Report Manager Manual

Add-on version 1.11.23

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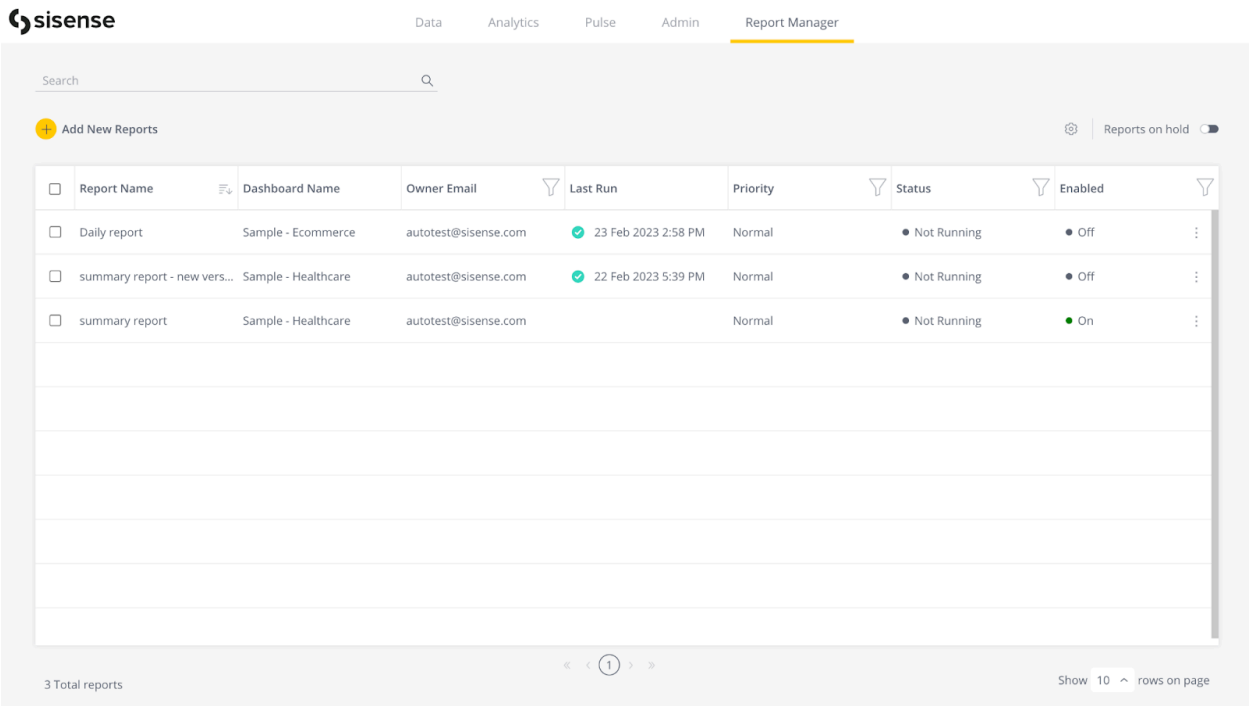
Introduction

The Sisense Report Manager is an advanced UI-based report scheduler with highly-flexible scheduling capabilities including event-driven triggers. You can set up and enable customized reports and send them to a wide audience including non-Sisense users through a centralized tab within Sisense. The centralized view allows you to receive live status updates, perform bulk operations, and more.



As of version 1.11.3, Report Manager is able to resume reports generation in case there was a service restart or failure that caused restarting.

Installing the Report Manager

The Report Manager is installed as a Sisense add-on. When you install the Report Manager, the following are installed:

Add-ons Client Side:

1. **Report Manager**: This add-on generates all the UI pages displayed in Sisense, including the Report Manager page, the Reports list page, and the Create/Edit report.
2. **Hide Report Schedule**: This add-on removes the option to schedule reports through the **Share Dashboard** window.

Add-ons Server Side

1. **Report Manager**: If the user is logged out of Sisense and tries to browse to the Report Manager, this add-on redirects them to the **Login** page.

External-plugins:

1. **Rest API – Data manager**: Adds another Report Manager route to the Sisense REST API list under the V1 version.
2. **Engine**: Exports reports and sends them to recipients. If it fails, all reports that were in the middle of export will be set to not running with a server error message.
3. **Scheduler**: Manages the report execution time based on priority and capacity. In case of failure and going up again, it will be set to 'no running'.
4. **Messaging**: Sends report update messages from the server to all logged-in users. If it fails, all sent messages are not stored and will not be sent after the service is restored. In this case, your users will need to refresh the page to see the updated data.

The archive contains installation package for Linux.

Installation

1. Open a bash window
2. Copy the Sisense.ReportManager.zip file to the Linux server
3. Run the command below to unarchive the Report Manager installation file:
   - unzip Sisense.ReportManager.zip
4. Go to folder with scripts:
   - cd Sisense.ReportManager.{version}/scripts
5. Run script with one of the keys described below in the Script Flags Description chapter.
   For the first time installation please use -i flag.
   For the upgrade of installed add-on use -u flag. (Please be aware that configuration backup will be made during upgrade)
   - All required pods will be restarted automatically. This may take a few minutes.
   - Verify interceptor status:
     Go to the configuration page http://[sisense-domain]/app/configuration/system.
     a. Click 5 times on the logo to unlock settings.
     b. Select api-gateway tab.
        Find chapter ServerSidePlugins and enable parameter serverSidePlugins.enabled.
     c. Check that serverSidePlugins.dirPath is equal to the path where interceptors were placed(option №3).
     d. Press the "Save changes" button.
6. Wait until pods restart

Script Flags Description

- To run script command use:

    - `bash ./l-addon-script.sh {command-key}` - replace `{command-key}` with one of the keys listed from `-h` command.
- Show available commands:
    - `bash ./l-addon-script.sh -h` - shows a list of available command keys and their description.
- Common commands:
    - `bash ./l-addon-script.sh -i` - install add-on or rewrite existing add-on files.
      `bash ./l-addon-script.sh -r` - remove add-on from the system. Configuration in Mongo and the Configuration page will persist.
      `bash ./l-addon-script.sh -u` - update the currently installed add-on by removing it and then installing a new version.

Uninstalling the Report Manager

1. Open a bash window
2. Go to folder with scripts (you should be in a folder with Report manager files):
   - cd Sisense.ReportManager.{version}/scripts
3. To uninstall please run:
   - `bash ./l-addon-script.sh -r`

   All required pods will be restarted automatically. This may take a few minutes.

Removing Configurations from the Configuration page

1. Open the Configuration Manager
2. Click the Sisense logo five times to display the full list of services configurations on the left
3. Click the General section title five times and navigate to the File Explorer tab
4. Navigate to **Production**

5. Select **external-plugins**
6. Select the relevant configurations
7. Click the Delete button in the top right corner
8. Restart the **external-plugins** pod

Configuring the Report Manager

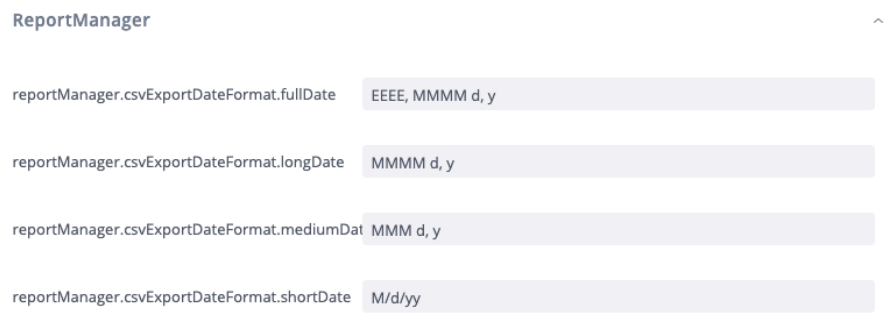
After the Report Manager has been installed on your machine in either a single-node deployment or on the build node in a multi-node deployment, you will need to configure Report Manager.

