Business Insight

User Guide

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Use Business Insight

What is Business Insight?

Business Insight allows you to showcase your Perceptive Content data using a ready-to-run library of reports as well as the reports created by the reports Insight Author user.

In Perceptive Content, you can view, run, and archive instances of the reports used in your enterprise. Flexible output allows you to run, view, and save instances of a report as an HTML page, a PDF document, an XML file, or as a Microsoft Excel spreadsheet. You can then import instances of the report as Perceptive Content documents or distribute instances of the report instantly using e-mail, shared file locations, or FTP.

Business Insight is an optional component of your Perceptive Content system and requires an additional license. When this component is installed and configured, every user in your enterprise can run and view reports.

Business Insight allows you to perform the following actions.

- Make more informed business decisions with dashboards regarding ECM-supported processes.
- Improve process and workflow efficiencies through advanced analytic tools and reporting.
- Expedite audits across your enterprise and provide nonintrusive system transparency.
- Quickly identify deficiencies and discrepancies within your content and data repository.
- Manage and measure productivity using standard and consistent reporting.
- Provide all Perceptive Content users with the metrics they need for system-wide report access.

Work with reports

Work with reports

Email a report

To email a saved version of a report in PDF, Excel, or XML format as a link or an attachment, or email a report in HTML format as a link, complete the following steps.

To set advanced email options for a report, you must use an output profile.

1. In the **Perceptive Content** toolbar, click **Reports.**
2. In the **Views** pane, expand the report category and click the report.
3. In the **Reports** toolbar, click the **Prior Versions** button.
4. Under **Report date**, select the run date and time of the report you want to email.
5. In the **Select Report Version** dialog box, under **File type**, select the format to email.
6. Click **OK**.

7. In the **Explorer** toolbar, click the **Email** button.
8. In the **Email** dialog box, complete one of the following procedures.

Situation	Steps
Use an output profile for email settings	1. In the **Profile** box, select the appropriate output profile to use to email the report. 2. In the **Email** box, enter the recipient email addresses or leave the box blank to select the recipients in your email client. 3. Click **OK** to send the email.
Enter email settings manually	1. In the **Email** box, enter the recipient email addresses or leave the box blank to select the recipients in your email client. 2. In the **Method** list, select whether to email the report using a link or an Attachment. 3. Click **OK** to send the email. 4. If you left the **Email** box blank, select the email recipients in your email client and then click **Send**.

Enter values for a select and search prompt

To search for the values you want to select to include in prompt on a report that uses select and search prompts, complete the following steps.

1. In the select and search prompt page, in the **Keywords** area, type the value you want to include on the report or perform any of the following options.
   - To enter multiple values, separate the strings with a space character.
   - To use a wildcard character to search for values, type a percent (`%`) character in the string.

   Note: For example, an entry of `I%E` returns values such as image, incomplete, or issue.

2. Optional. To refine additional search options, click **Options** and perform any of the following actions.
   - To search for values that begin with the string you entered, select **Starts with any of these keywords**.
   - To search for values that begin with the first string you entered and include all other strings you entered, select **Starts with the first keyword** and **Contains all of the remaining keywords**.
   - To search for values that include any of the strings you entered, select **Contains any of these keywords**.
   - To search for values that include all of the strings you entered, select **Contains all of these keywords**.

- To define the case sensitivity of the strings you entered, select or clear the **Case insensitive** check box.

3. Click the **Search** button.
4. In the **Results** list, select the values you want to include on the report and click the **Insert** button to move the values to the **Choices** list. If you do not select any values in this prompt, all possible values appear on the report.

Import a report as a document

To import a saved PDF, Excel, or XML version of a report into Perceptive Content as a new document you can annotate, add to version control, and process in workflow, complete the following steps.

1. In the explorer grid, in the **Views** pane, under **Reports**, select the report.
2. In the **Reports** toolbar, click the **Import** button.

> **Note:** You cannot import an HTML report version as a document. To display a compatible format of the report in the viewer, click the **Prior versions** button on the **Reports** toolbar and select an output type to import.

3. In the **Insert Document** dialog box, enter the document information as you would when normally creating a document and then click **OK**.

Result The document opens in the viewer. Perform any of the various actions available in the viewer, such as modifying keys, inserting annotations, or opening the document in an associated application.

Run a report

To run a report to view the most recent data, complete the following steps.

1. In the **Perceptive Content** toolbar, click **Reports**.
2. In the **Views** pane, expand the report category and then click the report.
3. In the **Reports** toolbar, click the **Run** button.

   The report prompts open in a separate browser window.
4. In the prompt pages, select the parameters to include on the report and then click **Finish**.

   The report displays in the HTML format for this report. To generate the report in a different file format, click the **Format** button in the **Reports** toolbar and select your preferred format from the list.

Next You can email the report to other users or save the instance of the report to make it available to all users who can access the report. You can also save this report to your system in its current output version.

Save reports to file

To configure Business Insight to save all saved and scheduled report output versions to a file directory, complete the following steps.

1. On the computer where **Business Insight** is installed, click **Start > All Programs > ImageNow > Business Insight Configuration**.
2. In **Business Insight** Configuration, in the **Explorer** pane, click **Data Access > Content Manager**.

3. In the **Content Manager - Component Properties** pane, set the **Save report outputs to a file system?** value to **True**.
4. Click **Actions > Edit Global Configuration**.
5. In the **Global Configuration** dialog box, on the **General** tab, in the **Archive Location File System Root** box, set the **Value** to the file directory to which you want to save reports and then click **OK**.
6. Restart the **Business Insight** service.

Set a report as default view

To set a report accessible to you as the default view when you open Perceptive Content, complete the following steps.

1. On the **Perceptive Content** toolbar, click the **Reports** down arrow and then point to the report category.
2. Right-click the report and then select **Set as Default Action**.

View a prior version of a report

Your report manager sets the number of prior versions saved for each report. To view a prior run or scheduled version of a report, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Reports**.
2. In the **Views** pane, expand the report category and select the report you want to view.
3. On the **Reports** toolbar, click the **Prior Versions** button.
4. In the **Select Report Version** dialog box, Under **Reports** date, select the date and time the report ran or completed its schedule.
5. Under **File type**, select the output format in which you want to view the report and click **OK**.
6. If viewing the report in **Excel**, click **Open** when prompted.

Work with report roles

Work with report roles

Report roles

Perceptive Content users take one of the following roles when they interact with reports.

- View User. To view reports, you must grant the user the Read, Execute, and Traverse permissions to the report folder or report in Cognos. Refer to the IBM website for Cognos capabilities and permissions documentation. To view reports in Perceptive Content Client, the user must also have the Reports > View privilege in Management Console.
- Author User. To create and modify customized Business Insight reports, the user must be a member of the Cognos Author role. To view reports in Perceptive Content Client, the user must also have the Reports > View privilege in Management Console.
- Scheduling. To schedule Business Insight reports, the user must have the Write permission to a report folder or report in Cognos.

- BI Owner. The BI Owner role provides the user the necessary privileges to manage or administer and author under one role assignment. However, to access the Reports button on the Perceptive Content toolbar, another manager-level user must assign the BI Owner the Global > Reports > View and the Reports > View privileges in Management Console.

Modify the BI Owner

The BI Owner role provides the user the necessary privileges to manage or administer and author under one role assignment. You select the BI Owner during the Business Insight installation process but you can switch the BI Owner credentials to another user at any time. To change the BI Owner role to a different user account, complete the following steps.

1. On the system where you installed **Business Insight**, in the **Program Files > ibm > Cognos > c10 > configuration** folder, open the *INAuth_Config_ImageNow.properties* file in Notepad.
2. In the properties file, following the text `biowner=`, replace the user name of the current BI Owner with a valid **Perceptive Content** user name.
3. Click **File > Save**.
4. Run the BIIntegrator.
5. To change the BI Owner immediately, restart the Cognos service.

Result The Perceptive Content Custom Authenticator stores the BI Owner user in a time-based cache. It may take up to thirty minutes before the new role assignment is in effect, but restarting the Cognos service changes the BI Owner immediately.

Add a report author

To designate a user as a report author, complete the following steps.

1. Log in to the Cognos Connection Portal and go to the IBM Cognos Administration section.
2. Select the **Security** tab, and under **Users, Groups, and Roles**, select **Cognos**.
3. On the **Authors** role, click the **Set properties - Authors** option.
4. Select the **Members** tab and click **Add**.
5. On the **Select entries** screen, click the **Perceptive** directory.
6. Check the users you want to add to the **Role** and click the arrow moving them into the **Selected entries** section.
7. When you are finished, click **OK**.

Use the Report Library

Use the Report Library

What is the Report Library?

The Report Library is a collection of ready-to-run reports used to view details about the configuration and use of your Perceptive Content environment.

All users in your Perceptive Content enterprise can access the Report Library using the Reports button on the Perceptive Content toolbar.

This catalog describes all the reports currently available in the Report Library. The reports are divided into the following categories.

- `Administrative Reports` that provide snapshots of system configuration, security, and auditing
- `Dashboards` that provide high-level graphical summaries of your item processing
- `Document Reports` that provide details about specific actions taken on documents, including scanning and annotations
- `Records Management Reports` that provide details about documents under retention policies
- `Sector-Specific Reports` that provide details specific to your business sector, such as Accounts Payable and Healthcare
- `Task Reports` that provide details about document task activity, including assignment and timely completion
- `Workflow Reports` that provide routing and cycle data at the workflow process or workflow queue level

This help system outlines the role each report plays in your environment, what information is used to run the report, and what information appears on each report. Within each report category, reports are listed in alphabetical order for quick reference. To view a PDF sample of each report in the Report Library, click the link at the end of each report description. The PDF launches in a new window.

Your report authors can create custom reports for your library at any time, and your report managers can copy, rename, and delete any report in the library. If you cannot find a help topic associated with the report you selected, contact your report author or manager.

Move the Report Library

To move an exported report library package from one Business Insight environment to another, complete the following steps on the computer where Business Insight is installed.

Prerequisite Before you do this procedure, you must first create the export for your report library.

1. Access the *[drive]:/Program Files/cognos/c10/deployment* directory and verify that the library package you want to import appears.

2. Open an Internet Explorer web browser and access the following URL, where **[host name]** represents the name of the **Business Insight** server computer and log into the interface: `https://[host name]/ibmcognos`
3. On the **Launch menu** page, select **IBM Cognos Administration**.
4. On the **Configuration** tab, in the left pane, click **Content Administration**.
5. In the **Administration** toolbar, click the **New Import** button and complete the following substeps.
    1. Under **Deployment archive**, select the report library package to import and click **Next**.
    2. Optional. Change the name, description, or screen tip for the package and click **Next**.
    3. Under **Public folders content**, select the check box in the title bar to import all report folders or select the check box of the folders you want to import.
    4. Optional. Under **Options**, modify the import settings as needed. These settings default from the export used to create the package.
6. Click **Next** until you reach the **Action** page.
7. Under **Action**, complete one of the following options.
    - To export the library, click **Save and run once**.
    - To export the library on a regular interval, click **Save and schedule**.
    - To save the export settings and manually run the export later, click **Save only**.
8. Click **Finish**.
9. If scheduling, set the export schedule.
10. If prompted, click **OK**
11. Open **Perceptive Content** and verify that the updated report library package appears in the list.

Next For all reports created or modified by your report author, validate the report specification.

What are administrative reports?

Reports in the Administration category enable you to analyze your Perceptive Content environment in the following ways:

- `Configuration`: Determine how your Perceptive Content environment is configured, including workflow queue setup and workflow queue attributes.
- `Security`: View access privileges for users, groups, and Perceptive Content features.
- `Auditing`: Explore what actions were performed in your Perceptive Content system, when they were performed, and who performed the actions.

What are dashboards?

Dashboards in the Report Library provide very high-level graphical information about your Perceptive Content environment.

You can use dashboards to view a high-level picture of the following details.

- The number of items currently in workflow
- The working states of workflow items and tasks
- The location and assignment of workflow items and tasks

What are document reports?

The document reports in the Report Library allow you to view the static properties and processing details of the documents in your environment.

These reports are useful when analyzing the following details.

- `Capture`: Determine how many documents were captured and the users involved with the capture process.
- `Annotations`: Identify the documents your users annotated within a range of dates.
- `Digital signatures`: Identify the documents users signed within a range of dates and the reasons documents were signed.

What are records management reports?

Reports in the Records Management category allow you to monitor the retention lifecycle of your documents, including those under retention policies and retention holds.

These reports are useful when analyzing the following details.

- `Disposition`: Generate a certificate of destruction for your managed documents.
- `Holds`: Identify the documents under a legal or audit hold.
- `Policy configuration`: Analyze the setup of your retention policies and identify documents managed and unmanaged by your policies.

What are Accounts Payable reports?

Sector-specific reports in the Accounts Payable category enable you to analyze your invoice and purchase order data.

Using the Open Payables report, you can track the payment status of all invoices. The Accounts Payable Accruable by Custom Property report returns total payment information for all invoices in a drawer.

What are healthcare reports?

Reports in the Healthcare category enable you to analyze your environment as it pertains to the healthcare sector.

Using these reports, you can quickly identify the deficiencies for patient charts and documents according the assigned physician.

What are task reports?

Reports in the Tasks category allow you to analyze your task data and quickly identify overdue and incomplete tasks.

These reports are useful in analyzing the following details.

- `Completion rate:` Determine the amount of time your users require to complete tasks.
- `Due date:` Quickly identify overdue and incomplete tasks for documents and folders.

What are workflow reports?

Workflow reports enable you to identify bottlenecks in your workflow processing and determine trends in workflow processing.

These reports are useful in analyzing the following details.

- `Volume`: Determine the number of workflow items being processed in workflow and identify any processing bottlenecks.
- `Processing time`: Identify where you can streamline the document and folder processing steps in your workflow.
- `Completion`: Evaluate the amount of time your organization spends processing documents and folders in workflow.

Administrative Reports

Automated System Queue Properties

The Automated System Queue Properties report allows you to view the convert form, integration, submit to content, and transfer automated system queues in the selected workflow processes and the properties of each automated system queue configured in Workflow Designer.

Details

For each selected workflow process, the report displays each convert form, integration, submit to content, and transfer automated system queue.

A convert form queue transforms a form into a single TIF file with the same behaviors as a document. This report displays the following properties for each convert form queue in the workflow process.

- Convert form queue name
- The workflow process and queue to route to after successful form conversion
- The workflow process and queue to route to if the form conversion fails
- The form data and presentation files associated with the form
- Whether JavaScript execution is enabled or disabled

To configure convert form queues in Workflow Designer, you must have an additional license.

An integration queue sends web service notifications to your business applications. This report displays the following properties for each integration automated system queue in the workflow process.

- Integration queue name
- The workflow process and queue to route to after successful web service notification
- The workflow process and queue to route to if a web service notification fails
- The number of days items remain in the queue after a successful web service notification
- The Envoy service operation associated with the endpoint

- The parameter map sets for the web service operation: either operation variables or operation parameter names

To configure integration queues in Workflow Designer, you must have an additional license.

A submit to content queue submits a document to Recognition Agent for bar code recognition. This report displays the following properties for each submit to content automated system queue in the workflow process.

- Submit to content queue name
- The workflow process and queue to route to after successful submission
- The workflow process and queue to route to after failed submission

A transfer queue saves documents in the queue to a specified OSM set. This report displays the following properties for each transfer automated system queue in the workflow process.

- Transfer queue name
- The workflow process and queue to route to after successfully saving to the OSM set
- The workflow process and queue to route to if saving to the OSM set fails
- The OSM set where the transfer queue saves documents

To configure transfer queues, you must have your OSM sets configured in your environment. If you do not specify an OSM set, the report appears blank for transfer queues.

Parameters

When you run the report, you must specify the workflow processes to include.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Client Action Audit Report

The Client Action Audit report allows you to view the details of documents for which an audited user performed an action audited in the ImageNow Client.

Details

For each user that is assigned under an audit template that includes any of the following conditions, this report displays the documents for which the user performed the associated action and the properties of the document.

- Email
- Export
- Fax
- Launch associated application
- Print

For data to appear on this report, you must configure an audit template that includes conditions with one or all of the above Client actions and assign at least one user to the audit template. The above actions are predefined actions for a client condition available in the Auditing pane of Management Console.

To return data on the report, you must set the audit log format to database format or both XML and database format.

For each client audit action performed in the specified time period, the report displays the following information.

- The user that performed the action
- The client action performed
- The date and time the use performed the action
- The properties of the document

Because you can perform multiple client actions for a document, the same document might appear multiple times on the report. Totaling information for the audit actions performed appears at the user and report level.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static date range or a relative date range
- For static, the audit date range
- For relative, the number of days, weeks, months, or years
- Users that performed the action
- The client actions performed

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any client actions performed yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any actions performed within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all client actions during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes actions performed in the last full calendar months specified, but it does not include any actions performed in within the current month. For example, if today is May 14, and you specify the last two months, the report includes all client actions between March 1 and April 30.

When you specify the past number of years, the report includes any actions performed within the last complete calendar year, but no actions performed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, client actions in 2009 and 2010 appear on the report.

If you select 15 or fewer users, the selected values appear in the Report Parameters box on the report. If you select more than 15 users, this box reads “Greater than 15 selected”. The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Document Types in Folders

The Document Types in Folders report allows you to determine the types of assigned or required documents that are missing from a folder.

Details

For the selected folder type, the report lists the document types assigned and the folders associated with the folder type. For each folder, the report displays the following information about the document types.

- The required icon in the column headings indicates required document types for the folder.
- Document types with a selected check box are present in the folder.
- Document types with a cleared check box are missing from the folder.

Parameters

When you run the report, you must specify the following parameters.

- Folder type
- Whether to use a static or relative date range
- For static, the folder creation date range
- For relative, the number of days, weeks, months, or years

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any folders created yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any folders created within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all folders created during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes folders created in the last full calendar months specified, but it does not include any folders created in within the current month. For example, if today is May 14, and you specify the last two months, the report includes all folders created between March 1 and April 30.

When you specify the past number of years, the report includes any folders created within the last complete calendar year, but no folders created in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, folders created in 2009 and 2010 appear on the report.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Documents Modified Audit Report

The Documents Modification Audit report allows you to view the details of documents an audited user modified within the specified time period.

Details

For each user that is assigned under an audit template that includes conditions associated with the actions below, this report displays the documents for which the user performed any of the following actions.

Condition	Performed By	Condition Components
Add document page	Adding a page to the document	Category: Document Action: Add Object: Document page
Copy document	Creating a new document by copying an existing document	Category: Document Action: Copy Object: Document

Condition	Performed By	Condition Components
Create document	Capturing a new document	Category: Document Action: Create Object: Document
Delete document	Deleting a document by sending it to the recycle bin	Category: Document Action: Send to Recycle Bin Object: Document
Delete document page	Deleting a single page from a document	Category: Document Action: Delete Object: Document page
Move document	Moving the document to a new folder location	Category: Document Action: Move Object: Document
Restore document	Restoring a document by removing it from the recycle bin	Category: Document Action: Restore Object: Document
Update document	Modifying a document by renaming it or changing a document key value, appending it to another document, or replacing it with another document	Category: Document

Condition	Performed By	Condition Components
		Action: Update Object: Document

For data to appear on this report, you must configure an active audit template with any or all of the above conditions and assign at least one user to the audit template. Some of the above conditions are predefined server conditions available in the Auditing pane of Management Console.

To return data on the report, you must set the audit log format to database format or both XML and database format.

You can specify two levels of sorting for the report data. For each grouping, the report list displays the following information.

- The audit action performed
- The date and time the user performed the action
- The document ID
- The folder location of the document before and after the action was performed
- The document keys before and after the action was performed
- The document property string that appears in the Document Keys Before Action and Document Keys After Action column uses the following values:

```
Drawer value^Field1 value^Field2 value^Field3 value^Field4 value^Field5
value^Document type value^Document name value
```

If the document is appended, replaced, or deleted, the drawer value is empty. If your administrator assigned an audit template to the All Agents group, actions performed by File System Agent, such as deleting, restoring, or moving documents, appear as separate audit entries under the File System Agent user. The user who initiated the action also appears on the report.

Parameters

When you run the report, you must specify the following parameters.

- Whether to group the report by user, drawer, Field1, Field2, Field3, Field4, Field5, or document type
- Whether to use a static date range or a relative date range
- For static, the audit date range
- For relative, the number of days, weeks, months, or years
- Audit conditions
- Whether to include or exclude system users
- Users that performed audit actions

To view the user who performed the audit action, you must select user as one of the sorting levels.

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

For example, user asmith deletes a document with four pages. ImageNow Server sends the document to the recycle bin. After the recycle bin interval passes, File System Agent deletes each page until the document is permanently deleted. On the report, an audit entry for Delete Document appears for user asmith, and four audit entries for Delete Document Page appear for user fs.agent.

When you specify the past number of days, the report includes any documents modified yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any documents modified within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents modified during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents modified in the last full calendar months specified, but it does not include any documents modified within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents modified between March 1 and April 30.

When you specify the past number of years, the report includes any documents modified within the last complete calendar year, but none in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents modified in 2009 and 2010 appear on the report.

If you select 15 or fewer users, the selected values appear in the Report Parameters box on the report. If you select more than 15 users, this box reads “Greater than 15 selected”. Selecting to group the report results by the same option at both levels does not adversely affect the report. Only users assigned to active audit templates with one of the associated conditions appear on the report. The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Documents Viewed Audit Report

The Documents Viewed Audit report allows you to view the properties of the documents an audited user viewed within the specified time period.

Details

For each user that is assigned under an audit template that includes the Document View condition, this report displays the documents the user viewed during the specified period and the document's properties. For data to appear on this report, you must configure an active audit template with the Document View condition and assign at least one user to the audit template. The Document View condition is a predefined server condition available in the Auditing pane of Management Console.

To return data on the report, you must set the audit log format to database format or both XML and database format.

You can specify two levels of sorting for the report data. For each grouping, the report list displays the following information.

- Date and time the user viewed the document
- The user that viewed the document
- The document's properties

Parameters

When you run the report, you must specify the following parameters.

- Whether to group the report by user, drawer, Field1, Field2, Field3, Field4, Field5, or document type
- Whether to use a static date range or a relative date range
- For static, the viewed date range
- For relative, the number of days, weeks, months, or years
- Users that viewed documents
- The document property values to include on the report

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any documents viewed yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any documents viewed within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents viewed during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents viewed in the last full calendar months specified, but it does not include any documents viewed within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents viewed between March 1 and April 30.

When you specify the past number of years, the report includes any documents viewed within the last complete calendar year, but none in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents viewed in 2009 and 2010 appear on the report.

If you select 15 or fewer users, document types, drawers, Field1, Field2, Field3, Field4, or Field5 values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The document key value prompts are optional. For document key values, if you do not make any selections in the prompts, this box reads “All values.”

Selecting to group the report results by the same option at both levels does not adversely affect the report. Only users assigned to active audit templates with a View Document condition appear on the report. The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

External Messaging Agent Monitoring Report

The Email Agent Monitoring Report allows you to view various statistics about messages processed in the Agent.

Details

The report includes the following sections, each monitoring a separate aspect of Email Agent.

Note: To return accurate Duration values for messages in the date range, you must enter information in the Start Date fields in External Messaging Agent. The report assigns a default start date of 1/1/1970 to messages with no given start date, which creates inaccurate data for each list in the report.

Message Status Count by Start Date

This chart illustrates the count of messages that existed in Email Agent during the set date range, grouped by start date. The messages are further grouped into their latest status, indicating the number of messages in each status per start date. The following are potential statuses: Stored Procedure Start, New, Processing, Complete, Error, Stored Procedure New, or Locked.

Message Status Counts

This list displays a full count of all messages that existed during the set date range, sorting them by type and then by name. All messages with a particular name are given separate counts for each message status. The following groupings are potential statuses: Stored Procedure Start, New, Processing, Complete, Error, Stored Procedure New, or Locked.

Duration Statistics

This list displays the average, minimum, maximum duration, and the standard deviation for all messages with a particular name during the set date range. Message names are sorted by type.

Most Recent Error Message

This list records the final message based on the user’s selection with an error status included in the set date range. The message’s ID, type, name, status, property name, property value, start time, and end time display.

Top Messages with the Longest Durations

This list displays the ten messages with the longest durations for the date range. The messages’ respective IDs, types, names, start times, end times, and durations display.

Messages to Troubleshoot

This list displays detailed information for messages selected in the “Select messages to troubleshoot” prompt during the report prompt phase. The messages’ respective IDs, types, names, statuses, property names, property values, start times, and end times display. This section only displays when messages are specified in the “Select messages to troubleshoot” prompt.

Parameters

When you run the report, you define the following parameters.

- Report sections to include
- Unit of measurement for date range - select from Days, Weeks, Months, Years, or Calendar Dates
- Length of the date range
- Message types - optional
- Message names - optional
- Messages to troubleshoot - optional

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Access Control Markings Group Security

The Access Control Markings Group Security report allows you to view the access control marking privileges granted or denied to a group for every access control marking in the system.

Details

For each access control marking, the list indicates the groups that have the Access and Apply privileges granted or denied for the marking. The Access Privilege and Apply Privilege columns indicate the privileges as follows.

- If the group has the privilege granted,  appears in the column.
- If the group has the privilege denied,  appears in the column.
- If the group does not have the privilege granted or denied, the column value is blank.
- If you view this report in Excel or XML format,  and  appear as + and -.

The report is grouped by picklist and then by access control marking. The report contains a section for each group. To appear on the report, an access control marking must have at least one associated privilege granted or denied to a group. You cannot view this report in PDF format.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Departments
- Groups in the selected departments

If you select 15 or fewer groups, the selected values appear in the Report Parameters box on the report. If you select more than 15 groups, this box displays "Greater than 15 selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Access Control Markings User Security

The Access Control Markings User Security report allows you to view the access control marking privileges granted to, denied to, or inherited by a user for each access control marking in the system.

Details

For each access control marking, the list indicates the users that have the Access and Apply privileges granted or denied for the access control marking. The Access Privilege and Apply Privilege columns indicate the privileges as follows.

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege granted or denied, the column value is blank.
- If the user is a Perceptive Manager, appears in the Role column.
- If the user is a Department Manager, appears in the Role column.
- If you view this report in Excel or XML format, and appear as + and -. and appear as (+) and (-). and appear as (P) and (D).

The report is grouped by picklist and then by access control marking. The report contains a section for each user. To appear on the report, an access control marking must have at least one associated privilege granted or denied to a group or user. Group members who inherit access control marking privileges from the group appear on the report as individual users. Only active users appear on the report. You cannot view this report in PDF format.

If you include users who are Perceptive Managers or Department Managers in the report, an icon representing each user's respective manager role appears in the list in the Role column. The Role column is empty unless a user is a Perceptive Manager or a Department Manager.

Privileges assigned directly to Perceptive Managers and Department Managers appear in the report. If managers have no privileges assigned directly to them, then the privilege columns in the list are blank. If a user has both the Perceptive Manager and the Department Manager roles, then the user displays as a Department Manager in the report.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Users
- Departments

If you select 15 or fewer users, the selected values appear in the Report Parameters box on the report. If you select more than 15 users, this box displays "Greater than 15 selected." The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Annotation Template Group Security

The Annotation Template Group Security report allows you to view the annotation templates associated with each annotation type and determine the privileges granted or denied to a group for an annotation that uses the template.

Details

For each annotation type, the report lists the annotation templates and the users or groups added to the template, and indicates whether the user is granted or denied the privilege to perform the following actions.

Privilege	Description
Create	Group members with this privilege can create a new annotation that uses the annotation template on a document.
Delete	Group members with this privilege can delete an annotation created with the annotation template from a document.
Hide	Group members with this privilege can hide an annotation created with the annotation template on a document.
Modify	Group members with this privilege can modify an annotation created with the annotation template on a document.
View	Group members with this privilege can view an annotation created with the annotation template on a document.

The columns indicate the privilege status as follows.

- If the group has the privilege explicitly granted, appears in the column.
- If the group has the privilege explicitly denied, appears in the column.
- If the group does not have the privilege explicitly granted or denied, the column value is blank.
- If you view this report in Excel format, and appear as + and -.

The report is grouped by annotation template with a section for each annotation type. Both active and inactive annotation templates appear on the report. You cannot view this report in PDF format.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Departments
- Groups in the selected departments

If you select 15 or fewer groups, the selected values appear in the Report Parameters box on the report. If you select more than 15 groups, this box reads “Greater than 15 selected.”

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Annotation Template User Security

The Annotation Template User Security report allows you to view the annotation templates associated with each annotation type and determine the privileges granted to, denied to, or inherited by a user for an annotation that uses the template.

Details

For each annotation type, the report lists the annotation templates and the users added to the template, and indicates whether the user is granted, denied, or inherited the privilege to perform the following actions.

Privilege	Description
Create	Users with this privilege can create a new annotation that uses the annotation template on a document.
Delete	Users with this privilege can delete an annotation created with the annotation template from a document.
Hide	Users with this privilege can hide an annotation created with the annotation template on a document.
Modify	Users with this privilege can modify an annotation created with the annotation template on a document.
View	Users with this privilege can view an annotation created with the annotation template on a document.

The columns indicate the privilege status as follows.

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege granted or denied, the column value is blank.
- If the user is a Perceptive Manager, appears in the Role column.
- If the user is a Department Manager, appears in the Role column.
- If you view this report in Excel or XML format, and appear as + and -. and appear as (+) and (-). and appear as (P) and (D).

The report is grouped by annotation template with a section for each annotation type. Both active and inactive annotation templates appear on the report. You cannot view this report in PDF format.

If you include users who are Perceptive Managers or Department Managers in the report, an icon representing each user's respective manager role appears in the list in the Role column. The Role column is empty unless a user is a Perceptive Manager or a Department Manager.

Privileges assigned directly to Perceptive Managers and Department Managers appear in the report. If managers have no privileges assigned directly to them, then the privilege columns in the list are blank. If a user has both the Perceptive Manager and the Department Manager roles, then the user displays as a Department Manager in the report.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Users
- Departments

If you select 15 or fewer users, the selected values appear in the Report Parameters box on the report. If you select more than 15 users, this box reads "Greater than 15 selected." The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Application Plan Group Security

The Application Plan Group Security report allows you to view the application plan privileges granted or denied to a group.

Details

For each application plan, the list indicates the groups added to the application plan, and indicates whether the following privileges have been granted or denied:

Privilege	Description
Link Documents	Group members with this privilege can create new documents based on an application plan or relink a document.
Auto Create Folders	Group members with this privilege can automatically create a folder when a document is linked using the application plan.
View	Group members with this privilege can run the active screen's configured view action.
Manage	Group members with this privilege can manage the application plan using the associated application plan designer. This is the only privilege available for Agent application plans.

The columns indicate the privilege status as follows:

- If the group has the privilege granted, appears in the column.
- If the group has the privilege denied, appears in the column.
- If the group does not have the privilege granted or denied, the column value is blank.
- If you view this report in XML or Excel format, and appear as + and -.

The report is grouped by application plan. Inactive application plans do not appear on the report. You cannot view this report in PDF format.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Departments
- Groups in the selected departments

If you select 15 or fewer groups, the selected values appear in the Report Parameters box on the report. If you select more than 15 groups, this box reads "Greater than 15 selected."

> **Note:** To view a sample of this report, see the Business Insight Sample Reports Guide.

Application Plan User Security

The Application Plan User Security report allows you to view the application plan privileges granted to, denied to, or inherited by a user.

Details

For each application plan, the list indicates the users added to the application plan, and indicates whether the following privileges have been granted, denied, or inherited.

Privilege	Description
Link Documents	Users with this privilege can create new documents based on an application plan or relink a document.
Auto Create Folders	Users with this privilege can automatically create a folder when a document is linked using the application plan.
View	Users with this privilege can run the active screen’s configured view action.
Manage	Users with this privilege can manage the application plan using the associated application plan designer. This is the only privilege available for Agent application plans.

The columns indicate the privilege status as follows.

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege granted or denied, the column value is blank.
- If the user is a Perceptive Manager, appears in the Role column.
- If the user is a Department Manager, appears in the Role column.
- If you view this report in Excel or XML format, and appear as + and -. and appear as (+) and (-). and appear as (P) and (D).

The report is grouped by application plan. You can run the report at the user or group level. Inactive application plans do not appear on the report. You cannot view this report in PDF format. The user who created the application plan appears on the report with all privileges granted.

If you include users who are Perceptive Managers or Department Managers in the report, an icon representing each user’s respective manager role appears in the list in the Role column. The Role column is empty unless a user is a Perceptive Manager or a Department Manager.

Privileges assigned directly to Perceptive Managers and Department Managers appear in the report. If managers have no privileges assigned directly to them, then the privilege columns in the list are blank. If a user has both the Perceptive Manager and the Department Manager roles, then the user displays as a Department Manager in the report.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Users
- Departments

If you select 15 or fewer users, the selected values appear in the Report Parameters box on the report. If you select more than 15 users, this box reads "Greater than 15 selected." The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

File Plan Hierarchy Summary

The File Plan Hierarchy Summary report displays information from the Summary pane in Management Console for all record categories and record folders in a file plan.

Details

The report retrieves information on the record categories in the selected file plans, and the record folders within those record categories. The following values display in the report for each file plan element.

Element	Values
File Plan	Name, Description
Record Category	Name, Description, Policy Name, Policy Authority, Cutoff Instructions, Vital Status, Review Cycle, Next Review Date, Last Review Date, and Last Reviewer
Record Folder	Name, Location in File Plan, Cutoff State, Closed State, Vital Status, Review Cycle, Next Vital Review, Last Vital Review, and Last Vital Reviewer

You cannot view this report in XML format.

Parameters

When you run the report, you must specify the following parameter.

- File plans to include in the report

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Department Group Security

The Department Group Security report allows you to view the department privileges granted or denied to a group.

Details

For each group, the list indicates the department privileges granted or denied in the following privilege categories.

Privilege	Description
Manage	Group members with the specified global privilege can perform the associated administrative action.
Records	Group members with the specified global privilege can perform the associated action for record content. To view records functionality, you must install a Records Manager license.
Administer User Privileges	Group members with the specified department privilege can assign privileges in the associated privilege category to other users.
Administer Group Privileges	Group members with the specified department privilege can assign privileges in the associated privilege category to other groups.

The columns indicate the privileges as follows.

- If the group has the privilege granted, appears in the column.
- If the group has the privilege denied, appears in the column.
- If the group does not have the privilege granted or denied, the column value is blank.
- If you view this report in XML or Excel format, and appear as + and -.

The report is grouped by group. You cannot view this report in PDF format.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Groups
- Departments

If you select 15 or fewer groups, the selected values appear in the Report Parameters box on the report. If you select more than 15 groups or departments, this box reads "Greater than 15 selected."

View report sample

Department User Security

The Department User Security report allows you to view the department privileges granted to, denied to, or inherited by a user.

Details

For each user, the list indicates the department privileges granted or denied in the following privilege categories.

Privilege	Description
Manage	Users with the specified department privilege can perform the associated administrative action.
Records	Users with the specified department privilege can perform the associated action for record content. To view records functionality, you must install a Records Manager license.
Administer User Privileges	Users with the specified department privilege can assign privileges in the associated privilege category to other users.
Administer Group Privileges	Users with the specified department privilege can assign privileges in the associated privilege category to other groups.

The columns indicate the privileges as follows.

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege explicitly granted or denied, the column value is blank.
- If you view this report in XML or Excel format, and appear as + and -. and appear as (+) and (-).

The report is grouped by user. Only active users appear on the report. You cannot view this report in PDF format.

This list also indicates if a user in the report is a Department Manager for a department included in the report. If a Department Manager has no directly assigned privileges but is included in the report, the privilege row displays no assigned privileges.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Users
- Departments

If you select 15 or fewer users, the selected values appear in the Report Parameters box on the report. If you select more than 15 users or departments, this box reads “Greater than 15 selected.” The user prompt is a select and search prompt.

View report sample

Document Type Group Security

The Document Type Group Security report allows you to view the document type privileges granted or denied to a group.

Details

For each document type, the list indicates the groups that have privileges granted or denied in the following privilege categories.

Privilege	Description
Documents	Group members with the specified document privilege granted can perform the action for documents associated with the document type.
Explorer/Folder Viewer	Group members with the specified Explorer/Folder Viewer privilege can perform the action for documents associated with the document type in ImageNowExplorer.

The columns indicate the privileges as follows.

- If the group has the privilege granted, appears in the column.
- If the group has the privilege denied, appears in the column.
- If the group does not have the privilege granted or denied, the column value is blank.
- If you view this report in Excel or XML format, and appear as + and -.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Departments
- Groups in the selected departments
- Document types in the selected departments

If you select 15 or fewer groups, the selected values appear in the Report Parameters box on the report. If you select more than 15 groups, this box reads “Greater than 15 selected.”

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Document Type User Security

The Document Type User Security report allows you to view the document type privileges granted to, denied to, or inherited by a user.

Details

For each document type, the list indicates the users that have privileges granted, denied, or inherited in the following privilege categories.

PrivilegeDescription
DocumentsUsers with the specified document privilege granted can perform the action for documents associated with the document type.
Explorer/Folder ViewerUsers with the specified Explorer/Folder Viewer privilege can perform the action for documents associated with the document type in ImageNowExplorer or FolderViewer.
ViewerUsers with the specified Viewer privilege can perform the action for documents associated with the document type in ImageNowViewer.
Document ManagementUsers with the specified document management privilege can perform the action for the documents associated with the document type in version control.

The columns indicate the privileges as follows.

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege granted or denied, the column value is blank.
- If the user is a Perceptive Manager, appears in the Role column.
- If the user is a Department Manager, appears in the Role column.
- If you view this report in Excel or XML format, and appear as + and -. and appear as (+) and (-). and appear as (P) and (D).

The report is grouped by user with a section for each document type. Only active users appear on the report. Both active and inactive document types appear on the report. You cannot view this report in PDF format.

If you include users who are Perceptive Managers or Department Managers in the report, an icon representing each user's respective manager role appears in the list in the Role column. The Role column is empty unless a user is a Perceptive Manager or a Department Manager.

Privileges assigned directly to Perceptive Managers and Department Managers appear in the report. If managers have no privileges assigned directly to them, then the privilege columns in the list are blank. If a user has both the Perceptive Manager and the Department Manager roles, then the user displays as a Department Manager in the report.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Users
- Departments
- Document types in the selected departments

If you select 15 or fewer users, the selected values appear in the Report Parameters box on the report. If you select more than 15 users, this box reads "Greater than 15 selected." The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Drawer Group Security

The Drawer Group Security report allows you to view the document privileges granted or denied to a group for a drawer.

Details

For each drawer, the list indicates the groups that have privileges granted or denied in the following privilege categories.

Privilege	Description
Content	Group members with the specified content privilege granted can perform the action for documents, folders, and shortcuts in the associated drawer.
Documents	Group members with the specified document privilege granted can perform the action for documents in the associated drawer.
Folders	Group members with the specified folder privilege granted can perform the action for folders in the associated drawer.
Explorer/Folder Viewer	Group members with the specified Explorer/Folder Viewer privilege can perform the action for items in the associated drawer in ImageNowExplorer or FolderViewer.
Viewer	Group members with the specified Viewer privilege can perform the action for documents in the associated drawer in ImageNowViewer.
Document Management	Group members with the specified document management privilege can perform the action for the documents in the associated drawer in version control.
Batch	Group members with the specified batch privilege can perform the action for the documents in the associated drawer in batch processing.

