

Portal Prodigy[™]
Reporting Features in Detail

Chapter Excerpt from Software User & Administration Guide

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www.portalprodigy.com

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1.1 Introduction

This chapter presents a detailed description of Portal Prodigy's Reporting capabilities. Portal Prodigy includes a number of pre-defined reports, plus you can create and register your own reports using Portal Prodigy's Reporting Interface. Portal Prodigy provides the ability to quickly view reports directly from your web browser, to print them to a printer and to export data in ASCII comma delimited format. The export feature allows you to import the data into other applications such as MS Excel. This chapter describes how to select and print reports, how to specify report criteria, how to specify sorting options, how to export report data, and how to create and register new reports.



1.2 The Visitor Experience

Reports require administrative access rights. Unless the visitor is given such access, reports are limited to Administrators.

1.3 Components

The following components are used to manage and print reports.

1.3.1 Report Selection

Report Selection lists the available reports. By default it limits the list to reports that are applicable to the feature component from where you selected Reports. Clicking the All Reports radio button displays all of the reports. To print a report, click on the report title.



Report List:

- Contact Log Report
- Letter Template Report
- Mail List Report
- Mail List Export Report
- Membership Home Mail Report
- Membership Office Mail Report
- Membership Phones Report

- Membership Profile Report
- Membership Record Report
- Membership Renewal Report
- **User Access Log Report** - Portal Prodigy maintains a detailed log of user access to your website. This report is one of several reports used to display and print information from the user access log.

SalesAnimals.com					
USER ACCESS LOG REPORT					
User Name	Remote Address	URL Description	UserID	Date	Time
Brock Miller	192.168.1.100	Listing Manage Page	1043	3/2/2004	2:04:32PM
Brock Miller	192.168.1.100	Listing	1044	3/2/2004	2:04:33PM
Brock Miller	192.168.1.100	Listing Manage Page	1043	3/2/2004	2:11:58PM
Brock Miller	192.168.1.100	Main Admin Page	9999	3/2/2004	2:14:04PM
Brock Miller	192.168.1.100	ExchangeBrowse	2061	3/2/2004	2:14:12PM
Brock Miller	192.168.1.100	Exchange Manage	2062	3/2/2004	2:14:14PM
Brock Miller	192.168.1.100	ExchangeBrowse	2061	3/2/2004	2:17:27PM
Brock Miller	192.168.1.100	Listing Manage Page	1043	3/2/2004	2:17:33PM
Brock Miller	192.168.1.100	Exch Listings Browse	1042	3/2/2004	2:17:38PM