To configure the Report Manager:

1. Open the Configuration Manager:
   Documentation
   Click the Sisense logo five times to display the full list of services configurations on the left, and navigate to **External-Plugins-Service** tab

2. Update the following settings:

    a. Review and update the general configuration - see the [Administrator Settings & Feature Management]() section
    b. Configure the **CSV date format** if needed.The CSV day date format will be translated based on these configurations.
    There are default date format values configured. The configured date format will be used for all report recipients.

    In case no format is selected, the date is presented as stored in the datasource.
    c. Configure **maximum export retries** - the number of times the Report Manager engine will try to generate a report in case of a failure. The default value is 3.

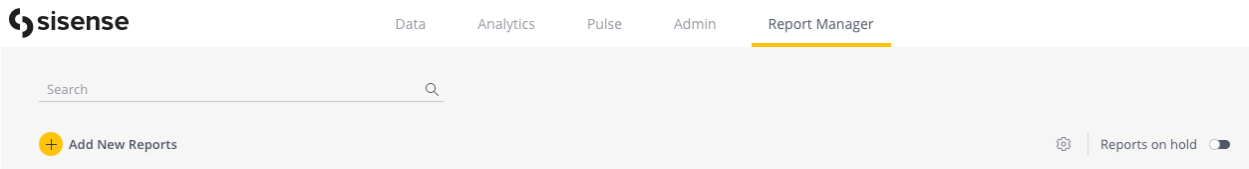
    d. Set the desired **time zone**. This time zone is used for report schedules.

3. Configure **alias** if needed - alias is used for generating the dashboard URL that is sent in the email body.
    [Documentation]()

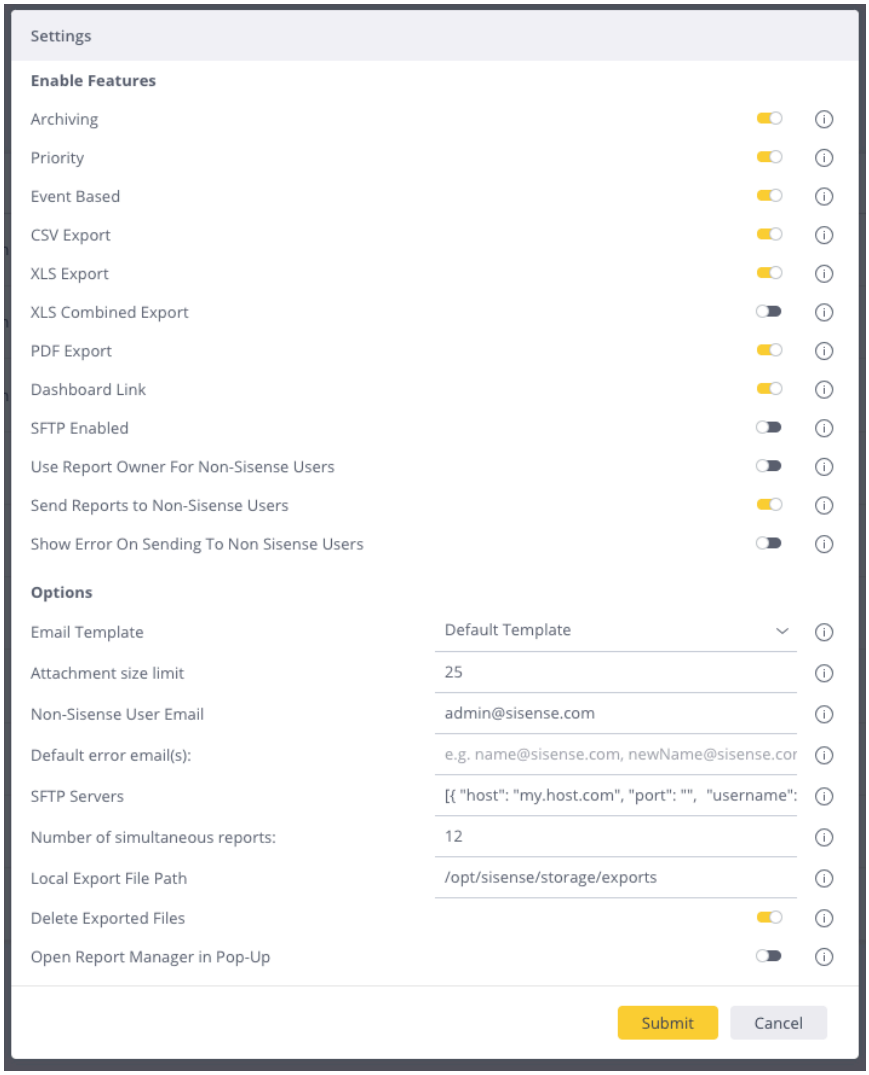
    Note: If a port is required, make sure to specify it in the alias field. In addition, make sure to not include '/' at the end of the alias.

Administrator Settings & Feature Management

Sisense Administrators have additional settings for controlling how many reports can be sent simultaneously and where error notifications are sent to. The icon is displayed for Administrators next to the **Reports on Hold** switch.



When you click on the icon, the **Settings** pop-up is displayed.



The Settings Pop-Up allows Administrators to also set which features Designer/Viewer users will be allowed to use or configure:

- **Archiving**. Show/hide "Acrhive To" section for the report format configuration on UI. This option doesn't change settings for the existing reports.
- **Priority**. Show/hide "Priority" selection for the report configuration on UI. This option doesn't change settings for the existing reports. All the new reports will be created with a "Normal" priority by default.
- **Event Based**. Show/hide "Event Based" report option for the report scheduling configuration on UI. This option doesn't change settings for the existing reports.
- **CSV Export**. Show/hide "CSV" report format option for the report configuration on UI. This option doesn't change settings for the existing reports.

- **XLS Export**. Show/hide "Excel" report format option for the report configuration on UI. This option doesn't change settings for the existing reports.
- **XLS Combined Export**. Show/hide "Excel" for all dashboard widgets report format option for the report configuration on UI. This option doesn't change settings for the existing reports.
- **PDF Export**. Show/hide "PDF" report format option for the report configuration on UI. This option doesn't change settings for the existing reports.
- **Dashboard Link**. Show/hide "Dashboard Link" report format option for the report configuration on UI. This option doesn't change settings for the existing reports.
- **Jasper Excel**. Show/hide "Jasper Excel" report format option for the report configuration on UI. This option appears if the Jasper Reports Add-On is installed on the system. This option doesn't change settings for the existing reports.
- **Jasper PDF**. Show/hide "Jasper PDF" report format option for the report configuration on UI. This option appears if the Jasper Reports Add-On is installed on the system. This option doesn't change settings for the existing reports.

Note: Toggling the above features on/off (via UI or REST API) doesn’t impact the previously created reports. For example, if a report has been created with “Combined Excel” option enabled, and an Administrator set this option to be disabled, then the report will still be exported into the Combined XLS format. Same behavior for all the other options.

More features that can be enabled:

- **SFTP Enabled.** When enabled, reports are archived via SFTP to a server designated on a per report basis. A list of SFTP server credentials must be provided in the “SFTP Servers” and a server must be selected for each report, if recipients are not designated. This replaces the default archiving process.
- **User Report Owner For Non-Sisense Users**. When enabled, reports for recipients that do not have a Sisense user are sent with the report owner credentials. Otherwise, reports for these recipients are sent with the credentials of the configured “Non Sisense User Email”
- **Send Reports to Non-Sisense Users**. When enabled, reports will be allowed to be sent to non-sisense (external) users.
- **Show Error On Sending To Non Sisense Users**. Enable to show an error message when a report is sent to an external user and when “Send Reports to Non-Sisense Users” is disabled.