The columns indicate the privileges as follows.

- If the group has the privilege granted,  appears in the column.
- If the group has the privilege denied,  appears in the column.
- If the group does not have the privilege granted or denied, the column value is blank.
- If you view this report in Excel or XML format,  and  appear as + and -.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Departments
- Groups in the selected departments
- Drawers in the selected departments

If you select 15 or fewer groups or drawers, the selected values appear in the Report Parameters box on the report. If you select more than 15 groups or drawers, this box reads "Greater than 15 selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Drawer User Security

The Drawer User Security report allows you to view the document privileges granted to, denied to, or inherited by a user for a drawer.

Details

For each drawer, the list indicates the users that have privileges granted, denied, or inherited in the following privilege categories.

Privilege	Description
Content	Users with the specified content privilege granted can perform the action for documents, folders, and shortcuts in the associated drawer.
Documents	Users with the specified document privilege granted can perform the action for documents in the associated drawer.
Folders	Users with the specified folder privilege granted can perform the action for folders in the associated drawer.
Explorer/Folder Viewer	Users with the specified Explorer/Folder Viewer privilege can perform the action for items in the associated drawer in ImageNowExplorer or

Privilege	Description
	FolderViewer.
Viewer	Users with the specified Viewer privilege can perform the action for documents in the associated drawer in ImageNowViewer.
Document Management	Users with the specified document management privilege can perform the action for the documents in the associated drawer in version control.
Batch	Users with the specified batch privilege can perform the action for the documents in the associated drawer in batch processing.

The columns indicate the privileges as follows.

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege granted or denied, the column value is blank.
- If the user is a Perceptive Manager, appears in the Role column.
- If the user is a Department Manager, appears in the Role column.
- If you view this report in Excel or XML format, and appear as + and -. and appear as (+) and (-). and appear as (P) and (D).

The report is grouped by user with a section for each drawer. Only active users appear on the report. You cannot view this report in PDF format.

If you include users who are Perceptive Managers or Department Managers in the report, an icon representing each user's respective manager role appears in the list in the Role column. The Role column is empty unless a user is a Perceptive Manager or a Department Manager.

Privileges assigned directly to Perceptive Managers and Department Managers appear in the report. If managers have no privileges assigned directly to them, then the privilege columns in the list are blank. If a user has both the Perceptive Manager and the Department Manager roles, then the user displays as a Department Manager in the report.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Users
- Departments
- Drawers in the selected departments

If you select 15 or fewer users or drawers, the selected values appear in the Report Parameters box on the report. If you select more than 15 users or drawers, this box reads "Greater than 15 selected." The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

eForms Group Security

The eForms Group Security report allows you to view the privileges granted to group members for an eForm.

Details

For each eForm, the list indicates the groups that have the following privileges granted or denied for the eForm:

Privilege	Description
Can Create	Group members can create an eForm.
Can Delete	Group members can delete an eForm
Can Modify	Group members can modify an eForm.
Can View	Group members can view an eForm.

The columns indicate the privileges as follows:

- If the group has the privilege granted, appears in the column.
- If the group has the privilege denied, appears in the column.
- If the group does not have the privilege granted or denied, appears in the column.
- If you view this report in Excel or XML format, and appear as + and -.

Parameters

When you run the report, you must specify the following parameters:

- Forms
- Groups

If you select 15 or fewer groups, the selected values appear in the Report Parameters box on the report. If you select more than 15 groups, this box reads "Greater than 15 selected."

eForms User Security

The eForms User Security report allows you to view the privileges granted to a user for an eForm.

Details

For each eForm, the list indicates the users that have the following privileges granted or denied for the eForm:

Privilege	Description
Can Create	Group members can create an eForm.
Can Delete	Group members can delete an eForm
Can Modify	Group members can modify an eForm.
Can View	Group members can view an eForm.

The columns indicate the privileges as follows:

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege granted or denied, appears in the column.

Parameters

When you run the report, you must specify the following parameters:

- Forms
- Users

If you select 15 or fewer users, the selected values appear in the Report Parameters box on the report. If you select more than 15 users, this box reads "Greater than 15 selected."

File Plan Group Security

The File Plan Group Security report allows you to view the privileges granted or denied to a group for a file plan.

Details

For each file plan, the list indicates the groups that have privileges granted or denied in the following privilege sections.

Privilege	Description
Content	Group members with the specified content privilege granted can perform the action for records, record folders, and record categories in the associated file plan.
Records	Group members with the specified record privilege granted can perform the action for records in the associated file plan.
Record Folders	Group members with the specified record folder privilege granted can perform the action for record folders in the associated file plan.
Explorer/Folder Viewer	Group members with the specified Explorer/Folder Viewer privilege can perform the action for items in the associated file plan in ImageNowExplorer or FolderViewer.
Viewer	Group members with the specified Viewer privilege can perform the action for records in the associated file plan in ImageNowViewer.

The columns indicate the privileges as follows:

- If the group has the privilege granted, appears in the column.
- If the group has the privilege denied, appears in the column.
- If the group does not have the privilege granted or denied, the column value is blank.
- If you view this report in Excel or XML format, and appear as + and -.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Departments
- Groups in the selected departments
- File plans in the selected departments

If you select 15 or fewer groups or file plans, the selected values appear in the Report Parameters box on the report. If you select more than 15 groups or file plans, this box displays "Greater than 15 selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

File Plan User Security

The File Plan Group Security report allows you to view the file plan privileges granted to, denied to, or inherited by a user.

Details

For each file plan, the list indicates the users that have privileges granted, denied, or inherited in the following privilege sections.

Privilege	Description
Content	Users with the specified content privilege granted can perform the action for records, record folders, and record categories in the associated file plan.
Records	Users with the specified record privilege granted can perform the action for records in the associated file plan.
Record Folders	Users with the specified record folder privilege granted can perform the action for record folders in the associated file plan.
Explorer/Folder Viewer	Users with the specified Explorer/Folder Viewer privilege can perform the action for items in the associated file plan in ImageNowExplorer or FolderViewer.
Viewer	Users with the specified Viewer privilege can perform the action for records in the associated file plan in ImageNowViewer.

The columns indicate the privileges as follows.

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege granted or denied, the column value is blank.
- If the user is a Perceptive Manager, appears in the Role column.
- If the user is a Department Manager, appears in the Role column.
- If you view this report in Excel or XML format, and appear as + and -. and appear as (+) and (-). and appear as (P) and (D).

The report is grouped by user with a section for each file plan. Only active users appear on the report. You cannot view this report in PDF format.

If you include users who are Perceptive Managers or Department Managers in the report, an icon representing each user's respective manager role appears in the list in the Role column. The Role column is empty unless a user is a Perceptive Manager or a Department Manager.

Privileges assigned directly to Perceptive Managers and Department Managers appear in the report. If managers have no privileges assigned directly to them, then the privilege columns in the list are blank. If a user has both the Perceptive Manager and the Department Manager roles, then the user displays as a Department Manager in the report.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Users
- Departments
- File plans in the selected departments

If you select 15 or fewer users or file plans, the selected values appear in the Report Parameters box on the report. If you select more than 15 users or file plans, this box displays "Greater than 15 selected." The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Folder Type Group Security

The Folder Type Group Security report allows you to view the folder type privileges granted or denied to a group.

Details

For each folder type, the list indicates the groups that have the Manage and Use privileges granted or denied for the folder type. The Manage Privilege and Use Privilege columns indicate the privileges as follows.

- If the group has the privilege granted, appears in the column.
- If the group has the privilege denied, appears in the column.
- If the group does not have the privilege granted or denied, the column value is blank.
- If you view this report in Excel format, and appear as + and -.

The report is grouped by folder type. Only active groups appear on the report. Both active and inactive folder types appear on the report. You cannot view this report in PDF format.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Departments
- Groups in the selected departments
- Folder types in the selected departments

If you select 15 or fewer folder types or groups, the selected values appear in the Report Parameters box on the report. If you select more than 15 folder types or groups, this box reads "Greater than 15 selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Folder Type User Security

The Folder Type User Security report allows you to view the folder type privileges granted to, denied to, or inherited by a user.

Details

For each folder type, the list indicates the users that have the Manage and Use privileges granted or denied for the folder type. The Manage Privilege and Use Privilege columns indicate the privileges as follows.

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege granted or denied, the column value is blank.
- If the user is a Perceptive Manager, appears in the Role column.
- If the user is a Department Manager, appears in the Role column.
- If you view this report in Excel or XML format, and appear as + and -. and appear as (+) and (-). and appear as (P) and (D).

The report is grouped by folder type. Only active users appear on the report. Both active and inactive folder types appear on the report. You cannot view this report in PDF format.

If you include users who are Perceptive Managers or Department Managers in the report, an icon representing each user's respective manager role appears in the list in the Role column. The Role column is empty unless a user is a Perceptive Manager or a Department Manager.

Privileges assigned directly to Perceptive Managers and Department Managers appear in the report. If managers have no privileges assigned directly to them, then the privilege columns in the list are blank. If a user has both the Perceptive Manager and the Department Manager roles, then the user displays as a Department Manager in the report.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Users
- Departments
- Folder types in the selected departments

If you select 15 or fewer folder types or users, the selected values appear in the Report Parameters box on the report. If you select more than 15 folder types or users, this box reads "Greater than 15 selected." The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Global Group Security

The Global Group Security report allows you to view the global privileges granted or denied to a group.

Details

For each group, the list indicates the department the group is associated with as well as the global privileges granted or denied in the following privilege categories.

Privilege	Description
Search	Group members with the specified global privilege can perform the associated search action.
Capture	Group members with the specified global privilege can capture documents using the associated capture mode.
Batch (General)	Group members with the specified global privilege can perform the associated action in batch processing.
Viewer (Unlinked Documents)	Group members with the specified global privilege can perform the associated action in ImageNowViewer for unlinked documents.
Manage	Group members with the specified global privilege can perform the associated management action in Cross Department Settings.
Administer User Privileges	Group members with the specified global privilege can assign privileges in the associated privilege category to other users.
Administer Group Privileges	Group members with the specified global privilege can assign privileges in the associated privilege category to other groups.

The columns indicate the privileges as follows.

- If the group has the privilege granted, appears in the column.
- If the group has the privilege denied, appears in the column.
- If the group does not have the privilege granted or denied, the column value is blank.
- If you view this report in XML or Excel format, and appear as + and -.

The report is grouped by group. You cannot view this report in PDF format.
This list also displays two privileges that are set outside the Global Privileges section of the Group Privileges. They are the Document Private Override privilege and the Retention Delete Override privilege, which are both set through INTool commands.

Parameters

When you run the report, you must specify the groups to include on the report.

If you select 15 or fewer groups, the selected values appear in the Report Parameters box on the report. If you select more than 15 groups, this box reads "Greater than 15 selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Global User Security

The Global User Security report allows you to view the global privileges granted to, denied to, or inherited by a user.

Details

For each user, the list indicates the global privileges granted or denied in the following privilege categories.

Privilege	Description
Search	Users with the specified global privilege can perform the associated search action.
Capture	Users with the specified global privilege can capture documents using the associated capture mode.
Batch (General)	Users with the specified global privilege can perform the associated action in batch processing.
Viewer (Unlinked Documents)	Users with the specified global privilege can perform the associated action in ImageNowViewer for unlinked documents.
Manage	Users with the specified global privilege can perform the associated management action in Cross

	Department Settings.
Administer User Privileges	Users with the specified global privilege can assign privileges in the associated privilege category to other users.
Administer Group Privileges	Users with the specified global privilege can assign privileges in the associated privilege category to other groups.

The columns indicate the privileges as follows.

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege explicitly granted or denied, the column value is blank.
- If you view this report in XML or Excel format, and appear as + and -. and appear as (+) and (-).

The report is grouped by user. Only active users appear on the report. You cannot view this report in PDF format.

This list indicates if a user in the report is a Perceptive Manager. If a Perceptive Manager has no directly assigned privileges but is included in the report, the privilege row displays no assigned privileges.
It also displays three privileges that are set outside the Global Privileges section of the User Privileges. They are the Report Author privilege, which is set in the Reports section of the Cross Department Settings, the Document Private Override, and the Retention Delete Override privileges, which are both set through the INTool commands.

Parameters

When you run the report, you must specify the users to include on the report.

If you select 15 or fewer users, the selected values appear in the Report Parameters box on the report. If you select more than 15 users, this box reads “Greater than 15 selected.” The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Record Category Type Group Security

The Record Category Type Group Security report allows you to view the record category type privileges granted or denied to a group.

Details

For each record category type, the list indicates the groups that have the Manage and Use privileges granted or denied for the record category type. The Manage Privilege and Use Privilege columns indicate the privileges as follows.

- If the group has the privilege granted, appears in the column.
- If the group has the privilege denied, appears in the column.
- If the group does not have the privilege granted or denied, the column value is blank.
- If you view this report in Excel or XML format, and appear as + and -.

The report is grouped by record category type. Only active groups appear on the report. Both active and inactive record category types appear on the report. You cannot view this report in PDF format.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Departments
- Groups in the selected departments
- Record category types in the selected departments

If you select 15 or fewer groups or record category types, the selected values appear in the Report Parameters box on the report. If you select more than 15 groups or record category types, this box displays "Greater than 15 selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Record Category Type User Security

The Record Category Type User Security report allows you to view the record category type privileges granted to, denied to, or inherited by a user.

Details

For each record category type, the list indicates the users that have the Manage and Use privileges granted or denied for the record category type. The Manage Privilege and Use Privilege columns indicate the privileges as follows.

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege granted or denied, the column value is blank.
- If the user is a Perceptive Manager, appears in the Role column.
- If the user is a Department Manager, appears in the Role column.
- If you view this report in Excel or XML format, and appear as + and -. and appear as (+) and (-). and appear as (P) and (D).

The report is grouped by record category type. Only active users appear on the report. Both active and inactive record category types appear on the report. You cannot view this report in PDF format.

If you include users who are Perceptive Managers or Department Managers in the report, an icon representing each user's respective manager role appears in the list in the Role column. The Role column is empty unless a user is a Perceptive Manager or a Department Manager.

Privileges assigned directly to Perceptive Managers and Department Managers appear in the report. If managers have no privileges assigned directly to them, then the privilege columns in the list are blank. If a user has both the Perceptive Manager and the Department Manager roles, then the user displays as a Department Manager in the report.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Users
- Departments
- Record category types in the selected departments

If you select 15 or fewer users or record category types, the selected values appear in the Report Parameters box on the report. If you select more than 15 users or record category types, this box displays "Greater than 15 selected." The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Record Container Group Security

The Record Container Group Security report allows you to view the record category and record folder privileges on individual categories and folders granted or not granted to a group.

Details

The list indicates the groups that have the File Content and Search privileges granted or denied for each record category and record folder in the system. The File Content Privilege and Search Privilege columns indicate the privileges as follows.

- If the group has the privilege granted, appears in the column.
- If the group does not have the privilege granted, the column value is blank.
- If you view this report in Excel or XML format, appears as +.

The report groups the displayed results by file plan. Only active groups appear on the report. You cannot view this report in PDF format.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Departments
- Groups in the selected departments

If you select 15 or fewer groups, the selected values appear in the Report Parameters box on the report. If you select more than 15 groups, this box displays "Greater than 15 selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Record Container User Security

The Record Container User Security report allows you to view the record category privileges and record folder privileges granted to or inherited by a user for individual categories and folders.

Details

The list indicates the users who have the File Content and Search privileges granted or inherited for each record category and record folder in the system. The File Content Privilege and Search Privilege columns indicate the privileges as follows.

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user does not have the privilege granted or inherited, the column value is blank.
- If the user is a Perceptive Manager, appears in the Role column.
- If the user is a Department Manager, appears in the Role column.

- If you view this report in Excel or XML format, appears as +, appears as (+), appears as (P), and appears as (D).

The report groups the displayed results by file plan. Only active users appear on the report. You cannot view this report in PDF format.

If you include users who are Perceptive Managers or Department Managers in the report, an icon representing each user's respective manager role appears in the list in the Role column. The Role column is empty unless a user is a Perceptive Manager or a Department Manager.

Privileges assigned directly to Perceptive Managers and Department Managers appear in the report. If managers have no privileges assigned directly to them, then the privilege columns in the list are blank. If a user has both the Perceptive Manager and the Department Manager roles, then the user displays as a Department Manager in the report.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Users
- Departments

If you select 15 or fewer users, the selected values appear in the Report Parameters box on the report. If you select more than 15 users or record category types, this box displays "Greater than 15 selected." The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Record Folder Type Group Security

The Record Folder Type Group Security report allows you to view the record folder type privileges granted or denied to a group.

Details

For each record folder type, the list indicates the groups that have the Manage and Use privileges granted or denied for the record folder type. The Manage Privilege and Use Privilege columns indicate the privileges as follows.

- If the group has the privilege granted, appears in the column.
- If the group has the privilege denied, appears in the column.
- If the group does not have the privilege granted or denied, the column value is blank.
- If you view this report in Excel or XML format, and appear as + and -.

The report is grouped by record folder type. Only active groups appear on the report. Both active and inactive record folder types appear on the report. You cannot view this report in PDF format.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Departments
- Groups in the selected departments
- Record folder types in the selected departments

If you select 15 or fewer groups or record folder types, the selected values appear in the Report Parameters box on the report. If you select more than 15 groups or record folder types, this box displays "Greater than 15 selected."

> **Note:** To view a sample of this report, see the Business Insight Sample Reports Guide.

Record Folder Type User Security

The Record Folder Type User Security report allows you to view the record folder type privileges granted to, denied to, or inherited by a user.

Details

For each record folder type, the list indicates the users that have the Manage and Use privileges granted or denied for the record folder type. The Manage Privilege and Use Privilege columns indicate the privileges as follows.

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege granted or denied, the column value is blank.
- If the user is a Perceptive Manager, appears in the Role column.
- If the user is a Department Manager, appears in the Role column.
- If you view this report in Excel or XML format, and appear as + and -. and appear as (+) and (-). and appear as (P) and (D).

The report is grouped by record folder type. Only active users appear on the report. Both active and inactive record folder types appear on the report. You cannot view this report in PDF format.

If you include users who are Perceptive Managers or Department Managers in the report, an icon representing each user’s respective manager role appears in the list in the Role column. The Role column is empty unless a user is a Perceptive Manager or a Department Manager.

Privileges assigned directly to Perceptive Managers and Department Managers appear in the report. If managers have no privileges assigned directly to them, then the privilege columns in the list are blank. If a user has both the Perceptive Manager and the Department Manager roles, then the user displays as a Department Manager in the report.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Users
- Departments
- Record folder types in the selected departments

If you select 15 or fewer users or record folder types, the selected values appear in the Report Parameters box on the report. If you select more than 15 users or record folder types, this box displays "Greater than 15 selected." The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Record Type Group Security

The Record Type Group Security report allows you to view the record type privileges granted or denied to a group.

Details

For each record type, the list indicates the groups that have privileges granted or denied in the following privilege categories.

Privilege	Description
Records	Group members with the specified record type privilege granted can perform the action for records associated with the record type.
Explorer/Record Folder Viewer	Group members with the specified Explorer/Record Folder Viewer privilege can perform the action for records associated with the record type in ImageNowExplorer or FolderViewer.
Viewer	Group members with the specified Viewer privilege can perform the action for records associated with the record type in ImageNowViewer.

The columns indicate the privileges as follows.

- If the group has the privilege granted, appears in the column.
- If the group has the privilege denied, appears in the column.
- If the group does not have the privilege granted or denied, the column value is blank.
- If you view this report in Excel or XML format, and appear as + and -.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Departments
- Groups in the selected departments
- Record types in the selected departments

If you select 15 or fewer groups, the selected values appear in the Report Parameters box on the report. If you select more than 15 groups, this box reads “Greater than 15 selected.”

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Record Type User Security

The Record Type User Security report allows you to view the record type privileges granted to, denied to, or inherited by a user.

Details

For each record type, the list indicates the users that have privileges granted, denied, or inherited in the following privilege categories.

Privilege	Description
Records	Users with the specified record type privilege granted can perform the action for records associated with the record type.
Explorer/Record Folder Viewer	Users with the specified Explorer/Record Folder Viewer privilege can perform the action for records associated with the record type in ImageNowExplorer or FolderViewer.
Viewer	Users with the specified Viewer privilege can perform the action for records associated with the record type in ImageNowViewer.

The columns indicate the privileges as follows.

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege granted or denied, the column value is blank.
- If the user is a Perceptive Manager, appears in the Role column.
- If the user is a Department Manager, appears in the Role column.
- If you view this report in Excel or XML format, and appear as + and -. and appear as (+) and (-). and appear as (P) and (D).

The report is grouped by user with a section for each record type. Only active users appear on the report. Both active and inactive record types appear on the report. You cannot view this report in PDF format.

If you include users who are Perceptive Managers or Department Managers in the report, an icon representing each user's respective manager role appears in the list in the Role column. The Role column is empty unless a user is a Perceptive Manager or a Department Manager.

Privileges assigned directly to Perceptive Managers and Department Managers appear in the report. If managers have no privileges assigned directly to them, then the privilege columns in the list are blank. If a user has both the Perceptive Manager and the Department Manager roles, then the user displays as a Department Manager in the report.

Parameters

When you run the report, you must specify the following parameters to include in the report.

- Users
- Departments
- Record types in the selected departments

If you select 15 or fewer users, the selected values appear in the Report Parameters box on the report. If you select more than 15 users, this box displays "Greater than 15 selected." The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Message Agent Transaction Report

The Message Agent Transaction Report allows you to view the number of Message Agent transactions performed each hour in a specified time period.

Details

Business Insight groups the report list by the date Message Agent performed the transactions. For each day and hour Message Agent performed a transaction, the report lists the number of transactions used within the hour. Totaling information appears for each day in the specified time period.

You can only use this report if you have Message Agent installed and use the hourly Message Agent Transaction Pack licensing option. The standard Message Agent Transaction Pack allows you to perform up to 200 Message Agent transaction per hour for all Message Agent operations, with no concurrent user limit. You can use this report to ensure that you do not require overdraft support for transactions that exceed the hourly limit. The following Message Agent operations do not affect the hourly transaction limit.

- ACCESS_SESSION_BEGIN_USING_PASSWORD
- ACCESS_SESSION_END
- ACCESS_USER_CHECK
- DOCUMENT_STORE
- DOCUMENT_STORE_SWA

For more information about licensing and installation options with Message Agent, refer to the “About Message Agent installation” topic in Message Agent Help. Important This report represents all hourly values in GMT.

This report includes the following chart.

Chart Title	Function
Message Agent Transactions per Hour	Displays the number of Message Agent transactions performed within the specified hour for each day in the specified time period.

Parameters

You must specify the following parameters when you run this report.

- Whether to use a static date range or a relative date range
- For static, the transaction date range
- For relative, the number of days, weeks, months, or years

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

When you specify the past number of days, the report includes any Message Agent transactions yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 - May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of weeks specified, but it does not include any transactions within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all transactions during the week of May 5-11 and the week of April 28 - May 4.

When you specify the past number of months, the report includes transactions in the last full calendar months specified, but it does not include any transactions within the current month. For example, if today is May 14, and you specify the last two months, the report includes all transactions between March 1 and April 30.

When you specify the past number of years, the report includes any transactions within the last complete calendar year, but none in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, transactions from 2009 and 2010 appear on the report.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

System Setup

The System Setup report allows you to view the details of how your Perceptive Content system is configured.

Details

This report outlines Perceptive Content configuration information in the following categories. You can select which of the following sections display in the report in the report setup prompts.

Section	Display
Annotations	Annotation type Annotation template Template description Whether the annotation template is active
Application Plans	Plan type Plan name Whether the application plan is active
Custom Properties - Date	Property name Default value Whether the custom property is in use (active)

Section	**Display**
	Whether to display the year, month, day, and weekday
Custom Properties – Flag	Property name Positive label Default value Negative label Whether the custom property is in use (active)
Custom Properties - List	Property name Whether the custom property is in use (active) List members Whether the list member is the default value
Custom Properties – Number	Property name Default value Display format Decimal places If the display format is Currency, the type of currency Decimal position Whether thousands are punctuated Whether the custom property is in use (active)
Custom Properties – String	Property name Default value Whether the custom property is in use (active)
Custom Properties – User	Property name Default value Display format Whether the user prefix and suffix are displayed Whether the custom property is in use (active)
Document Type	List name

Section	Display
Lists	List description Document types
Document Types	Document type Description Whether the document type is active The custom properties associated with the document type, whether they are required, and the custom property data type
Drawers	Drawer name Description Document types
Folder Types	Folder type Description Whether the folder type is active The document types associated with the folder type and whether those document types are required The custom properties associated with the folder type, whether they are required, and the custom property data type
Forms	Name of electronic form Description Whether the form is active
Groups	Group name Description
Group Member List	Group name Users assigned to the group. If there are no members assigned to the group, the group is not displayed in the report. Whether each group member is active
Users	User name User first and last name

Section	Display
	Title Location Whether the user is active The user category The user's default document and folder view
User List Assignment	User name Whether the user is active The groups for which the user is an assignment. If the user is not a member of a group, the user is not displayed in the report.
Views	View name Description Whether the view is in use (active)
Workflow	Workflow process name Process description Queues in the workflow process

The report indicates the system default view, used when a user accesses the client using a URL that does not have a view specified, with the default view icon.

Parameters

When you run the report, you can specify the following optional parameter.

- Displayed report sections

Depending on the selected report sections to display in the report, you can specify one or more of the following optional parameters.

- Annotation types
- Application plan types
- Custom property types
- Document type lists
- Document types
- Drawers
- Forms

- Folder types
- Groups
- Group member status
- Users
- User status
- View types
- Views
- Workflow processes

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

View Group Security

The View Group Security report allows you to view the privileges granted to group members for a view.

Details

For each document and folder view, the list indicates the groups that have the following privileges granted or denied for the view:

Privilege	Description
Access	Group members can access the view results and use the view as a basis for a search.
Access by URL	Group members can access the view results from a URL link and use the view as a basis for a search.
Filter	Group members can create private filters for the view.
Manage	Group members can modify the view in View Designer.

The columns indicate the privileges as follows:

- If the group has the privilege granted,  appears in the column.
- If the group has the privilege denied,  appears in the column.
- If the group does not have the privilege granted or denied, the column value is blank.
- If you view this report in Excel or XML format,  and  appear as + and -.
- Because default system views, such as My Recycled Documents or My Recycled Folders, are accessible to all users, these views do not appear on the report. The Filter and Access by URL privileges are not available for related document or related folder views. If no groups are assigned privileges for the view, it does not appear on the report.

Parameters

When you run the report, you must specify the following parameters:

- View types
- Groups
- View status

If you select 15 or fewer groups, the selected values appear in the Report Parameters box on the report. If you select more than 15 groups, this box reads "Greater than 15 selected."

> **Note:** To view a sample of this report, see the Business Insight Sample Reports Guide.

View User Security

The View User Security report allows you to view the privileges granted to user for a view.

Details

For each document and folder view, the list indicates the users that have the following privileges granted or denied for the view:

Privilege	Description
Access	Users can access the view results and use the view as a basis for a search.
Access by URL	Users can access the view results from a URL link and use the view as a basis for a search.
Filter	Users can create private filters for the view.
Manage	Users can modify the view in View Designer.

The columns indicate the privileges as follows:

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege granted or denied, the column value is blank.
- If the user is a Perceptive Manager, appears in the Role column.
- If the user is a Department Manager, appears in the Role column.
- If you view this report in Excel or XML format, and appear as + and -. and appear as (+) and (-). and appear as (P) and (D).
- Because default system views, such as My Recycled Documents or My Recycled Folders, are accessible to all users, these views do not appear on the report. The Filter and Access by URL privileges are not available for related document or related folder views.

If you include users who are Perceptive Managers or Department Managers in the report, an icon representing each user's respective manager role appears in the list in the Role column. The Role column is empty unless a user is a Perceptive Manager or a Department Manager.

Privileges assigned directly to Perceptive Managers and Department Managers appear in the report. If managers have no privileges assigned directly to them, then the privilege columns in the list are blank. If a user has both the Perceptive Manager and the Department Manager roles, then the user displays as a Department Manager in the report.

Parameters

When you run the report, you must specify the following parameters:

- View types
- Users
- View status

If you select 15 or fewer users, the selected values appear in the Report Parameters box on the report. If you select more than 15 users, this box reads "Greater than 15 selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Workflow Queue Group Security

The Workflow Queue Group Security report allows you to view the workflow queue privileges granted or denied to a group.

Details

For each workflow process, the list indicates the groups that have the following privileges granted or denied for a workflow queue:

Privilege	Description
Queue Lead	Group members with the specified role are workflow queue leads, and have all associated queue privileges granted.
Add	Group members with the specified queue privilege can add items to the workflow queue.
Process	Group members with the specified queue privilege can process items in the workflow queue by routing them forward.
Change Priority	Group members with the specified queue privilege can change a workflow item to high, normal, or low priority.
Upstream	Group members with the specified queue privilege can route items back through the workflow history.
Anywhere	Group members with the specified queue privilege can route items to any queue in the process.
Delete	Group members with the specified queue privilege can remove the document or folder from workflow and permanently delete it from ImageNow Server.
Remove	Group members with the specified queue privilege can remove a document or folder from workflow but not from ImageNow Server.
Archive	Group members with the specified queue privilege can save a copy of a workflow item into the workflow archive.

The columns indicate the privileges as follows:

- If the group has the privilege granted, appears in the column.
- If the group has the privilege denied, appears in the column.
- If the group does not have the privilege granted or denied, the column value is blank.
- If you view this report in Excel or XML format, and appear as + and -.

You can sort the report by either the workflow process and queue or group. Groups that are designated workflow queue leads are indicated in the Queue Lead column. Only active groups appear on the report. The Process privilege is granted for all groups assigned to sub queues.

Parameters

When you run the report, you must specify whether to sort the report by workflow process and queue or group and then, depending on the sort order, specify the following parameters:

Sort Order	Parameters
Workflow process and queue	• Workflow processes • Workflow queues
Group	Groups to include

If you select 15 or fewer workflow processes, queues, or groups, the selected values appear in the Report Parameters box on the report. If you select more than 15 processes, queues, or groups, this box reads "Greater than 15 selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Workflow Queue User Security

The Workflow Queue User Security report allows you to view the workflow queue privileges granted to, denied to, or inherited by a user.

Details

For each workflow process, the list indicates the users or groups that have the following privileges granted or denied for a workflow queue:

Privilege	Description
Queue Lead	Users with the specified role are workflow queue leads, and have all associated queue privileges granted.
Add	Users with the specified queue privilege can add items to the workflow queue.
Process	Users with the specified queue privilege can process items in the workflow queue by routing them forward.
Change Priority	Users with the specified queue privilege can change a workflow item to high, normal, or low priority.
Upstream	Users with the specified queue privilege can route items back through the workflow history.
Anywhere	Users with the specified queue privilege can route items to any queue in the process.
Delete	Users with the specified queue privilege can remove the document or project from workflow and permanently delete it from ImageNow Server.

Privilege	Description
Remove	Users with the specified queue privilege can remove a document or project from workflow but not from ImageNow Server.
Archive	Users with the specified queue privilege can save a copy of a workflow item into the workflow archive.

The columns indicate the privileges as follows:

- If the user has the privilege explicitly granted, appears in the column.
- If the user has the privilege explicitly denied, appears in the column.
- If the user has the privilege inherited from a group with the privilege granted, appears in the column.
- If the user has the privilege inherited from a group with the privilege denied, appears in the column.
- If the user does not have the privilege granted or denied, the column value is blank.
- If the user is a Perceptive Manager, appears in the Role column.
- If the user is a Department Manager, appears in the Role column.
- If you view this report in Excel or XML format, and appear as + and -. and appear as (+) and (-). and appear as (P) and (D).

You can sort the report by either the workflow process and queue or user. Users that are designated workflow queue leads are indicated in the Queue Lead column. Only active users appear on the report. The Process privilege is granted for all users assigned to sub queues.

If you grant a user the management privilege for a specific workflow process in ImageNow Management Console, and the user is already assigned to a queue in the workflow process, ImageNow automatically promotes the user to a queue lead. This promotion is not reflected on the report until a user with the management privilege for the workflow process accesses the Users section of the Queue Properties window for the workflow queue in ImageNow Workflow Designer, demotes the user from queue lead, and then manually promotes the user to a queue lead.

If a user with the management privilege for the workflow process accesses the Users section of the Queue Properties window for the workflow queue in ImageNow Workflow Designer and modifies the user’s privileges, the user appears on the report with all queue privileges, but is not designated a queue lead.

If you grant a user the management privilege for a specific workflow process in the Management Console, but the user is not assigned to any queues in the workflow process, the user does not appear on the report.

If you include users who are Perceptive Managers or Department Managers in the report, an icon representing each user’s respective manager role appears in the list in the Role column. The Role column is empty unless a user is a Perceptive Manager or a Department Manager.

Privileges assigned directly to Perceptive Managers and Department Managers appear in the report. If managers have no privileges assigned directly to them, then the privilege columns in the list are blank. If a user has both the Perceptive Manager and the Department Manager roles, then the user displays as a Department Manager in the report.

Parameters

When you run the report, you must specify whether to sort the report by workflow process and queue or user and then, depending on the sort order, specify the following parameters:

Sort Order	Parameters
Workflow process and queue	Workflow processes Workflow queues
User	Users to include

If you select 15 or fewer workflow processes, queues, or users, the selected values appear in the Report Parameters box on the report. If you select more than 15 processes, queues, or users, this box reads “Greater than 15 selected.”

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Incorrectly Filed Documents in Restricted Folders

The Incorrectly Filed Documents in Restricted Folders report allows you to identify the documents in a folder that are associated with a document type that is not allowed in the folder, according to its folder type definition.

Details

Documents should only appear on this report when they are stored in a folder that restricts its contents to specific document types. For folders that do not restrict document types, no documents appear on this report. If the folder type definition previously disabled the option to restrict the folder's document types, any documents outside the folder's document type restrictions appear on the report. For each folder type that includes folders that contain restricted documents, the report shows the following information for each document that does not have a document type allowed in the folder type.

- Document ID
- Document type
- The path to the document's folder location
- The drawer and folder in which the document is stored.
- When viewing the report in HTML output, the Document ID link opens the document in ImageNowViewer. The Folder ID link opens the document's folder in FolderViewer.

Parameters

When you run the report, you must specify the following parameters.

- Drawers
- Folder types

If the drawers you selected do not include any folders, the folder types prompt is blank. If you select 15 or fewer folder types or drawers, the selected values appear in the Report Parameters box on the report. If you select more than 15 users or drawers, this box reads "Greater than 15 selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Legacy Audit Report - Documents Modified

The Legacy Audit Report - Documents Modified report allows you to view the legacy audit records of the documents you or other users viewed prior to the audit database restructure in Perceptive Content version 6.5.

Details

For each user who has an audit condition for modifying documents, this report displays the documents the user modified during the specified time period and the document keys associated with the documents modified. For data to appear on this report, you must perform the following actions.

- Assign at least one user to the document modification conditions.
- Set the audit log format to database format or both XML and database format.

This report includes the following audit conditions for document modifications.

- Create document
- Create document from batch
- Delete document
- Add document page
- Delete document page
- Move document
- Copy document

This report only returns data for audit records logged prior to your upgrade to Perceptive Content, version 6.5 or higher. For more information about setting the audit log format, refer to the “Audit Actions” section in Perceptive Content Help.

You can specify two levels of sorting for the report data. For each grouping, the report list displays the following information.

- Date and time the user viewed the document
- The user that viewed the document
- The document ID and document key values

Parameters

When you run the report, you must specify the following parameters.

- Whether to group the report by user, drawer, folder, tab, field 3, field 4, field 5, or document type
- Date range
- The audit conditions performed
- Whether to include system users in the list
- Users who modified documents

If you select 15 or fewer users, document types, drawers, folders, tab values, field 3 values, field 4 values, or field 5 values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” For folders, tab values, field 3 values, field 4 values, and field 5 values, if you do not make any selections in the prompts, this box reads “All values.”

If the document was deleted or the batch was suspended, the group value and the new document keys appear blank. If the document was created, the previous document keys appear blank. Grouping the report results by the same option at both levels does not adversely affect the report. The user prompt is a select and search prompt. For more information about completing this type of prompt, refer to "Enter values for a select and search prompt."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Legacy Audit Report - Documents Viewed

The Legacy Audit Report - Documents Viewed report allows you to view the legacy audit records of the documents you or other users viewed prior to the audit database restructure in Perceptive Content version 6.5.

Details

For each user who has an audit condition for document viewing, this report displays the documents the user viewed during the specified period and the document keys associated with the documents viewed. For data to appear on this report, you must perform the following actions.

- Configure the document viewing conditions.
- Assign at least one user to the condition.
- Set the audit log format to database format or both XML and database format.

This report only returns data for audit records logged prior to your upgrade to Perceptive Content, version 6.5 or higher. For more information about setting the audit log format, refer to the “Audit Actions” section in Perceptive Content Help.

You can specify two levels of sorting for the report data. For each grouping, the report list displays the following information.

- Date and time the user viewed the document
- The user that viewed the document
- The document ID and document key values

Parameters

When you run the report, you must specify the following parameters.

- Whether to group the report by user, drawer, folder, tab, field 3, field 4, field 5, or document type
- Date range
- Users that viewed documents
- The document key values to include on the report

If you select 15 or fewer users, document types, drawers, folders, tab values, field 3 values, field 4 values, or field 5 values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” For folders, tab values, field 3 values, field 4 values, and field 5 values, if you do not make any selections in the prompts, this box reads “All values.”

Selecting to group the report results by the same option at both levels does not adversely affect the report. The user prompt is a select and search prompt. For more information about completing this type of prompt, refer to "Enter values for a select and search prompt."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Permanently Deleted Documents

The Permanently Deleted Documents report allows you to view the documents that were deleted from the system in the specified time period.

Details

The list is grouped by the user that deleted the document. For each user who deleted documents, the report lists the unique IDs, the original folder location, and document keys of the documents the user deleted and the date and time the documents were deleted. Because documents are sent to the recycle bin for a limited interval, a system user for File System Agent deletes the documents, such as "fs.agent." To view the audit record for the user who deleted the document from ImageNowExplorer and sent the document to recycle bin, run the Documents Modified Audit Report.

The document property string that appears in the Document Keys column uses the following values.

```
Drawer value^Field1 value^Field2 value^Field3 value^Field4 value^Field5
value^Document type value^Document name value
```

Totaling information for the number of documents permanently deleted in the specified time period appears at the bottom of the report. For data to appear on this report, you must configure an active audit template with the Document Delete or Document Send to Recycle Bin condition and assign the All Agents system group to the audit template. The Document Delete condition is a predefined server condition available in the Auditing pane of Management Console.

If you do not have any retention policies configured to delete documents, the option to show documents deleted by retention policies does not appear.

To return data on the report, you must set the audit log format to database format or both XML and database format.

Parameters

You must specify the following parameters when you run this report.

- Whether to include documents deleted from the recycle bin or retention policies
- Whether to use a static date range (the deletion date range) or a relative date range (the number of days, weeks, months, and years)

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Additional Information

When you specify the past number of days, the report includes any documents deleted yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 - May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of weeks specified, but it does not include any documents deleted within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents deleted during the week of May 5-11 and the week of April 28 - May 4.