Brock Miller	192.168.1.100	Listing Manage Page	1043	3/2/2004	2:17:51PM
Brock Miller	192.168.1.100	Exch Listing Search	1041	3/2/2004	2:18:17PM
Brock Miller	192.168.1.100	Exch Listing Search	1041	3/2/2004	2:18:29PM
Brock Miller	192.168.1.100	Listing Manage Page	1043	3/2/2004	2:22:39PM
Brock Miller	192.168.1.100	Exch Listings Browse	1042	3/2/2004	2:22:42PM
Brock Miller	192.168.1.100	Listing Manage Page	1043	3/2/2004	2:23:57PM
Brock Miller	192.168.1.100	Main Admin Page	9999	3/2/2004	2:24:55PM
Brock Miller	192.168.1.100	ExchangeBrowse	2061	3/2/2004	2:25:27PM
Brock Miller	192.168.1.100	Exchange Manage	2062	3/2/2004	2:25:29PM
Brock Miller	192.168.1.100	Listing Manage Page	1043	3/2/2004	2:25:46PM
Brock Miller	192.168.1.100	Listing	1044	3/2/2004	2:25:47PM
Brock Miller	192.168.1.100	Listing Manage Page	1043	3/2/2004	2:33:49PM
Brock Miller	192.168.1.100	Exch Listing Search	1041	3/2/2004	2:33:52PM
Brock Miller	192.168.1.100	Exch Listing Search	1041	3/2/2004	2:34:09PM
Brock Miller	192.168.1.100	Listing Manage Page	1043	3/2/2004	2:34:34PM
Brock Miller	192.168.1.100	Main Admin Page	9999	3/3/2004	10:14:02AM
Brock Miller	192.168.1.100	Site Feature Page	2040	3/3/2004	10:18:09AM
Brock Miller	192.168.1.100	Contents Features Page	2046	3/3/2004	10:18:13AM
Brock Miller	192.168.1.100	Site Feature Page	2040	3/3/2004	10:18:18AM
Brock Miller	192.168.1.100	Menu Builder Search Page	2149	3/3/2004	10:18:29AM
Brock Miller	192.168.1.100	Menu Builder Page	2150	3/3/2004	10:18:34AM
Brock Miller	192.168.1.100	Menu Builder Page	2150	3/3/2004	10:20:20AM
Brock Miller	192.168.1.100	Menu Builder Page	2150	3/3/2004	10:20:22AM
Brock Miller	192.168.1.100	Menu Item Manage	2049	3/3/2004	10:20:25AM
Brock Miller	192.168.1.100	Menu Item Manage	2049	3/3/2004	10:20:59AM
Brock Miller	192.168.1.100	Menu Builder Page	2150	3/3/2004	10:21:04AM
Brock Miller	192.168.1.100	Menu Item Manage	2049	3/3/2004	10:21:10AM
Brock Miller	192.168.1.100	Menu Item Manage	2049	3/3/2004	10:21:35AM
Brock Miller	192.168.1.100	ExchangeBrowse	2061	3/3/2004	10:21:37AM
Brock Miller	192.168.1.100	Menu Item Manage	2049	3/3/2004	10:21:39AM
Brock Miller	192.168.1.100	Menu Builder Page	2150	3/3/2004	10:21:44AM
Brock Miller	192.168.1.100	Menu Item Manage	2049	3/3/2004	10:21:49AM
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- **User Access Log 2 (Detailed) PDF Report** - Portal Prodigy maintains a detailed log of user access to your website. This report is one of several reports used to display and print information from the user access log. Note that the PDF version of the report is created using the Crystal Reports engine and converted to PDF format by PortalProdigy.

