code.

Notes and cautions

Icons used throughout this Guide identify additional details or special conditions.

Note

Provides additional information or describes special circumstances.

Caution

Warns of user actions that may cause system failure or irreversible conditions.

Stop

Describes actions that you should only perform under the supervision of Enghouse Interactive Customer Support.

Legal disclaimer

This document is governed by the terms of the software license agreement and applicable contract (including addendums) entered into with Enghouse.

Contact information

To submit comments or questions about the content in this Guide, please open a case in Support.

Basic concepts and terminology

Reporting is a web-based framework for report designing. It includes a set of configurable standard reports that should cover most of any Contact Center product's needs, and which are built on top of the Standard Data Warehouse. A number of such assets are already available, and more are continually being developed.

The software provides its users with the following features and advantages:

- Complete overview of the system behavior
- Customizable display of detailed information about every relevant KPI and data point in your system
- Printable, paginated, shareable reports, exportable in several formats
- Customers or Enghouse professionals can create custom assets based on the Enghouse adopted framework

Dashboarding is an extension of Reporting with which users can create and work with dashboards, powerful data visualization boards that use charts, widgets, tables and text to help you understand your data.

Note

BI Dashboarding is not included in Reporting by default. Therefore, if it is not enabled in your system, any references to it in this and other documents do not apply to your use case.

User roles

The following user roles are available in Reporting and Dashboarding:

- **System Administrators:** In charge of tenants and ensuring that standard assets (such as standard reports) are available as necessary. Little to no other interaction with the system, such as working with reports, is expected from this user role. Aside from the Admin tab, they can only interact with the rest of the application the way Viewers do.
- **Administrators:** Manage users, groups, and certain data source, report, dashboard, and system settings for their tenant. In addition to some extra access, they also have the same access rights as Viewers (below).
- **Data Designers:** Create, manage and work on data sources, in addition to the same access rights as Report Designers and Viewers (below).
- **Designers:** Create, manage and work on reports and dashboards. They also have the same access rights as Viewers (below).
- **Power Viewers:** Work with views and styles based on assets shared with them. They cannot edit other assets in any way. They also have the same access rights as Viewers (below).
- **Viewers:** View reports and work with reports' and dashboards' filters and settings, and have access to subscriptions and downloads.

For more information on this topic, see *User Roles on page 10*.

Assets

Assets in Reporting and Dashboarding are the basic building blocks of the software and the primary components that users work with. They are **data models, reports, dashboards, report views** and **styles**. In the following section, you can read more about each type of asset in Reporting and Dashboarding.

Data models and sources

Data models are used to define connections and queries that Reporting uses to access data for reports and dashboards from the relevant databases and files. In Reporting, data models are organized in a Dictionary, which information about connections to databases, data sources and their relations, variables and other objects.

A data model is used as the basis for every report and dashboard. Each data model can have one or multiple data sources. A **data source** is like a program "layer" which provides data from a database or file and handles its conversion and to the report generator. In other words, the data source is a description of the methods, parameters, and data access methods.

In BI Reporting, the following data sources can be used for your reports and dashboards:

- Files:
 - CSV file
 - Excel file
 - JSON file
 - XML file
- Database connections:
 - MySQL
 - MS SQL
 - Oracle
 - PostgreSQL

Data models and their related sources are shown in the **Data** tab of Reporting and are only available to Data Designer users, who can view, edit and generally work with them, as well as Administrators, who can only interact with them to share with other users, typically Data Designers.

The **Standard Data Warehouse (DWH)** is a standardized database developed by the Enghouse BI Team, the goal of which is to provide a standardized and equal-for-all way of organizing data. This is done by using ETL (extract-transform-load) procedures to transfer data from, for example, a customer's database and to adapt it to the structure of the standard DWH without altering any of the data. This method is currently in the process of being implemented for a number of CC and CCaaS products in Enghouse.

Although Reporting and Dashboarding can be used without the DWH, instead utilizing one's own data or database directly, using the Standard DWH enables the use of **Standard Reports**, which are out-of-the-box reports that can be customized to a degree through Views, and can be utilized right away, without having to wait for the creation of individual reports. More information on both standard reports and report views can be found below.

Data models are primarily the focus of Data Designers, so refer to the *Reporting Designer Guide* for detailed information on this topic.

Reports

Reports are assets connected to your data models to show you the data in meaningful ways, in pixel-perfect and typically (but not only) tabular form. This gives you a simple, yet effective overview of all the data you may need. Their design can vary and be customized, depending on your needs. All the reports you can interact with, whether they were created by you or shared with you, are shown in the tiles of the **Reports** tab. Viewers and other users can interact with reports to filter the data they want to see, adjust some of the settings of the report, focus on the data they need, and perform other actions, all depending on the design of the report.

Additionally, Viewers and other users can also download the report in a number of formats, including printable ones, and they can subscribe to periodic updates via email or other channels.

Another interesting feature that is part of Reporting is the **Standard Reports**. Standard reports are a set of out-of-the-box reports which take advantage of the standard DWH to provide users with reports that are ready to use as soon as they enter the web application. In order to be able to use them, the original database must be integrated with the standard DWH. Standard reports are made to suit the needs of many different CC and CCaaS environments and use cases, and can be modified in terms of which data will or will not be shown through the use of report **Views**. You can read more about them in the upcoming sections.

Here is an example of a report from the perspective of a Designer:

	Status Time	Agent Daily Avg Status Time	Logged In	Break	% Status Time of Total	% Status Time of Logged In Time	% Status Time of Break	Started Breaks	Agents per Day
Total	11389	1898.17	11389	3866	100.0%	100.0%	100.0%	0	6
Agent Group ALPHA	7631	3815.5	7631	2797	67.0%	100.0%	100.0%	0	2
2022-01	7631	3815.5	7631	2797	67.0%	100.0%	100.0%	0	2
2022-01-24	7558	7558.00	7558	2724	66.4%	100.0%	100.0%	0	1
2022-01-27	73	73.00	73	73	0.6%	100.0%	100.0%	0	1
Site CC_DEFAULT1	3758	939.5	3758	1069	33.0%	100.0%	100.0%	0	4
2022-02	1205	1205	1205	244	10.6%	100.0%	100.0%	0	1
2022-02-23	1205	1205.00	1205	244	10.6%	100.0%	100.0%	0	1
2022-03	2217	1108.5	2217	489	19.5%	100.0%	100.0%	0	2
2022-03-23	3	3.00	3	3	0.0%	100.0%	100.0%	0	1
2022-03-30	2214	2214.00	2214	486	19.4%	100.0%	100.0%	0	1
2022-04	336	336	336	336	3.0%	100.0%	100.0%	0	1
2022-04-15	336	336.00	336	336	3.0%	100.0%	100.0%	0	1

Reports are the basic asset of Reporting and are available to all users, although they may interact with reports in different ways. For basic use and interaction with reports, see the *Reporting Viewer Guide*. For more advanced topics, particularly on the creation and management of reports, see the *Designer Guide*.

To find out more about the topic of standard reports and which ones are available to you, make sure to read the *Standard Reports Guide*.

Dashboards

Similarly to reports, dashboards are also assets connected to your data models to show data in meaningful ways – but while reports primarily rely on tabular form, dashboards utilize various custom or premade elements to display your data. Their design can also vary and be customized depending on your needs. Viewers and other users can interact with dashboards in that they can modify the filters to show only the needed data, adjust the settings to suit their preferences, and work with some of the individual elements to, e.g., increase the size of the viewing field for that element or to download it.

All the dashboards available to a user are shown in the **Dashboards** tab.

Just like with reports, users can download the dashboard in a number of formats or subscribe to it to receive periodic updates through one of the chosen channels.

In the same way Standard Reports are available, users can utilize **Standard Dashboards** as well, if their system is integrated with the Standard DWH. Some Standard Dashboards are already available and more are currently in the process of being developed.

Below is an example of a dashboard from the perspective of a Viewer.

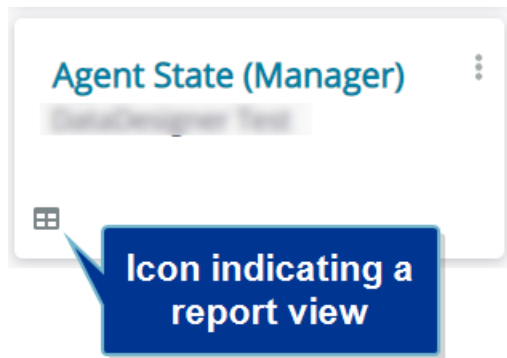
Dashboards are also a basic asset of Reporting and are available to all users, even though they can interact with them differently. For basic use and interaction with dashboards, see the *Dashboarding Viewer Guide*. For more advanced topics, particularly on the creation and management of dashboards, see the *Dashboarding Designer Guide*.

Views

Reports may be comprehensive and contain a large number of options, KPIs and other metrics that may not always all be needed at the same time. For example, if your report has 10 columns, but you only want to show call center managers 7 of them, you would typically have to create a copy of the original report and then remove the 3 extra columns. However, creating separate reports to accommodate each (small) change in the content of a report may quickly become difficult to maintain.

This is why, for reports that contain a lot of data and are not intended to be used in their full form with all users, reports can instead be modified to show only the metrics needed for a certain user profile, while still preserving all the data and metrics within the report in the background. This is done with the **Report Views asset**, which is a powerful tool used to facilitate the way users interact with reports, allowing them to focus only on the most relevant information at a time, as opposed to everything the report contains. With this feature, you can also control the way a report is displayed, what the report page size is, how the fields are resized etc.

A report view (as opposed to a full report) is indicated with the view icon, as can be seen below:



Users that can create and work with views are Designer users and Power Viewers. From a Viewer perspective, in the Reports tab of Reporting, individual views function the same way reports normally do.

Refer to the *Reporting Designer Guide* and *Power Viewer Guide* for more information on how to work with Views. Since Views function the same way as reports do for Viewers, Administrators, and users that only have viewing permissions, see the *Viewer Guide* for more information.

Some Standard Reports also contain readily available standard views, which are another useful component of the out-of-the-box features available with Reporting. To find out more about this topic, make sure to read the *Standard Reports Guide*.