When you specify the past number of months, the report includes documents deleted in the last full calendar months specified, but it does not include any documents deleted within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents deleted between March 1 and April 30.

When you specify the past number of years, the report includes any documents deleted within the last complete calendar year, but none in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents deleted in 2009 and 2010 appear on the report.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Workflow Queue Setup by Attributes

The Workflow Queue Setup by Attributes report allows you to view the types of workflow queues in the selected workflow processes and view the attributes assigned to the selected queues in Workflow Designer.

Details

For each selected workflow queue in the specified workflow processes, the list indicates whether the queue is a complete queue or a join queue. For super queues, the sub queues are listed.

The list is grouped by workflow process. For each selected workflow queue in the specified workflow processes, the list displays any inbound, within queue, or outbound actions that are assigned to the queue and whether any of the following attributes are enabled in the Queue Properties dialog box in Workflow Designer.

Attribute Type	Report Displays
Routing	• Whether routing is allowed between sub queues • Whether route back is enabled • Whether route recall is enabled • The time in which items can be recalled
Actions	• Whether the queue has an inbound, within queue, or outbound action • The time delay associated with the action
Application plan linking	• Whether application plan linking is enabled • Whether the item is validated against the application plan when routed back or forward
Removal	• The removal method for the queue • The interval used to enable removal

If route recall is not enabled or a removal method is not defined for the queue, the interval associated with the attribute appears as 0. If an inbound, within queue, or outbound action configured for a queue is associated with an iScript, the file name of the script appears. If the action is associated with an alarm or routing rule, the name of the rule appears.

Parameters

When you run the report, you must specify the following parameters.

- Workflow processes
- Workflow queues

For workflow processes and queues, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Dashboards

AP Invoice Dashboard

The Accounts Payable Invoice Dashboard allows you to view the invoice processing and amount statistics in your Perceptive Content environment.

Details

For the selected workflow process and queue, you can view the number of invoices processed in the last 7 days and view the total invoice amount currently being processed for each business unit. The AP Dashboard includes the following charts:

Chart Title	Function
Invoices Processed for Queue	Displays the number of invoices processed in the last 7 days for the selected workflow process and queue. This chart excludes invoice processing data during weekends. You can only select complete queues.
Open Invoice Totals Percent by Business Unit	Displays the percentage of the total invoice amount pending for each business unit. Invoices that have completed processing do not appear on the chart.
Open Invoice Totals Amount by Business Unit	Displays the total invoice amount pending for each business unit. Invoices that have completed processing do not appear on the chart.

Note: This report only returns data for the “Invoice” document type and the “Invoice Amount” custom property. The report also uses the Field1 document key to return Business Unit values. For processed invoices to appear accurately on the report, you must define the complete queues in your Accounts Payable workflow process.

Parameters

You do not need to specify any parameters to run this report. A dynamic prompt on the report page allows you to limit the Invoices Processed for Queue chart to a specific workflow process and complete queue. To change this prompt, select the process and queue values.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Tasks Dashboard

The Tasks Dashboard allows you to view high-level statistics associated with tasks in your Perceptive Content environment.

Details

For tasks, you can use this dashboard to view the number of tasks that were completed after their assigned due dates and the current states of the tasks in your Perceptive Content environment. The Tasks Dashboard includes the following charts.

Chart Title	Function
Tasks Completed After Due Date	Displays the number of tasks assigned to users that were completed after their assigned due date.
Total Tasks	Displays the current task states of all tasks.

Parameters

You do not need to specify any parameters to run this report.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Workflow Dashboard

The Workflow Dashboard allows you to view high-level statistics associated with outstanding workflow items in your Perceptive Content environment.

Details

For workflow, you can use this dashboard to view the number of items currently in workflow and the current states of the workflow items. The prompt associated with the Items in Workflow chart allows you to limit the chart to workflow queues that contain more than a specific number of items. The Workflow Dashboard includes the following charts.

Chart Title	Function
Items in Workflow	Displays the number of items currently in workflow queues. The gauge needles represent workflow queues. You can limit the queues that appear to those containing more than a specific number of items.
Workflow Item States	Displays the current workflow states of the items in workflow.

Parameters

You do not need to specify any parameters to run this report. A dynamic prompt on the report page allows you to limit the Items in Workflow chart to only queues that contain more than a specific number of items. To change this prompt, type the number and click Refresh.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Document Reports

Captured Document Totals by User

The Captured Document Totals by User report allows you to view the number of documents the users in your system captured and linked in the specified time period.

Details

For each date on which users captured documents, the report lists the following information.

- The user who captured the document. If the user who scanned the document is not the same user who linked the document, the user who linked the document appears as the user who captured the document.
- The number of documents the user captured. If the user added a captured page to a document previously linked by another user, and the original document was captured outside of the specified date range, the page appears on the report, but the document does not.
- The number of pages the user captured. If the user linked the page to a previously captured document by entering the same document key values as the previously captured document, the page is added to the original document and the page appears for the user. In this case, the document does not appear, unless the original document was captured by the same user who linked the page within the specified time period.
- The number of documents the user linked. If the user linked pages that were appended to previously captured documents, the total number of documents, both original and new, appear in this column.

This report includes the following charts.

Chart Title	Function
Total Documents Captured by User	Displays the number of documents the user captured in the specified time period.
Total Pages Captured by User	Displays the number of document pages the user captured in the specified time period.
Total Documents Linked by User	Displays the number of documents the user linked in the specified time period.

For additional information about the pages captured in the specified time period, including the details of the users who scanned or imported the pages, refer to the "Document Pages Captured Between Dates" report.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static date range or a relative date range
- For static, the capture date range
- For relative, the number of days, weeks, months, or years
- Drawers
- Field1 values
- Document types
- Whether to include documents captured by system users, such as Import Agent
- Capture sources
- Whether to summarize the report by day, week, or month

The report summary interval determines whether the report displays the data in daily, weekly, or monthly intervals. When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any documents captured yesterday and the number of days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13. If you add a page to a document created prior to the specified date range, the page appears on the report but the document was not.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of weeks specified, but it does not include any documents captured within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes everything captured during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents captured in the last full calendar months specified, but it does not include any documents captured within the current month. For example, if today is May 14, and you specify the last two months, the report includes everything captured between March 1 and April 30.

When you specify the past number of years, the report includes any documents captured within the last complete calendar year, but no documents from the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents captured in 2009 and 2010 appear on the report.

The Field1 prompt is optional. For drawers, Field1 values, and document types, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads "Greater than 15 selected." If you do not select any Field1 values, this box reads "All Field1 values selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Document Pages Captured Between Dates

The Document Pages Captured Between Dates report allows you to view the pages of documents that were captured in the specified date range.

Details

For each user that captured documents, the report lists the date and time the document was scanned, the document ID, the pages of the document captured by the associated user, the date and time the document page was linked, and the user who linked the document.

This report includes the following charts.

Chart Title	Function
Total Pages Captured by User	Displays the number of document pages captured by the user in the specified time period.
Total Pages Linked by User	Displays the number of document pages linked by the user in the specified time period.

The title of this report is dynamic. It updates based on the selected capture dates. For additional information about the documents associated with the captured pages, refer to the "Captured Document Totals by User" report.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static date range or a relative date range
- For static, the capture date range and weekdays
- For relative, the number of days, weeks, months, or years and the weekdays to include
- Drawers
- Field1 values
- Field2 values
- Document types
- Capture sources

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any documents captured yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any documents captured within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents captured during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents captured in the last full calendar months specified, but it does not include any documents captured within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents captured between March 1 and April 30.

When you specify the past number of years, the report includes any documents captured within the last complete calendar year, but none in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents captured in 2009 and 2010 appear on the report.

The Field1 and Field2 value prompts are optional. For drawers, Field1 values, Field2 values, and document types, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads "Greater than 15 selected." If you do not select any Field1 or Field2 values, this box reads "All Field1 values selected" or "All Field2 values selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Documents with Annotations

The Documents with Annotations report allows you to view the documents that were annotated in the specified time period.

Details

For each annotation template, the report displays the user that applied the annotation, the date and time they added the annotation, the properties of the document, and the document page annotated. For stamp, sticky note, text, and URL annotations, the annotation text appears.

This report includes the following chart.

Chart Title	Function
Document Pages Annotated by Annotation Date	Displays the number of document pages that were annotated during the specified time period. The columns represent the annotation date. The column stacks represent the annotation type and template.

The report is grouped by user with a section for each annotation template. Annotation templates that were not used to create new annotations in the specified time period do not appear on the report. Totaling information is available at the annotation date and user level. The Report Summary box lists the total number of pages that were annotated during the specified time period.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- For static, the annotation date range and weekdays
- For relative, the number of days, weeks, months, and years and the weekdays to include
- Drawers
- Field1 values
- Field2 values
- Document types

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any documents annotated yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of weeks specified, but it does not include any documents annotated within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents annotated during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents annotated in the last full calendar months specified, but it does not include any documents annotated within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents annotated between March 1 and April 30.

When you specify the past number of years, the report includes any documents annotated within the last complete calendar year, but none in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents annotated in 2009 and 2010 appear on the report.

The Field1 and Field2 prompts are optional. For drawers, Field1 values, Field2 values, and document types, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads "Greater than 15 selected." If you do not select any Field1 or Field2 values, this box reads "All Field1 values selected" or "All Field2 values selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Documents with Digital Signatures

The Documents with Digital Signatures report enables you to view the documents that were digitally signed in the specified time period.

Details

For each digital signature reason specified when digitally signing documents, this report displays the user who signed the document, the date and time the document was signed, the document properties, and the digital signature status.

This report includes the following chart.

Chart Title	Function
Digitally Signed Documents by Signed Date	Displays the number of documents digitally signed in the specified time period. The columns represent the dates users signed documents. The column stacks represent the digital signature reason specified.

The report includes a section for each digital signature reason. Digital signature reasons that were not selected in the specified time period do not appear on the report. A report summary displays the total number of digital signatures applied to documents in the specified date range. Totaling information for each digital signature reason appears at the user and date level. Because a document can include multiple digital signatures, the same document might appear more than once on the same report.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- For static, the annotation date range and weekdays
- For relative, the number of days, weeks, months, and years and the weekdays to include
- Drawers
- Field1 values
- Field2 values
- Digital signature reasons
- Document types

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any documents signed yesterday and the specified number of previous days. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of weeks specified, but it does not include any documents signed within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents signed during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents signed in the last full calendar months specified, but it does not include any documents signed within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents signed between March 1 and April 30.

When you specify the past number of years, the report includes any documents signed within the last complete calendar year, but none in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents signed in 2009 and 2010 appear on the report.

The Field1 and Field2 prompts are optional. For drawers, Field1 values, Field2 values, and document types, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads "Greater than 15 selected." If you do not select any Field1 or Field2 values, this box reads "All Field1 values selected" or "All Field2 values selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Records Management Reports

Audit Action Report

The Audit Action Report contains all audited actions for a user over a specified time range. This report only applies to user actions on records, record folders, and record categories stored in your system.

Details

This report allows you to prove the authenticity of your records by displaying every action taken on records in your system over a specified time range. You can use this report to view the entire audited history of any user and any record category, record folder, or record.

To use this report, you must set up an audit template for records and assign it to a user or group.

The report includes a list displaying the following properties for each record category, record folder, and record included in the report.

Column Name	Description
Audit ID	The ID for the audit action.
Audit User	The user name of the user who created the audit action.
Audit Date	The date the audit action was created.
Audit Category	The category of the audit action, such as Batch, Security, or Workflow.
Audit Action	The type of system action the audit targets.
Audit Object	The type of object the audit action targets.
Audit Result	Whether the audit action succeeded or failed.
Object ID	The ID of the object being audited.
Object Name	The name of the object being audited.
Object Description	The description of the object being audited.
Operation Description	The description of the action the audit performed on the object.
Detail Name	The name of the audited detail.
Detail Value	The value of the audited detail.

Parameter

You must select the following parameter when running this report.

- Audit templates
- Time period of audited action.

You can set the following optional parameters when running this report.

- ID or name of a particular record category, record folder, or record
- Users who performed an action on that audit template. Note that this parameter can slow down the report's generation.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Destruction Report

The Destruction Report displays properties of record categories, record folders, and records in your system that were destroyed according to your retention policies.

Details

For the selected retention policy, this report displays properties about destroyed record categories, record folders, or records. This data is captured at the moment of the file plan element's destruction. Various informations entered in fields for the record are retained.

To use this report, you must set up the audit templates to retain information about destroyed records for those records to appear in this report. To activate this setting, in the inow.ini file, under [Records], change the records.retain.metadata setting to TRUE. You must then apply an audit template to a user or group.

The report includes a list displaying the following properties for each record category, record folder, and record included in the report.

Column Name	Description
Policy	The retention policy for the file plan element.
Authority Name	The legal, regulatory, statutory, or operational entity, such as the federal government or a legal department, that defines lifecycle requirements.
Destruction Set Name	The name of the file plan element's destruction set.
Destruction User	The user name of the user or agent that destroyed the record or record folder.
Destruction Date	The date and time the file plan element was destroyed.
Object Type	Whether the file plan element is a record category, record folder, or record.
Object ID	The ID of the record category, record folder, or record.
Physical File Template	The physical file template associated with the file plan element.
Destruction Agent	The person or organization who performed the destruction action.

Column Name	Description
Scheduled Destruction Date	The date on which the destruction action was scheduled.
Destruction Method	The method used to remove the file plan element from the retention policy.
Approval Creation Date	The date the approval task was created.
Approval Date	The date the approval user approved the destruction action.
Approval User	The user name of the user who approved the destruction of the file plan element.
Deletion Audit ID	The ID of the audit that deleted the file plan element.
Deletion Time	The date and time the file plan element was deleted.
Deletion User Name	The name of the user or agent that deleted the file plan element.
Deletion Object ID	The ID of the deleted file plan element.
Deletion Object Type	Whether the deleted file plan element was a record category, record folder, or record.

Parameters

When you run the report, you must specify the following parameters.

- Time period for destruction, based off audit data
- Retention policy names

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Disposition Records

The Disposition Records report displays all retention policy information involving any upcoming disposition actions for record types in selected policies.

Details

For the selected retention policies, the report displays the disposition action, the current disposition phase, and the record type associated with the record scheduled for disposition in the selected date range. The report displays the total number of records associated with each retention policy.

The report includes the following list.

Section Title	Function
Policy Disposition Metrics for Records	This list displays the phase name, unique record ID, record name, record folder name, authority name, cutoff time, type of disposition, disposition event date, approver name, level of approval, approval status, date of approval, and the calculated date of disposition for every record in the record type.

Parameters

When you run the report, you must specify the following parameters.

- Time period for scheduled disposition events
- Retention policy names
- Event summary of the current phase
- Disposition actions

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Disposition Detail for Document Type Report

The Disposition Detail for Document Type report presents retention policy information for every individual item of a selected type. You can run the Disposition Detail for Document Type report manually. You can also run the Disposition report and then use a link to access the Disposition Detail report. The Disposition Detail report provides specific information not included in the Disposition report.

Details

For each document with the selected document type in the date range, the detail report displays the disposition action, the current approval status, and other retention statistics. The report lists every document that is scheduled for disposition in the selected date range and associated with the document type.

The report includes one list that contains the following information.

List Title	Function
Policy Disposition Metrics for Documents Detail	This list displays the unique document ID, name, lifecycle throughout the date range, event date, disposition action, level of approval, approver name, approval status, date of approval request, date of actual approval, and the set date of disposition for every document in the document type. Documents included in this list must be scheduled for disposition within the set date range for the report.

Parameters

When you run the report, you must specify the following parameters.

- Whether to run the report on documents or records
- Time period for scheduled disposition events
- Retention policy name
- Document type
- Disposition actions

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Document Disposition Report

The Document Disposition report displays the retention policies that performed a disposition action for the selected date.

Details

For each retention policy, the report displays the disposition action, the number of documents, and the document type associated with the documents scheduled for or pending disposition on the selected date. The report displays the total number of documents associated with each retention policy, as well as the total number for all retention policies.

The report includes one chart.

Chart Title	Function
Documents Scheduled for or Pending Disposition	Displays the total number of documents that are scheduled for a disposition action or pending disposition for each retention policy.

Parameters

When you run the report, you must specify the date that documents are scheduled for disposition. If you select a date in the past, the report shows the documents for which the disposition action was performed.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Document Destruction Report

The Document Destruction Report displays the documents approved for destruction according to your retention policies.

Details

You can use this report to generate a certificate of destruction for your documents. This report displays the documents under a retention policy destroyed in the specified time period with the following details.

- The approval columns display the date the approval was scheduled, the user who approved the destruction, and the date the user approved destruction. If the retention policy requires multiple approval levels, the report displays each approval and each level separately.
- The deletion columns display the date Perceptive Content permanently deleted the electronic version of the document and the user who approved the documents for deletion. Typically, the workflow agent automatically deletes documents approved for destruction, bypassing the recycle bin.
- If the documents are associated with a physical file reference, the destruction columns display the date a user destroyed the physical version of the document, the user who destroyed it, and the method used to destroy the documents. Users destroy physical documents using destruction sets. Documents without physical file references do not display details in the destruction columns.

Only documents under retention policies that have completed the destruction process appear on the report. Documents with a physical file reference do not appear on the report until the physical version of the document is destroyed and the destruction set is confirmed. The approval, deletion, and destruction times appear in GMT format.

To return data on the report, you must set the audit log format to database format or both XML and database format. You must also configure an audit template that includes the following audit conditions and assign it to the All Users or All Agents system group.

- Retention Holds
- Retention Policies
- Retention Agent Actions
- Retention Approval Actions

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date on the report:
- For static, the dates documents were destroyed
- For relative, the number of days, weeks, months, or years
- Retention policies
- Document types

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any documents destroyed yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any documents destroyed within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents destroyed during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents destroyed in the last full calendar months specified, but it does not include any documents destroyed within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents destroyed between March 1 and April 30.

When you specify the past number of years, the report includes any documents destroyed within the last complete calendar year, but no documents destroyed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents destroyed in 2009 and 2010 appear on the report.

Only the retention policies that have performed a destruction disposition action appear in the prompts. For document types and retention policies, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads "Greater than 15 selected."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Document Types without Retention Policies

The Document Types Without Retention Policies report displays the document types not currently assigned to a retention policy.

Details

You can use this report to identify document types to assign to a retention policy. All document types not assigned to an active or inactive retention policy appear on the report. The report includes both active and inactive document types.

You do not need to specify any parameters to run this report.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Documents Under Retention Holds

The Documents Under Retention Holds report displays the documents assigned to a direct retention hold and the document types assigned to an inherited retention hold.

Details

For each retention hold, the report displays the documents and document types currently under the hold. For documents assigned to a direct hold, the report displays the user who assigned the hold, the date the user assigned the hold, and the unique IDs of the documents under the hold. For document types assigned to an inherited hold, the report displays the user who assigned the hold, the date the user assigned the hold, and the document types under the hold.

Parameters

When you run the report, you must specify the following parameters.

- The dates users assigned holds
- The users who assigned the holds

For users, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Documents Under Retention Policies

The Documents Under Retention Policies report displays the details of all documents in a phase of any retention policy configured in your environment.

Details

For each selected retention policy, the report lists the phases that include documents. For each phase, the report lists the document properties and creation date. Summary information appears for each phase and each retention policy. A grand total for all selected policies displays at the end of the report.

Parameters

When you run the report, you must specify the retention policies you want to include.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Record Properties Report

This report displays the retained properties for destroyed records and record folders.

Prerequisites

Before you run this report, you must perform a series of actions to activate record property retention in Perceptive Content.

To return data on deleted records and record folders, an administrator must activate the flag to retain properties on delete for records. To do so, the administrator must change the inow.ini setting *records.retain.metadata* to TRUE. Next, the administrator must create an audit template targeting any record folders and records. Finally, the administrator must restart the File System Agent instance on the server.

Details

The report returns the following information for deleted records and record folders.

Instance Type	Properties
Record Folder	Audit ID, Creation Time, Deletion User, Location in File Plan, Retention Set ID, Record Folder ID, Previous Reviewer, Previous Review Date, Next Review Date, Review Cycle, Cutoff State, and Cutoff Time. The report displays the Previous Review Date, Next Review Date, and Cutoff Time results in GMT time.
Record	Audit ID, Creation Time, Deletion User, Location in File Plan, Retention Set ID, Record ID, Media Type, Originating Organization, Author, Addressees, Other Addressees, Received Date, Publication Date, Date Filed, Record Cutoff State, Record Cutoff Time, and Declaration User. The report displays the Received Date, Publication Date, Date Filed and Record Cutoff Time results in GMT time.

If you choose to report on both records and record folders, in the finished report, you can use tabs to select whether to view only records, only record folders, or both at once in the finished report. These tabs allow you to review an alternate selection of data without having to go through the report prompts again. If you run the report on both records and record folders and in XML format, the report displays no results.

Parameters

When you run the report, you must specify the following parameters.

- Date range of destroyed records and record folders
- Whether to display records, record folders, or both

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Retention Policy Setup

The Retention Policy Setup report displays the configuration details of the retention policies in your environment.

Details

For each retention policy in your environment, this report displays each phase in the policy, and each path within the phase. For each path, the report displays the following information.

- The retention time period
- The approval levels, users, and groups
- The disposition action

The report groups the list by retention policy. You can optionally display the document types assigned to the retention policy. All active and inactive document types assigned to the policy appear on the report. If a phase or path in the retention policy does not have an assigned name, the report displays the phase ID or path ID.

Parameters

When you run the report, you must specify the following parameters.

- Retention policies
- Whether to display document types

For retention policies, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.”

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Accounts Payable Reports

Accounts Payable Accrual by Custom Property

The Accounts Payable Accrual by Custom Property report allows you to view the total number of invoices in a drawer and analyze the total invoice amount.

Details

For each drawer that holds invoices, the report displays the document properties and dollar amount associated with each invoice that meets or exceeds the minimum dollar amount specified.

To return data for this report, you must have a number custom property that stores the invoice amount applied to the invoice document type. All number custom properties appear in the prompt list; you must select the custom property or properties that store the invoice amount. Totaling information appears at the drawer and report level.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- If static, the invoice creation date range
- If relative, the number of days, weeks, months, or years
- Minimum dollar amount
- The custom property that stores the invoice amount
- Drawers
- Field1 values

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, of years to include on the report. If you enter 0, no data appears.

If you select 15 or fewer drawer or Field1 values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads "Greater than 15 selected."

Examples

When you specify the past number of days, the report includes any invoices created yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any invoices created within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all invoices created during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes invoices created in the last full calendar months specified, but it does not include any invoices created within the current month. For example, if today is May 14, and you specify the last two months, the report includes all invoices created between March 1 and April 30.

When you specify the past number of years, the report includes any invoices created within the last complete calendar year, but no invoices created in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, invoices created in 2009 and 2010 appear on the report.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Open Payables

The Open Payables report displays the invoices that have not completed processing in your environment. This report assumes you use workflow for invoice processing.

Details

For each workflow queue that currently includes an invoice, this report displays each invoice that meets or exceeds the invoice amount threshold entered, the invoice document properties, and the dollar amount of the invoice. Invoices that have been routed to a complete queue do not appear on the report.

To return data for this report, you must have a number custom property that stores the invoice amount applied to the invoice document type. All number custom properties appear in the prompt list; you must select the custom property or properties that store the invoice amount. Totaling information appears at the workflow queue and report level.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range. For static, the invoice creation date range. For relative, the number of days, weeks, months, or years
- Minimum dollar amount
- The custom property that stores the invoice amount
- Workflow processes
- Workflow queues
- Drawers
- Field1 values

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Additional Information

When you specify the past number of days, the report includes any invoices created yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any invoices created within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all invoices created during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes invoices created in the last full calendar months specified, but it does not include any invoices created within the current month. For example, if today is May 14, and you specify the last two months, the report includes all invoices created between March 1 and April 30.

When you specify the past number of years, the report includes any invoices created within the last complete calendar year, but no invoices created in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, invoices created in 2009 and 2010 appear on the report.

If you select 15 or fewer Drawers or Field1 values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected”.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Healthcare Reports

Chart Deficiencies by Physician

The Chart Deficiencies by Physician report allows you to view the folders (or charts) with incomplete tasks, or deficiencies, currently assigned to the physicians in your enterprise.

Details

For each selected physician, the list indicates the charts that have incomplete tasks assigned to them. To return data on the report, the folder type for the chart must use the following custom properties in the listed order.

Property Name	Property Function
Account number	String custom property that represents the patient account code
Patient name	String custom property that represents the patient name
Unit number	String custom property that represents the unit code

The name assigned to the custom property does not affect the function of the report, but the custom properties must be assigned in the listed order for the report to return accurate data.

For each chart assigned to a physician, the list is grouped by chart type. For each chart, the list displays the number of incomplete tasks assigned to the physician for the chart. For each incomplete task, the report displays the following information.

- The chart type
- The unit code (MRN), patient account, and patient name associated with the chart
- The task type and task status
- The due date of the task and whether the task is overdue

The Deficiency Age column displays the amount of time the tasks are overdue. If the task is overdue, the value appears in parentheses.

Parameters

When you run this report, you must specify the following parameters.

- Physicians
- Chart types
- Deficiency types

For physicians and chart types, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads "Greater than 15 selected." The user prompt is a select and search prompt. For more information about completing this type of prompt, refer to "Enter values for a select and search prompt."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Delinquent Deficiency Month End Totals

The Delinquent Deficiency Month End Totals report allows you to view the total number of deficiencies and delinquencies in your enterprise per month for up to twelve months in the past.

Details

For each user name, the list is grouped by month. The Deficiencies column displays the number of deficiencies that were completed after the assigned due date. The Delinquencies column displays the average amount of delinquency time for the user for that month. The Summary row at the bottom of the list displays an average of all users' delinquency times for that month.

The report contains only deficiencies that are completed within the selected months. As a result, if a deficiency is completed prior to the selected time range, the report will not include that deficiency. When a deficiency is assigned to multiple users or a group the system regards it as a delinquency for all assigned users or member of the group.

Chart title	Function
Delinquent Deficiency Month End Totals	Displays the delinquencies and deficiencies by month for each user in your enterprise. The list includes only completed deficiencies, displaying them in the month in which the deficiencies are finished.

Parameters

When you run this report, you must specify the following parameters.

- Number of months
- Deficiency location

When choosing the number of months to include in the report, you only have the option of selecting three, six, nine, or twelve months. You can also choose to include document deficiencies, chart deficiencies, or both

If the time range exceeds three months, then the earliest three months of the time range appear on the first page of the report. Use the Page Down button to view subsequent months

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Document Deficiencies by Physician

The Document Deficiencies by Physician report allows you to view the documents with incomplete tasks – or deficiencies – currently assigned to the physicians in your enterprise.

Details

For each selected physician, the list indicates the documents with incomplete tasks assigned to the physician and the patient record associated with the document.

Note: This report assumes a document key structure as follows. If the document key structure is different, the report returns inaccurate data.

Document Key	Value
Field1	Unit code (MRN)
Field2	Patient account code
Field3	Patient name

The list is grouped by physician. For each selected physician, the list displays the number of incomplete tasks in all units. For each incomplete task, the list displays the following information.

- The unit code (MRN), patient account, and patient name associated with the document
- The document type associated with the task
- The task type and task status
- The due date of the task and whether it is overdue
- The amount of time in which the task is due or overdue

Parameters

When you run the report, you must specify the following parameters:

- User names of physicians
- Drawers

For drawers and users, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Capture and Indexing Reports

Batch Throughput List

The Batch Throughput List allows you to design a batch throughput report based on Solution, Location, and Batch groupings.

Details

For each solution, you can view users or locations associated with the batch life cycle and evaluate the following metric information.

- The number of documents captured at the beginning of the batch capture process.
- The number of documents captured at the end of the batch capture process.
- The number of pages captured at the beginning of the batch capture process.
- The number of pages captured at the end of the batch capture process.
- The number of steps the batch capture process moved through during the life cycle.
- The number of users who took action on the batch capture process as it moved through the life cycle.
- Thee number of actions taken on the batch capture process as it moved through the life cycle.
- The time interval duration for the batch capture process to move through during the life cycle.
- The time interval duration as the batch capture process sits idle during the life cycle.
- The time interval duration as the batch capture process is actively worked during the life cycle.

You can use this report to evaluate the effectiveness of your capture process on a batch-by-batch or location-by-location basis. Only batches, documents, and pages that you captured using the Capture & Indexing module appear on the report.

All data is available within the crosstab by default. When viewing the report within Cognos Workspace, the crosstab can be further customized to include value or slider filters to display or hide data.

Parameters

No parameters exist in this report.

Batch Throughput Report

The Batch Throughput Report provides multiple different views into your batch capture throughput during the specified period.

Details

For each solution that you specify, you can view users or locations associated with the batch life cycle and evaluate the following metric information.

- The number of documents captured at the beginning of the batch capture process.
- The number of documents captured at the end of the batch capture process.
- The number of pages captured at the beginning of the batch capture process.
- The number of pages captured at the end of the batch capture process.
- The number of steps the batch capture process moved through during the life cycle.
- The number of users who took action on the batch capture process as it moved through the life cycle.
- The number of actions taken on the batch capture process as it moved through the life cycle.
- The time interval duration for the batch capture process to move through during the life cycle.
- The time interval duration as the batch capture process sits idle during the life cycle.
- The time interval duration as the batch capture process is actively worked during the life cycle.

Parameters

When you run the report, you must specify the following parameters.

- Date range for the capture action
- Solutions
- Locations
- Whether to display report detail regarding the batch pages, documents, or all

Batch User Throughput - Crosstab

The Batch User Throughput - Crosstab report allows you to design a batch capture productivity based Solution, User, and Batch groupings for each step of the process.

Details

For each solution, you can view users associated with the batches and evaluate the following step information.

- The number of documents processed in for the step.
- The number of pages processed in for the step.
- The number of documents added for the step.
- The number of pages added for the step.
- The number of documents removed for the step.
- The number of pages removed for the step.
- The number of documents processed out for the step.

- The number of pages processed out for the step.
- The time interval duration the user had the batch open for the step.

You can use this report to evaluate the effectiveness of your capture process on a step, batch, and user basis. Only batches, documents, and pages that you captured using the Capture & Indexing module appear on the report.

All data is available within the crosstab by default. When viewing the report within Cognos Workspace, the crosstab can be further customized to include value or slider filters to display or hid data.

Parameters

No parameters exist in this report.

Batch User Throughput Report

The Batch User Throughput Report allows you to view the batch capture productivity based on Solution, User, and Batch groupings for each step of the process.

Details

For each selected solution, you can view users associated with the batches and evaluate the following step information.

- The number of documents processed in for the step.
- The number of pages processed in for the step.
- The number of documents added for the step.
- The number of pages added for the step.
- The number of documents removed for the step.
- The number of pages removed for the step.
- The number of documents processed out for the step.
- The number of pages processed out for the step.
- The time interval duration the user had the batch open for the step.

You can use this report to evaluate the effectiveness of your capture process on a step, batch, and user basis. Only batches, documents, and pages that you captured using the Capture & Indexing module appear on the report.

Parameters

When you run the report, you must specify the following parameters.

- Data range for the capture action
- Solutions
- Steps
- Users
- Whether to display the report information with batch level detail or with summary level information.

The user’s prompt is a select and search prompt. For more information about completing this type of prompt, refer to Enter values for a select and search prompt.

Productivity Report - Detail

The Productivity Report - Detail allows you to view the batch capture productivity based on Solution, Location, and User groupings.

Details

For each selected solution, you can view users associated with the locations and evaluate the following step and action information.

- The number of batches captured for the step and action.
- The number of pages captured for the step and action.
- The number of documents captured for the step and action.

You can use this report to evaluate the effectiveness of your capture process on a user-by-user basis. Only batches, documents, and pages that you captured using the Capture & Indexing module appear on the report.

Parameters

When you run the report, you must specify the following parameters.

- Date range for the capture action
- Solutions
- Steps
- Locations
- Whether to display user detail information or not - Users (prompt displays only when user detail is selected)
- Whether to display report detail regarding the batch, batch pages, documents, or all

The user’s prompt is select and search prompt. For more information about completing this type of prompt, refer to Enter values for a select and search prompt.

User Productivity by Location - Crosstab

The User Productivity by Location - Crosstab report allows you to design a batch capture productivity report based on Solution, Location, and User groupings.

Details

For each solution, you can view users associated with the locations and evaluate the following step and action information.

- The number of batches captured for the step and action.
- The number of pages captured for the step and action.
- The number of documents captured for the step and action.

You can use this report to evaluate the effectiveness of your capture process on a user-by-user basis. Only batches, documents, and pages that you captured using the Capture & Indexing module appear on the report.

All data is available within the crosstab by default. When viewing the report within Cognos Workspace, the crosstab can be further customized to include value or slider filters to display or hide data.

Parameters

No parameters exist in this report.

Task Reports

Completed Tasks by Task Template

The Completed Tasks by Task Template report displays the number of completed tasks processed in the specified date range and details the completion time for tasks.

Details

The report includes 4 charts, a summary list, and a detail list. You can choose whether to include tasks with a status of Completed, Complete Pending Review, or both.

The summary list displays the total number of completed tasks as well as the total, average, minimum, and maximum completion time for each selected task type. The report calculates total completion time from start to finish, from the time the task was created to the time the task was marked complete.

The detail list displays the total number of tasks completed based on the task template used to create it as well as the user who completed the task. For each task template and user, the list displays the following information.

- The total number of completed tasks
- The user’s number of completed tasks as a percentage of the total number of completed tasks for the task template
- The number of tasks the user completed after the defined due date
- Total, average, maximum, and minimum completion time for the tasks

Tasks completed after the defined due date appear in red. Totaling information for all task templates appears at the bottom of the list. This report includes the following charts.

Chart Title	Function
Top 10 Completion Times by Task Template	Displays the 10 task templates that have the highest task completion times. The columns indicate the maximum completion time. The line indicates the average completion time.
Top 10 Tasks Completed after Due Date by User	Displays the 10 users that have the highest number of tasks that were completed after their defined due date.

Chart Title	Function
Task Completion Time by Completion Date	Displays the maximum and average task completion times based on the months and years selected in the date range. The columns indicate the maximum completion time for the month. The line indicates the average completion time for the month.
Top 10 Completed Task Totals by Task Template	Displays the 10 task templates that have the highest number of completed tasks for the specified date range.

Because top 10 charts are calculated using a ranking system, if identical values exist in the top 10 rank, more than 10 columns can appear on the chart. For example, if you selected 20 users, 15 of which have 50 completed tasks after the due date and 5 of which have 45 completed tasks after the due date, 15 users appear on the Top 10 Tasks Completed after Due Date by User chart.

Parameters

When you run the report, you must specify the following parameters.

- Completed task states
- Whether to use a static or relative date range
- For static, the task completion date range and weekdays
- For relative, the number of days, weeks, months, or years and the weekdays to include
- Users completing tasks
- Task types
- Task templates

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any tasks completed yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 - May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any tasks completed within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all tasks completed during the week of May 5-11 and the week of April 28 - May 4.

When you specify the past number of months, the report includes tasks completed in the last full calendar months specified, but it does not include any tasks completed within the current month. For example, if today is May 14, and you specify the last two months, the report includes all tasks completed between March 1 and April 30.

When you specify the past number of years, the report includes any tasks completed within the last complete calendar year, but no tasks completed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, tasks completed in 2009 and 2010 appear on the report.

For any prompt, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Document Tasks Due in Specified Days

The Document Tasks Due in Specified Days report allows you to view the details of documents with assigned tasks that are due in the specified number of days or less.

Details

For each user or group with an assigned task due in the specified number of days or less, the report lists the properties of the document associated with the task, the task ID and task template, as well as details of when the task is due and the current state of the task.

Depending on whether your report targets users or groups, this report includes the following charts.

Chart Title	Function
Tasks Due by Assigned User	Displays the number of incomplete tasks due within the specified number of days for each assigned user and the task state.
Tasks Due by Assigned Group	Displays the number of incomplete tasks due within the specified number of days for each assigned group and the task state.

Because a task can be assigned to any number of users or groups, it possible that the same task appears more than once on the report. Only users and groups with assigned tasks that are due within the specified number of days appear on the report. Tasks in a Complete Pending Review state also appear on the report.

Parameters

When you run the report, you must specify the following parameters.

- Whether to include users, groups, or both
- Users or groups with assigned tasks
- Task states
- Number of days until task is due

If you select 15 or fewer users or groups, the selected values appear in the Report Parameters box on the report. If you select more than 15, this box reads “Greater than 15 selected.” The user prompt is a select and search prompt. For more information about completing this type of prompt, refer to "Enter values for a select and search prompt."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Documents with Incomplete Tasks

The Documents with Incomplete Tasks report allows you to view the details of the documents that have incomplete tasks and the users or groups assigned to the tasks.

Details

For each user or group assigned to an incomplete task associated with a document, the report displays the following information.

- Properties of the document associated with the task
- The number of incomplete tasks and overdue tasks associated with the document
- The earliest and latest due date of the incomplete tasks associated with the document

Depending on whether your report targets users or groups, this report includes the following charts.

Chart Title	Function
Document Types with Incomplete Tasks by Assigned User	Displays the number of incomplete tasks associated with a document type for each selected user. The columns represent users. The column stacks represent the document types associated with the tasks.
Document Types with Incomplete Tasks by Assigned Group	Displays the number of incomplete tasks associated with a document type for each selected group. The columns represent the groups. The column stacks represent the document types associated with the tasks.

Only users and groups with assigned tasks that are incomplete appear on the report. If the user or group only has one incomplete task associated with a listed document, the earliest and latest due date values are identical. Tasks in a Complete Pending Review state appear on the report.

Totaling information is listed at the drawer and user levels. Grand totaling information for all users and drawers appears at the bottom of the report.

Parameters

When you run the report, you must specify the following parameters.

- Whether to include users, groups, or both
- Users or groups with assigned tasks
- Task types

If you select 15 or fewer users or groups, the selected values appear in the Report Parameters box on the report. If you select more than 15, this box reads “Greater than 15 selected.” The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Folder Tasks Due in Specified Days

The Folder Tasks Due in Specified Days report allows you to view the details of folders with assigned tasks that are due in the specified number of days or less.

Details

For each user or group with an assigned task due within the specified number of days, the folder name and type associated with the task, the task ID and task template, as well as details of when the task is due and the current state of the task. Tasks without a specified due date appear on the report with blank due date details.

Depending on whether your report targets users or groups, this report includes the following charts.

Chart Title	Function
Tasks Due by Assigned User	Displays the number of incomplete tasks due assigned to users within the specified number of days for each folder type and the task state.
Tasks Due by Assigned Group	Displays the number of incomplete tasks due assigned to groups within the specified number of days for each folder type and the task state.

Because a task can be assigned to any number of users, it is possible that the same task appears more than once on the report. Only users and groups with assigned tasks that are due within the specified number of days appear on the report. Tasks in a Complete Pending Review state also appear on the report.

Parameters

When you run the report, you must specify the following parameters.

- Whether to include users, groups, or both
- Users or groups with assigned tasks
- Task states
- Number of days until task is due

If you select 15 or fewer users, the selected values appear in the Report Parameters box on the report. If you select more than 15, this box reads “Greater than 15 selected.” The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Folders with Incomplete Tasks

The Folders with Incomplete Tasks report allows you to view the details of the folders that have incomplete tasks and the users and groups assigned to the tasks.