SalesAnimals.com					
USER ACCESS LOG REPORT2					
User ID	Remote Address	URL	QueryString	Date	Time
28	127.0.0.1	salesanimal	ui=1041&ci=1	4/3/2004	8:48:16PM
28	127.0.0.1	salesanimal	ui=1041&ci=1&di=1	4/3/2004	8:48:24PM
28	127.0.0.1	salesanimal	ui=1044&ci=1&di=1&1	4/3/2004	8:48:33PM
28	127.0.0.1	salesanimal	ui=9999&ci=1	4/3/2004	8:48:40PM
28	127.0.0.1	salesanimal	ui=9999&ci=1	4/3/2004	8:48:48PM
28	127.0.0.1	salesanimal	ui=9999&ci=1&di=1	4/3/2004	8:49:00PM
32	127.0.0.1	salesanimal	ui=9999&ci=1&di=1	4/3/2004	8:49:00PM
32	127.0.0.1	salesanimal	ui=9999&ci=1	4/3/2004	8:49:07PM
32	127.0.0.1	salesanimal	ui=2041&gr=1	4/3/2004	8:49:07PM
32	127.0.0.1	salesanimal	ui=2042&action=26&gr=1&di=0	4/3/2004	8:49:08PM
32	127.0.0.1	salesanimal	ui=2042&action=11&di=0	4/3/2004	8:49:20PM
32	127.0.0.1	salesanimal	ui=2042&action=11&di=0	4/3/2004	8:49:28PM
32	127.0.0.1	salesanimal	ui=2041&gr=1	4/3/2004	8:49:36PM
32	127.0.0.1	salesanimal	ui=2042&action=26&gr=1&di=0	4/3/2004	8:49:41PM
32	127.0.0.1	salesanimal	ui=2042&action=11&di=0	4/3/2004	8:49:49PM
32	127.0.0.1	salesanimal	ui=2000&action=12&act=11&map=httpAccessLogReport00000160.p00&ci=yes	4/3/2004	8:49:57PM
32	127.0.0.1	salesanimal	ui=9999	4/3/2004	9:00:40PM
32	127.0.0.1	salesanimal	ui=1041&ci=1	4/3/2004	9:00:43PM
32	127.0.0.1	salesanimal	ui=1041&ci=1&di=1	4/3/2004	9:00:57PM
32	127.0.0.1	salesanimal	ui=9999&ci=1	4/3/2004	9:00:59PM
32	127.0.0.1	salesanimal	ui=2003	4/3/2004	9:00:59PM
32	127.0.0.1	salesanimal	ui=2003&di=1	4/3/2004	9:00:59PM
32	127.0.0.1	salesanimal	ui=2004&action=26&di=0	4/3/2004	9:00:59PM
32	127.0.0.1	salesanimal		4/3/2004	9:20:44PM
32	127.0.0.1	salesanimal	ui=1041&ci=1	4/3/2004	9:20:48PM
32	127.0.0.1	salesanimal	ui=1041&ci=1&di=1	4/3/2004	9:20:53PM
32	127.0.0.1	salesanimal	ui=1044&ci=1&di=1&1	4/3/2004	9:20:57PM
32	127.0.0.1	salesanimal	ui=1000&map=12&ci=20	4/3/2004	9:21:00PM
32	127.0.0.1	salesanimal	ui=9999&ci=1&di=1000map=35	4/3/2004	9:21:17PM
32	127.0.0.1	salesanimal	ui=9999&map=35&ci=11&di=1000map=35&di=0	4/3/2004	9:21:27PM
32	127.0.0.1	salesanimal	ui=9999&ci=26&di=1000map=35	4/3/2004	9:21:27PM
32	127.0.0.1	salesanimal	ui=9999&map=35&ci=26&di=1000map=35&di=0	4/3/2004	9:21:30PM
32	127.0.0.1	salesanimal	ui=9999&map=35&ci=26&di=1000map=35	4/3/2004	9:21:30PM
32	127.0.0.1	salesanimal	ui=9999&ci=1	4/3/2004	9:33:07PM
32	127.0.0.1	salesanimal	ui=2041&gr=1	4/3/2004	9:33:07PM
32	127.0.0.1	salesanimal	ui=2041&ci=yes&gr=1	4/3/2004	9:33:07PM
32	127.0.0.1	salesanimal	ui=9999	4/3/2004	9:39:04PM
32	127.0.0.1	salesanimal	ui=2002	4/3/2004	9:39:07PM
32	127.0.0.1	salesanimal	ui=3112	4/3/2004	9:39:13PM
32	127.0.0.1	salesanimal	ui=9999	4/3/2004	9:44:33PM
32	127.0.0.1	salesanimal	ui=2041&gr=1	4/3/2004	9:44:37PM
32	127.0.0.1	salesanimal	ui=2042&action=26&gr=1&di=0	4/3/2004	9:51:13PM
32	127.0.0.1	salesanimal	ui=2042&action=26&gr=1&di=0	4/3/2004	10:01:10PM
32	127.0.0.1	salesanimal	ui=2042&action=26&gr=1&di=0	4/3/2004	10:01:10PM
32	127.0.0.1	salesanimal	ui=2042&action=26&gr=1&di=0	4/3/2004	10:02:30PM
32	127.0.0.1	salesanimal	ui=2042&action=11&di=0	4/3/2004	10:03:00PM
32	127.0.0.1	salesanimal	ui=2000&action=12&act=11&map=httpAccessLogReport0020004372.p00&ci=yes	4/3/2004	10:03:00PM
32	127.0.0.1	salesanimal	ui=2041&gr=1	4/3/2004	10:11:23PM
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- **User Access Log 2 (Detailed) HTML Report** - Portal Prodigy maintains a detailed log of user access to your website. This report is one of several reports used to display and print information from the user access log. Note that the HTML version of this report is created by PortalProdigy's Reporting Engine. Actually the report is output as XML which is treated the same as HTML, and rendered directly by the browser, without the need for third party components. Whereas, PDF formatted reports require Acrobat Reader to be installed on the user's computer in order to view them.