- When the **Show Error On Sending To Non Sisense Users** option is ENABLED and when **Send Reports to Non-Sisense Users** is DISABLED - Error message will be displayed after the report execution. There will also be a validation error upon saving such report: “All recipients must have a Sisense user”
- When the **Show Error On Sending To Non Sisense Users** option is DISABLED and when **Send Reports to Non-Sisense Users** is also DISABLED - there will be a warning message in “Last run” section of the report, and report will be sent to only Sisense users but not non-sisense (external) users. There will also be a validation error upon saving such report: “All recipients must have a Sisense user”

In the same Pop-Up the following options can be configured:

- **Email Template.** A list of existing email templates that can be selected by default. You can also create a new or modify an existing template using this control.
- **Attachment Size Limit**. Limit in megabytes for the size of attached files to the email. If the limit is exceeded, report files will not be included in the email. Instead, a warning indicating that the limit has been exceeded will be displayed in the email. Default value is 25. 0 - for unlimited attachment size. When the limit is reached, the report will be considered as successful, but a report recipient’s email will contain a warning message (this message is configurable in translations). It is possible to configure a custom warning message via the template configuration.
- **Non-Sisense User Email**. The email of a Sisense user that will be used to export reports to Non-Sisense (external) users. External users reports will have the data security applied for this Sisense user.
- **Default error email(s)**. The email addresses where error notifications are sent when no specific email address has been defined for the report in the **Send error notification to** field when the report was created. You can add a list of email addresses, separated by a comma of both Sisense and non-Sisense users.
- **SFTP Servers**. A list of allowed SFTP servers and their credentials. The parameter requires an array of server objects. Each server object includes:
  - **host** Required. Server IP.
  - **port** Required**.** Server port.
  - **username** Required. Username to use when connecting to server
  - **password** Optional. Password to use when connecting to server (not required if authenticating with a **privateKey**)
  - **serverName** Required. Is used as the server display name on report creation/editing view.
  - **privateKey** Optional. Used for connecting via SSH to some servers which configurations may require a private key for authentication.
  - **allowOnlyToGroups** Optional. An array of user group IDs. If provided, only users in the provided group are allowed to archive reports to the server. If not provided, all users can archive reports to the server.

For example:

```
[{
        "host": "my.host.com",
        "port": "",
        "username": "username",
        "password": "sftpserverpassword",
        "serverName": "My Server",
        "allowOnlyToGroups": ["609048af5da057002cbc4e43"]
},
{
        "host": "my.second.host.com",
        "port": "",
        "username": "username",
        "password": "sftpserverpassword",
        "serverName": "My Server",
        “privateKey”: “-----BEGIN RSA PRIVATE
        KEY-----MIIBOgIBAAJBAKj34GkxFhD90vcNLYLIn….“
        "allowOnlyToGroups": ["609048af5da057002cbc4e45"]
}]
```

- **Number of simultaneous reports**. The amount of reports that the Report Manager can run at the same time. Carefully modify this number to the one that your system can digest. If the number of reports to be generated exceeds this threshold, new reports will be sent to the pending reports queue.

- **Local Export File Path**. The local server path to save the exported files to. The path will be created if it does not exist.

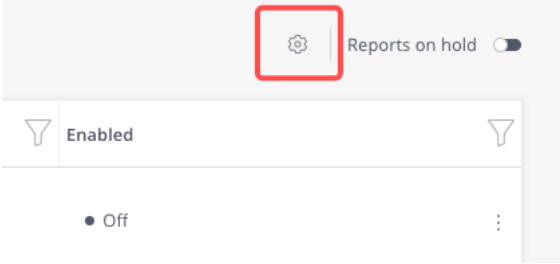
- **Delete Exported Files**. Select to delete exported files on report compilation. When enabled, all temporary report files are deleted on report compilation.

- **Open Report Manager in Pop-Up**. When enabled, the Report Manager will be opened in a pop-up window instead of a separate browser tab.

Configuring Email Templates

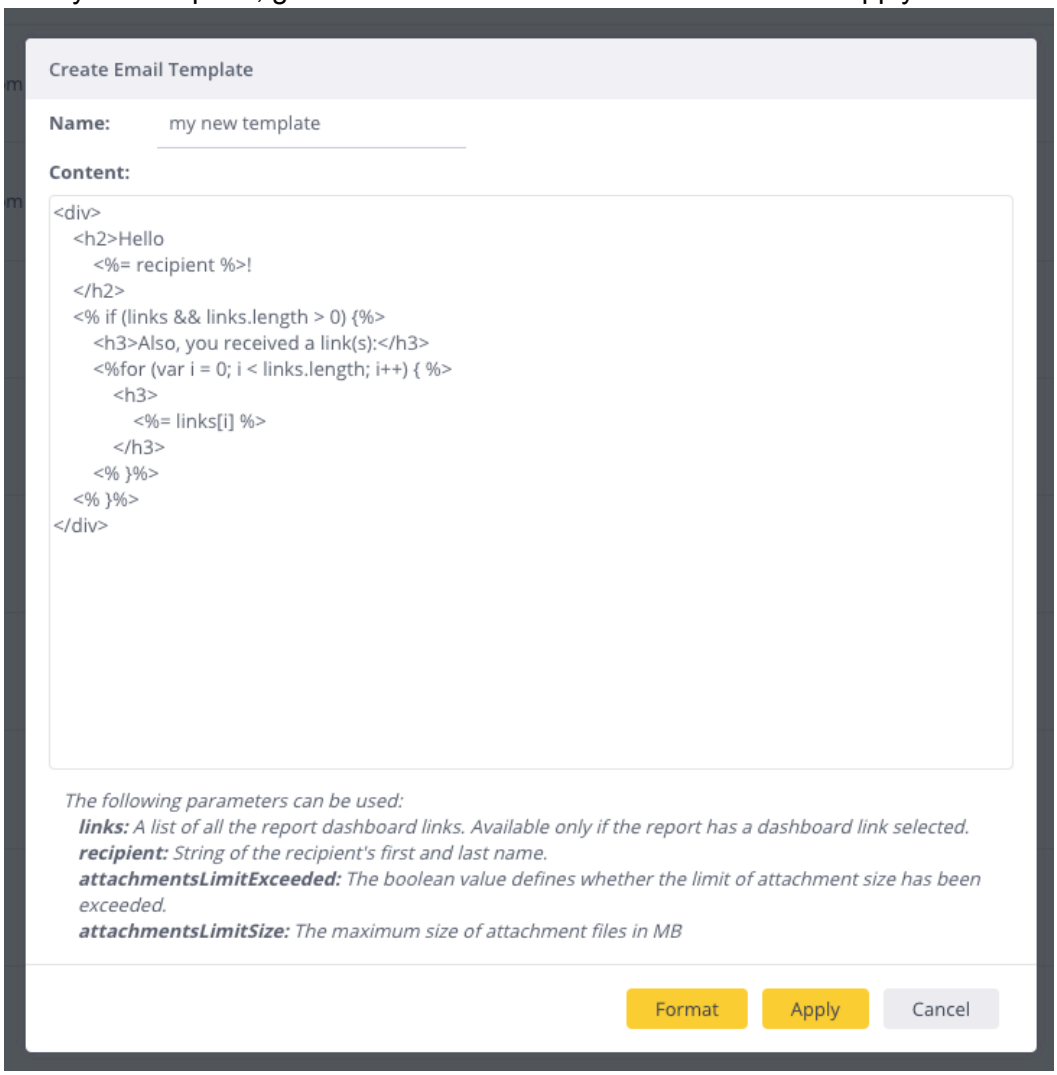
The Report Manager is installed with the default email template. For adding a new email template follow these steps:

1. As an Administrator user, click on the Settings icon



2. In the pop-up window, find the “Email Template” dropdown in the options section, expand it and click on the “Create New” button

3. Modify the template, give it a name in the “Name” field and click “Apply”

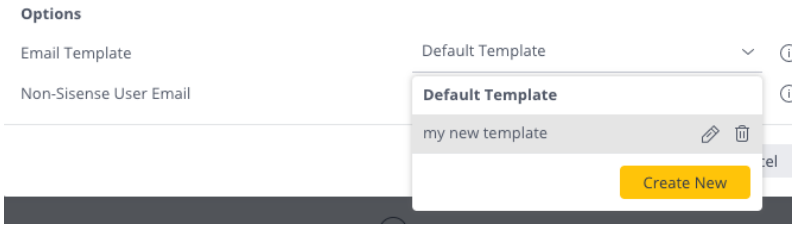


4. You can add a block that will show a warning message in case an attachment size for a recipient is exceeded. For that, you may add a block similar to this:

```
<% if (attachmentsLimitExceeded) {%>
        <div style="color:red;">
           {{ attachmentsLimitExceededMsg }}
        </div>
<% }%>
```

The message text is stored in the *attachmentsLimitExceededMsg* variable which is defined in the translations files.

5. Your newly created template will appear in the list.

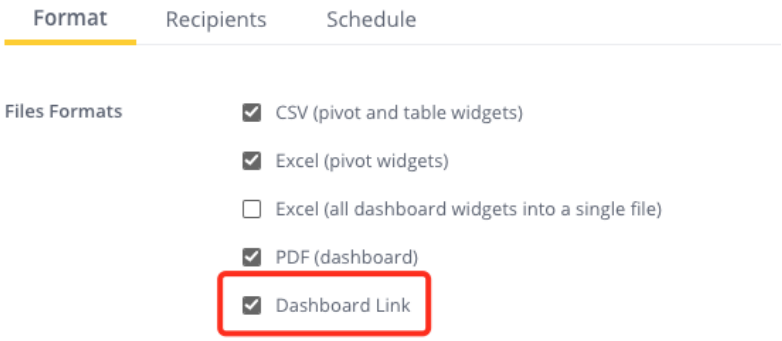


6. You can select the new template and it will become the default template for every report.
7. You can edit your custom templates by clicking on the edit “pencil” button or remove by clicking on the remove “trash can” button.
8. After all the changes click on the submit button at the bottom of the Settings pop-up

Email Template Parameters

The following email template parameters can be used when creating an email template:

- **links**: A list of all the report dashboard links. Currently it is always a link to a single dashboard, due to the fact that it is possible to only create one report per one dashboard. This option is available only if the report has a dashboard link selected as an option for the report format.



- **recipient**: String of the recipient's first and last name or an email address if there’s no defined first and last name.
- **attachmentsLimitExceeded**: The boolean value defines whether the limit of attachment size has been exceeded. Can be used to conditionally show an error message in case the attachment size is bigger than the configured “*Attachment size limit”* value.
- **attachmentsLimitSize**: The maximum size of attachment files in megabytes. Shows the “*Attachment size limit”* value from the Report Manager configuration to help email recipients understand the limit.

Translations

The Report Manager supports translations.By default the Report Manager comes with en-US translations. You can set Report Manager to use different translations depending on the current Sisense language. If translations are not defined for a given language, the Report Manager will use en-US translations as a fallback.

The translation files location is:

/opt/sisense/storage/translations

The translations files containing the Report Manager translations are the following:

- *intl.ReportManager.json* - contains translations for UI
- *intl.ReportManager.errors.json* - contains translations for error messages visible on UI and in the error emails
- *intl.ReportManager.email-templates.json* - contains translations for email templates content

Modifying translations

If you need to modify existing translations, for example, for en-US language do the following:

- Navigate to the en-US folder inside the translations folder and find the three translation files that are described above
- Open the one you need to change and modify the values. Make sure you don't modify the translation keys (they start from "@reportManager"), otherwise the translation for the specific key will not be found and you will see translation keys instead.
- Save your changes to the file

Adding new translations

If you want to add, for example, French translations to the Report Manager, follow these steps:

- Navigate to the en-US folder inside the translations folder and find the three translation files that are described above
- Copy the translation files to the fr-FR folder inside the translations folder
- Modify translation values in the files. Make sure you don't modify the translation keys (they start from "@reportManager"), otherwise the translation for the specific key will not be found and you will see translation keys instead.
- Save your changes to files.

This is an example of modified translations for French:

translations > fr-FR > intl.ReportManager.json

```
{
    "@reportManager/header/tab/reportManager": "Gestionnaire de rapports",

    "@reportManager/date/not_applicable": "N/a",
    "@reportManager/date/second_short": "s",

    "@reportManager/date/never": "Jamais",
    "@reportManager/date/today": "Aujourd'hui",
    "@reportManager/date/select_date": "Sélectionner une Date",

    "@reportManager/edit_page/create_new_report": "Créer un nouveau rapport",
```

Translating email templates

Modifying translations for the email templates is done the same way as any other translation and is already described in the chapters above.
Let's modify the translations for the base email template preinstalled by the Report Manager. The default template (with translations) looks like this:

```
<div>
  <h2>{{ hi }} <%= recipient %>!</h2>
  <% if (links && links.length > 0) {%>
  <h3>{{ receivedLinks }} </h3>
  <%for (var i = 0; i < links.length; i++) { %>
  <h3><%= links[i] %></h3>
  <% }%><% }%>
</div>
```

The template name is called "base". Let's find it in the translations.
For that, navigate to "translations/en-US/intl.ReportManager**.email-templates**.json" and find all the translations that contain "base" in its key:

intl.ReportManager.email-templates.json

translations > en-US > intl.ReportManager.email-templates.json

```
1  {
2      "@reportManager/templates/base/subject": "{name}",
3      "@reportManager/templates/base/hi": "Hello",
4      "@reportManager/templates/base/receivedLinks": "Also, you received a link(s):",
5      "@reportManager/templates/base/attachmentsLimitExceededMsg": "Warning! Attachment size limit (<%= attachmentsLimitSize%>MB) exceeded. All the attachments w
6
7      "@reportManager/templates/custom_email/subject": "{name}",
8      "@reportManager/templates/custom_email/hi": "Hello",
9      "@reportManager/templates/custom_email/receivedLinks": "Also, you received a link(s):",
10     "@reportManager/templates/custom_email/attachmentsLimitExceededMsg": "Warning! Attachment size limit reached and attachments don't include in the email.",
11
12     "@reportManager/templates/base_error/subject": "Error exporting report '{name}'",
13     "@reportManager/templates/base_error/failedReport": "Failed exporting report",
14     "@reportManager/templates/base_error/clientMessage": "Client message",
15     "@reportManager/templates/base_error/message": "Message",
16     "@reportManager/templates/base_error/information": "Information"
17 }
18
```

The format of the template key is <prefix>/<template name>/<key>. For all the templates the prefix should be "@reportManager/templates". For the default template the template name is "base". The keys are the text values that are present in the template and that will be replaced with the relevant values. The keys inside the template should be wrapped with "{{ }}". In the example above the keys are:

```
<h2>{{ hi }} <%= recipient %>!</h2>
```