Details

For each folder with an incomplete task, the report displays the following information.

- Folder type associated with the task
- The user or group the task is assigned to
- The number of incomplete tasks and overdue tasks associated with the folder
- The earliest and latest due date of the incomplete tasks associated with the folder

Depending on whether your report targets users or groups, this report includes the following charts.

Chart Title	Function
Folder Types with Incomplete Tasks by Assigned User	Displays the number of incomplete tasks associated with a folder type for each user. The columns represent users. The column stacks represent the folder types associated with the tasks.
Folder Types with Incomplete Tasks by Assigned Group	Displays the number of incomplete tasks associated with a folder type for each group. The columns represent groups. The column stacks represent the folder types associated with the tasks.

If the user or group only has one incomplete task associated with a listed folder, the earliest and latest due date values are identical. Grand totaling information for all incomplete and overdue tasks appears at the bottom of the report.

Parameters

When you run the report, you must specify the following parameters.

- Whether to include users, groups, or both
- Users or groups with assigned tasks
- Task types

If you select 15 or fewer folders, the selected values appear in the Report Parameters box on the report. If you select more than 15, this box reads "Greater than 15 selected." The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Task Aging Report by Task Template

The Tasks Aging Report by Task Template report allows you to view the number of incomplete tasks assigned to users and groups that are due and overdue in up to seven user-defined aging intervals within the specified time period.

Details

For each selected task template, you can view the incomplete tasks that are due in one of the four due intervals and the tasks that are overdue in one of the three overdue intervals. Tasks that are assigned, returned, or complete pending review appear on the report. You can define up to seven aging periods measured in days.

This report includes the following charts.

Tasks Due by User

Displays the number of tasks associated with the selected task templates that are due in the first four user-defined aging periods. The columns represent the assigned users. The column stacks represent the aging periods.

Tasks Overdue by User

Displays the number of tasks associated with the selected task templates that are overdue in one of the last three user-defined aging periods and the number of tasks that are due today. The columns represent the assigned users. The column stacks represent the aging periods.

Tasks Due by Group

Displays the number of tasks associated with the selected task templates that are due in the first four user-defined aging periods. The columns represent the assigned groups. The column stacks represent the aging periods.

Tasks Overdue by Group

Displays the number of tasks associated with the selected task templates that are overdue in one of the last three user-defined aging periods and the number of tasks that are due today. The columns represent the assigned groups. The column stacks represent the aging periods.

The report is grouped by task type. Totaling information is available at the user level for each type. Grand totaling information appears at the bottom of the user list and group list. Task types and task templates with no tasks due or overdue in the specified aging periods do not appear on the report.

Parameters

When you run the report, you must specify the following parameters.

- Task due date range
- Up to 5 aging periods
- Users assigned to tasks
- Groups assigned to tasks
- Task types
- Task templates

When you define the aging periods, you determine what data appears on the report chart and list. The values aggregate to define how the aging periods appear on the report. The first 4 aging periods operate on a descending scale, and represent the days by which tasks are due. The last 3 aging periods operate on an ascending scale and represent the days by which tasks are overdue. An additional aging period indicates the number of tasks that are due today.

For example, if you define the aging periods in days only, the aging period entries work as follows.

Aging Period 1

3

Report Display

Aging Period 2

2

Tasks Due Between 2 Days and 3 Days

Aging Period 3

1

Tasks Due Between 1 Day and 2 Days

Aging Period 4

1

Tasks Overdue Less Than 1 Day

Aging Period 5

2

Tasks Overdue Between 1 Day and 2 Days

In this example, the value entered in Aging Period 3 defines an additional aging period that displays the tasks due in less than one day, and the value entered in Aging Period 5 defines an additional aging period that displays the tasks overdue by more than 2 days.

You must complete all aging periods to run the report. For users, groups, and task templates, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.”

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Task Cycle Time

The Task Cycle Time report displays the number of tasks that were completed in the specified time period and the time it took to complete the tasks from the time they were assigned.

Details

For each task type with tasks completed during the specified time period, the report displays the following information.

- The task template associated with the task
- The total number of completed tasks
- The average, maximum, and minimum time it took for tasks to complete from the time they were assigned

This report includes the following chart:

Chart Title	Function
Completed Tasks by Task Type	Displays the number of tasks completed in the specified time period for each task type.

Tasks types and task templates with no tasks completed during the specified time period do not appear on the report. Totaling information for all completed tasks appears at the bottom of the report. Tasks in a Complete Pending Review, Invalid, or Canceled state do not appear on the report.

Parameters

When you run the report, you must specify the following parameters.

- Date range (static or relative)
- Task types
- Task templates

Additional Information

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

When you specify the past number of days, the report includes any tasks completed yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 - May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any tasks completed within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all tasks completed during the week of May 5-11 and the week of April 28 - May 4.

When you specify the past number of months, the report includes tasks completed in the last full calendar months specified, but it does not include any tasks completed within the current month. For example, if today is May 14, and you specify the last two months, the report includes all tasks completed between March 1 and April 30.

When you specify the past number of years, the report includes any tasks completed within the last complete calendar year, but no tasks completed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, tasks completed in 2009 and 2010 appear on the report.

If you select 15 or fewer task templates, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.”

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Task Productivity

The Task Productivity report allows you to view the elapsed time between the task start date and the task completion date.

Details

For each user that completed tasks during the specified time period, the report displays the task type, task template, the date tasks were completed, and the number of tasks that were completed. For the completed tasks, the report displays the elapsed time, starting from the start date and time for the task, and ending with the completion date and time. The average time it took to complete the tasks that use the task template appears.

If the user completed multiple tasks created with the same task template, the latest date a task that uses the task template was completed appears in the "Completed On" column. The latest task to be completed is also represented in the "Total Time: Start to Completion column." If the user only completed one task associated with a task template in the specified time period, the values in the "Total Time: Start to Completion" and "Average Completion Time" columns are the same.

This report includes the following chart.

Chart Title	Function
Tasks Completed by User	Displays the number of tasks completed by the user in the specified period. The columns represent the users. The column stacks represent the task templates.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- Users that completed tasks
- Task types
- Task templates

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Additional Information

When you specify the past number of days, the report includes any tasks completed yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 - May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any tasks completed within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all tasks completed during the week of May 5-11 and the week of April 28 - May 4.

When you specify the past number of months, the report includes tasks completed in the last full calendar months specified, but it does not include any tasks completed within the current month. For example, if today is May 14, and you specify the last two months, the report includes all tasks completed between March 1 and April 30.

When you specify the past number of years, the report includes any tasks completed within the last complete calendar year, but no tasks completed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, tasks completed in 2009 and 2010 appear on the report.

For users and task templates, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The user prompt is a select and search prompt. For more information about completing this type of prompt, refer to "Enter values for a select and search prompt."

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Tasks Snapshot by Assigned Users and Groups

The Tasks Snapshot by Assigned Users and Groups report allows you to view the number of incomplete tasks assigned to the selected users and groups.

Details

The report is grouped by task type. For each user, group, and task type, this report lists the total number of incomplete tasks, broken down as follows.

Incomplete Tasks	Task View
All tasks assigned to the user or group	My Assigned
All tasks returned by the user or any user in the group	Returned by Me
All tasks the user or group completed that need to be reviewed	Complete Pending Review

Because you can assign tasks to several users or groups to review or process, the same task might appear more than once on this report. Totaling information is available for each task type as well as the total number of incomplete tasks for all users and all groups.

Depend on whether your report targets users or groups, this report includes the following charts.

Chart Title	Function
Incomplete Tasks by Assigned User	Displays the total number of incomplete tasks based on the user the task was assigned to. The columns represent the users, and the column stacks represent the task state.
Incomplete Tasks by Assigned Group	Displays the total number of incomplete tasks based on the group the task was assigned to. The columns represent the groups, and the column stacks represent the task state.

Parameters

When you run the report, you must specify the following parameters.

- Whether to include users, groups, or both
- Users or groups with assigned tasks
- Task types

For either prompt, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Workflow Reports

Captured Document Routing Activity

The Captured Document Routing Activity report allows you to view the workflow routing distribution of documents captured during the specified time period.

Details

For each selected workflow queue, you can view the drawers associated with the documents captured in the specified time period and evaluate the following routing information.

- The number of captured documents routed into the queue compared to the total number of documents captured in the drawer
- The percentage of captured documents routed into the queue
- The number of captured documents routed out of the queue
- The number of documents currently in the queue that a user captured within the specified time period
- The number of captured documents currently in the queue, regardless of capture date

You can use this report to evaluate the effectiveness of your load balancing processes in workflow. Only documents that you captured using a scanning or import process appear on the report. Documents you create in ImageNowExplorer do not appear. Documents captured during the specified time period which completed workflow or entered the workflow archive do not appear on the report. Because you can route a document to any number of queues, the same document might appear several times on the report.

Parameters

When you run the report, you must specify the following parameters.

- Date range for document capture
- Workflow queues
- Drawers

The report includes sub queues for super queues. For workflow queues and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box displays “Greater than 15 selected.” The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Current Items in Queues

The Current Items in Queues report allows you to view the index values of the workflow items currently in the specified queues.

Details

For each selected workflow queue, you can view the workflow items currently in the queue as well as their associated index values, including the document or folder type. You can group the documents in the queue by the Drawer, Field1, Field2, Field3, Field4, and Field5 value when running the report. Items currently in complete queues do not appear on the report.

The report includes a section for each queue you select that contains items when the report is run. Totaling information for each queue appears below each section. Totaling information for the index key used to group the report appears in the list for the queue. A grand total for all queues appears at the bottom of the report.

Parameters

When you run the report, you must specify the following parameters.

- Whether to include documents or folders
- If folders, the folder status and folders to include
- If documents, the property by which to group results
- Workflow processes
- Whether to include complete queues
- Workflow queue types
- Workflow queues
- Drawers
- Priorities assigned to workflow items

Sub queues for super queues are included in the work queue type. For workflow processes, queues, and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Document Queue Entry to First View

The Document Queue Entry to First View report allows you to determine the amount of time a workflow item associated with a document spent in a queue before it was viewed for the first time in that queue.

Details

For each user that added or routed an item to a queue, the report displays the total number of workflow items the user added or routed to the queues and the average, minimum, and maximum amount of time the item spent in the workflow queue before a user viewed it for the first time in that queue during the specified time period.

The Report Summary box displays the total number of items, average time, minimum time, and maximum time spent between queue entry and first viewing for all users that added or routed items in the specified time period. If any of the selected workflow processes includes super queues, only the sub queues associated with the super queue appear in the queue selection list.

This report includes the following charts.

Chart Title	Function
Total Documents in Queue by Entry Day	Displays the total number of document items that were added or routed to the selected queues on the selected days of the week in the specified interval. The columns represent the days of the week.
Total Documents in Queue by Item Priority	Displays the total number of document items that were added or routed to the selected queues with the selected workflow item priority. Each pie chart represents a different workflow item priority. The pie slices represent the workflow queues.

The list is grouped by workflow queue. Totaling information as well as a summary of the average, minimum, and maximum amount of time the items spent in the queue before the first viewing appears at the queue level. If only one item was routed to the queue, or if the same user routed all the items in queue in the specified period, the average, minimum, and maximum queue times appear the same. The maximum queue times are displayed in HH:MM:SS format. Average and minimum queue time is formatted HH:MM:SS.milliseconds.

Because an item can be added or routed to any number of queues within a given time period, the same workflow item might be represented in several queues on the report.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- For static, the queue entry date range and weekdays
- For relative, the number of days, weeks, months, or years and the weekdays to include
- Whether to report using the active workflow processes, the archived workflow, or both
- Workflow processes
- Whether to include complete queues
- Workflow queue types
- Workflow queues
- Document types
- Drawers
- Workflow item priorities

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any documents added or routed in yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any documents added or routed in within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents that entered the queue during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents added or routed in the last full calendar months specified, but it does not include any documents added or routed in within the curent month. For example, if today is May 14, and you specify the last two months, the report includes all documents that entered the queue between March 1 and April 30.

When you specify the past number of years, the report includes any documents added or routed in within the last complete calendar year, but no documents added or routed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents that entered the queue in 2009 and 2010 appear on the report.

Sub queues for super queues are included in the work queue type. For workflow processes, workflow queues, document types, and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Document Workflow Lifecycle

The Document Workflow Lifecycle report allows you to view the workflow history of the documents completed during the specified time period.

Details

For each complete queue you specify, a section appears for each date that a document completed its workflow lifecycle and entered the complete queue. Each section includes the document properties and lists each queue that the document entered during its workflow lifecycle as well as the amount of time the document spent in each queue. If the document remains in the queue, the Routed Out and Time in Queue columns are blank. You can view workflow history for both the active workflow process and the workflow archive.

Documents that did not complete workflow do not appear on the report.

Parameters

When you run the report, you must specify the following parameters:

- Whether to use a static or relative date range
- For static, the date range, hourly range, and weekdays documents completed workflow
- For relative, the number of days, weeks, months, or years and the hourly range and weekdays include
- Whether to display the active workflow processes, the workflow archive, or both
- Workflow processes
- Complete queues
- Document types
- Drawers
- Workflow item priorities

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any documents that completed workflow yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any documents that completed workflow within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents that completed workflow during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents that completed workflow in the last full calendar months specified, but it does not include any documents that completed workflow within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents that completed workflow between March 1 and April 30.

When you specify the past number of years, the report includes any documents that completed workflow within the last complete calendar year, but no documents that completed workflow the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents that completed workflow in 2009 and 2010 appear on the report.

For processes, queues, document types, and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Documents Entering Queues per Hour

The Documents Entering Queues per Hour report allows you to view the hourly details of workflow items associated with documents added or routed to workflow queues in a given 24-hour period.

Details

This report is useful for determining the peak and off-peak hours of the day when documents are added or routed to workflow queues. For each selected queue, the report displays the users that added or routed document items to the queue and the hour of the day the items were routed.

This report includes the following charts.

Chart Title	Function
Documents Entering Queues by Hour	Displays the total number of workflow items added or routed to the selected queues during the hour of the day. The columns represent the hours of the day. The column stacks represent the workflow queues.
High Priority Documents Added or Routed	Displays the number of workflow items with a high priority added or routed to any queue during an hour of the day. The gauge needles represent the hours of the day. This chart only appears if you include high priority items in the report parameters.
Normal Priority Documents Added or Routed	Displays the number of workflow items with a normal priority added or routed to any queue during an hour of the day. The gauge needles represent the hours of the day. This chart only appears if you include normal priority items in the report parameters.

Chart Title	Function
Low Priority Documents Added or Routed	Displays the number of workflow items with a low priority added or routed to any queue during an hour of the day. The gauge needles represent the hours of the day. This chart only appears if you include low priority items in the report parameters.

The report is grouped by workflow queue. Totaling information appears at the hour, and queue levels. Grand totaling information for all queues and all hours appears at the bottom of the report. Complete queues do not appear on the report. If no workflow documents were added or routed in a given hour of the day, the hour does not appear on the report.

Parameters

When you run the report, you must specify the following parameters.

- Date for report
- Whether to report using the active workflow processes, the archived workflow, or both
- Workflow processes
- Whether to include complete queues
- Workflow queue types
- Workflow queues
- Document types
- Drawers
- Workflow item priorities

Sub queues for super queues are included in the work queue type. For workflow processes, queues, document types, and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Documents Remaining in Queue after Specified Interval

The Documents Remaining in Queue After Specified Interval report allows you to view the total number of items associated with documents that remain in the specified workflow queues after the defined number of days, hours, or minutes, or any combination of days, hours, and minutes.

Details

For each selected workflow queue, you can view the items that remain in the queue beyond the specified interval, measured in minutes, hours, and days. Complete queues and deleted queues do not appear on the report.

The detail list displays all the workflow items that meet or exceed the defined interval and remain in the workflow queues you specified. For each workflow item, the list displays the following information.

- The queue the item is currently in and the document name
- The Field1 and Field2 values for the item
- The date and time the item entered the workflow queue
- The number of seconds, minutes, hours, or days the item has been in the current queue and in workflow
- The date and time the item entered its current workflow state
- The current workflow state and the last action performed for the item
- The user who performed the last action for the item

The list is grouped by workflow queue. Totaling information for the number of remaining items appears below each group, as well as the average interval for the items in the queue and in workflow (in seconds, minutes, hours, or days).

This report includes the following charts.

Chart Title	Function
Total Documents in Queue by Current Status	Displays the total number of workflow document items that exceed the specified interval within the selected queues along with the associated workflow state and last action performed for the item. The columns represent the selected workflow queues.
Top 10 Queue Document Totals by Processed User	Displays the 10 users with the highest number of workflow document items that exceed the specified interval for which they performed the last action. The columns represent the users.

Because top 10 charts are calculated using a ranking system, if identical values exist in the top 10 rank, more than 10 values can appear on the charts. For example, if you selected 20 workflow queues, 15 of which have 50 items beyond the specified interval, 15 queues appear on the Top 10 Queue Document Totals by Processed User chart.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- For static, the queue entry date range and weekdays
- For relative, the number of days, weeks, months, or years and the weekdays to include
- Workflow processes
- Whether to include complete queues
- Workflow queue types
- Workflow queues

- Drawers
- Interval in days, hours, and minutes

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any documents added or routed in yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any documents added or routed in within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents that entered the queue during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents added or routed in the last full calendar months specified, but it does not include any documents added or routed in within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents that entered the queue between March 1 and April 30.

When you specify the past number of years, the report includes any documents added or routed in within the last complete calendar year, but no documents added or routed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents that entered the queue in 2009 and 2010 appear on the report.

Sub queues for super queues are included in the work queue type. For workflow processes, workflow queues and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Documents Remaining in Workflow after Specified Interval

The Documents Remaining in Workflow After Specified Interval report allows you to view the total number of items associated with documents that remain in the specified workflow processes after the defined number of days, hours, or minutes, or any combination of days, hours, and minutes.

Details

For each selected workflow process, you can view the number of items that remain in workflow beyond the specified interval, measured in minutes, hours, and days. Complete queues and queues that have been deleted but remain in the recycle bin do not appear on the report.

The detail list displays all the workflow items that meet or exceed the defined interval and remain in the workflow processes you specified. For each workflow item, the list displays the following information.

- The workflow process and queue the item is currently in
- The document name
- The Field1 and Field2 values for the item
- The date and time the item was added to workflow
- The number of seconds, minutes, hours, or days the item has been in workflow and the current queue
- The date and time the item entered its current workflow state
- The current workflow state and the last action performed for the item
- The user who performed the last action for the item

The list is grouped by workflow process and queue. Totaling information for the number of remaining items appears below each queue and workflow process, as well as the average interval for the items in the queue and in workflow.

This report includes the following charts.

Chart Title	Function
Total Documents in Workflow by Current Status	Displays the total number of workflow document items that exceed the specified interval within the selected processes along with the associated workflow state and last action performed for the item. The columns represent the selected workflow processes.
Top 10 Workflow Document Totals by Processed User	Displays the 10 users with the highest number of workflow document items that exceed the specified interval for which they performed the last action. The columns represent the users.

Because top 10 charts are calculated using a ranking system, if identical values exist in the top 10 rank, more than 10 values can appear on the charts. For example, if you selected 20 workflow processes, 15 of which have 50 items beyond the specified interval, 15 queues appear on the Top 10 Workflow Document Totals by Processed User chart.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- For static, the added to workflow date range and weekdays
- For relative, the number of days, weeks, months, or years and the weekdays to include
- Workflow processes
- Whether to include complete queues
- Workflow queue types

- Workflow queues
- Drawers
- Interval in days, hours, and minutes

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any documents added to workflow yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any documents added within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents added to workflow during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents added in the last full calendar months specified, but it does not include any documents added within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents added to workflow between March 1 and April 30.

When you specify the past number of years, the report includes any documents added within the last complete calendar year, but no documents added in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents added to workflow in 2009 and 2010 appear on the report.

Sub queues for super queues are included in the work queue type. For workflow processes, workflow queues, and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Documents Routed Out

The Documents Routed Out report allows you to view the documents that users routed out of workflow queues in the specified time period.

Details

For each selected workflow queue, you can view the properties of the documents that users routed out of the queue, the date they routed the documents, the user who routed the document, and the workflow queue they routed the document to. If a user routed a document in parallel to multiple queues, the document does not appear on the report until the document reaches the join queue that ends the parallel route. Any queues included in the parallel route do not appear on the report. For each queue, the total number of documents routed out appears.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- For static, the dates users routed documents forward
- For relative, the number of days, weeks, months, or years
- Whether to use the active workflow processes, the workflow archive, or both
- Workflow queues
- Document types
- Drawers

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any documents routed out yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any documents routed within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents routed forward during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents routed out in the last full calendar months specified, but it does not include any documents routed within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents routed forward between March 1 and April 30.

When you specify the past number of years, the report includes any documents routed out within the last complete calendar year, but no documents routed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents routed forward in 2009 and 2010 appear on the report.

The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Folder Queue Entry to First View

The Folder Queue Entry to First View report allows you to determine the amount of time a workflow item associated with a folder spent in a queue before it was viewed for the first time in that queue.

Details

For each user that added or routed an item to a queue, the report displays the total number of workflow items the user added or routed to the selected queues and the average, minimum, and maximum amount of time the item spent in the workflow queue before a user viewed it for the first time in that queue during the specified time period.

The Report Summary box displays the total number of items, average time, minimum time, and maximum time spent between queue entry and first viewing for all users that added or routed items in the specified time period. If any of the selected workflow processes includes super queues, only the sub queues associated with the super queue appear in the queue selection list.

This report includes the following charts.

Chart Title	Function
Total Folders in Queue by Queue Entry Day	Displays the total number of folder items that were added or routed to the selected queues on the selected days of the week in the specified interval. The columns represent the days of the week.
Total Folders in Queue by Item Priority	Displays the total number of folder items that were added or routed to the selected queues with the selected workflow item priority. Each pie chart represents a different workflow item priority. The pie slices represent the workflow queues.

The list is grouped by workflow queue. Totaling information as well as a summary of the average, minimum, and maximum amount of time the items spent in the queue before the first viewing appears at the queue level. If only one item was routed to the queue, or if the same user routed all the items in queue in the specified period, the average, minimum, and maximum queue times appear the same. The maximum queue times are displayed in HH:MM:SS format. Average and minimum queue time is formatted HH:MM:SS.milliseconds.

Because an item can be added or routed to any number of queues within a given time period, the same workflow item might be represented in several queues on the report.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- For static, the queue entry date range and weekdays
- For relative, the number of days, weeks, months, or years and the weekdays to include
- Whether to report using the active workflow processes, the archived workflow, or both
- Workflow processes
- Whether to include complete queues
- Workflow queue types
- Workflow queues
- Folder types
- Drawers
- Workflow item priorities

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any folders added or routed in yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any folders added or routed in within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all folders that entered the queue during the week of May 5 though 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes folders added or routed in the last full calendar months specified, but it does not include any folders added or routed in within the current month. For example, if today is May 14, and you specify the last two months, the report includes all folders that entered the queue between March 1 and April 30.

When you specify the past number of years, the report includes any folders added or routed in within the last complete calendar year, but no folders added or routed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, folders that entered the queue in 2009 and 2010 appear on the report.

Sub queues for super queues are included in the work queue type. For workflow processes, workflow queues, folder types, and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected”. Select date range type is a cascade source for this prompt.

The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Folders Entering Queues per Hour

The Folders Entering Queues per Hour report allows you to view the hourly details of workflow items associated with a folder added or routed to workflow queues in a given 24-hour period.

Details

This report is useful for determining the peak and off-peak hours of the day when folders are added or routed to workflow queues. For each selected queue, the report displays the users that added or routed folders to the queue and the hour of the day the items were routed.

This report includes the following charts.

Chart Title	Function
Folders Entering Queues by Hour	Displays the total number of workflow items added or routed to the selected queues during the hour of the day. The columns represent the hours of the day. The column stacks represent the workflow queues.
High Priority Folders Added or Routed	Displays the number of workflow items with a high priority added or routed to any queue during an hour of the day. The gauge needles represent the hours of the day. This chart only appears if you include high priority items in the report parameters.
Normal Priority Folders Added or Routed	Displays the number of workflow items with a normal priority added or routed to any queue during an hour of the day. The gauge needles represent the hours of the day. This chart only appears if you include normal priority items in the report parameters.
Low Priority Folders Added or Routed	Displays the number of workflow items with a low priority added or routed to any queue during an hour of the day. The gauge needles represent the hours of the day. This chart only appears if you include low priority items in the report parameters.

The report is grouped by workflow queue. Totaling information appears at the hour and queue levels. Grand totaling information for all queues and all hours appears at the bottom of the report. If no workflow folders were added or routed in a given hour of the day, the hour does not appear on the report.

Parameters

When you run the report, you must specify the following parameters.

- Date for report
- Whether to report using the active workflow processes, the archived workflow, or both
- Workflow processes
- Whether to include complete queues
- Workflow queue types
- Workflow queues
- Folder types
- Drawers
- Workflow item priorities

Sub queues for super queues are included in the work queue type. For workflow processes, queues, folder types, and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads "Greater than 15 selected." The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Folders Remaining in Queue after Specified Interval

The Folders Remaining in Queue After Specified Interval report allows you to view the total number of items associated with folders that remain in the specified workflow queues after the defined number of days, hours, or minutes, or any combination of days, hours, and minutes.

Details

For each selected workflow queue, you can view the items that remain in the queue beyond the specified interval, measured in minutes, hours, and days. Deleted queues do not appear on the report.

The detail list displays all the workflow items that meet or exceed the defined interval and remain in the workflow queues you specified. For each workflow item, the list displays the following information.

- The queue the folder is currently in
- The folder name
- The date and time the folder entered the workflow queue
- The number of seconds, minutes, hours, or days the folder has been in the current queue and in workflow
- The date and time the folder entered its current workflow state
- The current workflow state and the last action performed for the folder
- The user who performed the last action for the folder

The list is grouped by workflow queue. Totaling information for the number of remaining items appears below each group, as well as the average interval for the items in the queue and in workflow (in seconds, minutes, hours, or days).

This report includes the following charts.

Chart Title	Function
Total Folders in Queue by Current Status	Displays the total number of folder items that exceed the specified interval within the selected queues along with the associated workflow state and last action performed for the item. The columns represent the selected workflow queues.
Top 10 Queue Folders Totals by Processed User	Displays the 10 users with the highest number of folder items that exceed the specified interval for which they performed the last action. The columns represent the users.

Because top 10 charts are calculated using a ranking system, if identical values exist in the top 10 rank, more than 10 values can appear on the charts. For example, if you selected 20 workflow queues, 15 of which have 50 items beyond the specified interval, 15 queues appear on the Top 10 Queue Item Totals by Processed User chart. Select date range type is a cascade source for this prompt.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- For static, the queue entry date range and weekdays
- For relative, the number of days, weeks, months, or years and the weekdays to include
- Workflow processes
- Whether to include complete queues
- Workflow queue types
- Workflow queues
- Drawers
- Interval in days, hours, and minutes

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any folders added or routed in yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any folders added or routed in within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all folders that entered the queue during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes folders added or routed in the last full calendar months specified, but it does not include any folders added or routed in within the current month. For example, if today is May 14, and you specify the last two months, the report includes all folders that entered the queue between March 1 and April 30.

When you specify the past number of years, the report includes any folders added or routed in within the last complete calendar year, but no folders added or routed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, folders that entered the queue in 2009 and 2010 appear on the report.

Sub queues for super queues are included in the work queue type. For workflow processes, workflow queues and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Folders Remaining in Workflow after Specified Interval

The Folders Remaining in Workflow after Specified Interval report allows you to view the total number of items associated with folders that remain in the specified workflow processes after the defined number of days, hours, or minutes, or any combination of days, hours, and minutes.

Details

For each selected workflow process, you can view the number of items that remain in workflow beyond the specified interval, measured in minutes, hours, and days. Queues that have been deleted but remain in the recycle bin do not appear on the report.

The detail list displays all the workflow items that meet or exceed the defined interval and remain in the workflow processes you specified. For each workflow item, the list displays the following information.

- The workflow process and queue the folder is currently in
- The folder name
- The date and time the folder was added to workflow
- The number of seconds, minutes, hours, or days the folder has been in workflow and the current queue
- The date and time the folder entered its current workflow state
- The current workflow state and the last action performed for the folder
- The user who performed the last action for the folder

The list is grouped by workflow process and queue. Totaling information for the number of remaining items appears below each queue and workflow process, as well as the average interval for the items in the queue and in workflow.

This report includes the following charts.

Chart Title	Function
Total Folders in Workflow by Current Status	Displays the total number of folder items that exceed the specified interval within the selected processes along with the associated workflow state and last action performed for the item. The columns represent the selected workflow processes.
Top 10 Workflow Folder Totals by Processed User	Displays the 10 users with the highest number of folder items that exceed the specified interval for which they performed the last action. The columns represent the users.

Because top 10 charts are calculated using a ranking system, if identical values exist in the top 10 rank, more than 10 values can appear on the charts. For example, if you selected 20 workflow processes, 15 of which have 50 items beyond the specified interval, 15 queues appear on the Top 10 Workflow Folder Totals by Processed User chart.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- For static, the added to workflow date range and weekdays
- For relative, the number of days, weeks, months, or years and the weekdays to include
- Workflow processes
- Whether to include complete queues
- Workflow queue types
- Workflow queues
- Drawers
- Interval in days, hours, and minutes

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any folders added to workflow yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any folders added within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all folders added to workflow during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes folders added in the last full calendar months specified, but it does not include any folders added within the current month. For example, if today is May 14, and you specify the last two months, the report includes all folders added to workflow between March 1 and April 30.

When you specify the past number of years, the report includes any folders added within the last complete calendar year, but no folders added in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, folders added to workflow in 2009 and 2010 appear on the report.

Sub queues for super queues are included in the work queue type. For workflow processes, workflow queues and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Item Aging Report by Queue Entry Date

The Item Aging Report by Queue Entry Date report allows you to view the total number of workflow items in a queue for up to seven different defined aging intervals during the specified time period.

Details

For each selected workflow queue, you can view the selected users that routed items that fall into one of the aging periods into the queue or added items to the queue. You can define up to seven aging periods measured in days, hours, minutes, or seconds. For each user, the total number of workflow items in the queue during the defined aging period appears. Complete queues do not appear on the report.

The report is grouped by workflow queue. If any of the selected workflow processes includes super queues, only the sub queues associated with the super queue appear in the queue selection list. Totaling information for all workflow queues appears at the bottom of the report.

This report includes the following chart.

Chart Title	Function
Total Items in Queue by Aging Period	Displays the number of workflow items in the selected queues that fall within the specified aging periods. The columns represent the workflow queues. The column stacks represent the aging periods.

Parameters

When you run the report, you must specify the following parameters.

- Whether to report using the active workflow processes, the archived workflow, or both
- Workflow processes
- Whether to include complete queues
- Workflow queue types
- Workflow queues
- Whether to use a static or relative date range
- For static, the queue entry date range and weekdays
- For relative, the number of days, weeks, months, or years and weekdays to include
- Users that added or routed items to the selected queue
- Up to 6 aging periods

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Additional Information

When you specify the past number of days, the report includes any items added or routed in yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any items added or routed in within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all items that entered the queue during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes items added or routed in the last full calendar months specified, but it does not include any items that entered the queue within the current month. For example, if today is May 14, and you specify the last two months, the report includes all items that entered the queue between March 1 and April 30.

When you specify the past number of years, the report includes any items added or routed in within the last complete calendar year, but no items from the current year. For example, if today is May 14, 2011, and you specify the last 2 years, items that entered the queue in 2009 and 2010 appear on the report.

When you define the aging periods, you determine what data appears on the report chart and list. The values aggregate to define how the aging periods appear on the report. For example, if you define the aging periods in days, the aging period entries work as follows.

Field	Day Entry	Report Display
Aging Period 1	1	Less than 1 Day
Aging Period 2	2	Between 1 Day and 2 Days

Field	Day Entry	Report Display
Aging Period 3	3	Between 2 Days and 3 Days
Aging Period 4	4	Between 3 Days and 4 Days
Aging Period 5	5	Between 4 Days and 5 Days
Aging Period 6	6	Between 5 Days and 6 Days

You must complete all aging periods to run the report. If the aging periods overlap, the same item could appear more than once on the report. Sub queues for super queues are included in the work queue type. For workflow processes, queues, and users, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.”

The user and workflow queue prompts are select and search prompts.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Queue Cycle Time for Documents

The Queue Cycle Time for Documents report allows you to view detail information about items associated with documents that were routed out of the selected queues during the specified time period.

Details

For each queue you select, the report displays the total number of items that were routed out of the queue during the specified time period, the user that routed the item out of the queue, as well as the average, minimum, and maximum amount of time the items spent in the queue.

The Report Summary list displays the total number of items that were routed out of all selected queues during the specified time period as well as the average, minimum, and maximum amount of time the items spent in the queues. If any of the selected workflow processes includes super queues, only the sub queues associated with the super queue appear in the queue selection list. Complete queues do not appear on the report.

This report includes the following charts.

Chart Title	Function
Documents Routed Out by Weekday	Displays the total number of document items that were routed out of the selected queues on the selected days of the week in the specified interval. The columns represent the days of the week.

Chart Title	Function
Documents Routed Out by Workflow Process	Displays the total number of documents items that were routed out of the selected queues in the selected workflow processes in the specified interval. The columns represent the workflow processes.
Documents Routed Out by Item Priority	Displays the total number of items that were routed out of the selected queues with the selected workflow item priority. Each pie chart represents a different workflow item priority. The pie slices represent the workflow queues.

The list is grouped by workflow queue. Totaling information as well as a summary of the average, minimum, and maximum amount of time the items spent in the queue appears at the queue level. If only one item was routed out of the queue, or if the same user routed all the items in queue in the specified period, the average, minimum, and maximum queue times appear the same. The average and maximum queue times are displayed in *HH:MM:SS* format. Minimum queue time is formatted *HH:MM:SS.milliseconds*.

Because an item can be routed between many queues in a given time period, the same workflow item might be represented in several queues on the report. If an item is deleted, archived, or removed from workflow, it does not appear on the report.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static date range (the routed out date range and weekdays) or a relative date range (the number of days, weeks, months, and years)
- Whether to report using the active workflow processes, the archived workflow, or both
- Workflow processes
- Whether to include complete queues
- Workflow queue types
- Workflow queues
- Document types
- Drawers
- Workflow item priorities

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Additional Information

When you specify the past number of days, the report includes any documents routed out yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any documents routed within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents routed forward during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents routed out in the last full calendar months specified, but it does not include any documents routed within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents routed forward between March 1 and April 30.

When you specify the past number of years, the report includes any documents routed out within the last complete calendar year, but no documents routed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents routed forward in 2009 and 2010 appear on the report.

Sub queues for super queues are included in the work queue type. For processes, queues, document types, and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads "Greater than 15 selected."

The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Queue Cycle Time for Folders

The Queue Cycle Time for Folders report allows you to view detail information about items associated with a folder that were routed out of the selected queues during the specified time period.

Details

For each queue you select, the report displays the total number of items that were routed out of the queue during the specified time period, the user that routed the item out of the queue, as well as the average, minimum, and maximum amount of time the items spent in the queue.

The Report Summary list displays the total number of items that were routed out of all selected queues during the specified time period as well as the average, minimum, and maximum amount of time the items spent in the selected queues. If any of the selected workflow processes includes super queues, only the sub queues associated with the super queue appear in the queue selection list. Complete queues do not appear on the report.

This report includes the following charts.

Chart Title	Function
Chart Title	Displays the total number of folder items that were routed out of the selected queues on the selected days of the week in the specified interval. The columns represent the days of the week.

Chart Title	Function
Folders Routed Out by Weekday	Displays the total number of folder items that were routed out of the selected queues in the selected workflow processes in the specified interval. The columns represent the workflow processes.
Folders Routed Out by Workflow Process	Displays the total number of folder items that were routed out of the selected queues with the selected workflow item priority. Each pie chart represents a different workflow item priority. The pie slices represent the workflow queues.

The list is grouped by workflow queue. Totaling information as well as a summary of the average, minimum, and maximum amount of time the items spent in the queue appears at the queue level. If only one item was routed out of the queue, or if the same user routed all the items in queue in the specified period, the average, minimum, and maximum queue times appear the same. The average and maximum queue times are displayed in *HH:MM:SS* format. Minimum queue time is formatted *HH:MM:SS.milliseconds*.

Because an item can be routed between many queues in a given time period, the same workflow item might be represented in several queues on the report. If an item is deleted, archived, or removed from workflow, it does not appear on the report.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static date range (the routed out date range and weekdays) or a relative date range (the number of days, weeks, months, and years)
- Whether to report using the active workflow processes, the archived workflow, or both
- Workflow processes
- Whether to include complete queues
- Workflow queue types
- Workflow queues
- Folder types
- Drawers
- Workflow item priorities

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Additional Information

When you specify the past number of days, the report includes any folders routed out yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any folders routed within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all folders routed forward during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes folders routed out in the last full calendar months specified, but it does not include any folders routed within the current month. For example, if today is May 14, and you specify the last two months, the report includes all folders routed forward between March 1 and April 30.

When you specify the past number of years, the report includes any folders routed out within the last complete calendar year, but no folder routed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, folders routed forward in 2009 and 2010 appear on the report.

Sub queues for super queues are included in the work queue type. For processes, queues, folder types, and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.”

The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Super Queue Hourly Processing

The Super Queue Hourly Processing report enables you to analyze the load balancing processing efficiency between sub queues in a super queue and to identify the hours of the day and sub queues that experience peak processing.

Details

This report displays the number of workflow items that were processed in the sub queues of the selected super queue during each hour of the previous 24-hour period. If no items were routed during an hourly interval in the time period, the hour does not appear on the report. If no items were routed out of a sub queue, the sub queue does not appear on the report. Only items that were routed in and out of the queue in the previous 24-hour period appear on the report. Sub queues that are part of a complete queue do not appear on the report. You can only view processing data for one super queue at a time.

Parameters

When you run the report, you must specify the super queue to include on the report.

Total Queue Time from Document First View to Route Out

The Total Queue Time from Document First View to Route Out report evaluates the amount of time elapsed from the first time a workflow item associated with a document was viewed in a queue to the time when the item was routed out of the queue.

Details

For each selected workflow queue, the report displays the users routed items out of the queue, the number of items the users routed within the specified time period, and the average, minimum, and maximum amount of elapsed time between the first time the item in the queue was viewed by a user and the time the item was routed out of the queue.

Users that routed items out of queues that were not viewed while in the queue do not appear on the report. Items recalled or deleted from workflow do not appear on the report. Because users can route items between any number of queues within the specified time period, the same workflow item may appear multiple times.

This report includes the following charts.

Chart Title	Function
Documents Routed Out of Queues by Weekday	Displays the total number of document items that were viewed then routed out of the selected queues on the selected days of the week. The column stacks represent the workflow queues.
Documents Routed Out of Queues by Process	Displays the total number of document items that were viewed then routed out of the selected queues on the selected days of the week. The columns represent the workflow processes selected.
Documents Routed Out of Queues by Priority	Displays the total number of document items that were viewed then routed out of the selected queues with the selected workflow item priority. Each pie chart represents a different workflow item priority. The pie slices represent the workflow queues.