Styles

Styles are a feature that allows you to define a visual style or look and feel that you want to use across multiple assets. This feature is accessible to all Designer users and to Power Viewers, and they can utilize the styles and collections they make to modify what the reports, dashboards and views they work with will look like.

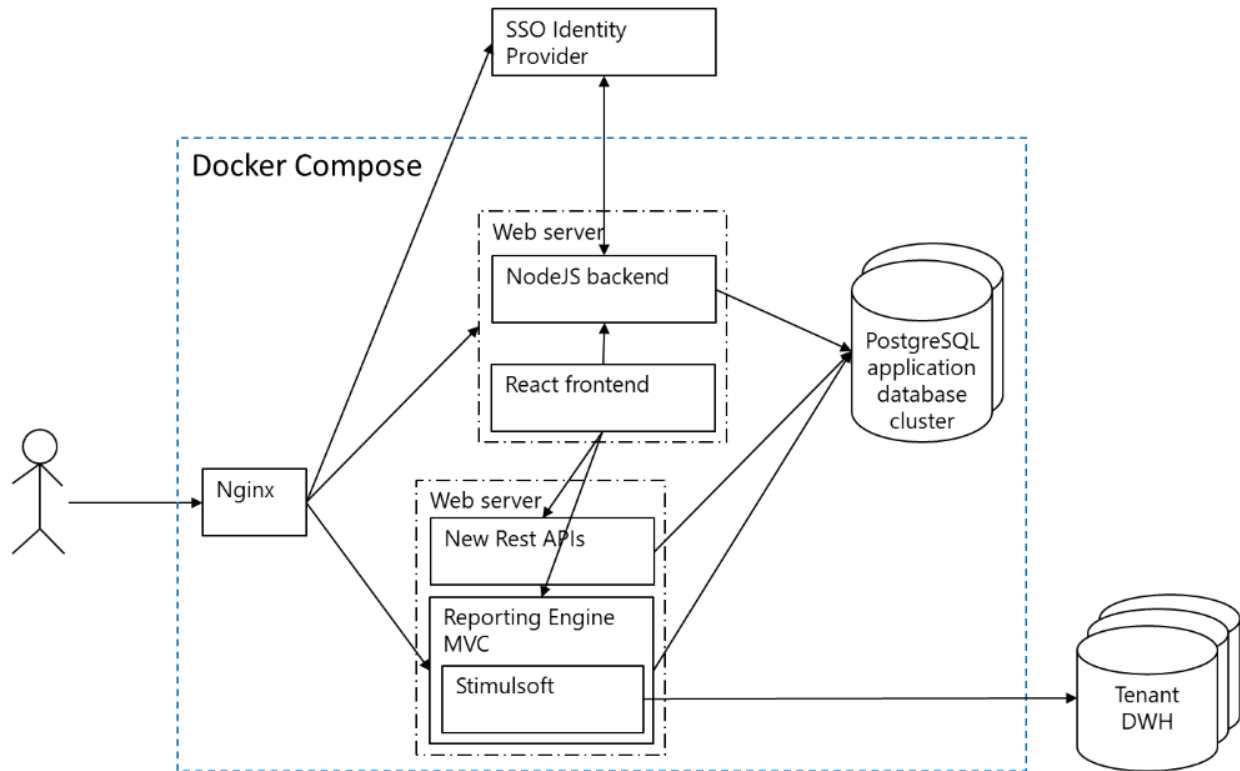
This allows users to create specific styles for different needs, which you can then quickly apply to assets without having to modify all the individual elements by hand.

The styles can be created, modified, deleted, and imported and exported. When a style is changed within the **Styles** tabs, these changes are also automatically shown in all the assets that the style was applied to, which means that you do not need to make the changes in the various places manually.

You can learn more about this topic in the *Designer Guide* and the *Power Viewer Guide*.

Architecture

The initial deployment of Reporting is done by installing Linux VMs using a template provided by the BI team. The deployment is based on Docker Compose and can be single-node or multi-node, the specific configuration and size depending on the system's needs.



Reporting is deployed through Docker Compose and the individual system modules are organized in Docker containers. The Reporting Engine MVC module implements the designer and visualization features using the .NET version of Stimulsoft libraries.

When a user accesses Reporting, they first go through NginX, which is the proxy app that allows the user to enter just one entry point. Based on the full URL the user entered to access BI Reporting, NginX forwards the request to the right app. Additionally, a custom SSO configuration option has been added to the Reporting architecture in order to enable enhanced use, particularly in cloud environments. If SSO is enabled for a tenant, the unauthenticated user is redirected to the third-party identity provider for that tenant. The identity provider is not part of Reporting and should be managed in the cloud environment, outside the Reporting environment.

Within the Docker-compose configuration of Reporting, the application database is hosted on a PostgreSQL database, deployed through Docker Compose as well, which consists of 2 instances of PostgreSQL in a master-slave configuration.

The individual tenant data warehouses, however, are not part of the Reporting assets and are managed by the Enghouse Interactive DevOps team, and not Reporting or the BI team.

Multitenancy

With Reporting Version 4.0 and newer, this is a cloud-based product with the multitenancy feature. This means that the same instance of Reporting can support multiple tenants that are separated from each other, with their own data, users and settings. This enables, for example, multiple customers to use the same

instance/installation of Reporting without having access to each other's data and users in any form, thereby eliminating the need for individual installations for each customer.

Multitenancy-related features are managed by System Administrators. For more information, see *the Dashboarding System Administrator Guide*.

User Roles

Reporting provides the following user profiles:

- **System Administrator:** Users handling the tenants of a multi-tenant (cloud-deployed) system. They have the same access rights to the Admin tab that Administrators do, but typically don't interact with assets (reports, views, and data sources) in any way. They can only interact with these assets the way Viewers do, and they do not have access to e.g. the Data tab. They are in charge of creating and managing tenants in a Reporting instance. When initializing your Reporting instance, the System Administrator is the first user to be created, and whose role is to set up the rest of the system (tenants and administrators).

Note

System Administrators are special and unique users created and configured on system initialization. They cannot be added, modified or deleted by Administrators, which manage all other users in a Reporting instance.

- **Administrator:** The role with the highest level of access in a tenant. Administrators can perform all actions in charge of general Reporting configuration, user and group management. The **Administrator**-level user can also view all the reports, views, and data models. They can manipulate ownership and subscriptions of these assets. However, Administrators cannot edit any content, such as reports or data models. Otherwise, Administrators can use and interact with assets in the same way a Viewer can.
- **Data Designer:** User role in charge of creating, modifying and sharing data sources needed for the creation of reports. Data Designers have full data access and distribute limited data access to **Designer**-level users, through data model design. In the context of system-wide access to data and users, this role has a lower access level than **Administrators**, but higher than **Designers** and **Viewers**.
- **Designer:** Designers are in charge of creating, modifying and publishing reports. The data available for components is limited by the data models that are shared with a **Designer**. This role has a lower access level than **Administrators** and **Data Designers**, but higher than **Viewers**.
- **Power Viewer:** Power Viewers can work with existing reports in order to create new views. However, they cannot create their own components or edit existing ones, only use them as a basis for views. In order to be able to do so, both the original component and its data source must be shared with the Power Viewer. Compared to a Designer, a Power Viewer has fewer options available to them even when they have all the permissions needed for asset editing. Other than that, they have the same access level and can use and interact with reports same as a Viewer can.
- **Viewer:** Users with this role can access shared reports, report views, modify the way data is displayed in them by using filters and settings (depending on the design of the asset), view, print and export reports, views . This is the lowest access level.

Logging in

To log into Reporting, do the following:

1. Start up the application and enter the necessary data:
 - **Email or username:** Email or username used to register the user to the system.
 - **Password:** The password used for the selected account upon registration.

A robust password policy requires a minimum length of eight characters and must include at least one digit, one lowercase letter, one uppercase letter, and one special character from the set [!@#\$%^&*()-_+={};:;<.>]. The system does not currently allow customization of these rules, nor does it enforce password expiration or retain a history of previously used passwords. System administrators can configure lockout behavior by setting the maximum number of failed login attempts and the lockout duration (in seconds). Because the platform primarily relies on Single Sign-On (SSO), the recommended approach is to delegate password management to the integrated identity provider (EIS), which offers finer-grained control over password complexity, rotation, and history across all Enghouse products.

Note

- An Administrator can provide an initial password for a user. In this case, the password must be communicated to the end user through some other channel.
- If an SSO option is set up in your instance of the software, you will typically be redirected to the SSO login page automatically. However, in case you use a different URL than the standard to log in, you may have the **Go to SSO Login** option available in the login page, allowing you to manually access the SSO login page.
- If you have forgotten your password, click the **Forgot your password?** link. The system will prompt you to enter your account's email address for the recovery process. Enter the address and click **Send**, then follow the instructions received via email.

2. Select the preferred language of the Reporting interface from the list of available languages in the dropdown menu (**English** is the default setting).

Welcome to Enghouse Reporting Suite

Email or username

Password

[GO TO SSO LOGIN](#) [FORGOT YOUR PASSWORD?](#)


LOGIN

English
▼

3. Click **Login** to enter the system.

User options menu

After a successful login, the **Data** page is displayed for Data Designers, and the **Reports** page for all other users.

Regardless of the user role you have, in the top right corner, the **User** icon  provides access to the user options menu.

The user's registered email address is displayed at the top of the menu. This is the address used for all Reporting related information, as well as automatic scheduling feature. Several user-related options are available from the menu:

- The currently selected interface language (**English** by default) is displayed under the email. Several other languages are available. To select another language, click English, and then click the desired language from the dropdown menu.
- **Change password:** Lets users change their own password at any time.
- **Logout:** Logs the current user out of the system. It is recommended that users log out before closing the web application window.

The last line of the menu displays the currently installed and used software version number. This number should be quoted when requesting assistance or used for selecting relevant user documentation.

Admin tab

Note

This document focuses on specific **Administrator-only** actions and options. Administrators also have the same access level to reports as Viewers (with a few additional options specifically described in this guide); for further information on how Administrators can interact with the Reports tab, refer to the *Reporting Viewer Guide*. Similarly, Administrators have limited access to the Data tab. The actions they have access to in the Data tab are described in this Guide. For more detail on roles and access, see *User Roles on page 10*.