USER ACCESS LOG REPORT 2					
User ID	Remote Address	URL	QueryString	Date	Time
32	192.168.1.100	/salesanimals/main.asp	uri=1041&ei=1	03/01/2004	11:49AM
32	192.168.1.100	/salesanimals/main.asp	uri=1041&ei=1	03/01/2004	12:49PM
32	192.168.1.100	/salesanimals/main.asp	uri=1041&ei=1&f=1	03/01/2004	12:50PM
32	192.168.1.100	/salesanimals/main.asp	uri=1044&ei=1&li=254	03/01/2004	12:50PM
32	192.168.1.100	/salesanimals/main.asp	uri=1044&ei=1&li=254&action=31	03/01/2004	12:50PM
32	192.168.1.100	/salesanimals/main.asp	uri=1044&action=32&ei=1&li=254	03/01/2004	12:51PM
32	192.168.1.100	/salesanimals/main.asp	uri=1044&ei=1&li=254&repl=1	03/01/2004	12:52PM
32	192.168.1.100	/salesanimals/main.asp	uri=1041&ei=1	03/01/2004	12:52PM
32	192.168.1.100	/salesanimals/admin.asp	uri=9999&sti=1	03/01/2004	12:52PM
32	192.168.1.100	/salesanimals/admin.asp	uri=2061	03/01/2004	12:53PM
32	192.168.1.100	/salesanimals/admin.asp	uri=2062&action=2&ei=1	03/01/2004	12:53PM
32	192.168.1.100	/salesanimals/admin.asp	uri=2061&cll=	03/01/2004	12:54PM
32	192.168.1.100	/salesanimals/admin.asp	uri=9999	03/01/2004	12:54PM
32	192.168.1.100	/salesanimals/log.asp	uri=900&log=2&sti=30	03/01/2004	12:54PM
28	192.168.1.100	/salesanimals/main.asp	uri=1041&ei=1	03/01/2004	12:54PM
28	192.168.1.100	/salesanimals/main.asp	uri=1041&ei=1&f=1	03/01/2004	12:54PM
28	192.168.1.100	/salesanimals/main.asp	uri=1041&ei=1&f=1	03/01/2004	12:54PM
28	192.168.1.100	/salesanimals/main.asp	uri=1044&ei=1&li=255	03/01/2004	12:54PM
28	192.168.1.100	/salesanimals/main.asp	uri=1043&ei=1	03/01/2004	12:55PM
28	192.168.1.100	/salesanimals/log.asp	uri=900&rqui=1&ms=40	03/01/2004	12:55PM
28	192.168.1.100	/salesanimals/log.asp	uri=951&qri=1&rqui=1&ms=40	03/01/2004	12:56PM
28	192.168.1.100	/salesanimals/log.asp	uri=951&uneg=1&qri=1&ci=28&rqui=1	03/01/2004	12:56PM
28	192.168.1.100	/salesanimals/log.asp	uri=951&uneg=1&qri=1&ci=28&rqui=1&rg=yes	03/01/2004	12:56PM
28	192.168.1.100	/salesanimals/log.asp	uri=900&igt=3&log=1&rqui=1	03/01/2004	12:57PM
28	192.168.1.100	/salesanimals/log.asp	uri=900&igt=3&rqui=1&log=1	03/01/2004	12:57PM