The list is grouped by workflow queue. Totaling information as well as a summary of the average, minimum, and maximum amount of time the items spent between first viewing and routing. If only one item was routed out of the queue, or if the same user routed all the items out of a queue in the specified period, the average, minimum, and maximum queue times appear the same. The average and maximum queue times are displayed in HH:MM:SS format. Minimum queue time is formatted HH:MM:SS.milliseconds.

The Report Summary box displays the total number of items viewed then routed out of all queues within the specified time period. It also displays the average, minimum, and maximum elapsed time for all queues.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- For static, the routed out date range and weekdays
- For relative, the number of days, weeks, months, or years and the weekdays to include
- Whether to report using the active workflow processes, the archived workflow, or both
- Workflow processes
- Whether to include complete queues
- Workflow queue types
- Workflow queues
- Document types
- Drawers
- Workflow item priorities

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Additional Information

When you specify the past number of days, the report includes any documents routed out yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any documents routed within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents routed forward during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents routed out in the last full calendar months specified, but it does not include any documents routed within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents routed forward between March 1 and April 30.

When you specify the past number of years, the report includes any documents routed out within the last complete calendar year, but no documents routed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents routed forward in 2009 and 2010 appear on the report.

Sub queues for super queues are included in the work queue type. For workflow processes, workflow queues, document types, and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Total Queue Time from Folder First View to Route Out

The Total Queue Time from Folder First View to Route Out report evaluates the amount of time elapsed from the first time a workflow item associated with a folder was viewed in a queue to the time when the item was routed out of the queue.

Details

Users that routed items out of queues that were not viewed while in the queue do not appear on the report. Items recalled or deleted from workflow do not appear on the report. Because users can route items between any number of queues within the specified time period, the same workflow item may appear multiple times.

This report includes the following charts.

Chart Title	Function
Folders Routed Out of Queues by Weekday	Displays the total number of folder items that were viewed then routed out of the selected queues on the selected days of the week. The column stacks represent the workflow queues.
Folders Routed Out of Queues by Process	Displays the total number of folder items that were viewed then routed out of the selected queues on the selected days of the week. The columns represent the workflow processes selected.
Folders Routed Out of Queues by Priority	Displays the total number of folder items that were viewed then routed out of the selected queues with the selected workflow item priority. Each pie chart represents a different workflow item priority. The pie slices represent the workflow queues.

The list is grouped by workflow queue. Totaling information as well as a summary of the average, minimum, and maximum amount of time the items spent between first viewing and routing. If only one item was routed out of the queue, or if the same user routed all the items out of a queue in the specified period, the average, minimum, and maximum queue times appear the same. The average and maximum queue times are displayed in *HH:MM:SS* format. Minimum queue time is formatted *HH:MM:SS.milliseconds*.

The Report Summary box displays the total number of items viewed then routed out of all queues within the specified time period. It also displays the average, minimum, and maximum elapsed time for all queues.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- For static, the routed out date range and weekdays
- For relative, the number of days, weeks, months, or years and the weekdays to include
- Whether to report using the active workflow processes, the archived workflow, or both
- Workflow processes
- Whether to include complete queues
- Workflow queue types
- Workflow queues
- Folder types
- Drawers
- Workflow item priorities

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Additional Information

When you specify the past number of days, the report includes any folders routed out yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any folders routed within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all folders routed forward during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes folders routed out in the last full calendar months specified, but it does not include any folders routed within the current month. For example, if today is May 14, and you specify the last two months, the report includes all folders routed forward between March 1 and April 30.

When you specify the past number of years, the report includes any folders routed out within the last complete calendar year, but no folders routed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, folders routed forward in 2009 and 2010 appear on the report.

Sub queues for super queues are included in the work queue type. For workflow processes, workflow queues, folder types, and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads "Greater than 15 selected." The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Workflow Cycle Time by Document Type

The Workflow Cycle Time by Document Type report displays the workflow statistics for items that were added to workflow, finished all queue processing, and entered a complete queue within the specified time period.

Details

For each document type, the report lists the number of items that completed the workflow cycle as well as the average, minimum, and maximum processing time for the item type. The Report Summary box lists the workflow cycle statistics for all selected document types.

This report includes the following chart.

Chart Title	Function
Total Items Processed by Document Type	Displays the total number of documents that entered workflow, finished queue processing, and entered a complete queue within the specified time period. The columns represent the document type.

Only document types that had items complete their workflow cycles appear on the report. The average and maximum queue times are displayed in HH:MM:SS format. Minimum queue time is formatted HH:MM:SS.milliseconds.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static date range or a relative date range
- For static, the added to workflow date range and weekdays
- For relative, the number of days, weeks, months, or years and the weekdays to include
- Whether to report using the active workflow processes, the archived workflow, or both
- Document types
- Drawers
- Workflow item priorities

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Additional Information

When you specify the past number of days, the report includes any documents added to workflow yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any documents added to workflow within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents added to workflow during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents added to workflow in the last full calendar months specified, but it does not include any documents added to workflow within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents added to workflow between March 1 and April 30.

When you specify the past number of years, the report includes any documents added to workflow within the last complete calendar year, but no documents added to workflow the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents added to workflow in 2009 and 2010 appear on the report.

For document types and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.”

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Workflow Cycle Time by Folder Type

The Workflow Cycle Time by Folder Type report displays the workflow statistics for items that were added to workflow, finished all queue processing, and entered a complete queue within the specified time period.

Details

For each folder type, the report lists the number of items that completed the workflow cycle as well as the average, minimum, and maximum processing time for the item type. The Report Summary box lists the workflow cycle statistics for all selected folder types.

This report includes the following chart.

Chart Title	Function
Total Items Processed by Folder Type	Displays the total number of workflow items that entered workflow, finished queue processing, and entered a complete queue within the specified time period. The columns represent the folder type.

Only folder types that had items complete their workflow cycles appear on the report. The average and maximum queue times are displayed in HH:MM:SS format. Minimum queue time is formatted HH:MM:SS.milliseconds.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- For static, the added to workflow date range and weekdays
- For relative, the number of days, weeks, months, or years and the weekdays to include
- Whether to report using the active workflow processes, the archived workflow, or both
- Folder types
- Drawers
- Workflow item priorities

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Additional Information

When you specify the past number of days, the report includes any folders added to workflow yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any folder added to workflow within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all folders added to workflow during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes folders added to workflow in the last full calendar months specified, but it does not include any folders added to workflow within the current month. For example, if today is May 14, and you specify the last two months, the report includes all folders added to workflow between March 1 and April 30.

When you specify the past number of years, the report includes any folders added to workflow within the last complete calendar year, but no folders added to workflow the current year. For example, if today is May 14, 2011, and you specify the last 2 years, folders added to workflow in 2009 and 2010 appear on the report.

For folder types and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.”

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Workflow Document Time on Hold

The Workflow Document Time on Hold report allows you to view the total number of workflow items associated with documents placed on hold during the specified time period and the amount of time the items were on hold.

Details

For each user that places a hold on a workflow item, the report displays the total number of workflow items the user put on hold and the average, minimum, and maximum hold time for all the documents the user put on hold within the specified time period in which they entered the specified queues. Because a document can be routed between multiple queues and placed on hold within each queue during the specified time period, it is possible the report displays multiple representations of the same document.

The Report Summary box displays the total number of items, average hold time, minimum hold time, and maximum hold time for all users that placed holds on items in the specified time period. Items not placed on hold do not appear on the report. If any of the selected workflow processes includes super queues, only the sub queues associated with the super queue appear in the queue selection list.

If multiple users place a hold on the same workflow item while it is in the same queue, the Average Hold Time applies to the user who last placed the item on hold, and the value in the Average Hold Time column appears as the total hold time for all users who placed the item on hold while it was in the queue instead of an average.

If a user placed a hold on an item and routed it to another queue without removing the hold, the workflow item status automatically changes from "On Hold" to "Idle".

This report includes the following charts.

Chart Title	Function
Total Documents Placed on Hold by User	Displays the total number of document items put on hold according to the user that placed the hold.
Top 10 Average Document Hold Times by User	Displays the 10 users that placed a hold on document items with the highest average time on hold.

Because top 10 charts are calculated using a ranking system, if identical values exist in the top 10 rank, more than 10 values can appear on the charts. For example, if twelve workflow items were put on hold at the same time and stay on hold longer than any other on hold items, the chart includes 12 columns.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- For static, the queue entry date range and weekdays
- For relative, the number of days, weeks, months, or years and the weekdays to include
- Workflow processes
- Workflow queue types
- Workflow queues
- Document types
- Drawers
- Workflow item priorities
- Whether to display the average hold time in days, minutes, hours, or seconds on the report chart

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Examples

When you specify the past number of days, the report includes any documents added or routed in yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any documents added or routed in within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all documents that entered the queue during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes documents added or routed in the last full calendar months specified, but it does not include any documents added or routed in within the current month. For example, if today is May 14, and you specify the last two months, the report includes all documents that entered the queue between March 1 and April 30.

When you specify the past number of years, the report includes any documents added or routed in within the last complete calendar year, but no documents added or routed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, documents that entered the queue in 2009 and 2010 appear on the report.

Sub queues for super queues are included in the work queue type. For workflow processes, workflow queues, document types, and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Workflow Folder Time on Hold

The Workflow Folder Time on Hold report allows you to view the total number of workflow items associated with folders placed on hold during the specified time period and the amount of time the items were on hold.

Details

For each user that places a hold on a workflow item, the report displays the total number of workflow items the user put on hold and the average, minimum, and maximum hold time for all the folders the user put on hold within the specified time period in which they entered the specified queues. Because a folder can be routed between multiple queues and placed on hold within each queue during the specified time period, it is possible the report displays multiple representations of the same folder.

The Report Summary box displays the total number of items, average hold time, minimum hold time, and maximum hold time for all users that placed holds on items in the specified time period. Items not placed on hold do not appear on the report. If any of the selected workflow processes include super queues, only the sub queues associated with the super queue appear in the queue selection list.

If multiple users place a hold on the same workflow item while it is in the same queue, the Average Hold Time applies to the user who last placed the item on hold, and the value in the Average Hold Time column appears as the total hold time for all users who placed the item on hold while it was in the queue instead of an average.

If a user placed a hold on an item and routed it to another queue without removing the hold, the workflow item status automatically changes from “On Hold” to “Idle”.

This report includes the following charts.

Total Folders Placed on Hold by User

Displays the total number of folders put on hold according to the user that placed the hold.

Top 10 Average Folder Hold Times by User

Displays the 10 users that placed a hold on folders with the highest average time on hold.

Because top 10 charts are calculated using a ranking system, if identical values exist in the top 10 rank, more than 10 values can appear on the charts.

> For example, if twelve workflow items were put on hold at the same time and stay on hold longer than any other on hold items, the chart includes 12 columns.

Parameters

When you run the report, you must specify the following parameters.

- Whether to use a static or relative date range
- For static, the queue entry date range and weekdays
- For relative, the number of days, weeks, months, or years and the weekdays to include
- Workflow processes
- Workflow queue types

- Workflow queues
- Folder types
- Drawers
- Workflow item priorities
- Whether to display the average hold time in days, minutes, hours, or seconds on the report chart

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report. If you enter 0, no data appears.

Additional Information

When you specify the past number of days, the report includes any folders added or routed in yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any folders added or routed in within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all folders that entered the queue during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes folders added or routed in the last full calendar months specified, but it does not include any folders added or routed in within the current month. For example, if today is May 14, and you specify the last two months, the report includes all folders that entered the queue between March 1 and April 30.

When you specify the past number of years, the report includes any folders added or routed in within the last complete calendar year, but no folders added or routed in the current year. For example, if today is May 14, 2011, and you specify the last 2 years, folders that entered the queue in 2009 and 2010 appear on the report.

Sub queues for super queues are included in the work queue type. For workflow processes, workflow queues, folder types, and drawers, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Workflow Queue Reconciliation

The Workflow Queue Reconciliation report allows you to view a summary of the queue activity within a specified time period.

Details

For each selected workflow queue, the report displays the number of items that were in the workflow queue at the beginning of the specified time period, the number of items that were routed into the queue and routed out of the queue during the specified time period, and the number of items in the queue at the end of the specified time period.

This report includes a Starting and Ending Item Count chart. This chart displays the number of items in the queue at the start of the specified time period versus the number of items in the queue at the end of the specified time period.

Parameters

If no items were routed in or out of the queue during the specified time period, the Items at Start and Items at End column values are identical and the Items Routed In and Items Routed Out columns display zero values.

When you run the report, you must specify the following parameters.

- Whether to report using the active workflow processes, the archived workflow, or both
- Workflow processes
- Whether to include complete queues
- Workflow queue types
- Workflow queues
- Whether to use a static or relative date range
- If the date range is static, the queue activity date range
- If the date range is relative, the number of queue activity days, weeks, months, or years

When you use a static date range, you can specify the calendar date range to include on the report. When you use a relative date range, you can specify the number of past days, weeks, months, or years to include on the report.

Additional Information

When you specify the past number of days, the report includes any workflow queue activity yesterday and the number of past days specified. For example, if today is Wednesday, May 14 at 2:00 PM, and you specify to run the report for the past seven days, the report returns data for May 7 through May 13.

When you specify the past number of weeks, the report includes the last full week (from Sunday to Saturday) in the number of past weeks specified, but it does not include any queue activity within the current week. For example, if today is Wednesday, May 14, and you specify the last two weeks, the report includes all queue activity during the week of May 5 through 11 and the week of April 28 through May 4.

When you specify the past number of months, the report includes queue activity in the last full calendar months specified, but it does not include any queue activity within the current month. For example, if today is May 14, and you specify the last two months, the report includes all queue activity between March 1 and April 30.

When you specify the past number of years, the report includes any queue activity within the last complete calendar year, but no queue activity within the current year. For example, if today is May 14, 2011, and you specify the last 2 years, queue activity in 2009 and 2010 appear on the report.

Sub queues for super queues are included in the work queue type. For workflow processes and workflow queues, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Workflow Queue Setup by Attributes

The Workflow Queue Setup by Attributes report allows you to view the types of workflow queues in the selected workflow processes and view the attributes assigned to the selected queues in Workflow Designer.

Details

For each selected workflow queue in the specified workflow processes, the list indicates whether the queue is a complete queue or a join queue. For super queues, the sub queues are listed.

The list is grouped by workflow process. For each selected workflow queue in the specified workflow processes, the list displays any inbound, within queue, or outbound actions that are assigned to the queue and whether any of the following attributes are enabled in the Queue Properties dialog box in Workflow Designer.

Attribute Type	Report Displays
Routing	• Whether routing is allowed between sub queues • Whether route back is enabled • Whether route recall is enabled • The time in which items can be recalled
Actions	• Whether the queue has an inbound, within queue, or outbound action • The time delay associated with the action
Application plan linking	• Whether application plan linking is enabled • Whether the item is validated against the application plan when routed back or forward
Removal	• The removal method for the queue • The interval used to enable removal

If route recall is not enabled or a removal method is not defined for the queue, the interval associated with the attribute appears as 0. If an inbound, within queue, or outbound action configured for a queue is associated with an iScript, the file name of the script appears. If the action is associated with an alarm or routing rule, the name of the rule appears.

Parameters

When you run the report, you must specify the following parameters.

- Workflow processes
- Workflow queues

For workflow processes and queues, if you select 15 or fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The user prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Workflow Queue Snapshot

The Workflow Queue Snapshot report allows you to view a high-level picture of the number of items currently in workflow processes and queues as well as their associated workflow item states.

Details

For each workflow queue, the report displays the total number of items in the queue and a breakdown of the items that have the following workflow item states.

- Idle.
- Working.
- On hold.
- Pending.
- Complete.

The list is grouped by workflow process. The totaling information for the total number of workflow items in each queue as well as the number of items with each of the above workflow states appears below each selected workflow process. Deleted queues do not appear on the report.

This report includes the following charts.

Chart Title	Function
Items in Workflow by Queue	Displays the total number of workflow items in each selected workflow queue.
Items in Workflow by Workflow Item State	Displays the number of tasks in each selected workflow process according to the current workflow item state.

Parameters

When you run the report, you must specify the following parameters.

- Whether to display workflow queues with no workflow items.
- Workflow processes.
- Whether to include complete queues.
- Workflow queue types.
- Workflow queues.

Sub queues for super queues are included in the work queue type. For workflow processes and queues, if you select 15 of fewer values, the selected values appear in the Report Parameters box on the report. If you select more than 15 values, this box reads “Greater than 15 selected.” The workflow queue prompt is a select and search prompt.

Note: To view a sample of this report, see the Business Insight Sample Reports Guide.

Author reports

Author reports

About authoring reports

You can use Business InsightQuery Studio, Report Studio, and Workspace Advanced to author new reports and modify existing reports.

You can also generate reports from a View automatically. You can modify any report that contains Document or Folder IDs to open those objects from within the report itself.

For more information about authoring Business Insight reports, view the official Cognos 10 documentation.

Getting started with report authoring

Users with the report authoring role work in Query Studio, Report Studio, and Workspace Advanced to create reports for your enterprise. Before you can begin creating reports, you must be added to the report authoring role. Report authors perform the following tasks.

- Create new reports
- Modify existing reports
- Copy existing reports
- Rename existing reports
- Delete existing reports
- View and Run reports

Report authoring programs

Your Perceptive ContentBusiness Insight suite includes two report authoring programs you can use to create reports.

- Query Studio allows you to create quick, ad hoc reports using your Perceptive Content data.
- Report Studio allows you to create professional reports with a customizable layout using your Perceptive Content data.

Create a report from a view

To create a new report in Report Studio using the data defined in a document or folder view, complete the following steps.

Prerequisite This procedure requires the report author role and document or folder to use as the basis for the report.

1. In **Management Console**, in the left pane, under **Select Department**, select your target department from the list.
2. In the left pane, click **Views**.
3. In the right pane, on the **Document** or **Folder** tab, select the target view.

   Note: The view must be active.

4. If you have access to **Author**, the **To Report** button is enabled. Click the button.
5. In the **Create Report from View** dialog box, enter a report name and select a folder in which to save the report.
6. Click **OK**.

   A report based off of the selected View is created and opens automatically in Report Studio.

Work with Query Studio

What is Query Studio?

The Query Studio module of Business Insight enables you to create simple, on-demand queries and reports using the data in your existing business intelligence database model.

With Query Studio, you can easily create and modify reports without extensive database schema knowledge or SQL query knowledge. When you access Query Studio, the items in your reporting database appear as tree objects in the navigation menu. From there, you can drag and drop objects into the Query Studio workspace to create ad hoc reports. Using this reporting tool, you can perform the following actions.

- Transform information in your business intelligence data source into report items.
- Use the data source report items to create reports you can save for future use.
- Create new reports based on existing queries.
- Compare and analyze data using filters, summaries, and calculations.
- Use charts and other layout tools to visually present your report data.

For more information about authoring Business Insight reports, view the official Cognos 10 documentation.

Getting started with Query Studio

New reports created in Query Studio contain no data. When you add report items to the report, the items appear as columns in the workspace. When you add a report item by double-clicking or using the Insert button, Query Builder automatically inserts the new report item in a list column immediately following the last inserted report item. When you drag a report item from the Menu pane to the workspace, you can determine its column position.

For more information about the different types of report items, refer to the “Reference” section of this guide. In Query Studio, you can create a list report, a crosstab report, or a chart.

This guide only presents a limited subset of the procedures you can use to build reports in Query Studio. For more information about building reports in Report Studio, refer to Perceptive ContentBusiness InsightQuery Studio Help, available on the Perceptive Software website.

About creating reports in Query Studio

When you create a new report in Query Studio, you create a query definition, which is a specific set of instructions for extracting particular data.

Creating a report in Query Studio, you add items from the Perceptive Content data source packages.

In the report, report items appear as columns and rows, depending on your report type. In a chart, report items appear as data markers and axis labels. With each report item you add to the report, the scope and complexity of the report increases. You can focus on specific data in the report by limiting the number of report items you add.

For more information about authoring Business Insight reports, view the official Cognos 10 documentation.

Common procedures in Query Studio

The following procedures enable you to create a quick report using Business InsightQuery Studio, add data to the report, apply some basic layout formatting to the report, and then save it in Perceptive Content.

- Create a new Query Studio report from IBM Cognos.
- Define a title for the Query Studio report
- Add and remove data in columns to the report
- Save the report for future use in Query Studio

Report items appear as columns in the report in the order in which you add them. Typically, data gets more granular with each column to the right. For example, from left to right, a report’s columns include Workflow Process, Workflow Queue, and Item Count.

Work with Report Studio

What is Report Studio?

The Report Studio module of Business Insight allows you to create complex reports that include multiple pages and queries using your existing business intelligence database model.

With Report Studio, you can create the reports your organization needs by utilizing a combination of multiple databases. To use Report Studio, you must be familiar with the database and SQL query creation and have report author user privileges.

When you access Report Studio from IBM Cognos, the items in your reporting database appear as objects in the Insertable Objects pane. From there, you can drag objects into the Report Studio workspace to create complex reports. Using this reporting tool, you can perform the following actions:

- Transform information in your business intelligence data source into report items.
- Use the data source report items to create reports you can save for future use.
- Create queries to use and reuse in reports.
- Compare and aggregate data using filters, summaries, and calculations.
- Use charts and other layout tools to visually present your report data.
- Build sophisticated, multiple-page, multiple-query reports against multiple databases.
- Create prompt pages that users must complete each time they run the report.
- Create invoices, statements, weekly sales, and inventory reports.

Report Studio runs in a web browser. For the best display and performance, use a screen resolution that meets or exceeds 1024 by 768 pixels.

For more information about authoring Business Insight reports, view the official Cognos 10 documentation.

Create a report using custom SQL overview

To create a report using custom SQL queries instead of the Perceptive Content data source, complete the following sequence of procedures.

Prerequisite This procedure requires the report author role.

1. Create a blank list report.
2. Add custom SQL to a new report.

Next Updating the Perceptive Content database may cause a report with custom SQL to fail. In this instance, you will need to recreate the report.

Exclude drawers from a prompt

To limit the Perceptive Content drawers that appear in a report prompt, complete the following steps.

Prerequisite Before completing this procedure, you must create a prompt with limited drawer values.

1. Open an existing report in **Report Studio**.
2. Click **View > Queries**.

3. In the **Queries** list, double-click the drawer prompt page query.

   Example This query is typically `Parameter Drawer`.

4. Drag **Drawer Name** from the **Data Items** pane to the **Detail filters** pane and then, in the **Detail Filter Expression** dialog box, do the following substeps:
   1. In the **Expression Definition** dialog box, type `in` after `[Drawer Name]`.
   2. In the **Available Components** list, expand **Business Logic View > Document Star Schema > Drawer** and then select **Drawer Name**.
   3. In the dialog box toolbar, click the **Select Values** button.
   4. In the **Select Multiple Values** box, under **Values**, select the drawers to include on the prompt.
   5. Click the button to move the drawers to the **Selected Values** list and click **Insert**.

      The expression should look similar to `[Drawer Name] in ('Admissions', 'Registrar')`
5. In the **Detail Filter Expression** box, click **OK**.
6. Optional. Customize the appearance of your prompt.

Guidelines for report layout

When formatting and customizing the layout for your report, keep the following guidelines in mind.

Report structure

- Define the page structure and determine what goes into the page header, body, and footer.
- When possible, use HTML as the output method, as it is the most widely supported output format for screen readers.
- Avoid using large, complex list or crosstab reports.
- Modify properties at the highest level report item possible.

Report layout

- Always put a title on your report.
- Decide which data container is the best layout option for your data. Choose a list, crosstab, chart, repeater, or text frame.
- Use padding and margins to create white space.
- Format data so that it matches any pattern of text and numbers when default formats are not appropriate.

Formatting numbers

- When you specify the number of decimal places in numbers, numbers are rounded to the nearest truncated value.
- If the maximum number of decimals you specify is lower than the number of decimals in the data value, the displayed data value is rounded to the maximum number of decimals.
- When you create reports, Report Studio automatically adapts the format of the currency numbers for each user according to the content language specified.

Localization considerations

- When formatting a date, different regions use different characters to represent the date separator.
- The positions of symbols used to indicate currency and decimals can be locale-sensitive.
- The calendar type you use might not be the same type of calendar used in all regions.
- When using timestamps on your report, include the time zone as well.

Data source report items

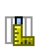
Report items displayed on the Source tab of the Insertable Objects pane represent records in the reporting database that you can add to the report. The Source tab is visible when you open a report page from the Page Explorer or a query from the Query Explorer in the workspace.

Note: If you attempt to add a report item on the Source tab to the workspace without adding it to an existing data container, Report Studio uses the singleton data container to hold the item and creates a new query.

For a description of a report item that appears in the Business Logic View or Data Source View data source, refer to one of the following topics:

- Administrative_schema_descriptions.htm#Administrative_schema_descriptions
- Capture_schema_definitions.htm
- Document schema definitions
- Folder schema definitions
- Task schema definitions
- Workflow schema definitions

The items that appear on the Source tab appear with the following icons:

Icon	Report Item
	Package
	Namespace
	Query subject
	Query item
	Measure
	Package filter

Expression editor elements

The expression editor allows you to combine the report items in your data source and your report with constants, functions, operators, and other components to derive a single value.

In Report Studio, you use the expression editor to create any of the following report items or objects.

- Filters
- Calculations
- Data items in a query

Expression editor toolbar

The following features are available on the expression editor toolbar.

Function	Description
Available Components	Show or hide the Available Components pane.
Information	Show or hide the Information box.
Validate	Check the expression for syntax errors.
Select Value	Use an individual value of a report item in the expression.
Select Multiple Values	Use multiple values of a report item in the expression.
Cut	Cut the selected expression definition and place it on the clipboard.
Copy	Copy the selected expression definition and place it on the clipboard.
Paste	Paste the expression definition on the clipboard.
Delete	Delete the selected expression definition.

Available Components pane

The Available Components pane displays all the available report items and other components you can double-click or drag to the Expression Definition box to create your expressions. The following tabs are available in this pane:

Note: Depending on the type of expression you define, some tabs are hidden.

- The Source tab displays all the report items you can add from the data source to create the expression.
- The Data Items tab displays all the report items in the associated query that you can use to create the expression.
- The Queries tab displays all the report items in all queries you can use to create the expression.
- The Functions tab displays all the operators, constants, functions and other components you can use to create the expression. For more information about the components that appear on this tab, refer to the Expression Components section.
- The Parameters tab displays all existing parameters in the report that you can use to create the expression.
- The Calculated items tab displays all existing calculated report items that you can use to create the expression.

Not all data sources support functions the same way. The Functions tab includes indicators that show the availability of each component in the context of the data source you use.

Indicator	Function	Description
X	Not available	You cannot use this function in any expression.
!!	Limited availability	The function is not available for some data sources in the package.
!	Limited support	The function is available for all data sources in the package but not supported for your data source.
(no symbol)	Unconstrained	You can use this function without limitation.

Expression Definition box

The Expression Definition box of the expression editor allows you to manage the syntax of an expression. When you double-click an item in the Available Components pane, Report Studio inserts the associated syntax at the cursor point in the Expression Definition box. If the cursor is not present, the syntax appears at the end of the Expression Definition box. You can also manually type the expression syntax in the Expression Definition box.

Information box

The Information box contains the following tabs.

- Tips
- Errors

The Tips tab displays helpful information about how to use the constants, operators, functions, and other operators available on the Functions tab.

The Errors tab displays any syntax or logic errors detected in the report specification.

Work with Framework Objects

Administrative schema descriptions

The following table lists the report items available in the Model Query Subjects and Filters folders of the namespace in the Perceptive Content Data Source View data source package, available on the Source tab of the Insertable Objects pane. The report items are listed in alphabetical order for quick reference.

The following tables only list the report items that are not also available in the Business Logic View package.

Workflow report items

Enum - Workflow Queue Type

Enumeration Value

The database values (0-9) of the workflow queue types. 0 is a work queue, 2 is a super queue, 3 is a sub queue, and 9 is a system queue.

Queue Type

The type of workflow queue. Possible values include Work queue, Super queue, Sub queue, and System queue.

First View Time

Calendar Date

The date and time the workflow item was viewed for the first time in the current queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM/PM.

Calendar Day

The day of the month the workflow item was viewed for the first time in the current queue. For example, if a document was viewed on August 22, 2002, the Calendar Day (Creation time) value is 22.

Calendar Hour

The hour of the day the workflow item was viewed for the first time in the current queue. For example, if a document was first viewed at 2:00 PM, the Calendar Hour (Creation Time) value is 14.

Calendar Key

The date and hour the workflow item was viewed for the first time in the current queue. By default, values are formatted YYYYDDMMHH.

Calendar Month

The month of the year the workflow item was viewed for the first time in the current queue. For example, if a document was first viewed in April 2008, the Calendar Month (Creation Time) value is 4.

Calendar Month Key

The year and month the workflow item was viewed for the first time in the current queue, formatted as YYYYMM. For example, if a document was first viewed on June 15, 2005, the value is 200506.

Calendar Quarter

The quarter of the year the workflow item was viewed for the first time in the current queue. For example, if a document was first viewed on August 9, 2009, the Calendar Quarter (Creation Time) value is 3.

Calendar Quarter Key

The year and quarter the workflow item was viewed for the first time in the current queue, formatted YYYYQ. For example, if a document was first viewed in November 2007, the value is 20074.

Calendar Year

The year the workflow item was viewed for the first time in the current queue. By default, the format is YYYY.

Day Name

The name of the day of the week the workflow item was viewed for the first time in the current queue. For example, Monday.

Day of Week

The number of the day of the week the workflow item was viewed for the first time in the current queue. For example, if a document was first viewed on Monday, the Day of Week (Creation Time) is 2.

Month Name

The name of the month the workflow item was viewed for the first time in the current queue. For example, December.

Week Number

The number of the week of the year the workflow item was viewed for the first time in the current queue. For example, if a document was first viewed December 4, 2009, the Week Number (Creation Time) value would be 49.

Task report items

Enum - Task History Mod Type

Enumeration Value

The database values (0-12) of the actions recorded for task history.

Mod Type

The type of action performed for the task and recorded in the task history. Possible values include Task Created, State Changed, Task Viewed, Task Updated, Task Start Working, Task Stop Working, Task Skipped, Task Returned, Page Deleted, User Assigned, User Unassigned, and Reassignment.

Enum - Task Template Completion Type

Enumeration Value

The database values (0-3) of the task completion method defined for the task template.

Completion Type

The completion method defined for the task template. Possible values include Automatic with Digital Signature, Complete Pending Review, and Manual.

Enum - Task Template Due Date Type

Enumeration Value

The database values (0-4) of the due date calculation method defined for the task template.

Due Date Type

The due date calculation method for tasks created using the task template. Possible values include Manually Assigned, in which the task creator sets the due date; Offset Assignment Date, in which the due date defaults based on the task assignment date; Offset Start Date, in which the due date defaults based on the task start date; and Offset Custom Property, in which the due date is based on a custom property.

Enum - Task Template Type

Enumeration Value

The database value (0-5) of the type of task template.

Task Template Type

The type of task template used to create the task. Possible values include Signature Required, Pointer, and Document Deficiency.

Administrative namespace report items

Perceptive Content managers can deny, grant, or soft deny privileges for users and groups. If a privilege is neither explicitly granted or denied, the privilege is considered soft denied and the user cannot perform the action. User privileges can also be inherited from groups.

Annotation privileges

Groups

Group ID

The unique ID of the Perceptive Content group.

Group Name

The name of the Perceptive Content group.

Group Description

The description of the Perceptive Content group.

Group Category

The type of group. Possible values include Regular, System, and Auto update. All groups configured in your Perceptive Content system, whether added or imported, appear as Regular groups.

Users

Is Active

Indicates whether the user is an active user.

User Category

The type of user. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user.

User ID

The unique ID of the user.

User Last Name

The last name of the user.

User Locality

The location of the user. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user.

Privileges

Add

Whether the privilege to add new annotations associated with the annotation template to documents is granted (1), denied (-1), or soft denied (0) for the associated entity.

Delete

Whether the privilege to delete existing annotations associated with the annotation template from documents is granted (1), denied (-1), or soft denied (0) for the associated entity.

Entity ID

The unique ID of the user or group for whom the privilege is defined.

Hide

Whether the privilege to hide annotations associated with the annotation template on documents is granted (1), denied (-1), or soft denied (0) for the associated entity.

Modify

Whether the privilege to modify existing annotations associated with the annotation template on documents is granted (1), denied (-1), or soft denied (0) for the associated entity.

Template ID

The unique ID of the annotation template.

View

Whether the privilege to view annotations created with the annotation template on documents is granted (1), denied (-1), or soft denied (0) for the associated entity.

Application Plan Privileges

Groups

Group ID

The unique ID of the Perceptive Content group.

Group Name

The name of the Perceptive Content group.

Group Description

The description of the Perceptive Content group.

Group Category

The type of group. Possible values include Regular, System, and Auto update. All groups configured in your Perceptive Content system, whether added or imported, appear as Regular groups.

Users

Is Active

Indicates whether the user is an active user.

User Category

The type of user. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user.

User ID

The unique ID of the user.

User Last Name

The last name of the user.

User Locality

The location of the user. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user.

Privileges

Auto Create Folder

Whether the privilege to automatically create folders for the application plan is granted (1), denied (-1), or soft denied (0) for the associated entity.

Entity ID

The unique ID of the user or group for whom the privilege is defined.

Link

Whether the privilege to link documents using the application plan is granted (1), denied (-1), or soft denied (0) for the associated entity.

Manage

Whether the privilege to modify the application plan is granted (1), denied (-1), or soft denied (0) for the associated entity.

Plan ID

The unique ID of the application plan.

View

Whether the privilege to view documents associated with the application plan is granted (1), denied (-1), or soft denied (0) for the associated entity.

Auditing

Audit Action User

Is Active

Indicates whether the user is an active user.

User Category

The type of user. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user.

User ID

The unique ID of the user.

User Last Name

The last name of the user.

User Locality

The location of the user. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user.

Documents Modified

Action Time

The date and time the audited action was performed.

Action Type

The type audited action that was performed.

Action User ID

The unique ID of the user that performed the audited action.

Audit ID

The unique ID of the audit record.

Audit Object ID

The ID of the object associated with the document (document or page) for which the audit condition was performed.

Category ID

The unique ID of the category associated with the audit condition.

Document ID

The unique ID of the document for which the audit condition was performed.

Object Class

The database value of the type of audit action performed. A value of 2 indicates the document has been modified.

Object Type

The type code for the type of object (document, folder, or logical object) being audited.

Documents Viewed

Action Time

The date and time the audited action was performed.

Action Type

The type audited action that was performed.

Action User ID

The unique ID of the user that performed the audited action.

Audit ID

The unique ID of the audit record.

Category ID

The unique ID of the category associated with the audit condition.

Object ID

The unique ID of the document that was viewed.

Object Class

The database value of the type of audit action performed. A value of 2 indicates the document has been viewed.

Object Type

The type code for the type of object (document, folder, or logical object) being audited.

Source Document Keys

Audit Object ID

The unique ID of the object associated with the audit condition.

Source Keys

The document key value prior to the audit action.

Destination Document Keys

Audit Object ID

The unique ID of the object associated with the audit condition.

Destination Keys

The document key value as a result of the audit action.

Client Side Actions

Action

The action associated with the client audit condition.

Action ID

The unique ID of the action associated with the client audit condition.

Action User ID

The unique ID of the user that performed the audited client action.

Audit ID

The unique ID of the audit record.

Category ID

The unique ID of the category associated with the client audit condition.

Object Class

The database value of the type of audit action performed. A value of 2 indicates the document has been viewed.

Object ID

The unique ID of the object associated with the client audit condition.

Object Type

The type code for the type of object (document, folder, or logical object) being audited.

Drawer Privileges

Groups

Group ID

The unique ID of the Perceptive Content group.

Group Name

The name of the Perceptive Content group.

Group Description

The description of the Perceptive Content group.

Group Category

The type of group. Possible values include Regular, System, and Auto update. All groups configured in your Perceptive Content system, whether added or imported, appear as Regular groups.

Users

Is Active

Indicates whether the user is an active user.

User Category

The type of user. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user.

User ID

The unique ID of the user.

User Last Name

The last name of the user.

User Locality

The location of the user. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user.

User Organization

The organization to which the user belongs. Organizations are configured as part of the user personal information in the Perceptive ContentManagement Console.

User Suffix

The suffix of the user. Suffixes are configured as part of the user personal information in the Perceptive ContentManagement Console.

Content

Entity ID

The unique ID of the user or group.

Drawer ID

The unique ID of the drawer.

Move

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for moving documents, folders, or shortcuts between folders in the drawer.

Documents

Create/Append

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating new documents, folders, or shortcuts in the drawer.

Delete

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for deleting content in the associated drawer.

Delete Signature Representations

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for deleting representations of digital signatures from documents in the associated drawer.

Delete Signed Documents

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for deleting digitally signed documents in the associated drawer.

Drawer ID

The unique ID of the drawer.

Edit Custom Properties

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for editing custom properties for documents in the associated drawer.

Edit Keys

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for editing the Field1-Field5 index keys of documents in the associated drawer.

Edit Notes

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for editing notes on documents in the associated drawer.

Entity ID

The unique ID of the user or group.

Move Page

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for moving document pages in the associated drawer.

Move Signature Representations

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for moving representations of digital signatures on documents in the associated drawer.

Merge

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for merging documents in the associated drawer.

Open

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for opening documents in the associated drawer.

Page Delete

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for deleting pages of documents in the associated drawer.

Page Reorder

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for reordering document pages in the associated drawer.

Search

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for searching for documents in the associated drawer.

Sign

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for digitally signing documents in the associated drawer.

Void Signatures

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for voiding digital signatures on documents in the associated drawer.

Explorer/Folder Viewer

Drawer ID

The unique ID of the drawer.

Entity ID

The unique ID of the user or group.

Fax Document

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for faxing a document from Perceptive Content.

Launch Associated Application

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for launching the associated application of a document from Perceptive Content.

Mail as Attachment

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for emailing a document as an attachment from Perceptive Content.

Mail Perceptive Content Link

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for emailing a document as an Perceptive Content link from Perceptive Content.

MailWebNow Link

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for emailing a document as a web link from Perceptive Content.

Print Document

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for printing a document from Perceptive Content.

Save Local Copies

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for saving a copy of a document locally from Perceptive Content.

Send Document to User

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for sending a document to another user from Perceptive Content.

Viewer

Drawer ID

The unique ID of the drawer.

Entity ID

The unique ID of the user or group.

Fax Document

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for faxing a document in the ImageNowViewer.

Launch Associated Application

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for launching the associated application for a document in the ImageNowViewer.

Mail as Attachment

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for emailing a document as an attachment in Perceptive Content.

Mail Perceptive Content Link

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for emailing a document as an Perceptive Content link in Perceptive Content.

MailWebNow Link

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for emailing a document as a web link from Perceptive Content.

Print Document

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for printing a document in Perceptive Content.

Save Local Copies

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for saving a copy of a document locally in Perceptive Content.

Send Document to User

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for sending a document to another user in ImageNowViewer.

Document Management

Delete History

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for deleting the history of a version controlled document.

Drawer ID

The unique ID of the drawer associated with the version controlled document.

Entity ID

The unique ID of the group or user associated with the privilege.

Remove from Version Control

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for removing a document from version control.