Clicking the **Admin** tab at the top of your Reporting window opens the Administrator screen.

In the left-hand side of the screen is the **Admin** pane. It shows various available settings and refers to user and system management. The options are divided into these groups:

- **User management**
 - Settings related to individual users
 - Settings related to user groups
 - Single Sign On settings
- **System settings**
 - License-related options
 - Tenant-related options
 - Look and feel

The screenshot displays the Enghouse Interactive Admin interface. The top navigation bar includes 'Data', 'Reports', 'Styles', and 'Admin' (which is highlighted). The left sidebar contains 'Admin' and 'User management' (with sub-items: Users, Groups, Single Sign On) and 'System settings' (with sub-items: License, Tenant settings, Look and feel). The main content area is titled 'Users' and features a '+ NEW USER' button and a search bar. Below the search bar is a table listing users with columns for User, Email, Roles, Status, and Actions.

User	Email	Roles	Status	Actions
System Administrator	system.admin@enghousebi.com	SystemAdministrator	Active	
Admin Test	admin@enghousebi.com	Administrator	Active	Edit
Viewer Test	viewer@enghousebi.com	Viewer	Active	Edit Delete
Designer Test	designer@enghousebi.com	Designer	Active	Edit Delete
DataDesigner Test	datadesigner@enghousebi.com	Data Designer	Active	Edit Delete

The upcoming sections of this Guide explain these options in more detail.

User Management

Administrators can manage all users who have access to this instance of Reporting. They can also add new users to the system. Administrators designate the roles of users as well. Other options include editing a user's data, such as passwords, or deleting the user altogether.

To access the menu for User management, click the **Admin** tab in the top part of the screen, and then click **Users** in the **User management** group of the pane on the left side of the window.


Basic information about the registered users is displayed here, including user names, email addresses, roles, statuses and actions available to you.

New users can be added here, or existing ones can be searched with the search box. In the image below, *demo* was entered into the search box and the users were filtered to those who have *demo* in their name or email.

User	Email	Roles	Status	Actions
System Administrator	system.admin@enghousebi.com	SystemAdministrator	Active	
Admin Test	admin@enghousebi.com	Administrator	Active	Edit
Viewer Test	viewer@enghousebi.com	Viewer	Active	Edit Delete
Designer Test	designer@enghousebi.com	Designer	Active	Edit Delete
DataDesigner Test	datadesigner@enghousebi.com	Data Designer	Active	Edit Delete

Adding a new user

To add a new user to your instance of Reporting, do the following:

1. Click **New User**  in the upper right corner of the screen. This opens a dialogue window, **User details**, asking you to enter details about the new user to be registered.
2. Enter the relevant information into their corresponding fields.

Note

The **Email** must be a valid email address as a validation link will be sent to the user upon user creation. This email address is also used for other purposes within Reporting, such as report subscription.

3. From the **User language** dropdown menu, select the default language for the user. The user can later change this setting at any point.
4. Select the user's role from the **Role** dropdown menu. For an explanation of all the roles available in Reporting, see *User Roles on page 10*.
5. Click **Save** to finish creating a new user.

Email

Username

First name

Last name

User language

Role

- Viewer
- Power Viewer
- Designer
- Data Designer
- Administrator

[Back to the user list](#)

After new user creation, an email from Reporting is sent to the new user with a link to activate their account and set a password.



You can also manually set a password for the new user. To do this, click **Set the initial user password** at the bottom of the new user creation window, and enter a password before saving. In this case, the user receives an invitation email, but does not set a new password.

Note

- You must personally (or through other secure channels) notify the user of the password you set for them so they can log in for the first time. If an initial password is given, it is recommended that the new user change their password after the first login.
- **System Administrators** are special users created and set up when initializing the system. While an Administrator can see the System Administrator user in the list of users, they cannot add, edit or delete this user.

Additional actions

You can perform some additional actions in the **Users** menu:

- **Search:** Helps you filter through all the users currently in the system. As you enter a query in the search box, the results are displayed instantly. The search query applies to both the User (username or first and last name) and the email address.
- **Edit existing users:** Click **Edit**  in the **Actions** column for one of the existing users to open the same dialogue box as when creating a new user. You can edit the user's data here, such as their role or password.
- **Delete a user:** Click **Delete**  in the **Actions** column to delete an existing user. Clicking this opens a warning message about any shared reports and dashboards that the user may own (in cases where the user role allows owning dashboards, reports or data sources).

Are you sure you want to delete user **designer.demo@enghouse.com**?

All shared reports owned by this user will be reassigned to you!

All unshared reports owned by this user will be permanently deleted!

Cancel Yes

Note

To prevent accidental loss of important reports and dashboards, any **shared** reports and data models owned by the deleted user are automatically transferred to the admin who performs the delete action.

Caution

Unshared reports and dashboards will be **permanently** deleted. This action cannot be undone.

Multitenancy in Reporting

The multitenancy option in Reporting allows you to have multiple independent instances, or tenants, of Reporting operating in a shared environment. A tenant is a group of users who share a common access to other users and data, while also having a defined set of privileges and rules that apply to all users in that tenant.

Tenants are isolated from one another, which means that you can have multiple large groups of users (such as for departments, company branches, or even multiple companies; depending on your use case) functioning within the same instance of Reporting without having any direct contact between users or data from different tenants. A user of one tenant can only see users and data connected to their tenant, without contact with any other users or data in your Reporting instance.

An example of how this is applied is when a Report Designer wants to share a report with other users - they can only see the users that are part of their tenant, and they can only share the report with them, not other users in the system.

In practical terms, from a user perspective, this means all users within a single tenant can interact with each other, the data or reports the same way they would if the system were used in single-tenant mode. However, they cannot share data or dashboards, or interact with users from other tenants.

Multitenancy, i.e. the individual tenants, are managed by System Administrators, and settings related to this cannot be accessed by Administrators (as they can only work within their own tenant).

Group management

This topic describes how to add and use user groups in Reporting.

Groups are a method of organizing users within Reporting. This option allows you, for instance, to share a report with a specified group of users, as opposed to a number of users individually. It is particularly useful when sharing data with repeatedly the same larger number of users.

Note

- User groups can only contain users. A group cannot be nested within another group.
- For more details on data model and report sharing, see *Asset sharing on page 38*.

Group access level

Users of various access levels, i.e. roles, can be placed within the same group. However, not all users within a group will have the same access level to a resource that is shared with the whole group if their user roles are not the same. In other words, the access level is not only based on the access level, but also on the user's role and its limitations. Here are two examples:

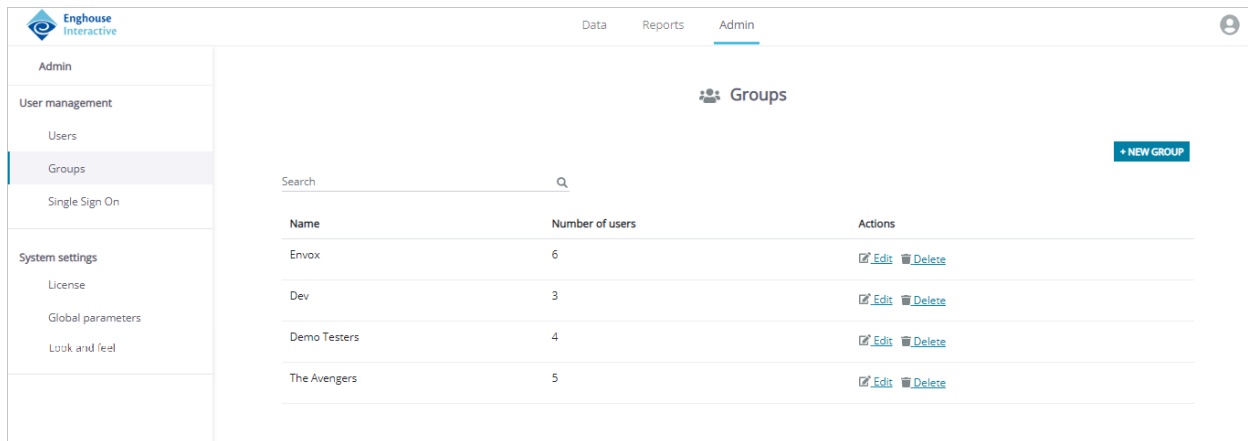
- Consider a group containing Designers and Viewers. A report is shared with this group, and the user sharing the report designated that the group **Can edit**. Viewers will still adhere to their role limitations and will not be able to modify the report in any way, only view it. Designers, however, will be able to edit the report.
- Similarly, if an Administrator is placed in a group with Data Designers and a data model is shared with the group with the **Can edit** setting, the Administrator will not be able to change the content of the data model, as that is a limitation of the role. However, they will still be able to, for example, change its sharing options, as this is one of the primary functions of the Administrator role.

Any combination of different user roles can be placed in the same group. However, this does not change the access level of the individual users and they retain their role as it is.


Managing user groups

To manage user groups, click the **Admin** tab in the top part of the screen, then navigate to the left-hand Admin pane and click **Groups**.

Here you can see information about existing groups, such as their name or number of users in the group. You can also add, edit and delete user groups, as well as assign users to them, or remove users from them.



To add a new group, you must do the following:

1. Click **+New group**  at the top right corner of the **Groups** list. This opens a new window.
2. Enter the title of the group in **Name**.
3. Add users by searching for them via the **Search users** search box. This user search is done by email.
4. Click the users you want to add to the group. If you want to remove any of the added users, click the **x** appearing next to their email in the **Users in the group** section.
5. Once all the users have been added, click **Save**. Alternatively, to cancel creating the group, click **Back to groups**.

Name


Users in the group

datadesigner.demo@endghouse.com ✕


viewer.demo@enghouse.com ✕

[Back to groups](#) SAVE

To modify an existing group, do the following:

1. In the Groups window, click **Edit**  in the Actions column for the group you want to edit.
2. Choose the group parameters you want to edit:
 - To modify the group title, enter the new title in **Name**.
 - To remove existing users from the group, click the **x** next to their email address.
 - To add new users, search for them by their email in the **Search users** search box. Click on the email of the user you want to add.
 - Click **Save** to finish.