28	192.168.1.100	/salesanimals/log.asp	uri=900&igt=3&rqui=1&log=1	03/01/2004	12:57PM
28	192.168.1.100	/salesanimals/log.asp	uri=900&igt=3&rqui=1&log=1	03/01/2004	12:57PM
28	192.168.1.100	/salesanimals/log.asp	uri=900&igt=3&rqui=1&log=1	03/01/2004	12:57PM
28	192.168.1.100	/salesanimals/log.asp	uri=900&sti=30	03/01/2004	12:57PM
28	192.168.1.100	/salesanimals/log.asp	uri=900&igt=1	03/01/2004	12:57PM
28	192.168.1.100	/salesanimals/log.asp	uri=900&igt=2	03/01/2004	12:57PM
28	192.168.1.100	/salesanimals/log.asp	uri=900&sti=30	03/01/2004	01:01PM
28	192.168.1.100	/salesanimals/log.asp	uri=900&igt=0&log=1	03/01/2004	01:01PM
32	192.168.1.100	/salesanimals/admin.asp	uri=9999&sti=1	03/01/2004	01:01PM
32	192.168.1.100	/salesanimals/admin.asp	uri=2040	03/01/2004	01:01PM
32	192.168.1.100	/salesanimals/admin.asp	uri=2047&action=2	03/01/2004	01:01PM
32	192.168.1.100	/salesanimals/admin.asp	uri=2047&action=4&state=close	03/01/2004	01:02PM
32	192.168.1.100	/salesanimals/admin.asp	uri=2040	03/01/2004	01:02PM
32	192.168.1.100	/salesanimals/admin.asp	uri=9999	03/01/2004	01:02PM
32	192.168.1.100	/salesanimals/main.asp	uri=1041&ei=1	03/01/2004	01:02PM
32	192.168.1.100	/salesanimals/main.asp	uri=1041&ei=1&f=1	03/01/2004	01:02PM
32	192.168.1.100	/salesanimals/main.asp	uri=1044&ei=1&li=254	03/01/2004	01:02PM
32	192.168.1.100	/salesanimals/main.asp	uri=1044&ei=1&li=254&action=31	03/01/2004	01:02PM
32	192.168.1.100	/salesanimals/main.asp	uri=1044&action=32&ei=1&li=254	03/01/2004	01:03PM
32	192.168.1.100	/salesanimals/main.asp	uri=1044&ei=1&li=254&repl=1	03/01/2004	01:03PM
32	192.168.1.100	/salesanimals/main.asp	uri=1041&ei=1	03/01/2004	01:03PM
32	192.168.1.100	/salesanimals/main.asp	uri=1041&ei=1&f=1	03/01/2004	01:04PM
32	192.168.1.100	/salesanimals/main.asp	uri=1044&ei=1&li=1	03/01/2004	01:04PM
32	192.168.1.100	/salesanimals/main.asp	uri=1041&ei=1&f=1	03/01/2004	01:04PM
32	192.168.1.100	/salesanimals/admin.asp	uri=9999&sti=1	03/01/2004	01:07PM
32	192.168.1.100	/salesanimals/admin.asp	uri=2061	03/01/2004	01:07PM