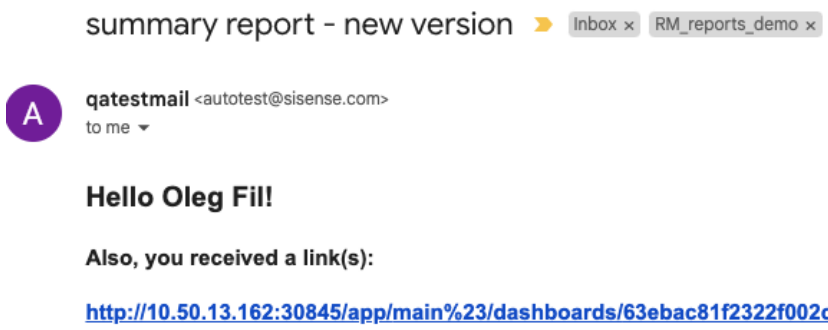
and

```
<h3>{{ receivedLinks }} </h3>
```

In the translations they match to the keys with the same name:

```
"@reportManager/templates/base/subject": "{name}",
"@reportManager/templates/base/hi": "Hello",
"@reportManager/templates/base/receivedLinks": "Also, you received a link(s):"
```

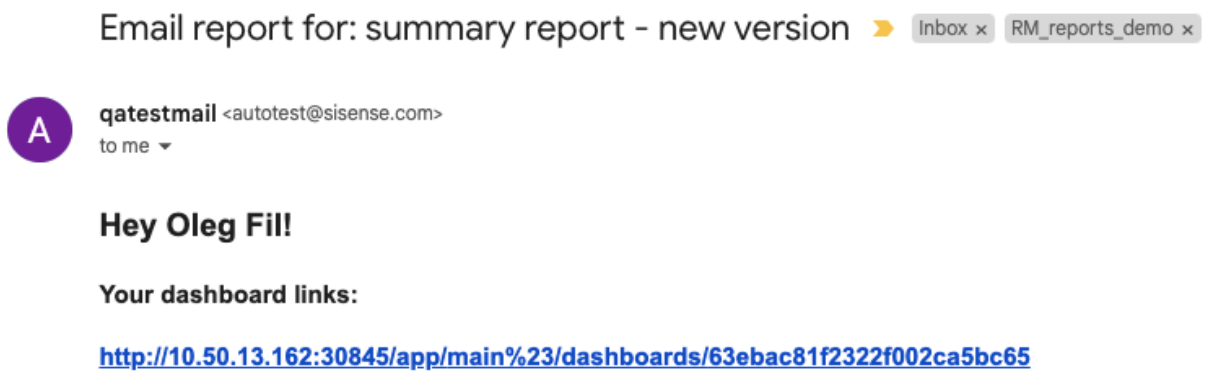
Which means the {{ hi }} and {{ receivedLinks }} will be replaced with the "Hello" and "Also, you received a link(s):" and the resulting email generated by the Report Manager will look like this:



Let's modify the translation text:

```
"@reportManager/templates/base/subject": "Email report for: {name}",
"@reportManager/templates/base/hi": "Hey",
"@reportManager/templates/base/receivedLinks": "Your dashboard links:",
```

The resulting email will be:

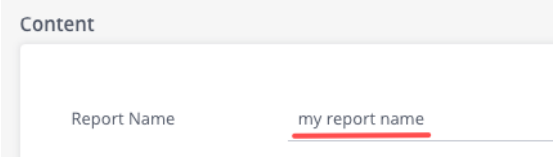


Picture 1. *An email report with modified translations*

There is another key in the template called "subject" which is used for the email subject:

```
"@reportManager/templates/base/subject":
```

You can set any value or use the reserved "{name}" value which will replace the email subject with the report name that a report designer configures for each report:



The result of the subject modification can be seen on Picture 1 above.

As of add-on version 1.10.0, all the emails may contain the warning message when the total size of the attachments is exceeded. For the base template, this warning text is configured via the translation *"attachmentsLimitExceededMsg"* translation key. The warning message will be

displayed in any case when the limit is exceeded (see the “Attachment Size Limit” configuration option in the Administrator Settings & Feature Management section of this document). You can modify the text according to your needs:

```
"@reportManager/templates/base/attachmentsLimitExceededMsg": "Warning! Attachment size limit (<%= attachmentsLimitSize%>MB) exceeded...
```

Having done the text configuration, using the default template, report recipients may get the following warning in the emails when the attachment size exceeds the configured value:

to me

Warning! Attachment size limit (25MB) exceeded. All the attachments were excluded from the email. Please update dashboard or widget filters to reduce data size or ask your system administrator for help.

Hello Oleg Fil!

Also, you received a link(s):

http://10.50.13.162:30845/app/main%23/dashboards/656da01f21da17003935abf5

To add email template translations for other languages, copy and modify similar translations to other languages’ folders as described in the Adding new translations chapter.

Translating custom email templates

Now when you know how to add or modify translations for the default email template, let’s get to know how to translate custom email templates. For that, you need to add translations for every email template (by the template name) and every language that you would like to have it translated to.
For example, let’s imagine you have created a template named “**my custom template**”. The template content is the following:

```
<div>
   <h2>{{ greeting }} <%= recipient %>!</h2>
   <span>{{ disclaimer }}</span>
</div>
```

This template has two keys: “greeting” and “disclaimer” that you would like to translate. To replace the keys with the translated text you need to add translations into the translation files for each language that you want to translate to.
Let’s add English translations. For that, navigate to “translations/en-US/intl.ReportManager.email-templates.json” file and add translations for subject and the “greetings” and “disclaimer” keys. Make sure you specified the correct template name in the translation key - “**my custom template**”:

intl.ReportManager.email-templates.json

translations > en-US > intl.ReportManager.email-templates.json

```
1  {
2      "@reportManager/templates/base/subject": "{name}",
3      "@reportManager/templates/base/hi": "Hello",
4      "@reportManager/templates/base/receivedLinks": "Also, you received a link(s):",
5      "@reportManager/templates/base/attachmentsLimitExceededMsg": "Warning! Attachment size limit (<%= attachmentsLimitSize%>MB) exceeded. All the attachments were excluded from the email. Please update
6
7      "@reportManager/templates/my_custom_template/subject": "A report '{name}' has been generated",
8      "@reportManager/templates/my_custom_template/greeting": "Greetings!",
9      "@reportManager/templates/my_custom_template/disclaimer": "My Important Disclaimer",
10     "@reportManager/templates/my_custom_template/attachmentsLimitExceededMsg": "Warning! Attachment size limit of <%= attachmentsLimitSize%>MB reached and attachments were not included in the email.",
11
```

It is mandatory that you add translations for the "*attachmentsLimitExceededMsg"* in all of your custom templates, otherwise the email will not contain the translated text, but only a variable name.

The warning message will be displayed in any case when the limit is exceeded. However you have the ability to manually configure the style and text via the template if-block that can be added to your template. It may look similar to this:

```
<% if (attachmentsLimitExceeded) {%>
        <div style="color:red;">
           {{ attachmentsLimitExceededMsg }}
        </div>
<% }%>
```

Now you're ready to save the changes and make sure you set "my custom template" as a default (see how here: Configuring Email Templates) The email reports received by your recipients will be translated to English according to the translation file that was configured.

Adding Reports

After you have installed and configured the Report Manager, you can begin to add reports.