Deleting a user group

If you want to delete an existing user group, click **Delete**  in the Actions column for the desired group.

This brings up a warning dialogue which requires confirmation of the action. Click **Yes** to finish deleting the user group.

Are you sure you want to delete group

Cancel Yes

Note

Deleting a group does not delete the users of the group. They remain active in Reporting.

Caution

Deleting a user group cannot be reverted. In order do restore a deleted group, you have to manually add the users again and adjust other settings.

Single Sign On

Note

In the current version of Reporting, the SSO functionality is **not available** to Administrator users, and is set up by System Administrators. Contact your System Administrator for more information.

Single Sign On (SSO) is a mechanism that allows systems outside of Reporting to authenticate users and subsequently tell Reporting that the user is valid and has been successfully authenticated. This mechanism allows other systems to register and authenticate users in and for Reporting. SSO in Reporting can be done via the JWT and OpenID Connect protocols.

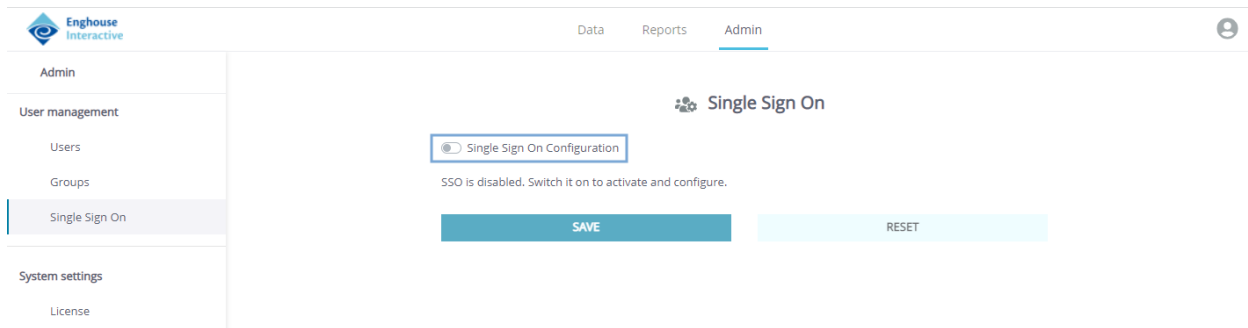
Note

This section only briefly focuses on Single Sign On within Reporting. For a full setup guide with detailed information, refer to the *ReportingSingle Sign On Configuration Guide*.

In order to enable SSO, click the **Admin** tab and then click **Single Sign On** in the Admin pane on the right side of the window. By default, SSO is disabled. Enable it by clicking the **Single Sign On Configuration** toggle to switch it on.

Once SSO is activated, you can choose to use either the JWT or the OpenID Connect protocol. For more detailed instructions about the configuration of SSO via these protocols, see the following sections of this document:

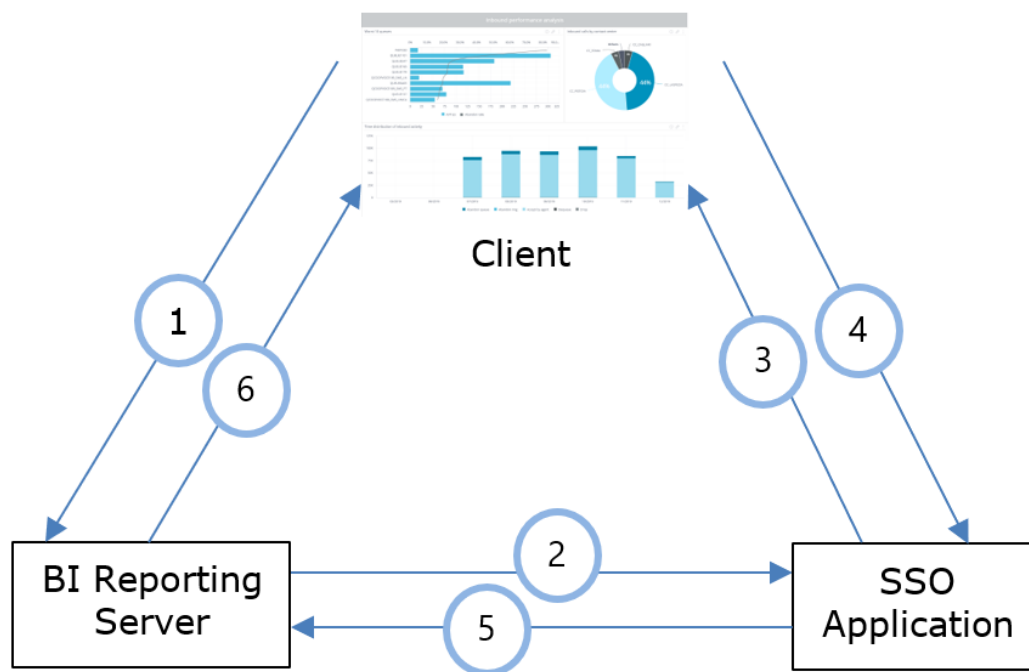
- *SSO via JWT below*
- *SSO via OIDC on page 25*



SSO via JWT

JSON Web Token (JWT) is a token that represents the users credentials wrapped in a single query string. Reporting uses additional parameters for security reason and user settings.

The JWT authentication flow in Reporting is as follows:



1. A user requests a resource from Reporting.
2. Reporting recognizes that no authenticated cookie is present. If SSO is enabled, the user is then redirected to the SSO endpoint defined by the Administrator or System Administrator in the Reporting web application.
3. The user is challenged to authenticate their account through the provided SSO endpoint.
4. The application at the SSO Endpoint authenticates the user and generates a JWT.
5. The application at the SSO Endpoint redirects the user back to Reporting with the encoded JWT in a query string. Reporting then sets a cookie that authenticates the user until the end of its session.
6. Reporting provides the user with the resource requested in the first step.

To enable SSO via JWT in Reporting, you need to enter the following information:

- **Remote Login URL:** The URL through which users need to sign in and authenticate their account. Users are redirected to this URL when accessing Reporting.
- **Remote Logout URL:** The URL to which the user will be redirected on logout or end of session.
- **Shared Secret:** When SSO authentication is enabled on a Reporting Server, a shared secret is generated and displayed on the SSO configuration page. The shared secret is a key used to sign the JWT payload. You must sign the JWT with the shared secret so that later it can be verified in Reporting. You can copy it by clicking **Copy** on the right-hand end of the Shares Secret field.

JWT payload description

JSON Web Tokens consist of three parts separated by dots (.), which are:

- Header: Used to specify token type and signature algorithm.
- Payload: The real content of the JWT, where the user is described.
- Signature: A checksum of the JWT that is used to verify it.

Therefore, a JWT typically looks like the following:

```
xxxxxx.yyyyyy.zzzzzz
```

The following sections describe in detail each part of the JWT.

Header

The header consists of two parts: the type of the token, which is JWT, and the signing algorithm being used.

For example:

```
{
  "alg": "HS256",
  "typ": "JWT"
}
```

This JSON is Base64Url encoded to form the first part of the JWT.

The following table sums up the fields included in the header:

Attribute	Description	Type	Value
typ	Type of token	string	JWT
alg	Algorithm of JWT signature	string	HS256

Payload

The second part of the token is the payload, which contains the claims. Claims are statements about a user and additional data.

An example payload could be:

```
{
  "sub": "user@example.com",
  "firstName": "John Doe",
}
```

The payload is Base64Url encoded to form the second part of the JSON Web Token.

The following table describes each field of the JWT payload:

Attribute	Description	Type	Value	Mandatory	Default value
iat	Time the token was generated. Used to ensure that given token gets used shortly after it was generated.	integer	Number of seconds since UNIX epoch.	Yes	
sub	Email of the user being signed in. Used to uniquely identify the user in Reporting.	string	e.g. 'Jon.Doe@example.com'	Yes	
jti	Unique string that is used to prevent a replay attack, by making sure token is used only once.	string	e.g. generate a UUID	Yes	
userName	User name of the user being signed in. Used to uniquely identify	string	e.g. 'Jon.Doe'	No	Default value is set to the same as

Attribute	Description	Type	Value	Mandatory	Default value
	the user in Reporting.				sub attribute
firstName	First name of the user, later used in the registration process if the user is accessing Reporting for the first time.	string	e.g. 'Jon'	No	Default value is set to the same as sub attribute
lastName	Last name of the user, later used in the registration process if the user is accessing Reporting for the first time.	string	e.g. 'Doe'	No	None
role	Role that the user is going to have in Reporting.	string	Allowed values are: <ul style="list-style-type: none"> • Admin • Designer • Viewer 	No	'Viewer'
lang	Language to be used for the Reporting user interface.	string	The language to set for the user interface, e.g., en-US. If not specified, the default Reporting language is used at first login. If the user then changes the language, the user-selected language is kept as default.	No	'en'

Signature

To create the signature part, the following elements are used to create a sign:

- Encoded header,
- encoded payload,
- a secret,
- the algorithm specified in the header.

For example, using the HMAC SHA256 algorithm, the signature will be created in the following way:

```
HMACSHA256 (
base64UrlEncode (header) + "." +
base64UrlEncode (payload) ,
```

secret)

The signature is used to verify the message was not changed along the way.

SSO via OIDC

To configure SSO via OpenID Connect, the following properties are required:

- **Issuer:** The entity that is responsible for issuing the relevant claims. Enter the URL of the issuer, in the following format: <issuer_base_URL>/auth/realms/<RealmName>. For example, if the issuer is Keycloak, the URL needs to be set to <keycloak_base_url>/auth/realms/<RealmName>
- **Client ID:** The client ID of this application with your issuer.
- **Client Secret:** The client secret generated by your issuer.
- **Scope:** Not required, by default set to "openid", which means full scope. If advanced scoping settings are needed, this can be set to a different value.
- **Challenge Methods:** Not required, by default set to 'S256'. If needed, this can be set to a different value.