1.3.2 Report Criteria

The Report Criteria page is used to specify data selection criteria and output sorting for the report.

Report Details:

Report Details	
Report name:	User Access Log
	Include listing of deactivated criteria <input type="checkbox"/>
	Include deactivated records in report results <input type="checkbox"/>
UserID:	<input type="text"/>  LookUp
Date Range:	<input type="text"/>  to <input type="text"/> 
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Resource/Page Name:	<div> <div>-----</div> <div> About Info Manage About Us Ad Page Administration of Ads Advanced Search Page Application Form AskTheExpert Available Actions Manage Page Biography Search Page </div> <div></div> </div>
User URL:	<input type="text"/>

The Report Details section is used to enter data selection criteria. The available criteria fields vary for each report. ID fields allow multiple ID's separated by commas. Text fields search match for entire entry. An asterisk * may be used as a wild card, e.g. the value Last Name = Mil* will find all Last names beginning with Mil. Lookup options are provided to retrieve normalized values. Multi-value list boxes allow selection of multiple search values. To select multiple values hold down the control key while clicking on each value. Multi-value list boxes performs search using OR between the values selected in the list box.

Order By:

This section is used to set the sort order of the data on the report. Each field that may used as part of the sort order is listed.

Order By:	
Enter digits according to the desired order, the greater the digit, the lower is the field's order priority. If zero is entered as an order criteria, the corresponding field will be ignored.	
LastName:	<input type="text"/> <input checked="" type="radio"/> Asc <input type="radio"/> Desc
CreationDate:	<input type="text"/> <input checked="" type="radio"/> Asc <input type="radio"/> Desc
RemoteAddr:	<input type="text"/> <input checked="" type="radio"/> Asc <input type="radio"/> Desc
FirstName:	<input type="text"/> <input checked="" type="radio"/> Asc <input type="radio"/> Desc
UrlID:	<input type="text"/> <input checked="" type="radio"/> Asc <input type="radio"/> Desc

Follow the instructions listed on the page. For each sort field the user may enter an integer to designate its order. Asc is for ascending order and Desc is for descending order.

Options:

<input type="button" value="Clear"/>	Clears all fields of criteria and sorting options.
<input type="button" value="Create Export File"/>	Exports report data to an ASCII comma delimited file with CSV extension.
<input type="button" value="Print"/>	Outputs the report to your browser. The report is created in printable format either as HTML or as PDF. Use your browser's print option to send the report to a printer.
<input type="button" value="Close"/>	Close the page returning to the previous page.

1.3.3 Reports Management

Reports Management is used to register reports with Portal Prodigy.

Reports Management				
Reports				
	Report Name	Reports Group	Report Query	
1	GL Account Listing Report	Accounting Reports	v_GLAccountReport	GLAccou
2	GL Transaction Report	Accounting Reports	v_GLTransactionsReport	GLTransi
3	Packing Slip	Batch Fulfillment	v_PackSlip	PackSlip
4	Picking List	Batch Fulfillment	v_PickList	PickList
5	Candidate Seeker Advertisement Order	CPI Reports	v_AdvertisementOrderReport	Advertise
6	Candidate Seeker Credit Card Payment	CPI Reports	v_AdvertisementCreditCard	Advertise

Reports grid contains the following columns:

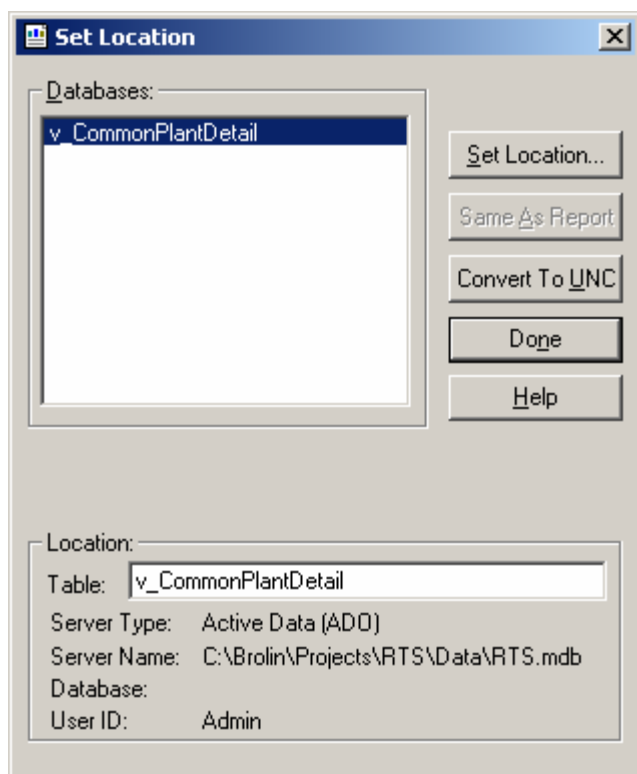
- **Report Name** – used to enter a name for the report. This is the name that is displayed on the Report Selection page.
- **Reports Group** – used to group reports for Report Selections page. Select a pre-defined group from the list box.
- **Report Query** – specifies the database query used by the report to retrieve the required data from the database. Queries may be uploaded to the database by permitted administrators.
- **Report File Name** – the physical name of the file containing the report definition.