Undo 3rd Party Checkout

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for reversing a document checked out by another user.

Use Library Services

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for adding a document to version control, checking documents in and out, viewing document history, undoing checkouts, and getting the latest versions of documents.

Batch (Proposed Key)

Drawer ID

The unique ID of the drawer associated with the batch.

Entity ID

The unique ID of the group or user associated with the privilege.

Process

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for processing a batch in the associated drawer.

Document Types

Users

Is Active

Indicates whether the user is an active user.

User Category

The type of user. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user.

User ID

The unique ID of the user.

User Last Name

The last name of the user.

User Locality

The location of the user. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user.

User Organization

The organization to which the user belongs. Organizations are configured as part of the user personal information in the Perceptive ContentManagement Console.

User Suffix

The suffix of the user. Suffixes are configured as part of the user personal information in the Perceptive ContentManagement Console.

Groups

Group ID

The unique ID of the Perceptive Content group.

Group Name

The name of the Perceptive Content group.

Group Description

The description of the Perceptive Content group.

Group Category

The type of group. Possible values include Regular, System, and Auto update. All groups configured in your Perceptive Content system, whether added or imported, appear as Regular groups.

Documents

Delete

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for deleting documents with the associated document type.

Delete Signature Representations

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for deleting representations of digital signatures from documents with the associated document type.

Delete Signed Documents

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for deleting digitally signed documents with the associated document type.

Document Type ID

The unique ID of the document type.

Edit Custom Properties

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for editing custom properties for documents with the associated document type.

Edit Keys

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for editing the index keys of documents with the associated document type.

Edit Notes

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for editing notes on documents with the associated document type.

Entity ID

The unique ID of the user or group.

Merge

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for merging documents with the associated document type.

Move Page

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for moving document pages in documents with the associated document type.

Move Signature Representations

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for moving representations of digital signatures on documents with the associated document type.

Open

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for opening documents with the associated document type.

Page Delete

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for deleting pages of documents with the associated document type.

Page Reorder

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for reordering document pages with the associated document type.

Sign

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for digitally signing documents with the associated document type.

Void Signatures

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for voiding digital signatures on documents with the associated document type.

Explorer/Folder Viewer

Document Type ID

The unique ID of the document type.

Entity ID

The unique ID of the user or group.

Fax Document

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for faxing a document with the associated document type from the Perceptive Content.

Launch Associated Application

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for launching the associated application of a document with the associated document type from the ImageNowExplorer.

Mail as Attachment

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for emailing a document with the associated document type as an attachment from the Perceptive Content.

Mail Perceptive Content Link

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for emailing a document with the associated document type as an Perceptive Content link from Perceptive Content.

MailWebNow Link

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for emailing a document as a web link from Perceptive Content.

Print Document

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for printing a document with the associated document type from the Perceptive Content.

Save Local Copies

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for saving a copy of a document with the associated document type locally from the ImageNowExplorer.

Send Document to User

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for sending a document with the associated document type to another user from the Perceptive Content.

Viewer

Document Type ID

The unique ID of the document type.

Entity ID

The unique ID of the user or group.

Fax Document

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for faxing a document with the associated document type in the ImageNowViewer.

Launch Associated Application

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for launching the associated application for a document with the associated document type in the ImageNowViewer.

Mail as Attachment

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for emailing a document with the associated document type as an attachment in the ImageNowViewer.

Mail Perceptive Content Link

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for emailing a document with the associated document type as an Perceptive Content link in the ImageNowViewer.

MailWebNow Link

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for emailing a document as a web link from Perceptive Content.

Print Document

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for printing a document with the associated document type in the ImageNowViewer.

Save Local Copies

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for saving a copy of a document with the associated document type locally in the ImageNowViewer.

Send Document to User

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for sending a document with the associated document type to another user in the ImageNowViewer.

Document Management

Delete History

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for deleting the history of a version controlled document with the associated document type.

Document Type ID

The unique ID of the document type associated with the version controlled document.

Entity ID

The unique ID of the group or user associated with the privilege.

Remove from Version Control

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for removing a document with the associated document type from version control.

Undo 3rd Party Checkout

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for reversing a document with the associated document type checked out by another user.

Use Library Services

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for adding a document with the associated document type to version control, checking documents in and out, viewing document history, undoing checkouts, and getting the latest versions of documents.

Folder Type Privileges

Users

Is Active

Indicates whether the user is an active user.

User Category

The type of user. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user.

User ID

The unique ID of the user.

User Last Name

The last name of the user.

User Locality

The location of the user. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user.

User Organization

The organization the user belongs to. Organizations are configured as part of the user profile information in the Perceptive ContentManagement Console.

User Suffix

The suffix assigned to the user.

Groups

Group ID

The unique ID of the Perceptive Content group.

Group Name

The name of the Perceptive Content group.

Group Description

The description of the Perceptive Content group.

Group Category

The type of group. Possible values include Regular, System, and Auto update. All groups configured in your Perceptive Content system, whether added or imported, appear as Regular groups.

Folder Type Privilege

Entity ID

The unique ID of the user or group.

Manage

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for managing the folder type.

Folder Type ID

The unique ID of the folder type.

Use

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for using the folder type.

Global Privileges

Users

Is Active

Indicates whether the user is an active user.

User Category

The type of user. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user.

User ID

The unique ID of the user.

User Last Name

The last name of the user.

User Locality

The location of the user. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user.

User Organization

The organization to which the user belongs. Organizations are configured as part of the user personal information in the Perceptive ContentManagement Console.

User Suffix

The suffix of the user. Suffixes are configured as part of the user personal information in the Perceptive ContentManagement Console.

Groups

Group ID

The unique ID of the Perceptive Content group.

Group Name

The name of the Perceptive Content group.

Group Description

The description of the Perceptive Content group.

Group Category

The type of group. Possible values include Regular, System, and Auto update. All groups configured in your Perceptive Content system, whether added or imported, appear as Regular groups.

Search

Content

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for using full-text search.

Entity ID

The unique ID of the user or group associated with the privilege.

ERM

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for accessing ERM search interface.

ERM: Load Local Query

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for loading ERM queries locally.

ERM: Load Server Query

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for loading an ERM query on the server.

ERM: Manage Local Queries

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for saving, deleting, or modifying local ERM queries.

ERM: Manage Server Queries

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for saving, deleting, or modifying server ERM queries.

Interact for Office Documents

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for searching for Interact for Office documents.

Interact for Office Folders

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for searching for Interact for Office Folders.

Tasks

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for searching for tasks.

Folder

Create shortcuts

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for adding shortcuts to a folder.

Create

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating new folders.

Delete

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for deleting folders.

Edit Folder Properties

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for editing the properties of a folder.

Entity ID

The unique ID of the user or group associated with the privilege.

View

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for viewing a folder.

Remove from Folder

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for removing a document, folder, or shortcut from folders.

Capture

Batch Mode

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for capturing documents in batch mode.

Entity ID

The unique ID of the user or group associated with the privilege.

Package Mode

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for capturing documents in package mode.

Single Mode

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for capturing documents in single mode.

Batch (General)

Bypass QA

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for bypassing the QA process.

Delete Batch

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for deleting a batch.

Entity ID

The unique ID of the user or group associated with the privilege.

Edit Batch Notes

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for editing batch notes.

Link Batch

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for linking batches.

Modify Step or State

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for modifying the batch step or state.

QA

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for quality assuring batches.

Resubmit Batch

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for resubmitting a batch.

Viewer (Unlinked Documents)

Entity ID

The unique ID of the user or group associated with the privilege.

Launch Associated Application

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for launch the associated application of the unlinked document.

Mail as Attachment

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for emailing an unlinked document as an attachment.

Print Unlinked Documents

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for printing an unlinked document.

Save Local Copies of Unlinked Documents

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for saving a local copy of an unlinked document.

Reports

Author Reports

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for authoring Business Insight reports.

Entity ID

The unique ID of the user or group associated with the privilege.

Manage Reports

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for managing Business Insight reports.

Manage

Add Users

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for adding new Perceptive Content Users.

Annotation Templates

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for managing annotations.

Digital ID

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for viewing, exporting, voiding, and expiring digital IDs.

Drawers

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating, deleting, and modifying drawers.

Edit Custom Properties

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for adding, changing, or deleting custom properties.

Entity ID

The unique ID of the user or group associated with the privilege.

Groups

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating, modifying, and deleting Perceptive Content groups.

LearnMode Application Plans

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating, deleting, and modifying application plans.

LearnMode Options

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for configuring LearnMode options.

Manage Audit Template Assignment

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for assigning audit templates.

Manage Audit Template Management

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating, deleting, and modifying audit templates.

Manage Basket Groups

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating, deleting, and modifying basket groups.

Manage Batch Upload Settings

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for modifying local batch upload settings.

Manage Capture Profiles

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating, deleting, and modifying capture profiles.

Manage Devices

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating and deleting capture devices.

Manage Digital Signatures

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for managing digital signatures.

Manage Document Types

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating, deleting, and modifying document types.

Manage Document Views

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating, deleting, and modifying document views.

Manage Folder Types

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for managing folder types and hierarchies.

Manage Folder Views

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating, deleting, and modifying folder views.

Manage Forms

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for managing forms.

Manage Output Profiles

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for modifying output profiles.

Manage Package Mode Document Rules

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating, deleting, or modifying scan prompt rules.

Manage Reports

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for managing Business Insight reports.

Manage Retention Holds

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating, modifying, assigning, and removing retention holds.

Manage Scanning Profiles

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating, deleting, and modifying scanning profiles.

Manage Task Templates

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating task templates and modifying and deleting task templates it creates.

Manage Task Views

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for modifying task views.

Manage Workflow Process

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating and managing workflow processes.

Record Types

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for creating, renaming, or removing record types.

Retention Policies

Whether the entity has the privilege granted (1), denied (-1) or soft denied (0) for creating, modifying, and deleting retention policies.

Remove Users

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for removing Perceptive Content users.

Server Administrator

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for accessing the Diagnostics tree in Management Console and running Perceptive Content Experience Index.

User Security

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for changing user security settings.

Administrative

Entity ID

The unique ID of the user or group associated with the privilege.

Manager

Whether the entity is a manager user.

Owner

Whether the entity is the owner user.

Queue Privileges

Groups

Group ID

The unique ID of the Perceptive Content group.

Group Name

The name of the Perceptive Content group.

Group Description

The description of the Perceptive Content group.

Group Category

The type of group. Possible values include Regular, System, and Auto update. All groups configured in your Perceptive Content system, whether added or imported, appear as Regular groups.

Users

Is Active

Indicates whether the user is an active user.

User Category

The type of user. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user.

User ID

The unique ID of the user.

User Last Name

The last name of the user.

User Locality

The location of the user. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user.

Queue Process Privilege

Add

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for adding an item to the workflow queue.

Archive

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for archiving items in the workflow queue.

Change Priority

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for changing the priority of items in the workflow queue.

Entity ID

The unique ID of the user or group.

Lead

Whether the user or group is a queue lead for the workflow queue.

Manager

Whether the user or group is a manager.

Member

Whether the user is added to the workflow queue.

Object Delete

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for deleting the document or folder from Perceptive Content within a workflow queue.

Process

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for processing items in the workflow queue.

Queue ID

The unique ID of the workflow queue.

Remove

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for removing the item from workflow within the workflow queue.

Route Anywhere

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for routing the workflow item anywhere in the workflow process.

Route Upstream

Whether the entity has the privilege granted (1), denied (-1), or soft denied (0) for routing the item to a previous destination in the workflow process.

Workflow Setup

Queue Definition

Allow Route Back

Whether the route back feature is enabled (1) or disabled (0) for the workflow queue.

Allow Linking

Whether the application plan linking feature is enabled (1) or disabled (0) for the workflow queue.

Check Applet on Route Back

Whether the workflow validates (1) or does not validate (0) items against the application plan when the items are routed back.

Check Applet on Route Forward

Whether the workflow validates (1) or does not validate (0) items against the application plan when the items are routed forward.

Complete Queue

Whether the queue is a complete queue (1) or not (0).

Description

The description of the workflow queue.

Disposition Mode

The method in which items are removed from the workflow queue. Possible values include Archive, Remove from workflow, Delete from system, and None.

Disposition Delay

The time elapsed before the disposition mode becomes active.

Inbound Action

The inbound action configured for the workflow queue.

Inbound Action Delay

The time elapsed before the inbound action is performed in the workflow queue.

Inter-Sub Queue Routing

Whether the routing between sub queues feature is enabled (1) or disabled (0) for the workflow queue.

Join Queue

Whether the queue is a join queue (1) or not (0).

Name

The name of the workflow queue.

Outbound Action

The outbound action configured for the workflow queue.

Process ID

The unique ID of the workflow process.

Queue ID

The unique ID of the workflow queue.

Queue Type

The type of workflow queue. Possible values include Work queue, User queue, Super queue, Sub queue, System Queue, Transfer queue.

Recall Time

The time elapsed before items can no longer be recalled.

Route Recall

Whether the route recall feature is enabled (1) or disabled (0) for the workflow queue.

Within Queue Action

The within queue action configured for the workflow queue.

Within Queue Action Delay

The time elapsed before the within queue action is performed in the workflow queue.

Process Definition

Description

The description of the workflow process.

Lock User ID

The unique ID of the user that is currently editing the workflow process in Workflow Designer.

Name

The name of the workflow process.

Process ID

The unique ID of the workflow process.

Type

The type of workflow process.

Process Lock User

User First Name

The first name of the user currently editing the workflow process in Workflow Designer.

User ID

The unique ID of the user currently editing the workflow process in Workflow Designer.

User Last Name

The last name of the user currently editing the workflow process in Workflow Designer.

User Name

The user name of the user currently editing the workflow process in Workflow Designer.

Within Queue Rule

Rule ID

The unique ID of the routing or alarm rule configured within the queue.

Rule Name

The name of the routing or alarm rule configured within the queue.

Within Queue Script

Script ID

The unique ID of the script configured within the queue.

Script Name

The name of the script

Outbound Rule

Rule ID

The unique ID of the routing or alarm rule configured for items exiting the queue.

Rule Name

The name of the routing or alarm rule configured for items exiting the queue.

Outbound Script

Script ID

The unique ID of the script configured for items exiting the queue.

Script Name

The name of the script configured for items exiting the queue.

Inbound Script

Script ID

The unique ID of the script configured for items entering the queue.

Script Name

The name of the script configured for items entering the queue.

Inbound Rule

Rule ID

The unique ID of the routing or alarm rule configured for items entering the queue.

Rule Name

The name of the routing or alarm rule configured for items entering the queue.

Action Filters

Routing Rule

Filter to include or exclude routing rules.

Script Filter

Filter to include or exclude iScripts.

System Setup

Annotation Definition

Creation Time

The date and time the annotation template was created.

Creation User ID

The unique ID of the user that created the annotation template.

Description

The description of the annotation template.

Modify Time

The last date and time the annotation template was modified.

Modify User ID

The unique ID of the user that last modified the annotation template.

Name

The name of the annotation template.

Template ID

The unique ID of the annotation template.

Type

The type of annotation the template creates.

Status

Whether the annotation template is active.

Annotation Creation User

Is Active

Indicates whether the user that created the annotation is an active user.

Is Deleted

Indicates whether the user that created the annotation is deleted from Perceptive Content.

User First Name

The first name of the user that created the annotation.

User ID

The unique ID of the user that created the annotation.

User Last Name

The last name of the user that created the annotation.

User Locality

The location of the user that created the annotation. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user.

User Organization

The organization to which the user that created the annotation belongs.

User Organization Unit

The unit of the organization to which the user that created the annotation belongs.

User Suffix

The suffix of the user that created the annotation.

Annotation Modification User

Is Active

Indicates whether the user that modified the annotation is an active user.

Is Deleted

Indicates whether the user that modified the annotation is deleted from Perceptive Content.

User First Name

The first name of the user that modified the annotation.

User ID

The unique ID of the user that modified the annotation.

User Last Name

The last name of the user that modified the annotation.

User Locality

The location of the user that modified the annotation. Locations are configured as part of the user contact information in the Perceptive Content Management Console.

User Name

The user name of the user that modified the annotation.

User Organization

The organization to which the user that modified the annotation belongs.

User Organization Unit

The unit of the organization to which the user that modified the annotation belongs.

User Suffix

The suffix of the user that modified the annotation.

Class Property

Class ID

A unique ID used to map a custom property to a document type or a folder type.

Is Required

Indicates whether a value for the custom property is required.

Property ID

The unique ID of the custom property.

Sequence Number

The order of the custom property applied to the document or folder type.

Enum - Annotation Type

Enumeration Value

The database value (1-13) of the annotation types.

Type

The type of annotation. Possible values include Arrow, Check, Highlight, Line, Rectangle, Oval, Pen, Stamp, Text, Sticky Notes, URL, OLE, and Redaction.

String Custom Properties

Default Value

The default value configured for the custom property.

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Status

Whether the custom property is active, or in use.

List Custom Properties

Default Value

The default value configured for the custom property.

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Status

Whether the custom property is active, or in use.

List Property Values

Property ID

The unique ID of the list custom property.

Property Value ID

The unique ID of the possible value for the list custom property.

Sequence Number

The sequence number of the possible value for the list custom property.

Value

The value of the possible value for the list custom property.

Numeric Custom Properties

Currency

If the numeric custom property represents currency, the type of currency (USD).

Decimal Places

The number of decimal places for the numeric custom property.

Default Value

The default value configured for the custom property.

Fixed or Variable Decimal

Whether the decimal place is fixed or variable.

Format

The display format for the numeric custom property.

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Punctuate at Thousands

Whether the numeric custom property values are punctuated at the thousands.

Status

Whether the custom property is active, or in use.

Flag Custom Properties

Default Value

The default value configured for the custom property.

Negative Value

The label for the negative value of the custom property, such as No or False.

Positive Value

The label for the positive value of the custom property, such as Yes or True.

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Status

Whether the custom property is active, or in use.

Date Custom Properties

Default Value

The default value configured for the custom property.

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Show Day

Whether to show the day in the date.

Show Month

Whether to show the month in the date.

Show Weekday

Whether to show the weekday in the date.

Show Year

Whether to show the year in the date.

Status

Whether the custom property is active, or in use.

User Custom Properties

Default Value

The default value configured for the custom property.

Display Format

The format to use when displaying the user.

Display Prefix

Whether to display the user prefix.

Display Suffix

Whether to display the user suffix.

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Status

Whether the custom property is active, or in use.

Document Type List

Description

The description of the document type list.

Document Type List ID

The unique ID of the document type list.

Name

The name of the document type list.

Document Type

Class ID

A unique ID used to map a custom property to the document type.

Description

The description of the document type.

Document Type ID

The unique ID of the document type.

Name

The name of the document type.

Status

Whether the document type is active or inactive.

Document Type List Member

Document Type List ID

The unique ID of the document type list.

Document Type ID

The unique ID of the document type.

Sequence Number

The order of the document type in the document type list.

Folder Type

Class ID

A unique ID used to map a custom property to the folder type.

Description

The description of the folder type.

Folder Type ID

The unique ID of the folder type.

Name

The name of the folder type.

Status

Whether the folder type is active or inactive.

Administrative report items

Application Plan

Description

The description of the application plan.

Plan ID

The unique ID of the application plan.

Plan Name

The name of the application plan.

Status

Whether the application plan is active or inactive.

Type

The type of application plan. Possible values include Agent, Interact, LearnMode, and Manual Entry.

Business Lists

List Type

The type of business list used in Perceptive Content. Possible values include Digital Signature Reason List, Task Reason List, Workflow Hold Reason List, Capture Predefined Server List, Out of Office Reason List, Retention Hold Reason List, and Approval Task Reason List.

List ID

The ID of the server list or reason list.

List Name

The name of the server list or reason list.

List Item Sequence

The sequence number of the item in the server list or reason list.

List Item ID

The ID of the item in the server list or reason list.

List Item Name

The name of the item in the server list or reason list.

Is Active

Whether the server list or reason list is active.

Is Deleted

Whether the server list or reason list is deleted from Perceptive Content.

Calendar

Calendar Date

The date and time, formatted MMM DD, YYYY HH:MM:SS AM/PM

Calendar Day

The number of the day of the month. (1-31)

Calendar Hour

The hour of the day in the 24-hour calendar. (1-24)

Calendar Key

The date and hour, formatted YYYYMMDDHH.

Calendar Month

The month of the year. (1-12)

Calendar Month Key

The year and month, formatted YYYYMM.

Calendar Quarter

The quarter in the calendar year. (1-4)

Calendar Quarter Key

The year and quarter in the calendar year, formatted YYYYQ.

Calendar Year

The calendar year, formatted YYYY.

Day Name

The name of the day of the week. (Monday-Friday)

Day of Week

The number of the day of the week. For example, the Day of Week value for Monday is 2.

Fiscal Quarter

The quarter of the fiscal year. (1-4)

Fiscal Year

The fiscal year, formatted YYYY.

Month Name

The name of the month. (January-December)

Week Number

The number of the week of the year. For example, the value for November 23, 2009 is 48.

Enum - Audit Actions

Action

The type of audit action specified for an audit condition.

Enumeration Value

The database value of the action specified for an audit condition.

Enum - Batch Step

Batch Step

The step involved in the batch process. Possible values include Invalid, Scanned, Import, Suspend State, QA, OCR, DC Read, DC Verify, DC Export, Form ID, Verify, and Link.

Enumeration Value

The database value of the step involved in the batch process.

Enum - Calendar Day

Calendar Day

The day of the week. Possible values include Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday.

Enumeration Value

The number of the day of the week. (1-7)

Enum - Calendar Month

Calendar Month

The month of the year. (January - December)

Enumeration Value

The number of the month of the year. (1-12)

Enum - Disposition Mode

Disposition Mode

The method used to dispose of documents and workflow items. Possible values include Archive, Remove, and Delete.

Enumeration Value

The database value of the disposition method.

Enum - Group Category

Enumeration Value

The database value of the group category.

Group Category

The category of the Perceptive Content group. Possible values include Regular, System, and Security. All groups created by Perceptive Content users are regular groups.

Enum - Learn Type

Enumeration Value

The database value of the type of application plan. (0-13)

Learn Type

The type of application plan. Possible values include Agent, Interact, LearnMode, and Manual Entry.

Enum - Privilege

Enumeration Value

The database value of the type of privilege

Privilege ID

The type of privilege. Possible values include Delete, Modify, Add, Hide, and View.

Enum - User Category

Enumeration Value

The database value of the user category.

User Category

The category of the Perceptive Content user. Possible values include Regular, System, Pooled, and Security.

Form Definition

Description

The description of the form.

Form ID

The unique ID of the form.

Name

The name of the form.

Status

Whether the form is active or inactive.

Group

Group Category

The category of the Perceptive Content group. Possible values include Regular, System, and Security. All groups created by Perceptive Content users are regular groups.

Group Description

The description of the Perceptive Content group.

Group ID

The unique ID of the Perceptive Content group.

Group Name

The name of the Perceptive Content group.

Is Deleted

Whether the Perceptive Content group is deleted. A value of 1 indicates a deleted group.

Group Security Entity

Entity ID

The unique ID of the Perceptive Content group.

Is Group

Whether the entity is a group. A value of 1 indicates a group.

Product Version

Database Version

The version numbers of the INOW database recorded in your database.

Mod Time

The modification time for the version of the INOW database.

Product Version - Max Mod Time

Max Mod Time

The latest date the INOW database was modified.

User

Is Active

Whether the user is active (1) or inactive (0).

Is Deleted

Whether the user is deleted (1) or not (0).

Title

The title assigned to the user.

User Category

The category of the Perceptive Content user. Possible values include Regular, System, Pooled, and Security.

User First Name

The first name of the Perceptive Content user.

User ID

The unique ID of the user.

User Last Name

The last name of the user

User Locality

The location of the user.

User Name

The user name of the user.

User Organization

The organization assigned for the user.

User Organization Unit

The organizational unit (or MRN) of the user.

User Suffix

The suffix assigned for the user.

User Security Entity

Entity ID

The unique ID of the Perceptive Content user.

Is User

Whether the entity is a user. A value of 1 indicates a user.

User Filters

Auto Update User Filter

Filter used to include or exclude users in the Auto-Update category.

Pooled User Filter

Filter used to include or exclude users in the Pooled category.

Regular User Filter

Filter used to include or exclude users in the Regular category.

System User Filter

Filter used to include or exclude users in the System category.

Instantiatable Objects

Project Deficiency

Document Count

The number of documents associated with the document type that are in the folder.

Document Type ID

The ID of the document type associated with the folder.

Document Type Name

The name of the document type associated with the folder.

Is Required

Indicates whether the document type is required or optional for the folder.

Project ID

The unique ID of the folder.

Project Name

The name of the folder.

Project Type ID

The unique ID of the folder type.

Project Type Name

The name of the folder type.

Sequence Number

The order of the document type within the folder.

Enum - Object Subob Type

Enumeration Value

The database value of the annotation type.

Subob Type

The type of annotation. Possible values include Unknown, Arrow, Check, Highlight, Line, Rectangle, Oval, Pen, Stamp, Text, Sticky Note, URL, OLE, Redaction, DC Export, Thumbnail, Full text, Task pointer, and Task digital signature.

Capture schema definitions

The following table contains the report items available in the Document Capture Fact Star Schema folders of the namespace in the Perceptive Content Business Logic View data source package, available on the Source tab of the Insertable Objects pane.

Capture Creation Time

Calendar Date

The date and time the document was captured. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the document was captured. For example, if a document was captured on August 22, 2011, the Calendar Day (Annotation Creation Time) value is 22.

Calendar Hour

The hour of the day the document was captured. For example, if a document was captured at 2:00 PM, the Calendar Hour (Annotation Creation Time) value is 14.

Calendar Key

The date and hour the document was captured. By default, values are formatted YYYYDDMMHH.

Calendar Month

The month of the year the document was captured. For example, if a document was captured in April 2011, the Calendar Month (Annotation Creation Time) value is 4.

Calendar Month Key

The year and month the document was captured, formatted as YYYYMM. For example, if a document was captured on June 15, 2011, the value is 201106.

Calendar Quarter

The quarter of the year the document was captured. For example, if a document was captured on August 9, 2011, the Calendar Quarter (Annotation Creation Time) value is 3.

Calendar Quarter Key

The year and quarter the document was captured, formatted YYYYQ. For example, if a document was captured in November 2011, the value is 20114.

Calendar Year

The year the document was captured. By default, the format is YYYY.

Day Name

The name of the day of the week the document captured. Day names include Sunday through Saturday.

Day of Week

The number of the day of the week the document was captured, starting with Sunday as 1. For example, if a document was captured on Monday, the Day of Week (Annotation Creation Time) is 2.

Month Name

The name of the month the document was captured, for example, December.

Week Number

The number of the week of the year the document was captured. For example, if a document was created December 4, 2011, the Week Number (Annotation Creation Time) value is 49.

Capture Creation User

Is Active

Indicates whether the user who captured the document is an active user.

Is Deleted

Indicates whether the user who captured the document is deleted from the system.

User Category

The type of user who captured the document. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user who captured the document.

User ID

The unique ID of the user who captured the document.

User Last Name

The last name of the user who captured the document.

User Locality

The location of the user who captured the document. Locations are configured as part of the user contact information in the Management Console.

User Name

The user name of the user who captured the document.

Document Capture Fact

Capture Creation Time

The date and time the document was captured from a capture source into the Perceptive Content system. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Capture Creation Time (Calendar Key)

The date and time the document was captured from a capture source into the Perceptive Content system, formatted YYYYMMDDHH.

Capture Creation User ID

The unique ID of the user that captured the document.

Deletion Status

Indicates whether the document is deleted.

Document Creation Time

The date and time the document entered the Perceptive Content system.

Document Creation Time (Calendar Key)

The date and hour the document was created. By default, values are formatted YYYYDDMMHH.

Document Creation User ID

The unique ID of the user that created the document.

Document ID

The unique ID of the document.

Drawer ID

The unique ID of the document drawer.

Field1

The Field1 value associated with the document.

Field2

The Field2 value associated with the document.

Field3

The Field3 value associated with the document.

Field4

The Field4 value associated with the document.

Field5

The Field5 value associated with the document.

Instance ID

The unique ID of the Perceptive Content object. In this case, the instance ID of the document.

Link Time

The date and time the document was linked against the application plan. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Link Time (Calendar Key)

The date and time the document was linked against the application plan, formatted YYYYMMDDHH.

Link User ID

The unique ID of the user that linked the document.

Modified Time

The date and time a user last modified the document. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Modified Time (Calendar Key)

The date and time a user last modified the document. By default, values are formatted YYYYMMDDHH.

Modified User ID

The unique ID of the user who last modified the document.

Name

The name of the document.

Object Type ID

The unique ID of the document type.

Parent Instance ID

The unique ID of the folder or drawer location associated with the document.

PhsOb ID

The unique ID of the physical object, such as document page, associated with the document. The physical object does not change regardless of the document's activity in Perceptive Content.

Scan Time

The date and time the document was captured. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Scan Time (Calendar Key)

The date and time the document was captured from a capture source into the Perceptive Content system, formatted YYYYMMDDHH.

Scan User ID

The unique ID of the user that captured the document.

The page number associated Sequence Number with the document.

Source

The database value of the capture source used to create the document.

Source ID

The unique ID of the capture source.

Version ID

The unique ID of the version associated with the logical object.

Document Capture Fact - Measures

Page Count

The number of pages in the document.

Drawer

Description

The description of the drawer.

Drawer ID

The unique ID of the drawer.

Drawer Name

The name of the drawer.

Enum - Document Capture Source

Enumeration Value

The database value (0-19) of the method in which the document was captured.

Capture Source

The method in which the document was captured. Possible values include the following:

- Batch Scan
- Batch Import
- Batch Perceptive Content Printer
- Single Scan
- Single Import
- Single Perceptive Content Printer
- Package Mode
- Viewer Add via Scan
- Viewer Add via Import
- Copy Page
- Fax Agent
- Import Agent
- Message Agent
- Mail Agent
- iScript
- Redaction

Folder

Folder Instance

The unique ID of the instance of the folder that stores the document or shortcut. This value appears blank if the document is stored at the drawer level.

Folder Name

The name of the folder that stores the document or shortcut.

Link Time

Calendar Date

The date and time the document was linked with the application plan. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the document was linked with the application plan. For example, if a document was linked on August 22, 2011, the Calendar Day (Annotation Creation Time) value is 22.

Calendar Hour

The hour of the day the document was linked with the application plan. For example, if a document was linked at 2:00 PM, the Calendar Hour (Annotation Creation Time) value is 14.

Calendar Key

The date and hour the document was linked with the application plan. By default, values are formatted YYYYDDMMHH.

Calendar Month

The month of the year the document was linked with the application plan. For example, if a document was linked in April 2011, the Calendar Month (Annotation Creation Time) value is 4.

Calendar Month Key

The year and month the document was linked with the application plan, formatted as YYYYMM. For example, if a document was linked on June 15, 2011, the value is 201106.

Calendar Quarter

The quarter of the year the document was linked with the application plan. For example, if a document was linked on August 9, 2011, the Calendar Quarter (Annotation Creation Time) value is 3.

Calendar Quarter Key

The year and quarter the document was linked with the application plan, formatted YYYYQ. For example, if a document was linked in November 2011, the value is 20114.

Calendar Year

The year the document was linked with the application plan. By default, the format is YYYY.

Day Name

The name of the day of the week the document was linked with the application plan. Day names include Sunday through Saturday.

Day of Week

The number of the day of the week the document was linked with the application plan, starting with Sunday as 1. For example, if a document was linked on Monday, the Day of Week (Annotation Creation Time) is 2.

Month Name

The name of the month the document was linked with the application plan, for example, December.

Week Number

The number of the week of the year the document was linked with the application plan. For example, if a document was linked December 4, 2011, the Week Number (Annotation Creation Time) value is 49.

Link User

Is Active

Indicates whether the user who linked the document is an active user.

Is Deleted

Indicates whether the user who linked the document is deleted from the system.

User Category

The type of user who linked the document. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user who linked the document.

User ID

The unique ID of the user who linked the document.

User Last Name

The last name of the user who linked the document.

User Locality

The location of the user who linked the document. Locations are configured as part of the user contact information in the Management Console.

User Name

The user name of the user who linked the document.

Object Creation Time

Calendar Date

The date and time the document or folder was created. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the document or folder was created. For example, if a document was created on August 22, 2011, the Calendar Day (Annotation Creation Time) value is 22.

Calendar Hour

The hour of the day the document or folder was created. For example, if a document was created at 2:00 PM, the Calendar Hour (Annotation Creation Time) value is 14.

Calendar Key

The date and hour the document or folder was created. By default, values are formatted YYYYDDMMHH.

Calendar Month

The month of the year the document or folder was created. For example, if a document was created in April 2011, the Calendar Month (Annotation Creation Time) value is 4.

Calendar Month Key

The year and month the document or folder was created, formatted as YYYYMM. For example, if a document was created on June 15, 2011, the value is 201106.

Calendar Quarter

The quarter of the year the document or folder was created. For example, if a document was created on August 9, 2011, the Calendar Quarter (Annotation Creation Time) value is 3.

Calendar Quarter Key

The year and quarter the document or folder was created, formatted YYYYQ. For example, if a document was created in November 2011, the value is 20114.

Calendar Year

The year the document or folder was created. By default, the format is YYYY.

Day Name

The name of the day of the week the document or folder was created. Day names include Sunday through Saturday.

Day of Week

The number of the day of the week the document or folder was created, starting with Sunday as 1. For example, if a document was created on Monday, the Day of Week (Annotation Creation Time) is 2.

Month Name

The name of the month the document or folder was created, for example, December.

Week Number

The number of the week of the year the document or folder was created. For example, if a document was created December 4, 2011, the Week Number (Annotation Creation Time) value is 49.

Object Creation User

Is Active

Indicates whether the user who created the document or folder is an active user.

Is Deleted

Indicates whether the user who created the document or folder is deleted from the system.

User Category

The type of user who created the document or folder. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user who created the document or folder.

User ID

The unique ID of the user who created the document or folder.

User Last Name

The last name of the user who created the document or folder.

User Locality

The location of the user who created the document or folder. Locations are configured as part of the user contact information in the Management Console.

User Name

The user name of the user who created the document or folder.

Object Modified Time

Calendar Date

The date and time the document was last modified. By default, the format is Month DD, YYYY HH:MM:SS AM/PM.

Calendar Day

The day of the month the document was last modified. For example, if the document properties were changed on October 5, 2001, the Calendar Day (Object Modified Time) value is 5.

Calendar Hour

The hour of the day the document was last modified. For example, if the document properties were changed at 3:00 PM, the Calendar Hour (Object Modified Time) value would be 15.

Calendar Key

The date and hour the document was last modified, formatted YYYYMMDDHH. For example, if the document properties were changed on March 23, 2011, at 3:34 PM, the Calendar Key (Object Modified Time) value is 2011032315.

Calendar Month

The number of the month of the year in which the document was last modified. For example, if the document properties were changed on June 15, 2011, the Calendar Month (Object Modified Time) value is 6.

Calendar Month Key

The year and month the document was last modified, formatted YYYYMM. For example, if the document properties were changed on May 14, 2011, the Calendar Month Key (Object Modified Time) value is 201105.

Calendar Quarter

The quarter of the year in which the document was last modified. For example, if the document properties were changed on February 12, 2011, the Calendar Quarter (Object Modified Time) is 1. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Quarter Key

The year and quarter in which the document was last modified, formatted YYYYQ. For example, if the document properties were changed on January 9, 2010, the Calendar Quarter Key (Object Modified Time) value is 20101. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Year

The year the document was last modified. The default format is YYYY.

Day Name

The day of the week the document was last modified. (Monday-Friday)

Day of Week

The number of the day of the week the document was last modified. For example, if the document properties changed on December 30, 1999, the Week Number (Object Modified Time) value is 52.

Month Name

The month in which the document was last modified. For example, January.

Week Number

The number of the week in the year in which the document was last modified. For example, if the document properties changed on December 30, 1999, the Week Number (Object Modified Time) value is 52.

Object Modified User

Is Active

Indicates whether the user that last modified the document in Perceptive Content is active or inactive.

Is Deleted

Indicates whether the user that last modified the document is deleted.

User Category

The type of user that last modified the document in Perceptive Content. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content environment, whether added or imported, appear as Regular users.

User First Name

The first name of the user that last modified the document in Perceptive Content.

User ID

The unique ID of the user that last modified the document in Perceptive Content.

User Last Name

The last name of the user that last modified the document in Perceptive Content.

User Locality

The location of the user that last modified the document in Perceptive Content. Locations are configured as part of the user contact information in the Management Console.

User Name

The user name of the user that last modified the document in Perceptive Content.

Object Type

Object Active Flag

Whether the document or folder type is active or inactive.

Object Category ID

Indicates whether the object is a document (1) or a folder (2).

Object Category Name

The name of the object type. Possible values include Document and Folder.

Object Type ID

The unique ID of the document or folder type.

Object Type Name

The name of the document or folder type.

Scan Time

Calendar Date

The date and time the document page was captured. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the document page was captured. For example, if a page was scanned on August 22, 2011, the Calendar Day (Capture Creation Time) value is 22.

Calendar Hour

The hour of the day the document page was captured. For example, if a page was scanned at 2:00 PM, the Calendar Hour (Annotation Creation Time) value is 14.

Calendar Key

The date and hour the document page was captured. By default, values are formatted YYYYDDMMHH.

Calendar Month

The month of the year the document page was captured. For example, if a page was scanned in April 2011, the Calendar Month (Capture Creation Time) value would be 4.

Calendar Month Key

The year and month the document page was captured, formatted as YYYYMM. For example, if a page was scanned on June 15, 2011, the value is 201106.

Calendar Quarter

The quarter of the year the document page was captured. For example, if the page was scanned on August 9, 2011, the Calendar Quarter (Capture Creation Time) value is 3.

Calendar Quarter Key

The year and quarter the document page was captured, formatted YYYYQ. For example, if the page was scanned in November 2011, the value is 20114.

Calendar Year

The year the document page was captured. By default, the format is YYYY.

Day Name

The name of the day of the week the document page was captured. Day names include Sunday through Saturday.

Day of Week

The number of the day of the week the document page was captured, starting with Sunday as 1. For example, if the page was scanned on Monday, the Day of Week (Capture Creation Time) is 2.

Month Name

The name of the month the document page was captured, for example, December.

Week Number

The number of the week of the year the document page was captured. For example, if the page was scanned December 4, 2011, the Week Number (Capture Creation Time) value is 49.

Scan User

Is Active

Indicates whether the user who captured the document page is an active user.

Is Deleted

Indicates whether the user who captured the document page is deleted from the system.

User Category

The type of user who captured the document page. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user who captured the document page.

User ID

The unique ID of the user who captured the document page.

User Last Name

The last name of the user who captured the document page.

User Locality

The location of the user who captured the document page. Locations are configured as part of the user contact information in the Management Console.

User Name

The user name of the user who captured the document page.

Shortcut

Shortcut ID

The unique ID of the document or folder shortcut.

Name

The name of the document or folder shortcut.

Shortcut Type

Whether the shortcut points to a document or a folder.

Target ID

The unique ID of the document or folder referenced by the shortcut.

Workflow Fact

Completion Time

The date and time the workflow item associated with the document entered a complete queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Completion Time (Calendar Key)

The date and time the workflow item associated with the document entered a complete queue, formatted YYYYMMDDHH.