After these settings are saved, and the user logs out, if all settings are correct, users will be redirected to the login page of your OpenID Connect issuer:

If the password was set as temporary, the user will immediately be asked to change the password.

After successful login, and password change, the user will be redirected back to the Reporting application with the corresponding role rights assigned.

Find more information on how to use SSO via OIDC in Reporting, on the example of Keycloak, in the *Reporting SSO with Keycloak and OIDC Configuration Guide*.

SSO via EIS

SSO can also be done via the Enghouse Identity Server (EIS), an OpenID Connect based identity and access manager, used to support SSO between different Enghouse systems and off-the-shelf components.

EIS and its settings are defined by the in-house EIS team; refer to their documentation on Confluence or contact the EIS team for more information on EIS as a whole.

In order to enable using EIS with Reporting, you have to use the following settings:

- **Issuer:** The entity that is responsible for issuing the relevant claims. Enter the URL of the issuer, in the following format: <issuer_base_URL>/auth/realms/<RealmName>.
- **Client ID:** The client ID of this application with your issuer. For **EIS**, this needs to be "ei_enghousebi_ers".
- **Client Secret:** The client secret generated by your issuer. For example, using EIS, when you create a new client with the Tenant Provisioning Tool, the CLI shows you the client secret that you need to use in this field.
- **Scope:** Not required, by default set to "openid", which means full scope. If advanced scoping settings are needed, this can be set to a different value. For **EIS**, this value needs to include "all-roles" to properly handle the roles set through EIS. For example: `openid all-roles`
- **Challenge Methods:** Not required, by default set to "S256". If needed, this can be set to a different value.

Licensing information

Reporting is a cloud-based product with a single- and multi-tenancy feature. This means that the same instance of Reporting can support one tenant or multiple tenants that are separated from each other, with their own data, users and settings.

Single tenant licenses

To access relevant single tenant license information for your Reporting, click **License** under **System settings** in the left-hand pane of your Admin tab.

This section can be used to check the license status and upload a new license.

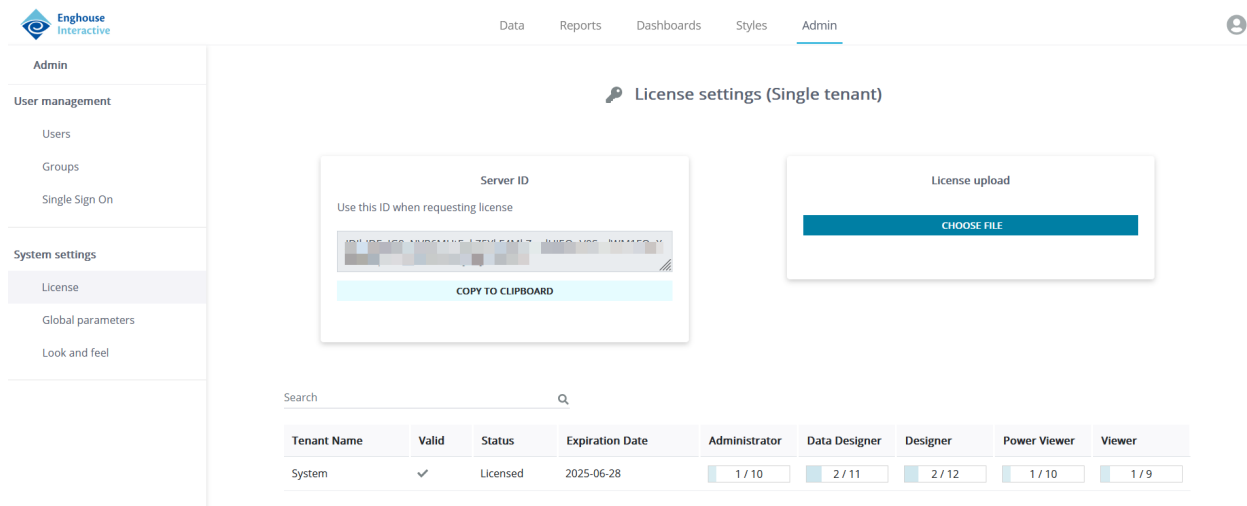
The following options are available:

1. **Server ID:** This is the unique identification of your server machine, used to generate a license needed to authorize your Reporting.

Note

Server ID is generated every time you request it. All of your previous server IDs are valid, not just the latest.

2. **License upload:** The location to which you upload the license sent to you by your Reporting representative.



Tenant Name	Valid	Status	Expiration Date	Administrator	Data Designer	Designer	Power Viewer	Viewer
System	✓	Licensed	2025-06-28	1 / 10	2 / 11	2 / 12	1 / 10	1 / 9

The existing tenants in your instance of Reporting are listed in a table format. The following columns are shown:

- **Tenant Name:** The assigned name of the tenant.
- **Valid:** Flag indicating whether a tenant is licensed and whether the license is still valid. The license is still valid if the expiration date has not passed.

Note

Users cannot use tenants without a valid license. Administrators must license a tenant for the users to start using it.

- **Status:** Licensed, unlicensed, or expired. Describes whether there is a license for a tenant.
- **Expiration Date:** The date a license expires. A license is valid until the end of the day according to the local time.

Note

If your license is about to expire, a message notifying you about the exact date will pop up when logging into Reporting Suite.

- **Administrator:** Number of users and licenses for the Administrator role.
- **Data Designer:** Number of users and licenses for the Data Designer role.
- **Designer:** Number of users and licenses for the Designer role.
- **Power Viewer:** Number of users and licenses for the Power Viewer role.
- **Viewer:** Number of users and licenses for the Viewer role.

Multi-tenant licenses

To access relevant multi-tenant license information for your Reporting, you would do the same as with your single tenant licenses. However, there are a key differences. Click **License** under **System settings** in the left-hand pane of your Admin tab.

This section can be used to check the license status.

The screenshot shows the Admin interface with the following structure:

- Top navigation: Data, Reports, Styles, Admin
- Left sidebar: Admin, User management (Users, Groups, Single Sign On), System settings (License, Global parameters, Look and feel)
- Main content area: License settings (Multi tenant)
- Message: Multi tenant mode is on. Contact the System Administrator if a license change is required.
- Table:

Tenant Name	Valid	Status	Expiration Date	Administrator	Data Designer	Designer	Power Viewer	Viewer
System	✓	Licensed	2030-01-01	1 / 2	1 / 2	1 / 2	0 / 2	1 / 2

Administrators can see the license settings, but cannot edit the licenses. If a license change is required, contact your System Administrator.

Licenses - Backward compatibility

Prior to Version 5.2.0 of Reporting, licenses did not have an expiration date. Additionally, the licenses had a limited combined number of users for the Designer and Data Designer user roles and an unlimited number of users for other roles. The "new" licenses (from Version 5.2.0 onwards) limit the number of users for each role.

Changing the license of your Reporting


To acquire a valid Reporting license, do the following:

1. Copy the server ID to clipboard.
2. Paste the copied server ID key to a license request email along with the details of the license you need: specify the expiration date, define users per role, and state whether you need a single- or multi-tenant license. Send the email to your Enghouse Interactive representatives. They will provide you with a unique license file required for the licensing of Reporting on your server.
3. Click **Close File** under the **License upload** option.
4. A window detailing the license information pops up. Check to see if the information is correct.
5. Click **Upload** to upload the license file.

Follow instructions in the Reporting installation documentation to apply the provided license.

Tenant settings

This section is dedicated to defining Reporting tenant settings. The **Tenant settings** are located in the Admin tab, in the **System settings** group of the admin pane on the left side of the window.

 **Tenant settings**

License settings

Number of days to warn the user before license expires

3▾

Application calendar settings

First day of the week

Monday ▾

SAVE

The following License and Application calendar settings are available:

- **Number of days to warn the user before license expires:** Select how many days prior to your license expiring you would like to be reminded that your license is about to expire.

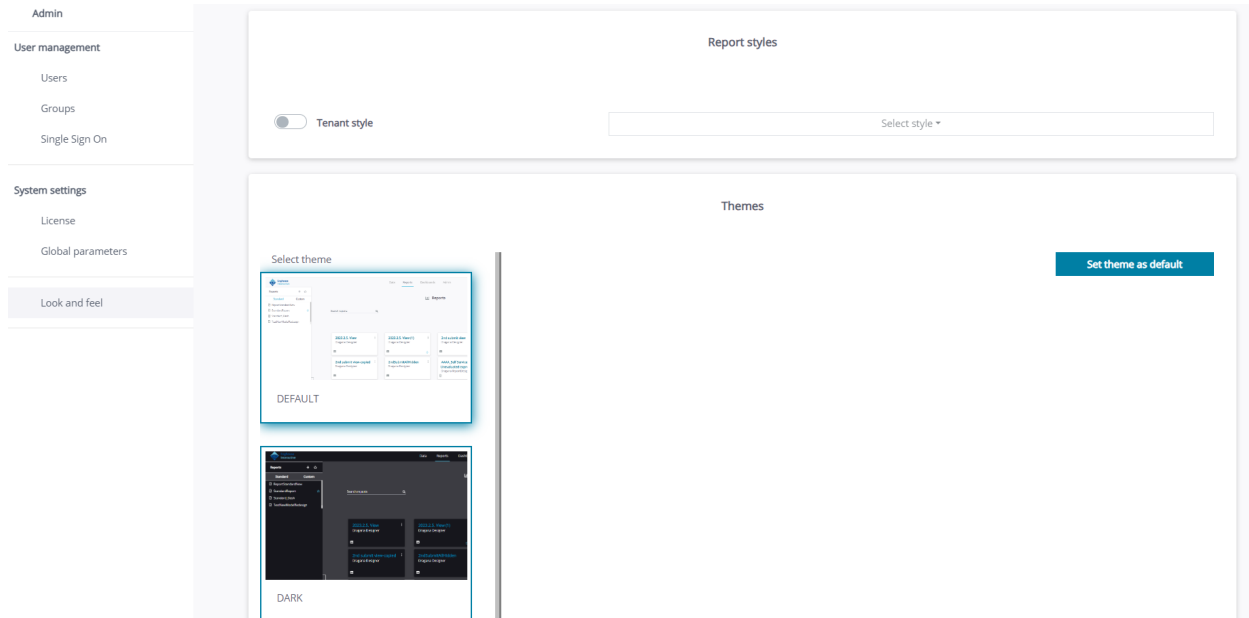
Note

If you choose **0**, you will not be reminded of your license expiring.