- **File Ext.** – the name of the file extension for the physical file containing the report definition. E.g. *RPT* is the extension for Crystal Reports Definition files and *XSL* is the extension for Portal Prodigy XML/HTML Report Definitions files.
- **Report File** – the path on the Web Server where the report file is stored.
- **Records Number Limit** – places a limit on the number of records returned by the query. This is often necessary to overcome server disconnections. It is recommended to limit to 10,000 or less.
- **Additional RecordSet** – specifies an additional query or record-set required by the report.
- **Search Criteria** – link to display the Report Search Criteria Management page which is used to define search criteria options displayed on the Report Criteria page.
- **Active** – defaults to *Yes*, set to *No* to remove the report from the Report Selection page, i.e. to remove it as a selection.

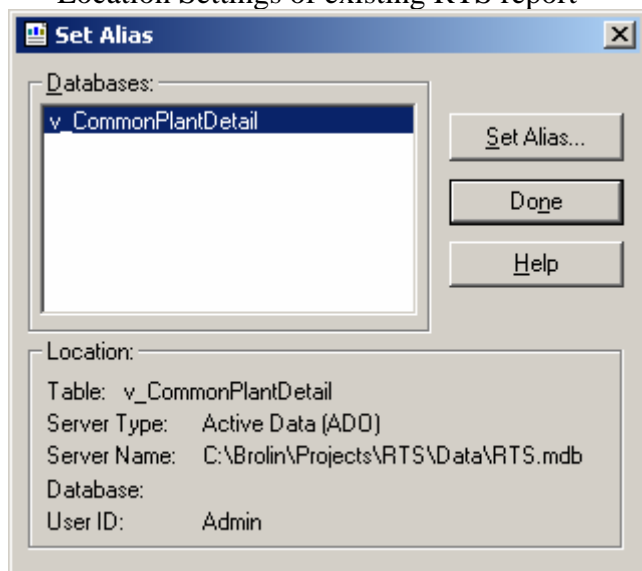
1.4 Feature Administration

1.4.1 Configuring Crystal Reports

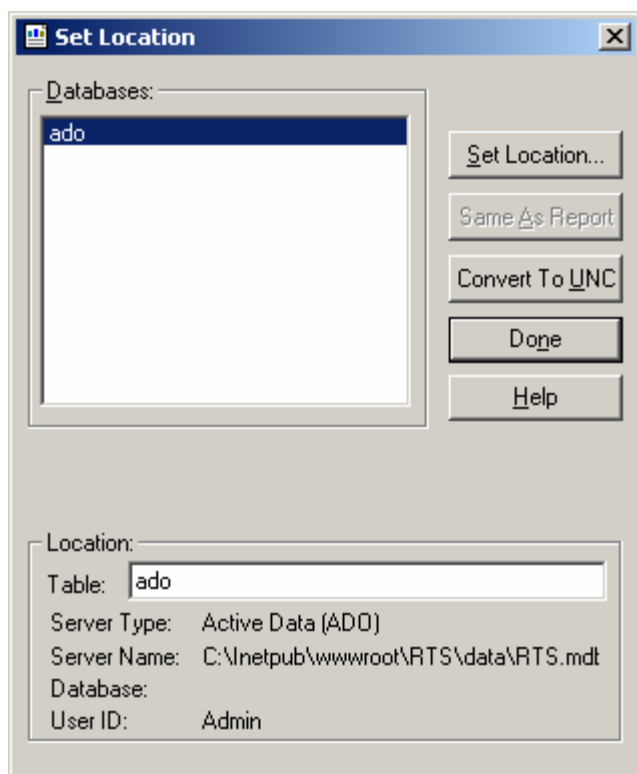
The following options must be set with Crystal Reports:



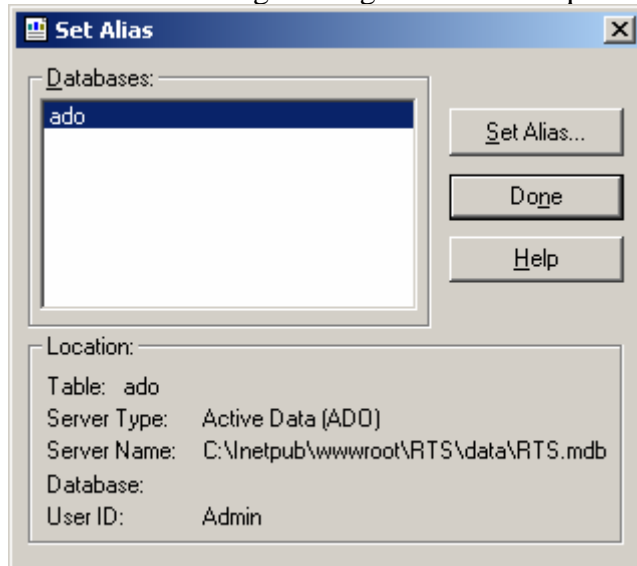
- Location Settings of existing RTS report