Counter

An item you can use with any workflow report item associated with the document to act as a measure.

Creation Time

The date and time the workflow item associated with the document was created. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Creation Time (Calendar Key)

The date and time the workflow item associated with the document was created, formatted YYYYMMDDHH.

Creation User ID

The unique ID of the user who created the workflow item associated with the document.

Finish Time

The date and time the workflow item left the workflow queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Finish Time (Calendar Key)

The date and hour the workflow item associated with the document left the workflow queue. By default, values are formatted YYYYDDMMHH.

Finish User ID

The unique ID of the user who routed the workflow item associated with the document out of the workflow queue.

First View Time

The first time the workflow item associated with the document was viewed.

Hold User ID

The unique ID of the user who placed a hold on the workflow item associated with the document.

Item ID

The unique ID of the workflow item associated with the document.

Item Location

Whether the item is in the active workflow process or the workflow archive.

Item State

The current workflow item state associated with the document. Possible values include:

- Any
- Idle
- Working
- Holding
- Pending
- Finished
- Completed
- Waiting for routing
- Waiting for siblings
- Waiting for inbound action
- Error

Object ID

The document ID associated with the workflow item.

Priority

The priority assigned to the workflow item associated with the document. Possible values are low, normal, and high.

Queue ID

The unique ID of the queue for the workflow item associated with the document.

Queue Start Time

The time the workflow item associated with the document was added or routed to the workflow queue.

Queue Start Time (Calendar Key)

The date and time the workflow item associated with the document was added or routed to the workflow queue, formatted YYYYMMDDHH. For example, if the item was routed forward on March 12, 2011, at 1:00 PM, the Queue Start Time (Calendar Key) value is 2011031213.

Queue Start User ID

The unique ID of the user who added or routed the workflow item associated with the document to the workflow queue.

State Detail

The last workflow action performed for an item associated with the document. Possible values include:

- Unknown
- Routed in
- Routed out
- Marked routable
- Created
- Cancelled
- Put on hold
- Set to work
- Finished
- Split
- Joined
- Priority changed
- Recalled

State Start Time

The date and time the workflow item associated with the document began its current workflow state.

State Start Time (Calendar Key)

The date and hour the workflow item associated with the document began its current workflow state. By default, values are formatted YYYYDDMMHH.

State User ID

The unique ID of the user who changed the workflow item associated with the document to its current workflow state.

Total Hold Time

The total amount of time a workflow item associated with the document spent on hold.

Workflow Fact (with Archive)

Completion Time

The date and time the workflow item associated with the document entered a complete queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Completion Time (Calendar Key)

The date and time the workflow item associated with the document entered a complete queue, formatted YYYYMMDDHH.

Counter

An item you can use with any workflow report item associated with the document to act as a measure.

Creation Time

The date and time the workflow item associated with the document was created. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Creation Time (Calendar Key)

The date and time the workflow item associated with the document was created, formatted YYYYMMDDHH.

Creation User ID

The unique ID of the user who created the workflow item associated with the document.

Finish Time

The date and time the workflow item left the workflow queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Finish Time (Calendar Key)

The date and hour the workflow item associated with the document left the workflow queue. By default, values are formatted YYYYDDMMHH.

Finish User ID

The unique ID of the user who routed the workflow item associated with the document out of the workflow queue.

First View Time

The first time the workflow item associated with the document was viewed.

Hold User ID

The unique ID of the user who placed a hold on the workflow item associated with the document.

Item ID

The unique ID of the workflow item associated with the document.

Item Location

Whether the item is in the active workflow process or the workflow archive.

Item State

The current workflow item state associated with the document. Possible values include:

- Any
- Idle
- Working
- Holding
- Pending
- Finished
- Completed
- Waiting for routing
- Waiting for siblings
- Waiting for inbound action
- Error

Object ID

The document ID associated with the workflow item.

Priority

The priority assigned to the workflow item associated with the document. Possible values are low, normal, and high.

Queue ID

The unique ID of the queue for the workflow item associated with the document.

Queue Start Time

The time the workflow item associated with the document was added or routed to the workflow queue.

Queue Start Time (Calendar Key)

The date and time the workflow item associated with the document was added or routed to the workflow queue, formatted YYYYMMDDHH. For example, if the item was routed forward on March 12, 2011, at 1:00 PM, the Queue Start Time (Calendar Key) value is 2011031213.

Queue Start User ID

The unique ID of the user who added or routed the workflow item associated with the document to the workflow queue.

State Detail

The last workflow action performed for an item associated with the document. Possible values include:

- Unknown
- Routed in
- Routed out
- Marked routable
- Created
- Cancelled
- Put on hold
- Set to work
- Finished
- Split
- Joined
- Priority changed
- Recalled

State Start Time

The date and time the workflow item associated with the document began its current workflow state.

State Start Time (Calendar Key)

The date and hour the workflow item associated with the document began its current workflow state. By default, values are formatted YYYYDDMMHH.

State User ID

The unique ID of the user who changed the workflow item associated with the document to its current workflow state.

Total Hold Time

The total amount of time a workflow item associated with the document spent on hold.

Document schema definitions

The following table lists the report items available in the Document Star Schema namespace of the Perceptive Content Business Logic View data source package, available on the Source tab of the Insertable Objects pane.

Annotation Creation Time

Calendar Date

The date and time the annotation was created. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the annotation was created. For example, if a document was annotated on August 22, 2011, the Calendar Day (Annotation Creation Time) value is 22.

Calendar Hour

The hour of the day the annotation was created. For example, if a document was annotated at 2:00 PM, the Calendar Hour (Annotation Creation Time) value is 14.

Calendar Key

The date and hour the annotation was created. By default, values are formatted YYYYDDMMHH.

Calendar Month

The month of the year the annotation was created. For example, if a document was annotated in April 2011, the Calendar Month (Annotation Creation Time) value is 4.

Calendar Month Key

The year and month the annotation was created, formatted as YYYYMM. For example, if a document was annotated on June 15, 2011, the value is 201106.

Calendar Quarter

The quarter of the year the annotation was created. For example, if a document was annotated on August 9, 2011, the Calendar Quarter (Annotation Creation Time) value is 3.

Calendar Quarter Key

The year and quarter the annotation was created, formatted YYYYQ. For example, if a document was annotated in November 2011, the value is 20114.

Calendar Year

The year the annotation was created. By default, the format is YYYY.

Day Name

The name of the day of the week the annotation was created. Day names include Sunday through Saturday.

Day of Week

The number of the day of the week the annotation was created, starting with Sunday as 1. For example, if a document was annotated on Monday, the Day of Week (Annotation Creation Time) is 2.

Month Name

The name of the month the annotation was created. For example, December.

Week Number

The number of the week of the year the annotation was created. For example, if a document was annotated December 4, 2011, the Week Number (Annotation Creation Time) value is 49.

Annotation Creation User

Is Active

Indicates whether the user who created the annotation is an active user.

Is Deleted

Indicates whether the user who created the annotation is deleted from the system.

User Category

The type of user who created the annotation. Possible values include

- Regular
- System
- Pooled
- Auto update

All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user who created the annotation.

User ID

The unique ID of the user who created the annotation.

User Last Name

The last name of the user who created the annotation.

User Locality

The location of the user who created the annotation. Locations are configured as part of the user contact information in the Management Console.

User Name

The user name of the user who created the annotation.

Annotation Definition

Creation Time

The date and time the annotation template was created. The creation time for predefined annotation templates appears as the Perceptive Content installation date.

Creation User ID

The unique ID of the user that created the annotation template. The creation user for the predefined annotation templates appears as the Perceptive Content owner user.

Description

The description of the annotation template. The description for the predefined annotation templates displays "Predefined".

Modify Time

The date and time the annotation template was last modified. If the annotation template has never been modified, the creation date appears. If a predefined annotation template has never been modified, the modify time displays Jan 1, 1970 12:00 AM.

Modify User ID

The unique ID of the user who last modified the annotation template.

Name

The name of the annotation template.

Status

Indicates whether the annotation template is an active template.

Template ID

The unique ID of the annotation template.

Type

The type of annotation template.

Annotation Fact

Annotation Creation Time

The date and time the annotation was created. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Annotation Creation Time (Calendar Key)

The date and hour the annotation was created. By default, values are formatted YYYYDDMMHH.

Annotation Creation User ID

The unique ID of the user who created the annotation.

Annotation ID

The unique ID of the annotation.

Annotation Modified Time

The date and time the annotation was modified. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Annotation Modified Time (Calendar Key)

The date and hour the annotation was modified. By default, values are formatted YYYYDDMMHH.

Annotation Modified User ID

The unique ID of the user that last modified the annotation.

Annotation Type

The database value for the type of annotation.

Link Time

The date and time the logical object associated with the document was linked with the application plan. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Link Time (Calendar Key)

The date and time the logical object associated with the document was linked with the application plan. By default, values are formatted YYYYDDMMHH.

Link User ID

The unique ID of the user that linked the logical object associated with the document.

Logical Object ID

The unique ID of the logical object, the Perceptive Content object that changes when you annotate the document, associated with the document annotated.

PhsOb ID

The unique ID of the physical object, such as document page, associated with the document annotated. The physical object does not change regardless of the document activity in Perceptive Content.

Sequence Number

The page number associated with the annotation.

Template ID

The unique ID of the annotation template.

Version ID

The unique ID of the version associated with the logical object. Each time you annotate a document page, the version ID associated with the logical object changes.

Annotation Modified Time

Calendar Date

The date and time the annotation was modified. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the annotation was modified. For example, if the wording in a text annotation was changed on August 22, 2011, the Calendar Day (Annotation Modified Time) value is 22.

Calendar Hour

The hour of the day the annotation was modified. For example, if the wording in a text annotation was changed at 2:00 PM, the Calendar Hour (Annotation Modified Time) value is 14.

Calendar Key

The date and hour the annotation was modified. By default, values are formatted YYYYDDMMHH.

Calendar Month

The month of the year the annotation was modified. For example, if the wording in a text annotation was changed in April 2011, the Calendar Month (Annotation Modified Time) value is 4.

Calendar Month Key

The year and month the annotation was modified, formatted as YYYYMM. For example, if the wording in a text annotation was changed on June 15, 2011, the value is 201106.

Calendar Quarter

The quarter of the year the annotation was modified. For example, if the wording in a text annotation was changed on August 9, 2011, the Calendar Quarter (Annotation Modified Time) value is 3.

Calendar Quarter Key

The year and quarter the annotation was modified, formatted YYYYQ. For example, if the wording in a text annotation was changed in November 2011, the value is 20114.

Calendar Year

The year the annotation was modified. By default, the format is YYYY.

Day Name

The name of the day of the week the annotation was modified. Day names include Sunday through Saturday.

Day of Week

The number of the day of the week the annotation was modified, starting with Sunday as 1. For example, if the wording in a text annotation was changed on Monday, the Day of Week (Annotation Modified Time) is 2.

Month Name

The name of the month the annotation was modified. For example, December.

Week Number

The number of the week of the year the annotation was modified. For example, if the wording in a text annotation was changed December 4, 2011, the Week Number (Annotation Modified Time) value is 49.

Annotation Modified User

Is Active

Indicates whether the user who modified the annotation is an active user.

Is Deleted

Indicates whether the user who modified the annotation is deleted from the system.

User Category

The type of user who modified the annotation. Possible values include

- Regular
- System
- Pooled
- Auto update

All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user who modified the annotation.

User ID

The unique ID of the user who modified the annotation.

User Last Name

The last name of the user who modified the annotation.

User Locality

The location of the user who modified the annotation. Locations are configured as part of the user contact information in the Management Console.

User Name

The user name of the user who modified the annotation.

Annotation Text

Annotation ID

The unique ID of the annotation.

Annotation Text

The text associated with the annotation. Only stamp, sticky note, and text annotations have associated text.

Sequence Number

The page number of the document associated with the annotation text.

Clientside Actions

Action

The ImageNow Client audit condition that was performed for the document. Possible values include

- E-mail
- Export
- Fax
- Launch
- Associated Application
- Print

Action Time

The date and time the ImageNow Client audit action was performed for the document.

Action User ID

The user ID of the user that performed the ImageNow Client audit action for the document.

Audit ID

The ID of the audit record created when the ImageNow Client audit action was performed.

Category ID

The unique ID of the category associated with the ImageNow Client audit condition.

Object Class

The database value of the type of ImageNow Client audit action performed. A value of 2 indicates the action has been performed.

Object ID

The unique ID of the object associated with the ImageNow Client audit condition.

Object Type

The type code for the type of object (document, folder, or logical object) being audited.

Date Custom Property

Instance ID

The unique ID that links an instance of a date custom property (using the property ID) to a document (using the document ID).

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Value

The value of the custom property for the document.

Digital Signatures

Action Time

The date and time the digital signature action was performed.

Action

The digital signature action performed. Valid values include

- Digitally Signed
- Invalidated Signature
- Signature Expired
- Voided Signature
- Verified Void Signature
- Verified Voided Key Pair
- Verified Valid Signature
- Automatically Verified Voided Signature
- Automatically Verified Key Pair
- Automatically Verified Valid Signature
- Automatically Verified Expired Signature
- Automatically Verified Invalid Signature

Creation Time

The date and time the document was digitally signed.

Document ID

The unique ID of the document that was digitally signed.

Reason

The digital signature reason associated with the action performed.

Signature ID

The unique ID of the digital signature.

Signature Status

The status of the digital signature. Valid values include

- Previously signed.
- Not signed.
- Invalid.
- Valid.
- Void.

Digital Signatures - Signature User

Signature User Name

The user name of the user who applied the digital signature to the document.

Signature User Last Name

The last name of the user who applied the digital signature to the document.

Signature User First Name

The first name of the user who applied the digital signature to the document.

Signature User Category

The type of user who applied the digital signature to the document. Possible values include

- Regular
- System
- Pooled
- Auto update

All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

Signature User Location

The location of the user who applied the digital signature to the document. Locations are configured as part of the user contact information in the Management Console.

Signature User Is Deleted

Whether the user who applied the digital signature to the document has been deleted from Perceptive Content.

Signature User Is Active

Whether the user who applied the digital signature to the document is active or inactive.

Digital Signatures - Void Signature User

Void Signature User Name

The user name of the user who voided the digital signature for the document.

Void Signature User Last Name

The last name of the user who voided the digital signature for the document.

Void Signature User First Name

The first name of the user who voided the digital signature for the document.

Void Signature User Category

The type of user who voided the digital signature for the document. Possible values include

- Regular
- System
- Pooled
- Auto update

All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

Void Signature User Location

The location of the user who voided the digital signature for the document. Locations are configured as part of the user contact information in the Management Console.

Void Signature User Is Deleted

Whether the user who voided the digital signature for the document has been deleted from Perceptive Content.

Void Signature User Is Active

Whether the user who voided the digital signature for the document is active or inactive.

Document Fact

Creation Time

The date and time the document entered the Perceptive Content system. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Creation Time (Calendar Key)

The date and time the document entered the Perceptive Content system, formatted YYYYMMDDHH.

Creation User ID

The unique ID of the user that created the document in Perceptive Content.

Deletion Status

Whether the document has been deleted.

Document ID

The unique ID of the document.

Drawer ID

The unique ID of the document drawer.

Field1

The Field1 value associated with the document.

Field2

The Field2 value associated with the document.

Field3

The Field3 value associated with the document.

Field4

The Field4 value associated with the document.

Field5

The Field5 value associated with the document.

Instance ID

The unique ID of the Perceptive Content object. In this case, the instance ID of the document.

Modified Time

The date and time the document was last modified. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Modified Time (Calendar Key)

The date and time the document was last modified, formatted YYYYMMDDHH.

Modified User ID

The unique ID of the user that last modified the document.

Name

The name of the document.

Page Count

The number of pages in the document.

Parent Instance ID

The unique ID of the folder or drawer location associated with the document.

Object Type ID

The unique ID of the document type.

Version ID

The unique ID of the version associated with the logical object.

Documents Modified

Action

The action component of the audit condition performed on the document.

Audit ID

The unique ID of the audit record logged in the Perceptive Content database.

Category ID

The unique ID of the category associated with the ImageNow Client audit condition.

Action Time

The date and time the audit condition was performed.

Action User ID

The unique ID of the user who performed the audit condition.

Document ID

The unique ID of the document.

Object Type

The ID of the object component of the audit condition performed on the document.

Object Class

The database value of the type of audit action performed. A value of 2 indicates the document has been viewed.

Audit Object ID

The unique ID of the audited object used to determine values changed by the audit condition.

Documents Viewed

Action Type

The unique ID of the action component of the audit condition performed on the document.

Audit ID

The unique ID of the audit record logged in the Perceptive Content database.

Category ID

The unique ID of the category associated with the ImageNow Client audit condition.

Action Time

The date and time the audit condition was performed.

Action User ID

The unique ID of the user who performed the audit condition.

Object ID

The unique ID of the document.

Object Type

The ID of the object component of the audit condition performed on the document.

Object Class

The database value of the type of audit action performed. A value of 2 indicates the document has been viewed.

Drawer

Description

The description of the drawer.

Drawer ID

The unique ID of the drawer.

Drawer Name

The name of the drawer.

Flag Custom Property

Instance ID

The unique ID that links an instance of a flag custom property (using the property ID) to a document (using the document ID).

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Raw Value

The default database value for the custom property. 0 indicates a false flag. 1 indicates a true flag.

Value

The value of the custom property for the document.

Folder

Folder Instance

The unique ID of the instance of the folder that stores the document, folder, or shortcut.

Folder Name

The name of the folder or volume that stores the document, folder, or shortcut.

Link Time

Calendar Date

The date and time the document was linked with the application plan. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the document was linked with the application plan. For example, if a document was linked on August 22, 2011, the Calendar Day (Link Time) value is 22.

Calendar Hour

The hour of the day the document was linked with the application plan. For example, if a document was linked at 2:00 PM, the Calendar Hour (Link Time) value is 14.

Calendar Key

The date and hour the document was linked with the application plan. By default, values are formatted YYYYDDMMHH.

Calendar Month

The month of the year the document was linked with the application plan. For example, if a document was linked in April 2011, the Calendar Month (Link Time) value is 4.

Calendar Month Key

The year and month the document was linked with the application plan, formatted as YYYYMM. For example, if a document was linked on June 15, 2011, the value is 201106.

Calendar Quarter

The quarter of the year the document was linked with the application plan. For example, if a document was linked on August 9, 2011, the Calendar Quarter (Annotation Creation Time) value is 3.

Calendar Quarter Key

The year and quarter the document was linked with the application plan, formatted YYYYQ. For example, if a document was linked in November 2011, the value is 20114.

Calendar Year

The year the document was linked with the application plan. By default, the format is YYYY.

Day Name

The name of the day of the week the document was linked with the application plan. Day names include Sunday through Saturday.

Day of Week

The number of the day of the week the document was linked with the application plan, starting with Sunday as 1. For example, if a document was linked on Monday, the Day of Week (Annotation Creation Time) is 2.

Month Name

The name of the month the document was linked with the application plan. For example, December.

Week Number

The number of the week of the year the document was linked with the application plan. For example, if a document was linked December 4, 2011, the Week Number (Annotation Creation Time) value is 49.

Link User

Is Active

Indicates whether the user who linked the document is an active user.

Is Deleted

Indicates whether the user who linked the document is deleted from the system.

User Category

The type of user who linked the document. Possible values include

- Regular
- System
- Pooled
- Auto update

All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user who linked the document.

User ID

The unique ID of the user who linked the document.

User Last Name

The last name of the user who linked the document.

User Locality

The location of the user who linked the document. Locations are configured as part of the user contact information in the Management Console.

User Name

The user name of the user who linked the document.

List Custom Property

Instance ID

The unique ID that links an instance of a list custom property (using the property ID) to a document (using the document ID).

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Value

The value of the custom property for the document.

Number Custom Property

Currency

The type of currency specified if the number custom property represents currency.

Instance ID

The unique ID that links an instance of a number custom property (using the property ID) to a document (using the document ID).

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Value

The value of the custom property for the document.

Object Creation Time

Calendar Date

The date and time the document was created. By default, the format is Month DD, YYYY HH:MM:SS AM/PM

Calendar Day

The day of the month the document was created. For example, if the document was added to Perceptive Content on October 5, 2001, the Calendar Day (Object Creation Time) value is 5.

Calendar Hour

The hour of the day the document was created. For example, if the document was added to Perceptive Content at 3:00 PM, the Calendar Hour (Object Creation Time) value is 15.

Calendar Key

The date and hour the document was created, formatted YYYYMMDDHH. For example, if the document was added to Perceptive Content on March 23, 2011, at 3:34 PM, the Calendar Key (Object Creation Time) value is 2011032315.

Calendar Month

The number of the month of the year in which the document was created. For example, if the document was added to Perceptive Content on June 15, 2011, the Calendar Month (Object Creation Time) value is 6.

Calendar Month Key

The year and month the document was created, formatted YYYYMM. For example, if the document was added to Perceptive Content on May 14, 2011, the Calendar Month Key (Object Creation Time) value is 201105.

Calendar Quarter

The quarter of the year in which the document was created. For example, if the document was added to Perceptive Content on February 12, 2011, the Calendar Quarter (Object Creation Time) is 1. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Quarter Key

The year and quarter in which the document was created, formatted YYYYQ. For example, if the document was added to Perceptive Content on January 9, 2010, the Calendar Quarter Key (Object Creation Time) value is 20101. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Year

The year the document was created. The default format is YYYY.

Day Name

The day of the week the document was created. (Monday-Friday)

Day of Week

The number of the day of the week the document was created. For example, if the document was added to Perceptive Content on Tuesday, the Day of Week (Object Creation Time) value would be 3.

Month Name

The month in which the document was created. For example, January.

Week Number

The number of the week in the year in which the document was created. For example, if the document was added to Perceptive Content on December 30, 1999, the Week Number (Object Creation Time) value is 52.

Object Creation User

Is Active

Indicates whether the user that created the document in Perceptive Content is active or inactive.

Is Deleted

Indicates whether the user that created the document in Perceptive Content is deleted.

User Category

The type of user that created the document in Perceptive Content. Possible values include

- Regular
- System
- Pooled
- Auto update

All users configured in your Perceptive Content environment, whether added or imported, appear as Regular users.

User First Name

The first name of the user that created the document in Perceptive Content.

User ID

The unique ID of the user that created the document in Perceptive Content.

User Last Name

The last name of the user that created the document in Perceptive Content.

User Locality

The location of the user that created the document in Perceptive Content. Locations are configured as part of the user contact information in the Management Console.

User Name

The user name of the user that created the document in Perceptive Content.

Object Modified Time

Calendar Date

The date and time the document was last modified. By default, the format is Month DD, YYYY HH:MM:SS AM/PM

Calendar Day

The day of the month the document was last modified. For example, if the document properties were changed on October 5, 2001, the Calendar Day (Object Modified Time) value is 5.

Calendar Hour

The hour of the day the document was last modified. For example, if the document properties were changed at 3:00 PM, the Calendar Hour (Object Modified Time) value would be 15.

Calendar Key

The date and hour the document was last modified, formatted YYYYMMDDHH. For example, if the document properties were changed on March 23, 2011, at 3:34 PM, the Calendar Key (Object Modified Time) value is 2011032315.

Calendar Month

The number of the month of the year in which the document was last modified. For example, if the document properties were changed on June 15, 2011, the Calendar Month (Object Modified Time) value is 6.

Calendar Month Key

The year and month the document was last modified, formatted YYYYMM. For example, if the document properties were changed on May 14, 2011, the Calendar Month Key (Object Modified Time) value is 201105.

Calendar Quarter

The quarter of the year in which the document was last modified. For example, if the document properties were changed on February 12, 2011, the Calendar Quarter (Object Modified Time) is 1. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Quarter Key

The year and quarter in which the document was last modified, formatted YYYYQ. For example, if the document properties were changed on January 9, 2010, the Calendar Quarter Key (Object Modified Time) value is 20101. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Year

The year the document was last modified. The default format is YYYY.

Day Name

The day of the week the document was last modified. (Monday-Friday)

Day of Week

The number of the day of the week the document was last modified. For example, if the document properties changed on December 30, 1999, the Week Number (Object Modified Time) value is 52.

Month Name

The month in which the document was last modified. For example, January.

Week Number

The number of the week in the year in which the document was last modified. For example, if the document properties changed on December 30, 1999, the Week Number (Object Modified Time) value is 52.

Object Modified User

Is Active

Indicates whether the user that last modified the document in Perceptive Content is active or inactive.

Is Deleted

Indicates whether the user that last modified the document is deleted.

User Category

The type of user that last modified the document in Perceptive Content. Possible values include

- Regular
- System
- Pooled
- Auto update

All users configured in your Perceptive Content environment, whether added or imported, appear as Regular users.

User First Name

The first name of the user that last modified the document in Perceptive Content.

User ID

The unique ID of the user that last modified the document in Perceptive Content.

User Last Name

The last name of the user that last modified the document in Perceptive Content.

User Locality

The location of the user that last modified the document in Perceptive Content. Locations are configured as part of the user contact information in the Management Console.

User Name

The user name of the user that last modified the document in Perceptive Content.

Object Type

Object Active

Indicates whether the document type is active or inactive.

Object Category ID

The numeric identifier of the type of Perceptive Content object. A value of 1 indicates a document; a value of 2 indicates a folder.

Object Category Name

Indicates whether the type of Perceptive Content object is a document or a folder.

Object Type ID

The unique ID of the document type.

Object Type Name

The name of the document type.

Shortcut

Shortcut ID

The unique ID of the document or folder shortcut.

Name

The name of the document or folder shortcut.

Shortcut Type

Whether the shortcut points to a document or a folder.

Target ID

The unique ID of the document or folder referenced by the shortcut.

String Custom Property

Instance ID

The unique ID that links an instance of a string custom property (using the property ID) to a document (using the document ID).

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Value

The value of the custom property for the document.

Task

Assigning Time

The date and time the task associated with the document was assigned.

Assigning Time (Calendar Key)

The date and hour the task associated with the document was assigned, formatted YYYYMMDDHH. For example, if the task was assigned on March 23, 2011, at 3:34 PM, the Assigning Time (Calendar Key) value is 2011032315.

Assigning User ID

The unique ID of the user who originally assigned the task associated with the document.

Completed Late Count

The number of tasks associated with the document that were completed after the assigned due date.

Completion Time

The date and time the task associated with the document entered a Complete state. By default, the format is Month DD, YYYY HH:MM:SS AM or PM

Completion Time (Calendar Key)

The date and hour the task associated with the document entered a Complete state, formatted YYYYMMDDHH. For example, if the task was completed on March 23, 2011, at 3:34 PM, the Calendar Key (Task Completion Time) value is 2011032315.

Completion User ID

The unique ID of the user who completed the task associated with the document.

Creation Time

The date and time the task associated with the document was created.

Creation Time (Calendar Key)

The date and hour the task associated with the document was created, formatted YYYYMMDDHH. For example, if the task was created on March 23, 2011, at 3:34 PM, the Calendar Key (Task Creation Time) value is 2011032315.

Creation User ID

The unique ID of the user who created the task associated with the document.

Document ID

The unique ID of the document associated with the task associated with the document.

Due Time

The date and time the task associated with the document is due. By default, the format is Month DD, YYYY HH:MM:SS AM or PM

Due Time (Calendar Key)

The date and hour the task associated with the document is due, formatted YYYYMMDDHH. For example, if the task is due on March 23, 2011, at 3:34 PM, the Calendar Key (Task Due Time) value is 2011032315.

Folder ID

The ID of the folder associated with the task.

Start Time

The date and time the task associated with the document is configured to start. By default, the format is Month DD, YYYY HH:MM:SS AM or PM

Start Time (Calendar Key)

The date and hour the task associated with the document is configured to start, formatted YYYYMMDDHH. For example, if the task is set to start on March 23, 2011, at 3:34 PM, the Calendar Key (Task Start Time) value is 2011032315.

Start to Completion Time

The amount of time elapsed between when the task associated with the document started and when the task was completed.

Start to Due Time

The amount of time elapsed between the time the task associated with the document starts and the time the tasks is due.

Task ID

The unique ID of the task associated with the document.

Task State

The status of a task associated with the document. Possible values include

- Assigned
- Returned
- Complete pending review
- Canceled
- Invalid
- Complete

Task Template ID

The unique ID of the task template associated with the task associated with the document.

Task Type

The type of task associated with the document. Possible values include

- Signature required
- Document deficiency
- Pointer

User Group Custom Property

Instance ID

The unique ID that links an instance of a user custom property (using the property ID) to a document (using the document ID).

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

String ID

The default value for the custom property.

Value

The value of the custom property for the document.

Workflow Fact

Item Location

Whether the document is in active workflow or the workflow archive.

Completion Time

The date and time the workflow item associated with the document entered a complete queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Completion Time (Calendar Key)

The date and time the workflow item associated with the document entered a complete queue, formatted YYYYMMDDHH.

Counter

An item you can use with any workflow report item associated with the document to act as a measure.

Creation Time

The date and time the workflow item associated with the document was created. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Creation Time (Calendar Key)

The date and time the workflow item associated with the document was created, formatted YYYYMMDDHH.

Creation User ID

The unique ID of the user who created the workflow item associated with the document.

Finish Time

The date and time the workflow item left the workflow queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Finish Time (Calendar Key)

The date and hour the workflow item associated with the document left the workflow queue. By default, values are formatted YYYYDDMMHH.

Finish User ID

The unique ID of the user who routed the workflow item associated with the document out of the workflow queue.

First View Time

The first time the workflow item associated with the document was viewed.

Hold User ID

The unique ID of the user who placed a hold on the workflow item associated with the document.

Item ID

The unique ID of the workflow item associated with the document.

Item State

The current workflow item state associated with the document. Possible values include

- Any
- Idle
- Working
- Holding
- Pending
- Finished
- Completed
- Waiting for routing
- Waiting for siblings
- Waiting for inbound action
- Error

Object ID

The document ID or folder ID associated with the workflow item.

Priority

The priority assigned to the workflow item associated with the document. Possible values include

- Low
- Normal
- High

Queue ID

The unique ID of the queue for the workflow item associated with the document.

Queue Start Time

The time the workflow item associated with the document was added or routed to the workflow queue.

Queue Start Time (Calendar Key)

The date and time the workflow item associated with the document was added or routed to the workflow queue, formatted YYYYMMDDHH. For example, if the item was routed forward on March 12, 2011, at 1:00 PM, the Queue Start Time (Calendar Key) value is 2011031213.

Queue Start User ID

The unique ID of the user who added or routed the workflow item associated with the document to the workflow queue.

State Detail

The last workflow action performed for an item associated with the document. Possible values include

- Unknown
- Routed in
- Routed out
- Marked routable
- Created
- Cancelled
- Put on hold
- Set to work
- Finished
- Split
- Joined
- Priority changed
- Recalled

State Start Time

The date and time the workflow item associated with the document began its current workflow state.

State Start Time (Calendar Key)

The date and hour the workflow item associated with the document began its current workflow state. By default, values are formatted YYYYDDMMHH.

State User ID

The unique ID of the user who changed the workflow item associated with the document to its current workflow state.

Total Hold Time

The total amount of time a workflow item associated with the document spent on hold.

Workflow Fact (with Archive)

Item Location

Whether the document is in active workflow or the workflow archive.

Completion Time

The date and time the workflow item associated with the document entered a complete queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Completion Time (Calendar Key)

The date and time the workflow item associated with the document entered a complete queue, formatted YYYYMMDDHH.

Counter

An item you can use with any workflow report item associated with the document to act as a measure.

Creation Time

The date and time the workflow item associated with the document was created. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Creation Time (Calendar Key)

The date and time the workflow item associated with the document was created, formatted YYYYMMDDHH.

Creation User ID

The unique ID of the user who created the workflow item associated with the document.

Finish Time

The date and time the workflow item left the workflow queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Finish Time (Calendar Key)

The date and hour the workflow item associated with the document left the workflow queue. By default, values are formatted YYYYDDMMHH.

Finish User ID

The unique ID of the user who routed the workflow item associated with the document out of the workflow queue.

First View Time

The first time the workflow item associated with the document was viewed.

Hold User ID

The unique ID of the user who placed a hold on the workflow item associated with the document.

Item ID

The unique ID of the workflow item associated with the document.

Item State

The current workflow item state associated with the document. Possible values include

- Any
- Idle
- Working
- Holding
- Pending
- Finished
- Completed
- Waiting for routing
- Waiting for siblings
- Waiting for inbound action
- Error

Object ID

The document ID or folder ID associated with the workflow item.

Priority

The priority assigned to the workflow item associated with the document. Possible values a include

- Low
- Normal
- High

Queue ID

The unique ID of the queue for the workflow item associated with the document.

Queue Start Time

The time the workflow item associated with the document was added or routed to the workflow queue.

Queue Start Time (Calendar Key)

The date and time the workflow item associated with the document was added or routed to the workflow queue, formatted YYYYMMDDHH. For example, if the item was routed forward on March 12, 2011, at 1:00 PM, the Queue Start Time (Calendar Key) value is 2011031213.

Queue Start User ID

The unique ID of the user who added or routed the workflow item associated with the document to the workflow queue.

State Detail

The last workflow action performed for an item associated with the document. Possible values include

- Unknown
- Routed in
- Routed out
- Marked routable
- Created
- Cancelled
- Put on hold
- Set to work
- Finished
- Split
- Joined
- Priority changed
- Recalled

State Start Time

The date and time the workflow item associated with the document began its current workflow state.

State Start Time (Calendar Key)

The date and hour the workflow item associated with the document began its current workflow state. By default, values are formatted YYYYDDMMHH.

State User ID

The unique ID of the user who changed the workflow item associated with the document to its current workflow state.

Total Hold Time

The total amount of time a workflow item associated with the document spent on hold.

Folder schema definitions

The following table lists the report items available in the Folder Star Schema namespace of the Perceptive Content Business Logic View data source package, available on the Source tab of the Insertable Objects pane.

Date Custom Property

Instance ID

The unique ID that links an instance of a date custom property (using the property ID) to a folder (using the folder ID).

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Value

The value of the custom property for the folder. The value is a date or date and time format.

Drawer

Description

The description of the drawer.

Drawer ID

The unique ID of the drawer.

Drawer Name

The name of the drawer.

Enum - Folder Status

Enumeration Value

The database value of the folder active status.

Folder Status

Whether the folder is active or inactive.

Flag Custom Property

Instance ID

The unique ID that links an instance of a flag custom property (using the property ID) to a folder (using the folder ID).

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Raw Value

The default database value for the custom property. A value of 0 indicates a false flag. A value of 1 indicates a true flag.

Value

The value of the custom property for the folder.

Folder

Folder Instance

The unique ID of the instance of the folder that stores the document, folder, or shortcut.

Folder Name

The name of the folder or volume that stores the document, folder, or shortcut.

Folder Fact

Creation Time

The date and time the folder was created. By default, the format is Month DD, YYYY HH:MM:SS AM or PM

Creation Time (Calendar Key)

The date and hour the folder was created, formatted YYYYMMDDHH. For example, if the folder was added to Perceptive Content on November 23, 2011, at 8:24 PM, the Creation Time (Calendar Key) value is 2011112320.

Creation User ID

The unique ID of the user who created the folder in Perceptive Content.

Deletion Status

Indicates whether the folder has been sent to the recycle bin to be deleted.

Drawer ID

The unique ID of the drawer in which the folder is stored.

Folder ID

The unique ID of the folder.

Folder Name

The name of the folder.

Folder Status

Whether the folder is active or inactive. A value of 0 indicates an active folder. A value of 1 indicates an inactive folder.

Instance ID

The instance ID of the folder used to associate custom properties.

Modified Time

The date and time the folder was last modified. By default, the format is Month DD, YYYY HH:MM:SS AM or PM

Modified Time (Calendar Key)

The date and hour the folder was last modified, formatted YYYYMMDDHH. For example, if the folder properties were changed on March 23, 2011, at 3:34 PM, the Calendar Key (Object Modified Time) value is 2011032315.

Modified User ID

The unique ID of the user who last modified the folder in Perceptive Content.

Object Type ID

The unique ID of the folder type.

Parent Instance ID

The unique of the folder or drawer location associated with the folder.

List Custom Property

Instance ID

The unique ID that links an instance of a list custom property (using the property ID) to a folder (using the folder ID).

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

String Value

The default value for the custom property.

Value

The value of the custom property for the folder.

Number Custom Property

Currency

The type of currency specified if the number custom property represents currency.

Instance ID

The unique ID that links an instance of a number custom property (using the property ID) to a folder (using the folder ID).

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Value

The value of the custom property for the folder. Value must contain numeric values to aggregate correctly.

Object Creation Time

Calendar Date

The date and time the folder was created. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the folder was created. For example, if the folder was added to Perceptive Content on October 5, 2001, the Calendar Day (Object Creation Time) value is 5.

Calendar Hour

The hour of the day the folder was created. For example, if the folder was added to Perceptive Content at 3:00 PM, the Calendar Hour (Object Creation Time) value is 15.

Calendar Key

The date and hour the folder was created, formatted YYYYMMDDHH. For example, if the folder was added to Perceptive Content on March 23, 2011, at 3:34 PM, the Calendar Key (Object Creation Time) value is 2011032315.

Calendar Month

The number of the month of the year in which the folder was created. For example, if the document was added to Perceptive Content on June 15, 2011, the Calendar Month (Object Creation Time) value is 6.

Calendar Month Key

The year and month the folder was created, formatted YYYYMM. For example, if the folder was added to Perceptive Content on May 14, 2011, the Calendar Month Key (Object Creation Time) value is 201105.

Calendar Quarter

The quarter of the year in which the folder was created. For example, if the folder was added to Perceptive Content on February 12, 2011, the Calendar Quarter (Object Creation Time) is 1. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Quarter Key

The year and quarter in which the folder was created, formatted YYYYQ. For example, if the folder was added to Perceptive Content on January 9, 2010, the Calendar Quarter Key (Object Creation Time) value is 20101. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Year

The year the folder was created. The default format is YYYY.

Day Name

The day of the week the folder was created. For example, Monday through Friday.

Day of Week

The number of the day of the week the folder was created. For example, if the folder was added to Perceptive Content on Tuesday, the Day of Week (Object Creation Time) value would be 3.

Month Name

The month in which the folder was created, for example, January.

Week Number

The number of the week in the year in which the folder was created. For example, if the folder was added to Perceptive Content on December 30, 1999, the Week Number (Object Creation Time) value is 52.

Object Creation User

Is Active

Indicates whether the user who created the folder in Perceptive Content is active or inactive.

Is Deleted

Indicates whether the user who created the folder is deleted from Perceptive Content.

User Category

The type of user who created the folder in Perceptive Content. Possible values include:

- Regular
- System
- Pooled
- Auto update

All users configured in your Perceptive Content environment, whether added or imported, appear as Regular users.

User First Name

The first name of the user who created the folder in Perceptive Content.

User ID

The unique ID of the user who created the folder in Perceptive Content.

User Last Name

The last name of the user who created the folder in Perceptive Content.

User Locality

The location of the user who created the folder in Perceptive Content. Locations are configured as part of the user contact information in the Management Console.

User Name

The user name of the user who created the folder in Perceptive Content.

Object Modified Time

Calendar Date

The date and time the folder was last modified. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the folder was last modified. For example, if the folder properties were changed on October 5, 2001, the Calendar Day (Object Modified Time) value is 5.