To add a report:

1. In Sisense, click Report Manager in the top navigation bar.
2. In the Report Manager, click **Add New Reports** -

3. Enter the following information:

Field	Required	Description
Report Name	yes	Unique name of the report per owner.
Dashboard	yes	Select the dashboard the report is based on.
Custom Filters	no	Custom filters will apply for all recipients and override any existing dashboard filters. Editing of the custom filters is done to the filters JAQL query directly. For convenience, you can fetch the current dashboard filters by clicking the "Fetch dashboard filters" and update the imported JAQL query
Priority	no	Is presented only for Admins. Normal by default. Take into place when there are a few reports that should be

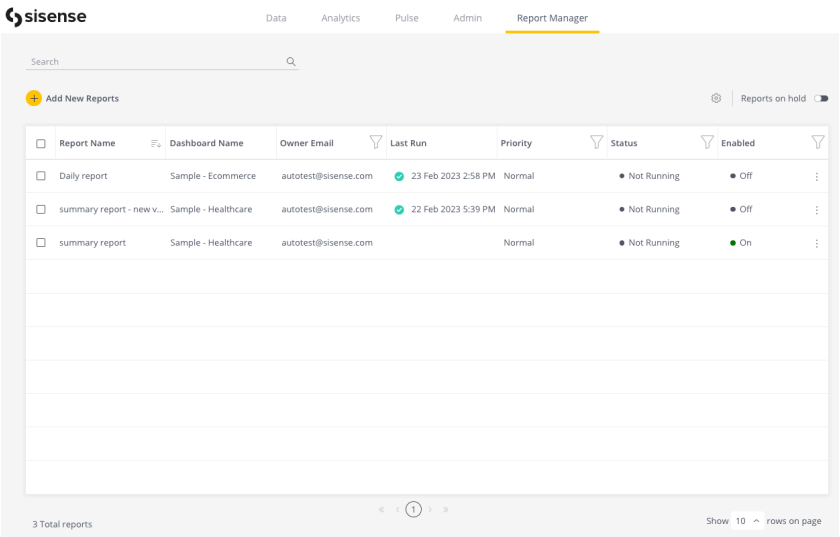
		exported at the same time and there is not enough capacity to export all due to concurrency settings. In this case, the Scheduler will export the High priority reports first.
Format	yes	Select the format of the report, CSV, Excel, PDF, or a Link to the dashboard. You can select one or multiple formats. CSV files are generated only for Pivot and Table widgets. Each widget is exported as a separate file. Excel files are generated either for Pivot widgets only (each widget as a separate file) or a single Excel file with the widgets that can be exported either to CSV or Excel. **Note:** In case Jasper Report plugin is installed, there is an additional format option to export the dashboard to either PDF or Excel using the configured Jasper template. In case the option is selected, all the widgets with a configured Jasper template are exported into a single file.
Archive to	no	Required if recipients are not specified. This is a shared folder location where the expected value is a valid UNC path. You must ensure that the server has access to this path. All exported files will be saved to this location with the file name: ‘ReportName_YYYY_MM_DD[identifier]‘ If **Overwrite existing files** is selected, the last identifier part is not added to the file name and old files with the same name will be overwritten. If recipients are not specified, the report will be archived with the report owner permissions. In case archiving is done to an SFTP server, a server must be selected before specifying the path on the server. **If archiving on a remote server shared folder, make sure the full path exists on the destination server. In addition, the folder has to be shared between the servers.**
Recipients	no	Required if **Archive to** is not specified. Enter one or more recipients. As you begin to type, the relevant Sisense users’ email addresses are displayed. Select the relevant users or groups. The Sisense dashboard **has to be shared with a user or group,** otherwise the user/group will not appear in the autocomplete list. If a report has 2 recipients - a group and a single user, and the user is also part of this group, the report will be sent only once to the recipient. Non-Sisense users will get reports for either the special non-sisense user configured in the settings or the report owner credentials. See the “Configuring the Report Manager” chapter

		for an example **Note:** Administrators can disable the option to send reports to non-Sisense user recipients. See the “Configuring the Report Manager” chapter for an example.
Send error notification to		Recipients that will get an email in case there was an export error
Schedule	yes	Select either **Event** or **Time** **Event**: Enter a list of event names separated by a comma. All the events should be triggered after the report was last executed for the report to be executed again. To trigger an event use the '/report_manager/events' endpoint in the REST API. **Time Based:** Select a frequency: 1. **One Time**: Enter the time in the **At** field and the report will be sent one time. 2. **Hours**: Define what hour to begin sending the report and when to finish. 3. **Days**: Select every N day of the month (starting from the 1st day) at a specific time. For example, if you enter 5, the report will be exported every five days: 1, 6, 11, 16, 21, 26, 31. The month after the report will be exported again on day 1 of the month. 4. **Week**: Enter the start and end date in addition to which days and time the report should be sent on. 5. **Monthly**: Enter the day and time of the month the report should be sent.

4. Click **Done**. The report is added to the Report Manager page.

Managing Reports

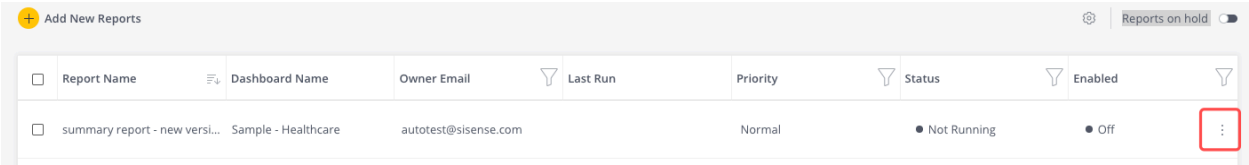
After you have added some reports to the Report Manager, you can manage them from the main page of the Report Manager.



The Reports table displays a list of reports and the following information:

1. **Report Name**: The name of the report.
2. **Dashboard Name**: The name of the dashboard the report is based on.
3. **Owner Email**: The name of the owner of the report.
4. **Last Run**: The date and time the report was sent. The icon indicates if the report was sent successfully.
5. **Priority**: The priority of the report, High or Normal.
6. **Status**: The current status of the report., Not running, Pending, or Running.
7. **Enabled**: Indicates if the report is scheduled to be exported or not.

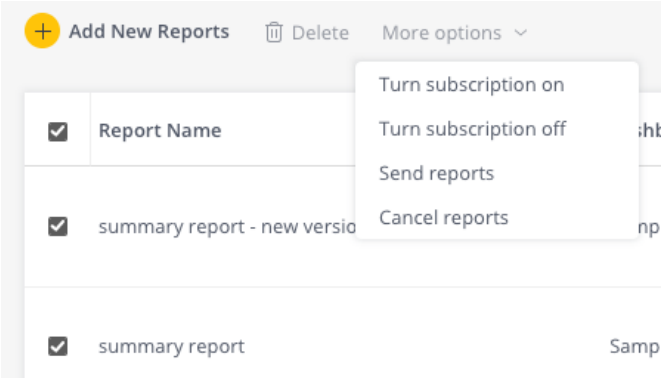
For each of these fields, you can sort or filter the information displayed. Click or in the headers to see the available sorting and filtering options. In addition, at the end of each row you can open the report's menu that includes the following options:



- **Edit**: Edit the report. This opens the same screen as the **Add New Reports** button, but with your current report's details.
  Duplicate: Create a copy of the report. The copied report has (1) added to the report name and is disabled by default.
- **Delete**: Delete the report.
- **Turn subscription on/off**: Turn the subscription on or off. Turning a subscription off does not stop running reports, only prevents future reports from being sent. Reports that are turned off will be deleted from the pending queue.

- **Send Report/Cancel Report**: Activate or cancel the report. This changes the status to Running/Not Running.
- **Reports on hold**: Set all reports to on-hold if you want to stop sending all reports and clear your queue. Reports will not be sent until this option is disabled.

You can delete multiple reports, modify multiple subscriptions, or send and cancel multiple reports from the Reports table in a single action. When you select a report by clicking the checkboxes on the left side of the table, additional options are displayed above the table.



Select the relevant reports and then click the action you want to perform on the selected reports.

Setting Permissions

Your permissions determine what reports you can see and what actions you can perform. You can manage your users' permissions through the REST API **report_manager/permissions** end points (GET and POST).