- **First day of the week:** Starting day of the week for calendar-related reports and visualizations. In the drop-down menu, you can choose between Sunday and Monday.

Look and feel

This topic describes what you can do with the **Look and feel** section of the **Admin** tab in Reporting.



In **Look and feel**, you can define what the UI theme of your tenant will look like, as well as which default style will be assigned to the assets in your tenant. With this feature, you can choose to use any of the predefined themes, such as the light and dark ones, or you can define one for your needs. This includes changing the colors of certain elements in the UI, as well as changing the logo displayed in the upper left corner of the Reporting window. Similarly, you can also define a tenant default style for Reporting assets, such as report views.

Administrators define the default style and theme for all users and assets in the individual tenant they are assigned to, while System Administrators define the default style and theme for all users in the whole system and all its tenants. Read more about the relationship of these levels in *Style and theme hierarchy on page 32*.

Working with styles

In the **Report styles** section, you can choose whether to define a tenant style, and which style should be used for it.

- If you toggle the **Tenant style** ON, in the dropdown list, you can choose which style will be used for all the assets (such as report views) in your tenant.
- If you keep the toggle OFF, no specific style will be applied to assets by default. See more about the style setting hierarchy in *Style and theme hierarchy on page 32*.

Note

In order to be able to select any files as a tenant style, they first need to be created. The style element naming rules need to be followed in order for styles to work properly in assets. Read more in *Styles on page 36*.

Working with themes

To use this feature, do the following:

1. In the left pane of the **Admin** tab, click **Look and Feel**. Here the available themes are shown.
2. To change a theme to one of the available themes, click the desired theme.
3. Optionally, to first preview the theme for yourself, click **Preview theme**. This will apply it only to your user and not to anyone else.
4. Optionally, if you want to create your own theme, you can do so by clicking **Custom** in the list of available themes. You can read more about this in *Custom theme below*.
5. Once you have decided which theme to use, click **Set theme as default** to change the UI to this theme for the whole tenant and all its users. You will be prompted to confirm your choice.
6. To change back to the previously used theme, click **Revert theme**.

Custom theme

You can create a custom theme in Reporting. This action requires a basic to intermediate understanding of CSS in the context of web design.

To create a custom theme, follow these steps:

1. From the list of available themes, click **Custom**.
2. If you want to add a theme logo to replace the Enghouse logo in the upper left corner of the window, click **Choose file** in the **Theme Logo Image** section.
3. Locate the desired file on your local machine and upload it. The recommended image size and format is **240x80 px** and .png, respectively. A preview of it is shown if it is of an appropriate image format.
4. In the **Theme CSS Editor**, you enter the CSS values you want to change. To do so, click **Load template CSS** and chose which already available theme you want to load the CSS data from so that you can edit it.

Caution

It is **strongly recommended** that you only use the template CSS and only modify the values of the provided CSS, not the properties, as any other way of changing the theme CSS may not work properly.

5. Once you have modified all the values as needed, click **Save theme** to save all your changes. Now the **Custom** theme is saved to these settings.
6. Now you can do any of the following:
 - To see what your Custom theme looks like, click **Preview theme**. This will set the theme just for your user and will allow you to preview the changes.
 - To apply the custom theme to the whole tenant , click **Set theme as default**.
 - To delete the modified content of the custom theme, click **Clear theme**.

Custom theme modification example

As an example, we will change the logo of the theme and just one CSS property value.

We will change the logo to a simple placeholder:

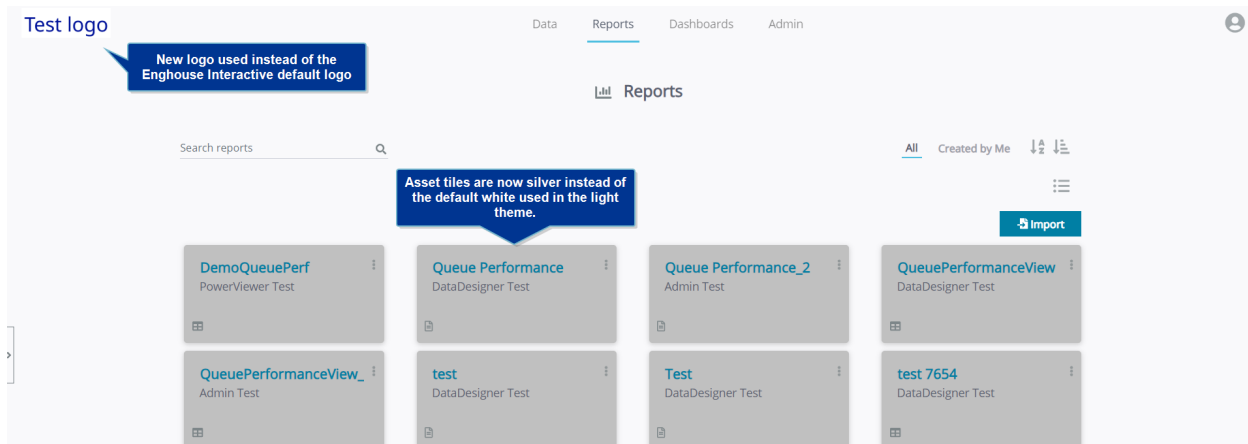
Test logo

Additionally, we will change the color of the report tiles (`.report-card`) and their actions menu buttons (`.report-card .actions-menu`) to `silver`, leaving all the other properties as they are by default.

```
.report-card {  
  background: silver;  
  -webkit-box-shadow: 0 2px 6px 0 rgba(0,0,0,.2);  
  box-shadow: 0 2px 6px 0 rgba(0,0,0,.2);  
  height: 120px;  
  width: 100%;  
  border-radius: 4px;  
}
```

```
.report-card .actions-menu {  
  height: 50%;  
  position: absolute;  
  right: 5px;  
  background-color: silver;  
}
```

Once the theme is saved and set as default, this will result in a change of the logo on all pages for all users, as well as the report cards (and all other assets, including, e.g., data models) now being silver, as opposed to white (or any other color in your previous theme):



Style and theme hierarchy

Both styles and themes can be defined on multiple levels. The following hierarchy is followed if multiple levels of Look and feel settings are applied:

Styles

1. If a style is defined for an individual view or other asset, such as in the View designer, this style is applied regardless of any other style settings on the tenant or system.
2. If no individual view style is defined, the tenant style is used.
3. If no tenant style is defined, the style applied by the System Administrator is used.
4. If no system style is defined by the System Administrator, no style is applied to assets by default.

Themes

Themes can be applied on a system and on a tenant level. They are defined by the System Administrator (for the system level) or Administrator (for the tenant) for all users on that level.

1. If a tenant theme, either custom or one of the predefined ones, is defined, the tenant theme is used for all users on that tenant.
2. If no tenant theme is defined, the system theme defined by the System Administrator is applied for all users on all tenants in that system.
3. If no system theme is defined, the application default theme is used for all users in the system.

Asset tabs

This section refers to all asset tabs available to Administrator users in Reporting:

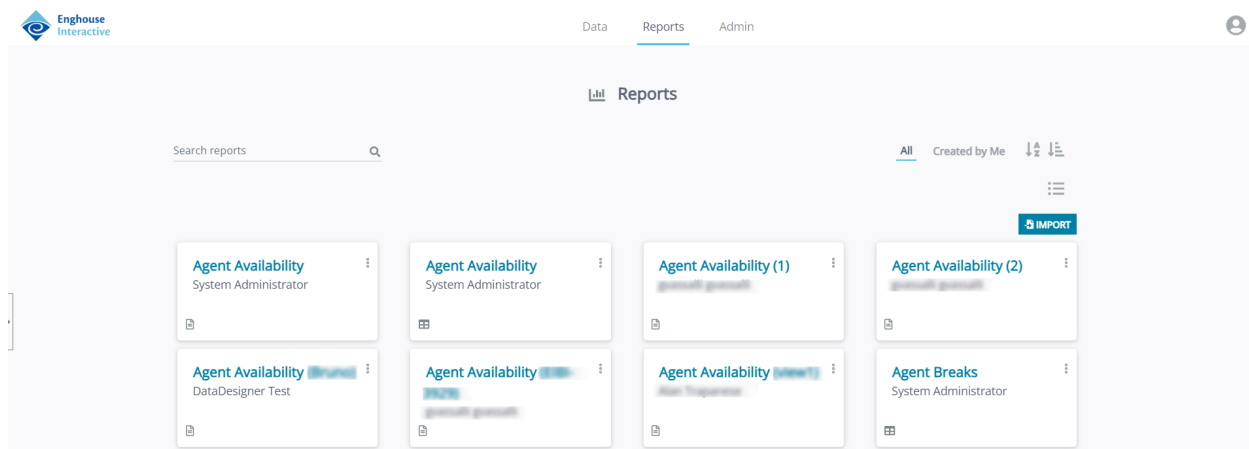
- Data
- Reports, including:
 - Reports
 - Report views
- Styles, covered in *Styles on page 36* and **not** further referred to in this section.

Everything described here refers to all asset tabs (except Styles), unless stated otherwise. In the upcoming section, you will find out more about the basic interactions Administrators can have in these tabs.

Note

Aside from being able to share and own them, Administrator users can only interact with assets the way Viewers do. For more details on that, see the *Reporting Viewer Guide*. This section focuses only on the additional actions Administrators can perform.

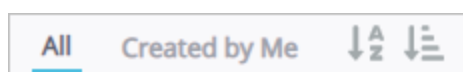
The owner of an asset is listed under the asset's name. As an Administrator, you can share assets with others, delete assets you own, or import and export assets. Below is an example of one of the assets tabs:






Click **Import** to import assets. Find out more about asset importing and exporting in *Asset tabs*.

You can use the search bar to search for a specific asset by name. The search function is not case-sensitive.