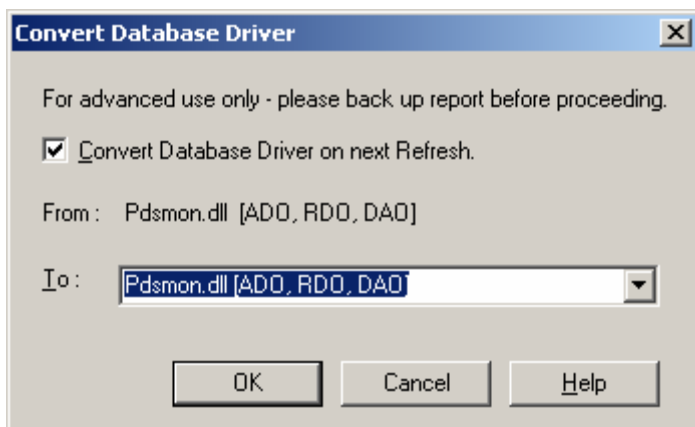
- Alias Settings of existing RTS report



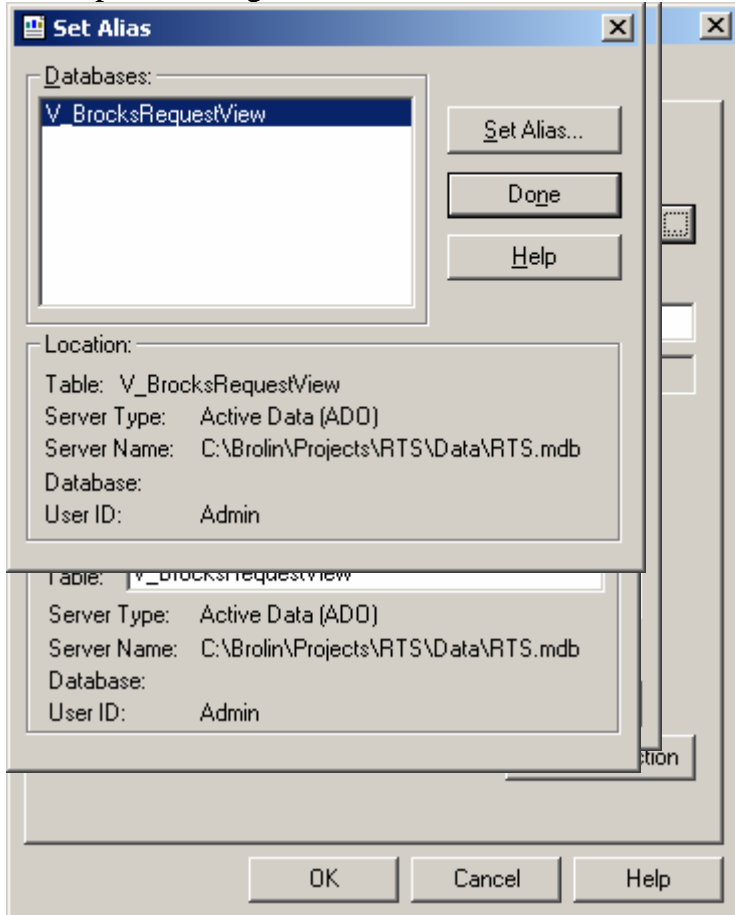
- Location Settings of original BrocksRequestReport.rpt



- Alias Settings of original BrocksRequestReport.rpt



- Steps for setting Database Driver, Location and Alias



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