You can set your users' permission by setting the boolean values below to true or false:

- **edit**: Allows the user to edit a report.
- **edit all**: Allows the user to edit all reports including reports made by other users.
- **create**: Allows the user to create reports.
- **display all**: Allows the user to view all system reports.
- **delete**: Allows the user to delete logged in user reports.
- **delete all**: Allows the user to delete all reports including reports made by other users.
- **run now**: Allows the user to run logged in user reports.
- **run now all**: Allows the user to run all system reports including reports made by other users.
- **high priority**: Allows the user to set reports as high priority.
- **cancel**: Allows the user to cancel logged in user reports.
- **cancel all**: Allows the user to cancel all reports including reports made by other users.
- **report manager access**: Gives the user role access to the Report Manager.

Note: If the basic level permission of the action is **false**, even if the extended permission is **true** the user cannot access this report. For example, in case ‘edit’ is **false**, but ‘editAll’ is **true**, the user cannot edit any report.

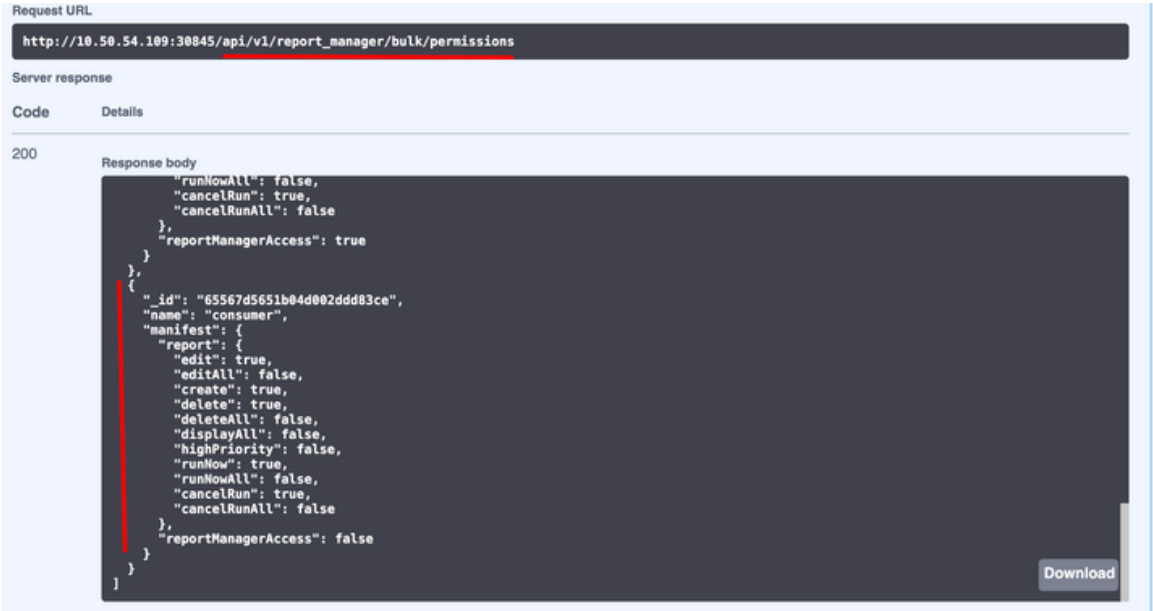
Note: Only Administrators have access to modify role permissions.

Viewer Access

As of version 1.10.6 and Sisense version L2023.11, Report Manager allows users with Viewer (consumer) roles to access Report Manager and schedule reports for themselves and other users. To enable this functionality the add-on has to be configured

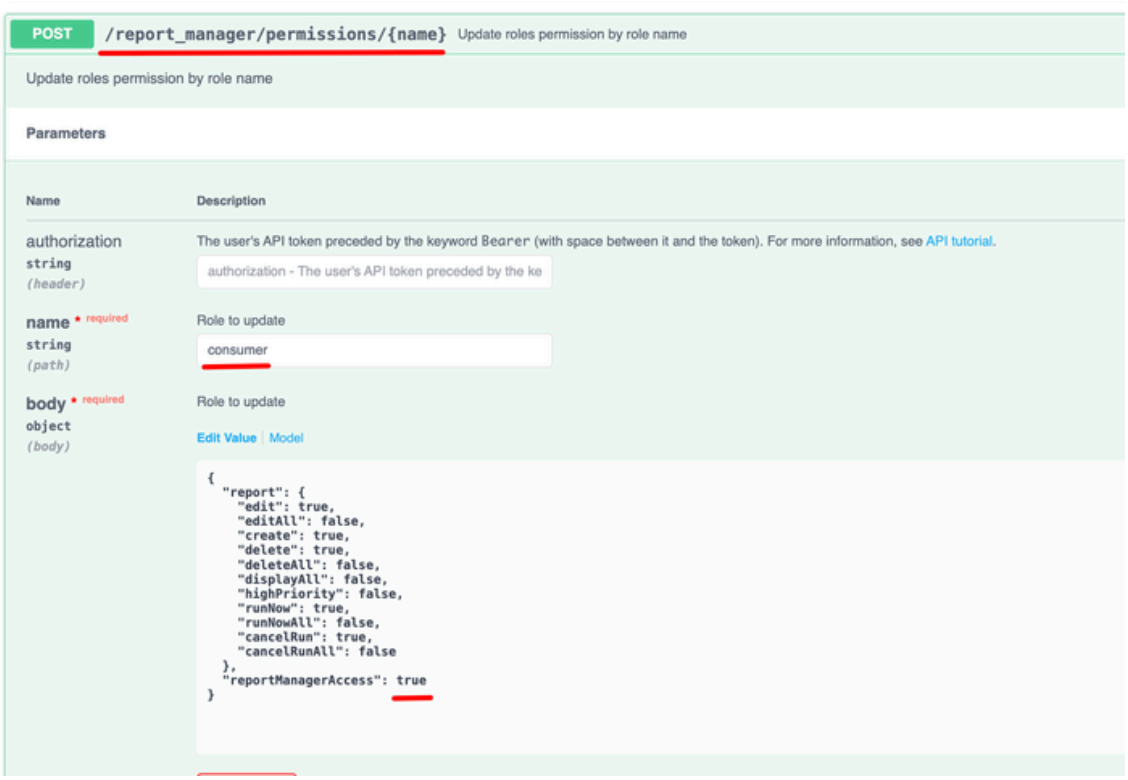
1. Set add-on permissions for “Consumer” via rest API.

    a. Go to api/v1/report_manager/bulk/permissions and check permissions for “consumer”:

    b. 

    c. Copy the manifest object for “consumer”

    d. Navigate the POST /report_manager/permissions/{name} API and use the copied object to edit the “consumer” role permissions. Make sure “reportManagerAccess” is set to “true”. Configure the remaining properties if needed.

e. 