Asset tabs also offer the following filtering and sorting options:



- **All:** Full list of all the assets available to the current user.
- **Created by Me:** List of only the assets owned by the current user.
-  : Sorting the listed assets by name (alphabetically) in ascending or descending order.
-  : Sorting the listed assets by creation date in ascending or descending order.

Click **Options**  next to the asset name in the tile to see further actions you can perform with an asset. If a user owns the asset, there is an extended options menu available.

Depending on your shared access level, you can choose among the following options:


- **Subscribe:** Set up the automated report/view delivery. For details refer to the *Viewer Guide*.
- **Share:** Manage asset access for other users (viewing, editing or ownership transfer). See *Asset sharing on page 38* for more information.
- **Rename:** Modify the title of the asset.
- **Delete:** Delete the selected asset.

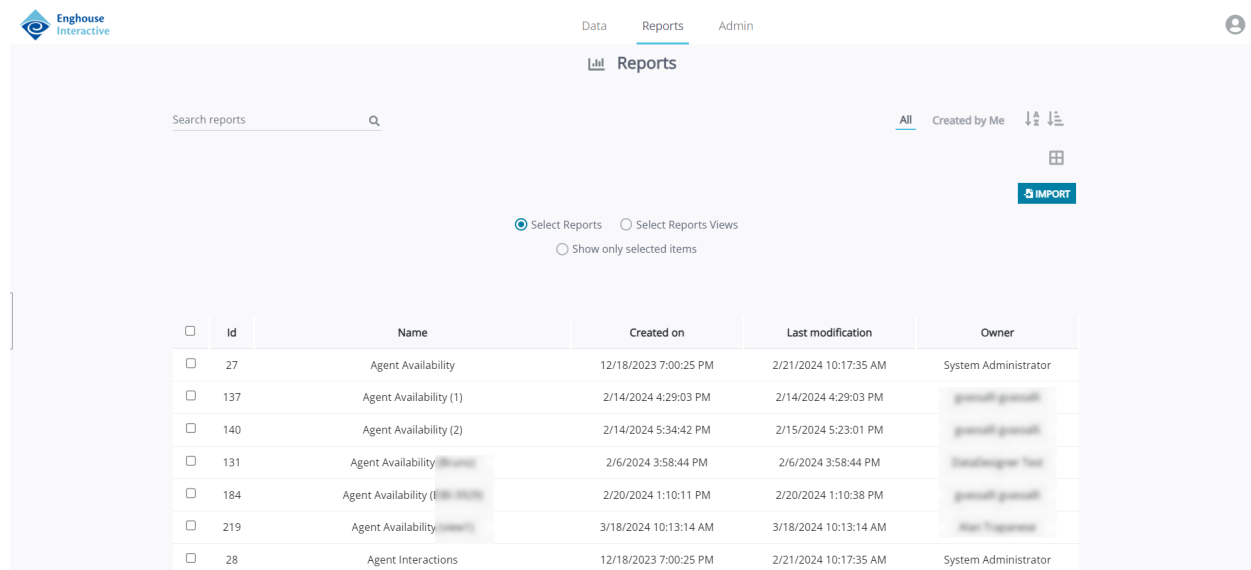
Caution

Deleting an asset **cannot be undone**. Always check before confirming this action.

Note

If a report selected for deletion is connected to report views, the views should be mapped to a replacement report before starting or finishing the action. The mapping can be postponed for a later time, but the view will not be functional until it is mapped to a new report (and adjusted as needed).

Furthermore, you can also choose to see an asset tab in a tabular form. You can switch to this mode by clicking  . The asset list is then shown as follows:



The screenshot shows the 'Reports' section of the Enghouse Interactive interface. It includes a search bar, navigation tabs (Data, Reports, Admin), and a table of reports. The table has columns for Id, Name, Created on, Last modification, and Owner. There are also radio buttons for 'Select Reports' and 'Select Reports Views', and a 'Show only selected items' checkbox.

<input type="checkbox"/>	Id	Name	Created on	Last modification	Owner
<input type="checkbox"/>	27	Agent Availability	12/18/2023 7:00:25 PM	2/21/2024 10:17:35 AM	System Administrator
<input type="checkbox"/>	137	Agent Availability (1)	2/14/2024 4:29:03 PM	2/14/2024 4:29:03 PM	System Administrator
<input type="checkbox"/>	140	Agent Availability (2)	2/14/2024 5:34:42 PM	2/15/2024 5:23:01 PM	System Administrator
<input type="checkbox"/>	131	Agent Availability (3)	2/6/2024 3:58:44 PM	2/6/2024 3:58:44 PM	System Administrator
<input type="checkbox"/>	184	Agent Availability (4)	2/20/2024 1:10:11 PM	2/20/2024 1:10:38 PM	System Administrator
<input type="checkbox"/>	219	Agent Availability (5)	3/18/2024 10:13:14 AM	3/18/2024 10:13:14 AM	System Administrator
<input type="checkbox"/>	28	Agent Interactions	12/18/2023 7:00:25 PM	2/21/2024 10:17:35 AM	System Administrator

Here you can see the most important data about the assets, such as the UUID, name, relevant dates and the owner. In the first column of the table, you can select all or just some individual assets. To show only the selected items in the table, click **Show only selected items** above the table. In the **Reports** tab, you can switch between showing only reports or only views by selecting either **Select Reports** or **Select Report Views**. Additionally, when you select one or more assets, additional options are shown for the asset(s):


- **Share:** Share the asset with other users or groups. See *Asset sharing on page 38* for further details.
- **Unshare:** Remove the access rights from users or groups. See *Asset sharing on page 38* for further details.
- **Delete:** Delete the selected asset(s). You must be the owner of an asset to be able to delete it. If there are any assets among the selected that you do not own, a warning message will be shown to indicate which assets the action will not be performed for.


Caution

Deleting an asset **cannot be undone**. Always check before confirming this action.

- **Export:** Export the selected asset(s). See *Asset importing and exporting on page 41* for further details.

Note

- You need to have the relevant access level to an asset to be able to perform all of these actions. If you select any assets for which you do not have the needed access level (such as being the owner), you will not be able to perform the needed action for those assets. A warning message is shown in this case. If there are any assets left among the selected that you have the relevant access level for, you can proceed with the action for these assets only.
- Hover over  in the top part of the pop-up window to see which assets you are working with if multiple are selected.

To turn the tile view back on, click  under the sorting tools in the upper right section of the asset tab.

Styles

In the **Styles** tab of Reporting, you can define style sets and collections to use in your assets, such as report views.

Once a style is created, it can be applied to report views, or exported and used separately for reports. This allows you to create specific styles for different needs, which you can then quickly apply to assets without having to modify all the individual elements by hand.

The styles can be created, modified, deleted, and imported and exported. When a style is changed within the **Styles** tabs, these changes are also automatically shown in all the assets that the style was applied to, which means that you do not need to make the changes in the various assets manually.

Note

When styles and style sets are created in the Styles tab of Reporting, they are referred to as view styles, as they are primarily intended to be used with report views. Similarly, if they are created within a report, in the Report Designer (which means they are not available for all users and for views), they are referred to as report styles.

Read more about the various functionalities of styles in Reporting, as well as how to use them, in the upcoming sections of this document.

Styles tab

To work with view styles in Reporting, navigate to the tabs in the upper central section of the Reporting window and click **Styles**. This opens the Styles tab.



The following becomes available:

- A list of all available view styles, in form of a table:
 - Information about the name and owner of the style is shown.
 - Each row has additional options, allowing you to **Edit** or **Delete** existing styles.
- A search bar, facilitating the navigation through available styles. Searches are done by style title.
- The **+ Create new style** button.

Creating a new style

To create a new view style in Reporting, do the following:

1. Click **Create new style** in the **Styles** tab. A new pop-up opens.
2. Enter the name in the style name field.
3. Click **Create style**. A new window opens where you can start creating the view style elements within your set. This window consists of the following:

- **Style title:** Located in the top-left part of the screen. Click **Edit**  to modify the title of the style.
 - **Top toolbar:** This section contains basic editing options, such as **Save**.
 - **Properties pane:** A pane containing the properties of each individual element style that you add to the style set. Here you can set up, edit and see the properties for each style. The properties vary based on what kind of style you are working with (e.g., for a component, a chart, a map, etc.).
 - **Style Designer:** In this section of the window, you create and organize the individual style elements for your style set.
4. To create a new view style element, in the Style Designer section, click **Add Style**. Alternatively, if you have not created any styles yet, click anywhere inside the Style Designer space and proceed to the next step.
 5. In the dropdown menu, click the element you want to create a style for.
 6. In the **Properties** pane, set up all the relevant properties to suit your needs. The individual properties vary based on the report element you are creating the style for. If the style you want to edit is not already selected (and its properties not opened), click it in the list in the Style Designer to see and modify its properties.
 7. If needed, use any of the options available in the style designer toolbar. Find out more about this in *Style designer toolbar below*.
 8. Repeat the previous three steps as many times as necessary to create all the needed style elements.
 9. Once you have set everything up, click **Save**  to save your changes. Your style set can now be used with report views, as described in *Select style*.

Style designer toolbar

The style designer toolbar offers some additional features that can be used to further enhance your use of styles in Reporting.



The following options are available:

- **Add Style:** Add an individual new style, as described in *Creating a new style on the previous page*.
- **Actions:** The following actions apply to all the styles in the currently open style set:
 - **Open:** Load an .sts file from your machine to import a premade style set.
 - **Save As:** Save the current style set as an .sts file on your machine. This file can then be shared with Reporting users that have access to the Styles feature.
 - **Create Style Collection:** Create a new collection in your style set. This feature creates a predefined set of styles for certain report elements, such as charts or various level headings. This also creates a new folder for the collection. Multiple collections can be created within the same style set. In the **Create Style Collection** pop-up window, adjust the collection settings to your needs. Individual styles from the

collection can later on be modified as needed.

- **Delete:** Delete the currently selected individual style or collection folder.

Caution

The action of deleting a style component or collection folder is permanent and cannot be undone.

- **Get Style from Selected Components:** Primarily used by Report Designers in the Report Designer tool when creating base reports and adding individual report elements; this feature is used to select a pre-styled component and to turn its properties into a style that can then be applied to other report elements.

Note

This can only be performed by Designer users.