2. In order to let viewers select other users as recipients, it is required to allow viewers to query users and groups via API. For that, go to **Admin - Rest API - v0.9** tab and find POST /roles/{idOrName}/manifest/{path}. Then click on “Try it out” and set the parameters as below once for “manage/users” and once for “manage/groups” manifest path and click “Execute” button:

POST `/roles/{idOrName}/manifest/{path}` Updates a user role manifest by role ID or name.

add manifest by id or name and path

Parameters

Name	Description
idOrName * required `string` *(path)*	The name or ID of the role. consumer
path * required `string` *(path)*	Encoded path to the manifest. Enter the path to the setting that you want to change as it appears in enter dashboards/filters/. For creating dashboards, enter /dashboards. See the reference table abo manage/users
manifest *(body)*	The updated manifest object. Defines whether to enable or disable the setting. For example, to ena Edit Value | Model `{ "get": true }`

POST `/roles/{idOrName}/manifest/{path}` Updates a user role manifest by role ID or name.

add manifest by id or name and path

Parameters

Name	Description
idOrName * required `string` *(path)*	The name or ID of the role. consumer
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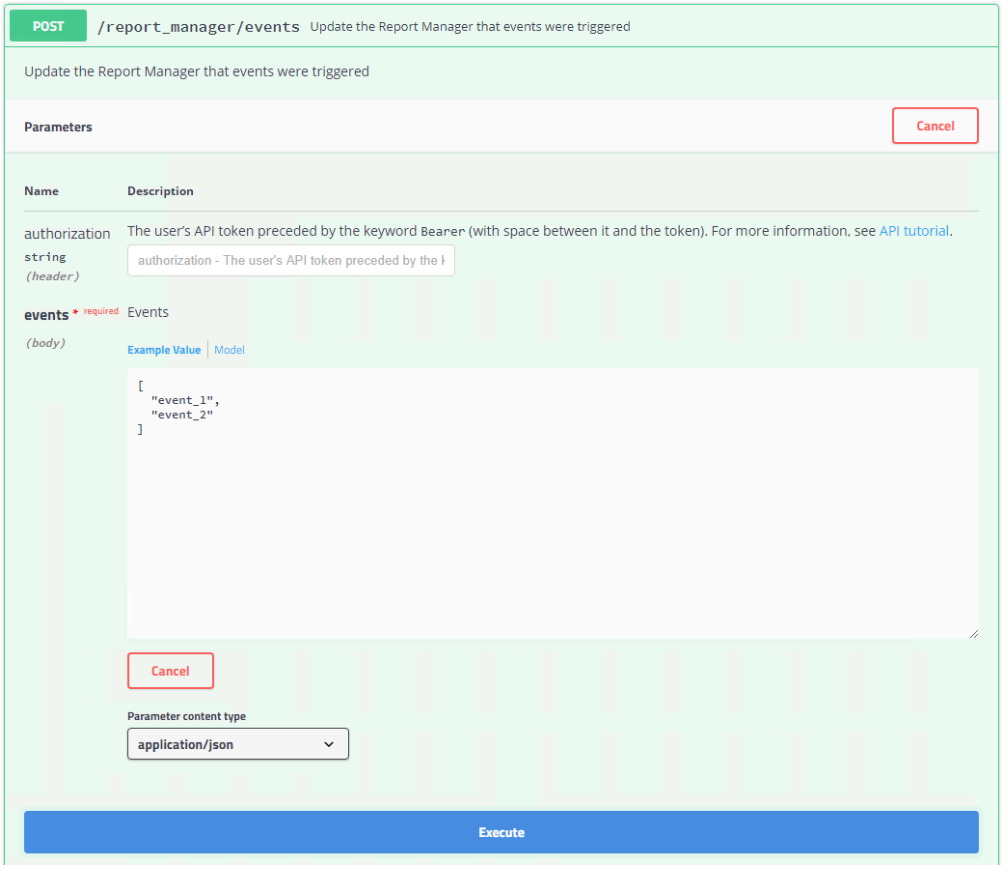
manifest *(body)*	The updated manifest object. Defines whether to enable or disable the setting. For example, to ena Edit Value | Model `{ "get": true }`

Make sure allowing users with a “viewer” role to query other users and groups is not a security concern for your organization.

Additional Information

1. Using SSL: The Report Manager cannot work if the SSL certificate is not valid.

2. Time Zones: The server uses UTC time zone to log the report creation date and update date.
3. All time-based reports that are recurring (not once) are saved with a CRON format. For more information read this: http://crontab.org/
4. Trigger event based reports: To trigger event-based reports, you should use the '/report_manager/events' POST REST API endpoint:

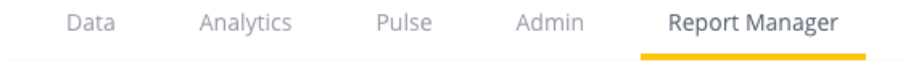


The endpoint body is an array of strings. Each string is the name of an event.
Above you can see an example where two events are triggered: event_1 and event_2.
When this endpoint is triggered the request time is saved as the last triggered time of the relevant event. An event-based report is exported only after all its events are triggered. An event is considered as triggered if it was triggered after the report's last execution date.

Limitations

1. If a recipient that did not have a Sisense user is added as a user, Report Manager Engine service/pod should be manually restarted.
2. Widget of type Table with aggregation are not exported to csv or excel.
3. You can only customize the branding and look-and-feel using the out-of-the-box feature. Changing the Look and Feel
4. Metadata translation is not applied to Excel and CSV files.

5. URL parameters are not passed to Report Manager when navigating using the top Sisense navigation bar



6. When Report Manager is used with the Export Modifications add-ons:
    a. **exportModification.maxColumnsNumber** and **exportModification.maxRowsNumber** options are not supported
    b. Combined Excel export results will not be modified by the Export Modification add-on.
7. When the multi-tenancy feature is enabled, Report Manager is only working with system tenant users. Full support for multi-tenancy will be added in later versions.
8. Users who authenticated to Sisense using Web Access Token don't have access to the report manager.
9. When using dashboard co-authoring functionality, private versions of dashboards are used for generating reports.

Troubleshooting common issues

Reports are failing:

- Alias - In case you are using an alias, make sure it is configured properly in Sisense.
- Dashboard Sharing - Make sure the dashboard to export is shared with all the report recipients.
  In addition, in case the report is shared with a non-Sisense user, the dashboard to export should be shared with the non-Sisense user configured in the Configuration Manager page.
- Plugin exceptions - In case of plugin exceptions, the PDF export will fail. Try disabling all plugins but the **Report Manager** plugin.
- Reports generation can consume a high percentage of the server resources. Use **Number of simultaneous reports** option from the settings to control the amount of reports that the Report Manager can run at the same time
- If proxy URL is configured, make sure to include the protocol as well, for example: *https://analytics.com*
- If a report is sent to an Admin user, make sure the admin user is shared with the dashboard

Large CSV files fail to export:

- Report Manager is installed on the External Plugins pod. The pod has 1GB RAM allocated but large CSV files might require more than that. In case of CSV file failures, you can increase the External-Plugins pod memory.

Report statuses are not updated live:

- Multi-node environment - make sure the load balancer and the firewall is configured to allow websockets.

Pivot Widgets are cut off when using custom filters

- If there is a custom PDF layout applied to the dashboard, the layout is respected even if custom filters are applied. That means the height of the Pivot Widget in the custom layout might not fit the new size of the widget once custom filters are applied, hence the Pivot Widget is cut off.
  Try removing the custom PDF layout by making any changes to the dashboard layout, for example: change the position of a widget.

If you need extensive DEBUG logs from nodemailer (to troubleshoot email sending), they will only be written into the external plugins logs under the following conditions:

- email_server.debug = true
  Go to the configuration page http://[sisense-domain]/app/configuration/system.
  a. Click 5 times on the logo to unlock settings.
  b. Select Base Configuration tab.
     Find chapter Email_server and enable parameter **Debug**
  c. Press the “Save changes” button.
- The reportManager.logDebugMsg option is enabled.
  Assuming you’re still on the configuration page:
  d. Select External-Plugins-Service tab.
     Find chapter Report Manager and enable parameter **reportManager.logDebugMsg**
  e. Press the “Save changes” button.
- The Log Level of external plugins is set to DEBUG or TRACE.
  Assuming you’re still on the configuration page:
  f. Select External-Plugins-Service tab.
     Find chapter Log Level and enable parameter **Log Level** to “Debug” or “Trace”
  g. Press the “Save changes” button.

  Only when all three conditions above are met will the DEBUG logs from nodemailer appear in the external plugins logs.

There is an empty Excel file after Export to Excel V2 was enabled/disabled

Please restart the “external-plugins“ pod after enabling/disabling “Export to Excel V2“ or “Export to PDF and Image V2“.