- **Filter and Sort:** Filter through the various kinds of styles, or sort them in ascending or descending order.
- **Search:** Search the available styles for quicker use. The search is done by style name only.

Note

In order for styles to work properly, all elements of a report that you want to apply styles to need to be given a style in the Report Designer (available to Designer users). Report elements without an assigned style will not have any style applied to them in report views.


The name of the styles assigned to the individual elements in the Report Designer need to be the same as the names in any other style you may want to use e.g. for report views.

In other words, you need to ensure that **all the styles intended for the same element** (e.g., Heading 1) **always have the same name** across all style sets to ensure full functionality and faster switching between styles.

Asset sharing

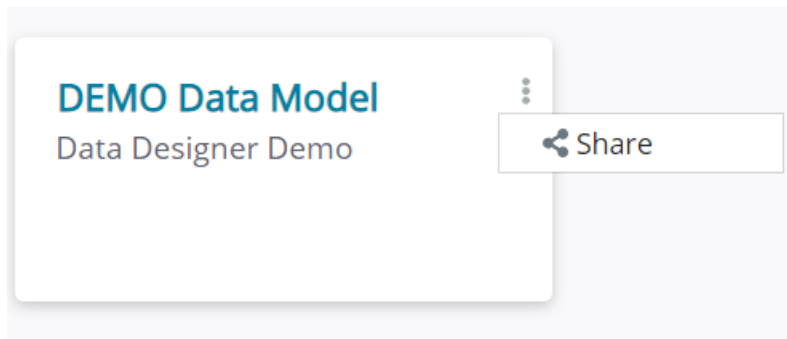
The sharing option lets Administrators share the assets in Reporting with other users and user groups in the system.

It is located in the options menu for all assets: Data models in the **Data** tab, or reports and report views in the **Reports** tab. To share an asset with other users or a user group, do the following:

1. Click **Options**  in the corner of an asset tile, then click **Share** in the dropdown menu.

Note

The Options menu may include more options based on which asset you open it for.



2. In the **Search user or group** search box, enter the group name or individual user name or email address.
3. Click on the user or group you want to share the data model with.
4. In the dropdown menu for that user or group, choose one of the following sharing options:
 - **Can query:** For data models - the user or group gains permission to view or create reports that access any data included in the data model, but cannot access or change the parameters of the model or the data itself. Available for all user roles.
 - **Can read:** For reports and views - the user or group gains permission to open, generate and view the asset as a Viewer would, but cannot edit it directly. Designers can duplicate assets shared with the "Can read" permission level and are the owners of the duplicate, enabling them to edit the duplicate.
 - **Can create view:** For reports - the user or group gains permission to create report views based on the shared report, but they cannot see the report in the **Reports** tab and they cannot duplicate or edit it. For example, a Power Viewer can benefit from this access level as they would still be able to create views from the shared base report, but since they cannot interact with reports directly (other than as Viewers), they would not have a report tile they cannot interact with in their Reports tab.
 - **Can edit:** For all assets - the user can access and modify the data model, report, report view, but not share it with other users. In case of data models, this is available only for Data Designers. For reports, this is available for Data Designers and Designers.
 - **Make owner:** Ownership of the data model or report is transferred to the user. Current owner loses all access rights to the data model. Available for Data Designers (for both data models and reports), Designers (only for reports) and Administrators.

Caution

Transferring ownership cannot be undone by the original owner. It can be reversed only by the new owner or the tenant Administrator or System Administrator.

Note

For further details about sharing with groups, see *Group management on page 18*.

Existing sharing settings for each user or group can be modified (dropdown list) or deleted ().

Furthermore, you can also choose to see the assets in a tabular form. You can switch to this mode by clicking



. The asset list (in all the asset tabs) is then shown as follows:

The screenshot shows the 'Data models' section of the Enghouse Interactive interface. At the top, there are navigation tabs for 'Data', 'Reports', and 'Styles'. Below the navigation, there is a search bar labeled 'Search data models' and a filter section with 'All' selected, 'Created by Me', and sorting options. There are buttons for 'IMPORT' and 'CREATE A NEW DATA MODEL'. Below the filters, there is a checkbox labeled 'Show only selected items'. The main content is a table with the following data:

<input type="checkbox"/>	Id	Name	Created on	Last modification	Owner
<input type="checkbox"/>	1	Agent Availability	12/18/2023 7:00:23 PM	2/21/2024 10:17:33 AM	System Administrator
<input type="checkbox"/>	225	Agent Availability (1)1	4/4/2024 11:59:00 AM	4/4/2024 11:59:00 AM	DataDesigner Test
<input type="checkbox"/>	2	Agent Interactions	12/18/2023 7:00:24 PM	2/21/2024 10:17:33 AM	System Administrator
<input type="checkbox"/>	3	Agent Scorecard Detail	12/18/2023 7:00:24 PM	1/29/2024 6:02:01 PM	System Administrator
<input type="checkbox"/>	4	Agent Scorecard Summary	12/18/2023 7:00:24 PM	2/21/2024 10:17:33 AM	System Administrator
<input type="checkbox"/>	5	Agent State	12/18/2023 7:00:24 PM	2/19/2024 5:14:36 PM	System Administrator
<input type="checkbox"/>	6	Agent Wrapup	12/18/2023 7:00:24 PM	2/21/2024 10:17:33 AM	System Administrator
<input type="checkbox"/>	7	Concurrent Agents	12/18/2023 7:00:24 PM	2/21/2024 10:17:34 AM	System Administrator

Here you can see the most important data about the assets, such as the UUID, name, relevant dates and the owner. In the first column of the table, you can select all or just some individual assets. To show only the selected items, click **Show only selected items** above the table. In the **Reports** tab, you can switch between showing only reports or only views by selecting either **Select Reports** or **Select Report Views**. Additionally, when you select one or more assets, additional options are shown for the asset(s):


- **Configure sharing:** If only one asset is selected, its sharing settings are modified the same way as described at the beginning of this section.
- **Share:** Share the assets with other users or groups. Only available if multiple assets are selected.
- **Unshare:** Remove the access rights from users or groups for the selected assets. Only available if multiple assets are selected.
- **Delete:** Delete the selected asset(s). You must be the owner of an asset to be able to delete it. If there are any assets among the selected that you do not own, a warning message will be shown to indicate which assets the action will not be performed for.

Caution

Deleting a data model cannot be undone. Always check before confirming this action.

- **Export:** Export the selected asset(s). See *Data model export/import* for further details.

Note


- You need to have the relevant access level to an asset to be able to perform all of these actions. If you select any assets for which you do not have the needed access level (such as being the owner), you will not be able to perform the needed action for those assets. A warning message is shown in this case. If there are any assets left among the selected that you have the relevant access level for, you can proceed with the action for these assets only.
- Hover over  in the top part of the pop-up window to see which assets you are working with if multiple are selected.

To turn the tile view back on, click  under the sorting tools in the upper right section of the window.

Asset importing and exporting

It is possible to export and import assets in the respective asset tabs in Reporting. With this feature you can, for example, share assets with other users or create backups of your assets.

Asset export

Using the tabular view , you can export individual assets or assets in bulk. To do so, follow these steps:

1. Select one or more assets in the table.
2. Click **Export**. All the assets to be exported are listed in this window.
3. Select **Include Universal ID** to include the unique ID of the selected asset in the exported data.

Note

The Universal ID is a unique string ID assigned to an individual asset within the Reporting instance. It is used to update an existing asset in the system with its versions created or modified outside the current system. Such a modified asset can be imported into the system to seamlessly replace an existing one via the Universal ID.

4. To confirm, click **Export**. The assets are bundled in a single file that is then downloaded to the default browser download folder, and can be accessed using the file browser.

In this interface, you can also do the following:

- **Select reports:** When this option is selected, only reports are shown in the list. Only shown in the **Reports** tab.
- **Select report views:** When this checkbox is selected, only report views are shown in the list. Only shown in the **Reports** tab.
- **Show only selected items:** Filter the list to show only selected items.
- **Search:** Search through the assets. The search is performed by the name column values.

Asset import

To import assets into Reporting, you must do the following:

1. Open the relevant asset tab, such as the **Reports** tab to import a report.
2. Click **Import** at the top-right of the window to start the importing procedure.
3. Choose the format for the file. Older Reporting versions use the *.mrt* format, while newer versions use the *.ebimodels* format. The format should correspond to the file that is being imported.
4. In the file browser, navigate to the file location and select the file you want to import. A pop-up window opens:

- For reports and views: A warning states that the reports about to be imported are not connected to data models. Imported reports will not be functional until the corresponding data models are connected with them after import.
 - For data models: A warning pops up stating that the data models that are about to be imported do not contain corresponding connection strings. Imported data models will not be functional until the connection strings are configured after import. This needs to be done by a Data Designer.
 - The window also lists all the assets that will be imported.
5. Select **Replace existing asset by Universal ID** to update existing assets in Reporting with the same universal ID. Leave cleared if you want to import a separate asset.
 6. Click **Confirm** to finish the importing process. The assets contained in the file are imported and added to the respective tab.

Note

- When importing report views, if a base report (used to create the view) with a corresponding Report ID is available in the system, the view will connect to it automatically and will be ready for use on import. If no base report with a corresponding ID is available, you will need to connect the view with the relevant report for it to function.
- If an imported asset has the same name as another object in Reporting, and is not used to update the existing object through replacing an existing asset via Universal ID, the object is then renamed to signify it is a copy, e.g., Report (1).

Introduction to system reports

Reporting is a powerful tool that allows you to effectively visualize and present your data with ease.

System Reports are designed to simplify system monitoring and management, as well as to detect possible issues in the infrastructure. There are a number of Enghouse System Reports which are readily-available for you to use as soon as you log into your Reporting system. These system reports help users understand the system's operations and health by providing structured data or insights.

System Reports

System Reports are typically tabular data reports that show you either summary or detailed overviews of the relevant data. Usually they can be adjusted to suit your needs using a variety of filters and settings, so that you can focus precisely on the data you need, while also having multiple options available.

This document provides a detailed description of the individual system reports, along with information how to effectively use them. You can read more about this in the upcoming sections.