Calendar Hour

The hour of the day the folder was last modified. For example, if the folder properties were changed at 3:00 PM, the Calendar Hour (Object Modified Time) value would be 15.

Calendar Key

The date and hour the folder was last modified, formatted YYYYMMDDHH. For example, if the folder properties were changed on March 23, 2011, at 3:34 PM, the Calendar Key (Object Modified Time) value is 2011032315.

Calendar Month

The number of the month of the year in which the folder was last modified. For example, if the folder properties were changed on June 15, 2011, the Calendar Month (Object Modified Time) value is 6.

Calendar Month Key

The year and month the folder was last modified, formatted YYYYMM. For example, if the folder properties were changed on May 14, 2011, the Calendar Month Key (Object Modified Time) value is 201105.

Calendar Quarter

The quarter of the year in which the folder was last modified. For example, if the folder properties were changed on February 12, 2011, the Calendar Quarter (Object Modified Time) is 1. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Quarter Key

The year and quarter in which the folder was last modified, formatted YYYYQ. For example, if the folder properties were changed on January 9, 2010, the Calendar Quarter Key (Object Modified Time) value is 20101. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Year

The year the folder was last modified. The default format is YYYY.

Day Name

The day of the week the folder was last modified. For example, Monday through Friday.

Day of Week

The number of the day of the week the folder was last modified. For example, if the folder properties changed on December 30, 1999, the Week Number (Object Modified Time) value is 52.

Month Name

The month in which the folder was last modified, for example, January.

Week Number

The number of the week in the year in which the folder was last modified. For example, if the folder properties changed on December 30, 1999, the Week Number (Object Modified Time) value is 52.

Object Modified User

Is Active

Indicates whether the user who last modified the folder in Perceptive Content is active or inactive.

Is Deleted

Indicated whether the user who last modified the folder in Perceptive Content is active or inactive.

User Category

The type of user who modified the folder in Perceptive Content. Possible values include:

- Regular
- System
- Pooled
- Auto update

All users configured in your Perceptive Content environment, whether added or imported, appear as Regular users.

User First Name

The first name of the user who last modified the folder in Perceptive Content.

User ID

The unique ID of the user who last modified the folder in Perceptive Content.

User Last Name

The last name of the user who last modified the folder in Perceptive Content.

User Locality

The location of the user who last modified the folder in Perceptive Content. Locations are configured as part of the user contact information in the Management Console.

User Name

The user name of the user who last modified the folder in Perceptive Content.

Object Type

Active Flag

Indicates whether the folder type is active or inactive.

Object Category ID

A numeric identifier that represents the type of Perceptive Content object. A value of 1 indicates a document; a value of 2 indicates a folder.

Object Category Name

Indicates whether the type of Perceptive Content object is a document or a folder.

Object Type ID

The unique ID of the folder type.

Object Type Name

The name of the folder type.

folder Fact

Creation Time

The date and time the folder was created. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Creation Time (Calendar Key)

The date and hour the folder was created, formatted YYYYMMDDHH. For example, if the folder was added to Perceptive Contenton November 23, 2011, at 8:24 PM, the Creation Time (Calendar Key) value is 2011112320.

Creation User ID

The unique ID of the user who created the folder in Perceptive Content.

Deletion Status

Indicates whether the folder has been sent to the recycle bin to be deleted.

Drawer ID

The unique ID of the drawer in which the folder is stored.

Instance ID

The instance ID of the folder used to associate custom properties.

Modified Time

The date and time the folder was last modified. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Modified Time (Calendar Key)

The date and hour the folder was last modified, formatted YYYYMMDDHH. For example, if the folder properties were changed on March 23, 2011, at 3:34 PM, the Calendar Key (Object Modified Time) value is 2011032315.

Modified User ID

The unique ID of the user who last modified the folder in Perceptive Content.

Object Type ID

The unique ID of the folder type.

folder ID

The unique ID of the Perceptive Content folder.

folder Name

The name of the Perceptive Content folder.

folder Status

Indicates whether the folder is active or inactive. A value of 0 indicates an active folder. A value of 1 indicates an inactive folder.

Shortcut

Shortcut ID

The unique ID of the document or folder shortcut.

Name

The name of the document or folder shortcut.

Shortcut Type

Whether the shortcut points to a document or a folder.

Target ID

The unique ID of the document or folder referenced by the shortcut.

String Custom Property

Instance ID

The unique ID that links an instance of a string custom property (using the property ID) to a folder (using the folder ID).

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

Value

The value of the custom property for the folder.

Task

Assigning Time

The date and time the task associated with the folder was assigned.

Assigning Time (Calendar Key)

The date and hour the task associated with the folder was assigned, formatted YYYYMMDDHH. For example, if the task was assigned on March 23, 2011, at 3:34 PM, the Assigning Time (Calendar Key) value is 2011032315.

Assigning User ID

The unique ID of the user who originally assigned the task associated with the folder.

Completed Late Count

The number of tasks associated with the folder that were completed after the assigned due date.

Completion Time

The date and time the task associated with the folder entered a Complete state. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Completion Time (Calendar Key)

The date and hour the task associated with the folder entered a Complete state, formatted YYYYMMDDHH. For example, if the task was completed on March 23, 2011, at 3:34 PM, the Calendar Key (Task Completion Time) value is 2011032315.

Completion User ID

The unique ID of the user who completed the task associated with the folder.

Creation Time

The date and time the task associated with the folder was created.

Creation Time (Calendar Key)

The date and hour the task associated with the folder was created, formatted YYYYMMDDHH. For example, if the task was created on March 23, 2011, at 3:34 PM, the Calendar Key (Task Creation Time) value is 2011032315.

Creation User ID

The unique ID of the user who created the task associated with the folder.

Document ID

The unique ID of the document associated with the task associated with the folder.

Due Time

The date and time the task associated with the folder is due. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Due Time (Calendar Key)

The date and hour the task associated with the folder is due, formatted YYYYMMDDHH. For example, if the task is due on March 23, 2011, at 3:34 PM, the Calendar Key (Task Due Time) value is 2011032315.

folder ID

The unique ID of the folder associated with the task.

Start Time

The date and time the task associated with the folder is configured to start. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Start Time (Calendar Key)

The date and hour the task is configured to start, formatted YYYYMMDDHH. For example, if the task is set to start on March 23, 2011, at 3:34 PM, the Calendar Key (Task Start Time) value is 2011032315.

Start to Completion Time

The amount of time elapsed between when the task associated with the folder started and when the task was completed.

Start to Due Time

The amount of time elapsed between the time the task associated with the folder starts and the time the tasks is due.

Task ID

The unique ID of the task associated with the folder.

Task State

The status of a task associated with the folder. Possible values include:

- Assigned
- Returned
- Complete pending review
- Complete
- Canceled
- Invalid

Task Template ID

The unique ID of the task template associated with the task associated with the folder.

Task Type

The type of task associated with the folder. Possible values include:

- Pointer
- Document deficiency
- Signature required

User Group Custom Property

Instance ID

The unique ID that links an instance of a user custom property (using the property ID) to a folder (using the folder ID).

Property ID

The unique ID of the custom property.

Property Name

The name of the custom property.

String ID

The default value for the custom property.

Value

The value of the custom property for the folder.

Workflow Fact

Item Location

Whether the document is in active workflow or the workflow archive.

Completion Time

The date and time the workflow item associated with the folder entered a complete queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Completion Time (Calendar Key)

The date and time the workflow item associated with the folder entered a complete queue, formatted YYYYMMDDHH.

Counter

An item you can use with any workflow report item to act as a measure.

Creation Time

The date and time the workflow item associated with the folder was created. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Creation Time (Calendar Key)

The date and time the workflow item associated with the folder was created, formatted YYYYMMDDHH.

Creation User ID

The unique ID of the user who created the workflow item associated with the folder.

Finish Time

The date and time the workflow item associated with the folder left the workflow queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Finish Time (Calendar Key)

The date and hour the workflow item associated with the folder left the workflow queue. By default, values are formatted YYYYDDMMHH.

Finish User ID

The unique ID of the user who routed the workflow item associated with the folder out of the workflow queue.

First View Time

The first time the workflow item associated with the folder was viewed.

Hold User ID

The unique ID of the user who placed a hold on the workflow item associated with the folder.

Item ID

The unique ID of the workflow item associated with the folder.

Item State

The current workflow item state associated with the folder. Possible values include:

- Any
- Idle
- Working
- Holding
- Pending
- Finished
- Completed
- Waiting for routing
- Waiting for siblings
- Waiting for inbound action
- Error

Object ID

The document ID or folder ID for the workflow item associated with the folder.

Priority

The priority assigned to the workflow item associated with the folder. Possible values include:

- low
- normal
- high

Queue ID

The unique ID of the queue associated with the folder workflow item.

Queue Start Time

The time the workflow item associated with the folder was added or routed to the workflow queue.

Queue Start Time (Calendar Key)

The date and time the workflow item associated with the folder was added or routed to the workflow queue, formatted YYYYMMDDHH. For example, if the item was routed forward on March 12, 2011, at 1:00 PM, the Queue Start Time (Calendar Key) value is 2011031213.

Queue Start User ID

The unique ID of the user who added or routed the workflow item associated with the folder to the workflow queue.

State Detail

The last workflow action performed for an item associated with the folder. Possible values include:

- Unknown
- Routed in
- Routed out
- Marked routable
- Created
- Put on hold
- Set to work
- Finished
- Split
- Joined
- Priority changed
- Recalled
- Cancelled

State Start Time

The date and time the workflow item began its current workflow state.

State Start Time (Calendar Key)

The date and hour the workflow item associated with the folder began its current workflow state. By default, values are formatted YYYYDDMMHH.

State User ID

The unique ID of the user who changed the workflow item associated with the folder to its current workflow state.

Total Hold Time

The total amount of time a workflow item associated with the folder spent on hold.

Workflow Fact (with Archive)

Item Location

Whether the document is in active workflow or the workflow archive.

Completion Time

The date and time the workflow item associated with the folder entered a complete queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Completion Time (Calendar Key)

The date and time the workflow item associated with the folder entered a complete queue, formatted YYYYMMDDHH.

Counter

An item you can use with any workflow report item to act as a measure.

Creation Time

The date and time the workflow item associated with the folder was created. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Creation Time (Calendar Key)

The date and time the workflow item associated with the folder was created, formatted YYYYMMDDHH.

Creation User ID

The unique ID of the user who created the workflow item associated with the folder.

Finish Time

The date and time the workflow item associated with the folder left the workflow queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Finish Time (Calendar Key)

The date and hour the workflow item associated with the folder left the workflow queue. By default, values are formatted YYYYDDMMHH.

Finish User ID

The unique ID of the user who routed the workflow item associated with the folder out of the workflow queue.

First View Time

The first time the workflow item associated with the folder was viewed.

Hold User ID

The unique ID of the user who placed a hold on the workflow item associated with the folder.

Item ID

The unique ID of the workflow item associated with the folder.

Item State

The current workflow item state associated with the folder. Possible values include:

- Any
- Idle
- Working
- Holding
- Pending
- Finished
- Completed
- Waiting for routing
- Waiting for siblings
- Waiting for inbound action
- Error

Object ID

The document ID or folder ID for the workflow item associated with the folder.

Priority

The priority assigned to the workflow item associated with the folder. Possible values include:

- low
- normal
- high

Queue ID

The unique ID of the queue associated with the folder workflow item.

Queue Start Time

The time the workflow item associated with the folder was added or routed to the workflow queue.

Queue Start Time (Calendar Key)

The date and time the workflow item associated with the folder was added or routed to the workflow queue, formatted YYYYMMDDHH. For example, if the item was routed forward on March 12, 2011, at 1:00 PM, the Queue Start Time (Calendar Key) value is 2011031213.

Queue Start User ID

The unique ID of the user who added or routed the workflow item associated with the folder to the workflow queue.

State Detail

The last workflow action performed for an item associated with the folder. Possible values include:

- Unknown
- Routed in
- Routed out
- Marked routable
- Created
- Put on hold
- Set to work
- Finished
- Split
- Joined
- Priority changed
- Recalled
- Cancelled

State Start Time

The date and time the workflow item began its current workflow state.

State Start Time (Calendar Key)

The date and hour the workflow item associated with the folder began its current workflow state. By default, values are formatted YYYYDDMMHH.

State User ID

The unique ID of the user who changed the workflow item associated with the folder to its current workflow state.

Total Hold Time

The total amount of time a workflow item associated with the folder spent on hold.

Task schema definitions

The following table lists the report items available in the Task Star Schema namespace of the Perceptive Content Business Logic View data source package, available on the Insert Data tab of the Menu pane.

Document Fact

Content Status

The database value for the task document's status in Perceptive ContentContent Server.

Creation Time

The date and time the task document entered the Perceptive Content system. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Creation Time (Calendar Key)

The date and time the task document entered the Perceptive Content system, formatted YYYYMMDDHH.

Creation User ID

The unique ID of the user who created the task document in Perceptive Content.

Deletion Status

Indicates whether the document associated with the task has been sent to the recycle bin to be deleted.

Document ID

The unique ID of the task document.

Document name

The name of the document.

Drawer ID

The unique ID of the document drawer.

Field1

The Field1 value associated with the task document.

Field2

The Field2 value associated with the task document.

Field3

The Field3 value associated with the task document.

Field4

The Field4 value associated with the task document.

Field5

The Field5 value associated with the task document.

Instance ID

The unique ID of the Perceptive Content object. In this case, the instance ID of the task document.

Modified Time

The date and time the task document was last modified. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Modified Time (Calendar Key)

The date and time the task document was last modified, formatted YYYYMMDDHH.

Modified User ID

The unique ID of the user who last modified the task document.

Object Type ID

The unique ID of the document type.

Page Count

The number of pages in the task document.

Parent Instance ID

The unique ID of the folder or drawer that stores the document.

Version ID

The unique ID of the version associated with the logical object.

Enum - Task State

Enumeration Value

The database value (0-6) of the status of the task. 0 is Not set, 1 is Assigned, 2 is Returned, 3 is Complete pending review, 4 is Complete, 5 is Canceled, and 6 is Invalid.

Task State

The status of a task. Possible values include Assigned, Returned, Complete pending review, Complete, Canceled, and Invalid.

Enum - Task Type

Enumeration Value

The database value (0-3) of the type of task. 0 is Not set, 1 is Signature required, 2 is Document Deficiency, and 3 is Pointer.

Task Type

The type of task. Possible values include Signature required, Document deficiency, and Pointer.

Folder Fact

Creation Time

The date and time the task folder was created. By default, the format is Month DD, YYYY HH:MM:SS AM/PM.

Creation Time (Calendar Key)

The date and hour the task folder was created, formatted YYYYMMDDHH. For example, if the folder was added to Perceptive Content on November 23, 2011, at 8:24 PM, the Creation Time (Calendar Key) value is 2011112320.

Creation User ID

The unique ID of the user who created the task folder in Perceptive Content.

Deletion Status

Indicates whether the folder associated with the task has been sent to the recycle bin to be deleted.

Drawer ID

The unique ID of the drawer in which the task folder is stored.

Folder ID

The unique ID of the Perceptive Content folder.

Folder Name

The name of the Perceptive Content folder.

Folder Status

Indicates whether the task folder is active or inactive. A value of 0 indicates an active folder. A value of 1 indicates an inactive folder.

Instance ID

The instance ID of the task folder used to associate custom properties.

Modified Time

The date and time the task folder was last modified. By default, the format is Month DD, YYYY HH:MM:SS AM/PM.

Modified Time (Calendar Key)

The date and hour the task folder was last modified, formatted YYYYMMDDHH. For example, if the folder's properties were changed on March 23, 2007, at 3:34 PM, the Calendar Key (Object Modified Time) value is 2007032315.

Modified User ID

The unique ID of the user who last modified the task folder in Perceptive Content.

Object Type ID

The unique ID of the folder type.

Parent Instance ID

The unique ID of the folder or drawer that stores the folder associated with the task.

Task

Assigning Time

The date and time the task was assigned.

Assigning Time (Calendar Key)

The date and hour the task was assigned, formatted YYYYMMDDHH. For example, if the task was assigned on March 23, 2011, at 3:34 PM, the Assigning Time (Calendar Key) value is 2011032315.

Assigning User ID

The unique ID of the user who originally assigned the task.

Completed Late Count

The number of tasks that were completed after the assigned due date.

Completion Time

The date and time the task entered a Complete state. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Completion Time (Calendar Key)

The date and hour the task entered a Complete state, formatted YYYYMMDDHH. For example, if the task was completed on March 23, 2011, at 3:34 PM, the Calendar Key (Task Completion Time) value is 2011032315.

Completion User ID

The unique ID of the user who completed the task.

Creation Time

The date and time the task was created.

Creation Time (Calendar Key)

The date and hour the task was created, formatted YYYYMMDDHH. For example, if the task was created on March 23, 2011, at 3:34 PM, the Calendar Key (Task Creation Time) value is 2011032315.

Creation User ID

The unique ID of the user who created the task.

Document ID

The unique ID of the document associated with the task.

Due Time

The date and time the task is due. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Due Time (Calendar Key)

The date and hour the task is due, formatted YYYYMMDDHH. For example, if the task is due on March 23, 2011, at 3:34 PM, the Calendar Key (Task Due Time) value is 2011032315.

Folder ID

The unique ID of the folder associated with the task.

Start Time

The date and time the task is configured to start. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Start Time (Calendar Key)

The date and hour the task is configured to start, formatted YYYYMMDDHH. For example, if the task is set to start on March 23, 2011, at 3:34 PM, the Calendar Key (Task Start Time) value is 2011032315.

Start to Completion Time

The amount of time elapsed between when the task started and when the task was completed.

Start to Due Time

The amount of time elapsed between the time the task starts and the time the tasks is due.

Task ID

The unique ID of the task.

Task State

The status of a task. Possible values include Assigned, Returned, Complete pending review, Complete, Canceled, and Invalid.

Task Template ID

The unique ID of the task template associated with the task.

Task Type

The type of task. Possible values include Signature required, Document deficiency, and Pointer.

Task Assignee Group

Is Deleted

Indicates whether the group to whom the task is assigned is deleted from Perceptive Content.

Group Category

The type of group to which the task is currently assigned. Possible values include Regular, System, Pooled, and Auto update. All groups configured in your Perceptive Content system, whether added or imported, appear as Regular groups.

Group Description

The description of the group to which the task is currently assigned.

Group ID

The unique ID of the group to whom the task is assigned.

Group Name

The name of the group to which the task is currently assigned.

Task Assignee User

Is Active

Indicates whether the user to whom the task assigned is an active user. A value of 1 indicates an active user. A value of 0 indicates an inactive user.

Is Deleted

Indicates whether the user to whom the task is assigned is deleted from Perceptive Content.

User Category

The type of user to which the task is currently assigned. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user to whom the task is assigned.

User ID

The unique ID of the user to whom the task is assigned.

User Last Name

The last name of the user to whom the task is assigned.

User Locality

The location of the user to whom the task is assigned. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user to whom the task is assigned.

Task Assigning Group

Group Category

The type of group that assigned the task. Possible values include Regular, System, Pooled, and Auto update. All groups configured in your Perceptive Content system, whether added or imported, appear as Regular groups.

Group Description

The description of the group containing the user that assigned the task.

Group ID

The unique ID of the group containing the user that assigned the task.

Group Name

The name of the group to which the user that assigned the task belongs.

Is Deleted

Indicates whether the group that assigned the task is deleted from Perceptive Content.

Task Assigning Time

Calendar Date

The date and time the task was assigned. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the task was assigned. For example, if the task was assigned on October 5, 2010, the Calendar Day (Task Assigning Time) value is 5.

Calendar Hour

The hour of the day the task was assigned. For example, if the task was assigned at 3:00 PM, the Calendar Hour (Task Assigning Time) value is 15.

Calendar Key

The date and hour the task was assigned, formatted YYYYMMDDHH. For example, if the task was assigned on March 23, 2011, at 3:34 PM, the Calendar Key (Task Assigning Time) value is 2011032315.

Calendar Month

The number of the month the task was assigned. For example, if the task was assigned June 15, 2011, the Calendar Month (Task Assigning Time) value is 6.

Calendar Month Key

The year and month the task was assigned, formatted YYYYMM. For example, if the task was assigned on May 14, 2011, the Calendar Month Key (Task Assigning Time) value is 201105.

Calendar Quarter

The quarter of the year the task was assigned. For example, if the task was assigned on February 12, 2011, the Calendar Quarter (Task Assigning Time) is 1. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Quarter Key

The year and quarter the task was assigned, formatted YYYYQ. For example, if the task was assigned January 9, 2010, the Calendar Quarter Key (Task Assigning Time) value is 20101. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Year

The year the task was assigned, formatted YYYY.

Day Name

The name of the day of the week the task was assigned, for example, Monday or Friday.

Day of Week

The number of the day of the week the task was assigned. For example, if the task was assigned on Tuesday, the Day of Week (Task Assigning Time) value is 3.

Month Name

The name of the month in which the task was assigned, for example, December.

Week Number

The number of the week of the year in which the task was assigned. For example, if the task was assigned December 30, 1999, the Week Number (Task Assigning Time) value is 52.

Task Assigning User

Is Active

Indicates whether the user who assigned the task is an active user. A value of 1 indicates an active user. A value of 0 indicates an inactive user.

Is Deleted

Indicates whether the user who assigned the task is deleted from Perceptive Content.

User Category

The type of user who originally assigned the task. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user who originally assigned the task.

User ID

The unique ID of the user who originally assigned the task.

User Last Name

The last name of the user who originally assigned the task.

User Locality

The location of the user who originally assigned the task. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user who originally assigned the task.

Task Assignment

Entity ID

The unique ID of the user or group to which the task is currently assigned.

Task Creation Time

The date and time the task was created.

Task Due Time

The date and time the task is due.

Task ID

The unique ID of the task.

Task Completion Time

Calendar Date

The date and time the task entered a Complete state. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the task entered a Complete state. For example, if the task was completed on October 5, 2010, the Calendar Day (Task Completion Time) value is 5.

Calendar Hour

The hour of the day the task entered a Complete state. For example, if the task was completed at 3:00 PM, the Calendar Hour (Task Completion Time) value is 15.

Calendar Key

The date and hour the task entered a Complete state, formatted YYYYMMDDHH. For example, if the task was completed on March 23, 2011, at 3:34 PM, the Calendar Key (Task Completion Time) value is 2011032315.

Calendar Month

The number of the month the task entered a Complete state. For example, if the task was completed June 15, 2011, the Calendar Month (Task Completion Time) value is 6.

Calendar Month Key

The year and month the task entered a Complete state, formatted YYYYMM. For example, if the task was completed on May 14, 2011, the Calendar Month Key (Task Completion Time) value is 201105.

Calendar Quarter

The quarter of the year the task entered a Complete state. For example, if the task was assigned on February 12, 2011, the Calendar Quarter (Task Completion Time) is 1. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Quarter Key

The year and quarter the task entered a Complete state, formatted YYYYQ. For example, if the task was completed January 9, 2010, the Calendar Quarter Key (Task Completion Time) value is 20101. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Year

The year in which the task was completed. By default, this value is formatted YYYY.

Day Name

The name of the day of the week the task entered a Complete state, for example, Monday or Friday.

Day of Week

The number of the day of the week the task entered a Complete state. For example, if the task was completed on Tuesday, the Day of Week (Task Completion Time) value is 3.

Month Name

The name of the month in which the task entered a Complete state, for example, December.

Week Number

The number of the week of the year in which the task entered a Complete state. For example, if the task was completed December 30, 2011, the Week Number (Task Completion Time) value is 52.

Task Completion User

Is Active

Indicates whether the user who completed the task is an active user. A value of 1 indicates an active user. A value of 0 indicates an inactive user.

Is Deleted

Indicates whether the user who completed the task is deleted from Perceptive Content.

User Category

The type of user who completed the task. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user who completed the task.

User ID

The unique ID of the user who completed the task.

User Last Name

The last name of the user who completed the task.

User Locality

The location of the user who completed the task. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user who completed the task.

Task Creation Time

Calendar Date

The date and time the task was created. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the task was created. For example, if the task was created on October 5, 2010, the Calendar Day (Task Creation Time) value is 5.

Calendar Hour

The hour of the day the task was created. For example, if the task was created at 3:00 PM, the Calendar Hour (Task Creation Time) value is 15.

Calendar Key

The date and hour the task was created, formatted YYYYMMDDHH. For example, if the task was created on March 23, 2011, at 3:34 PM, the Calendar Key (Task Creation Time) value is 2011032315.

Calendar Month

The number of the month the task was created. For example, if the task was created June 15, 2011, the Calendar Month (Task Creation Time) value is 6.

Calendar Month Key

The year and month the task was created, formatted YYYYMM. For example, if the task was created on May 14, 2011, the Calendar Month Key (Task Creation Time) value is 201105.

Calendar Quarter

The quarter of the year the task was created. For example, if the task was created on February 12, 2011, the Calendar Quarter (Task Creation Time) is 1. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Quarter Key

The year and quarter the task was created, formatted YYYYQ. For example, if the task was created January 9, 2010, the Calendar Quarter Key (Task Creation Time) value is 20101. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Year

The year in which the task was created. By default, this value is formatted YYYY.

Day Name

The name of the day of the week the task was created, for example, Monday or Friday.

Day of Week

The number of the day of the week the task was created. For example, if the task was created on Tuesday, the Day of Week (Task Creation Time) value is 3.

Month Name

The name of the month in which the task was created, for example, December.

Week Number

The number of the week of the year in which the task was created. For example, if the task was created December 30, 2011, the Week Number (Task Creation Time) value is 52.

Task Creation User

Is Active

Indicates whether the user who created the task is an active user. A value of 1 indicates an active user. A value of 0 indicates an inactive user.

Is Deleted

Indicates whether the user who created the task is deleted from Perceptive Content.

User Category

The type of user who created the task. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user who created the task.

User ID

The unique ID of the user who created the task.

User Last Name

The last name of the user who created the task.

User Locality

The location of the user who created the task. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user who created the task.

Task Due Time

Calendar Date

The date and time the task is due. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the task is due. For example, if the task is due on October 5, 2010, the Calendar Day (Task Due Time) value is 5.

Calendar Hour

The hour of the day the task is due. For example, if the task is due at 3:00 PM, the Calendar Hour (Task Due Time) value is 15.

Calendar Key

The date and hour the task is due, formatted YYYYMMDDHH. For example, if the task is due on March 23, 2011, at 3:34 PM, the Calendar Key (Task Due Time) value is 2011032315.

Calendar Month

The number of the month the task is due. For example, if the task is due on June 15, 2011, the Calendar Month (Task Due Time) value is 6.

Calendar Month Key

The year and month in which the task is due, formatted YYYYMM. For example, if the task is due on May 14, 2011, the Calendar Month Key (Task Due Time) value is 201105.

Calendar Quarter

The quarter of the year in which the task is due. For example, if the task is due on February 12, 2011, the Calendar Quarter (Task Due Time) is 1. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Quarter Key

The year and quarter in which the task is due, formatted YYYYQ. For example, if the task is due on January 9, 2010, the Calendar Quarter Key (Task Due Time) value is 20101. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Year

The year in which the task is due. By default, this value is formatted YYYY.

Day Name

The name of the day of the week the task is due, for example, Monday or Friday.

Day of Week

The number of the day of the week the task is due. For example, if the task is due on Tuesday, the Day of Week (Task Due Time) value is 3.

Month Name

The name of the month in which the task is due, for example, December.

Week Number

The number of the week of the year in which the task is due. For example, if the task is due on December 30, 2011, the Week Number (Task Due Time) value is 52.

Task Start Time

Calendar Date

The date and time the task is configured to start. By default, the format is Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the task is configured to start. For example, if the task is set to start on October 5, 2010, the Calendar Day (Task Start Time) value is 5.

Calendar Hour

The hour of the day the task is configured to start. For example, if the task is set to start at 3:00 PM, the Calendar Hour (Task Start Time) value is 15.

Calendar Key

The date and hour the task is configured to start, formatted YYYYMMDDHH. For example, if the task is set to start on March 23, 2011, at 3:34 PM, the Calendar Key (Task Start Time) value is 2011032315.

Calendar Month

The number of the month the task is configured to start. For example, if the task is set to start on June 15, 2011, the Calendar Month (Task Start Time) value is 6.

Calendar Month Key

The year and month the task is configured to start, formatted YYYYMM. For example, if the task is set to start on May 14, 2011, the Calendar Month Key (Task Start Time) value is 201105.

Calendar Quarter

The quarter of the year the task is configured to start. For example, if the task is set to start on February 12, 2011, the Calendar Quarter (Task Start Time) is 1. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Quarter Key

The year and quarter the task is configured to start, formatted YYYYQ. For example, if the task is set to start on January 9, 2010, the Calendar Quarter Key (Task Start Time) value is 20101. The quarter value applies to the calendar quarter, not the fiscal quarter.

Calendar Year

The year in which the task is configured to start. By default, this value is formatted YYYY.

Day Name

The name of the day of the week the task is configured to start, for example, Monday or Friday.

Day of Week

The number of the day of the week the task is configured to start. For example, if the task is set to start on Tuesday, the Day of Week (Task Start Time) value is 3.

Month Name

The name of the month in which the task is configured to start, for example, December.

Week Number

The number of the week of the year in which the task is configured to start. For example, if the task is set to start on December 30, 2011, the Week Number (Task Start Time) value is 52.

Task Template

Completion Type

The completion method defined for the task template. A value of 1 indicates the task is automatically completed with a valid digital signature, a value of 2 indicates the task is complete pending review, and a value of 3 indicates the task is manually completed.

Due Date Type

The type of due date for the task template. A value of 0 indicates no due date, a value of 1 indicates a due date prompted by the task creator, a value of 2 indicates the due date is based on the assignment date, and a value of 3 indicates the due date is based on the start date.

Is Active Flag

Indicates whether the task template is an active template. A value of 1 indicates an active template. A value of 0 indicates an inactive template.

Task Template Description

The description of the task template.

Task Template ID

The unique ID of the task template.

Task Template Name

The name of the task template.

Task Template Type

The type of task template. A value of 1 indicates a Signature required task template, a value of 2 indicates a Document deficiency task template, and a value of 3 indicates a Pointer task template.

Task Filters

Task is Complete

Filter used to exclude incomplete tasks.

Task Template - Is Active

Filter used to exclude task templates that are inactive.

Workflow schema definitions

The following table lists the report items available in the Workflow Star Schema namespace of the Perceptive Content Business Logic View data source package, available on the Insert Data tab of the Menu pane. The report items are listed in alphabetical order for quick reference.

Creation Time

Calendar Date

The date and time the workflow item was created. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the workflow item was created. For example, if a document was added to workflow on August 22, 2011, the Calendar (Creation Time) value is 22.

Calendar Hour

The hour of the day the workflow item was created. For example, if a document was added to workflow at 2:00 PM, the Calendar Hour (Creation Time) value is14.

Calendar Key

The date and hour the workflow item was created. By default, values are formatted YYYYDDMMHH.

Calendar Month

The month of the year the workflow item was created. For example, if a document was added to workflow in April 2011, the Calendar Month (Creation Time) value is 4.

Calendar Month Key

The year and month the workflow item was created, formatted as YYYYMM. For example, if a document was added to workflow on June 15, 2011, the value is 201106.

Calendar Quarter

The quarter of the year the workflow item was created. For example, if a document was added to workflow on August 9, 2011, the Calendar Quarter (Creation Time) value is 3.

Calendar Quarter Key

The year and quarter the workflow item was created, formatted YYYYQ. For example, if a document was added to workflow in November 2011, the value is 20114.

Calendar Year

The year the workflow item was created. By default, the format is YYYY.

Day Name

The name of the day of the week the workflow item was created. Day names include Sunday through Saturday.

Day of the Week

The number of the day of the week the workflow item was created, starting with Sunday as 1. For example, if a document was added to workflow on monday, the Day of Week (Creation Time) value is 2.

Month Name

The name of the month the workflow item was created.

Week Number

The number of the week of the year the workflow item was created. For example, if a document was added to workflow on December 4, 2011, the Week Number (Creation Time) value is 49.

Creation User

Is Active

Indicates whether the user who created the workflow item is an active user.

Is Deleted

Indicates whether the user who created the workflow item is deleted from Perceptive Content.

User Category

The type of user who created the workflow item. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user who created the workflow item.

User ID

The unique ID of the user who created the workflow item

User Last Name

The last name of the user who created the workflow item.

User Locality

The location of the user who created the workflow item. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user who created the workflow item.

Document Fact

Content Status

The database value for the document in workflow's status in Perceptive Content Content Server.

Creation Time

The date and time the document in workflow entered the Perceptive Content system. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Creation Time (Calendar Key)

The date and time the document in workflow entered the Perceptive Content system, formatted YYYMMDDHH.

Creation User ID

The unique ID of the user that created the document in workflow in Perceptive Content.

Deletion Status

Indicates whether the workflow document item has been sent to the recycle bin to be deleted.

Document ID

The unique ID of the document in workflow.

Document Name

The name of the document.

Drawer ID

The unique ID of the document drawer.

Field 1

The Field1 value associated with the document in workflow.

Field2

The Field2 value associated with the document in workflow.

Field3

The Field3 value associated with the document in workflow.

Field4

The Field4 value associated with the document in workflow.

Field5

The Field5 value associated with the document in workflow.

Instance ID

The unique ID of the Perceptive Content object. In this case, the instance ID of the document in workflow.

Modified Time

The date and time the document in workflow was last modified. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Modified Time (Calendar Key)

The date and time the document in workflow was last modified, formatted YYYYMMDDHH.

Modified User ID

The unique ID of the user that last modified the document in workflow.

Name

The name of the document in workflow.

Page Count

The number of pages in the document in workflow.

Parent Instance ID

The unique ID of the folder or drawer that stores the document.

Object Type ID

The unique ID of the document type in workflow.

Version ID

The unique ID of the version associated with the logical object.

Enum - Workflow Item Priority

Enumeration Value

The database value (0-2) of the workflow item priority. 0 is Low, 1 is Normal, and 2 is High.

Priority

The priorities assigned to workflow items. Possible values include Low, Normal, and High.

Enum - Workflow Item State

Enumeration Value

The database value (0-10) of the workflow item state. 0 is Any, 1 is Idle, 2 is Working, 3 is Holding, 4 is Pending, 5 is Finished, 6 is Completed, 7 is Waiting for routing, 8 is Waiting for siblings, 9 is Waiting for inbound action, and 10 is an error.

Item State

The states a workflow item can be in. Possible values include Any, Idle, Working, Holding, Pending, Finished, Completed, Waiting for routing, Waiting for siblings, Waiting for inbound action, and Error.

Enum - Workflow State Detail

Enumeration Value

The database value (0-12) of the action performed for the workflow item. 0 is Unknown, 1 is Routed in, 2 is Routed out, 3 is Marked routable, 4 is Created, 5 is Cancelled, 6 is Put on hold, 7 is Set to work, 8 is Finished, 9 is Split, 10 is Joined, 11 is Priority changed, and 12 is Recalled.

State Detail

The last action performed for the workflow item. Possible values include Unknown, Routed in, Routed out, Marked routable, Created, Cancelled, Put on hold, Set to work, Finished, Split, Joined, Priority changed, and Recalled.

Finish Time

Calendar Date

The date and time the workflow item left the workflow queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the workflow item left the workflow queue. For example, if an item was routed forward on August 22, 2011, the Calendar Day (Finish time) value for the queue it was routed from is 22.

Calendar Hour

The hour of the day the workflow item left the workflow queue. For example, if an item was routed forward at 2:00 PM, the Calendar Hour (Finish Time) value for the queue it was routed from is 14.

Calendar Key

The date and hour the workflow item left the workflow queue. By default, values are formatted YYYYDDMMHH.

Calendar Month

The month of the year the workflow item left the workflow queue. For example, if an item was routed forward in April 2011, the Calendar Month (Finish Time) value for the queue it was routed from is 4.

Calendar Month Key

The year and month the workflow item left the workflow queue, formatted as YYYYMM. For example, if an item was routed forward on June 15, 2011, the value for the queue it was routed from is 201106.

Calendar Quarter

The quarter of the year the workflow item left the workflow queue. For example, if an item was routed forward on August 9, 2011, the Calendar Quarter (Finish Time) value is 3.

Calendar Quarter Key

The year and quarter the workflow item left the workflow queue. For example, if an item was routed forward in November 2011, the value for the queue it was routed from is 20114.

Calendar Year

The year the workflow item left the workflow queue. By default, the format is YYYY.

Day Name

The name of the day of the week the workflow item left the workflow queue. Day names include Sunday through Saturday.

Day of Week

The number of the day of the week the workflow item left the workflow queue, starting with Sunday as 1. For example, if an item was routed forward on Monday, the Day of Week (Finish Time) value for the queue it was routed from is 2.

Month Name

The name of the month the workflow item left the workflow queue, for example, December.

Week Number

The number of the week of the year the workflow item left the workflow queue. For example, if an item was routed forward on December 4, 2011, the Week Number (Finish Time) value is 49.

Finish User

Is Active

Indicates whether the user who routed the workflow item out of the workflow queue is an active user.

Is Deleted

Indicates whether the user who routed the workflow item out of the queue is deleted from Perceptive Content.

User Category

The type of user who routed the workflow item out of the workflow queue. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user who routed the workflow item out of the workflow queue.

User ID

The unique ID of the user who routed the workflow item out of the workflow queue.

User Last Name

The last name of the user who routed the workflow item out of the workflow queue.

User Locality

The location of the user who routed the workflow item out of the workflow queue. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user who routed the workflow item out of the workflow queue.

Folder Fact

Creation Time

The date and time the folder in workflow was created. By default, the format is Month DD, YYYY HH:MM:SS AM/PM.

Creation Time (Calendar Key)

The date and hour the folder in workflow was created, formatted YYYYMMDDHH. For example, if the folder was added to Perceptive Content on November 23, 2011, at 8:24 PM, the Creation Time (Calendar Key) value is 2011112320.

Creation User ID

The unique ID of the user that created the folder in workflow in Perceptive Content.

Deletion Status

Indicates whether the folder in workflow has been deleted from Perceptive Content.

Drawer ID

The unique ID of the drawer in which the folder in workflow is stored.

Folder ID

The unique ID of the folder in workflow.

Folder Name

The name of the folder in workflow.

Folder Status

Whether the folder in workflow is active or inactive.

Instance ID

The instance ID of the folder in workflow used to associate custom properties.

Modified Time

The date and time the folder in workflow was last modified. By default, the format is Month DD, YYYY HH:MM:SS AM/PM.

Modified Time (Calendar Key)

The date and hour the folder in workflow was last modified, formatted YYYYMMDDHH. For example, if the folder's properties were changed on March 23, 2011, at 3:34 PM, the Calendar Key (Object Modified Time) value is 2011032315.

Modified User ID

The unique ID of the user that last modified the folder in workflow in Perceptive Content.

Object Type ID

The unique ID of the folder type in workflow.

Parent Instance ID

The unique ID of the folder or drawer that stores the folder.

Hold User

Is Active

Indicates whether the user who placed a hold on the workflow item is an active user.

Is Deleted

Indicates whether the user who placed a hold on the workflow item is deleted from Perceptive Content.

User Category

The type of user who placed a hold on the workflow item. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user who placed a hold on the workflow item.

User ID

The unique ID of the user who placed a hold on the workflow item.

User Last Name

The last name of the user who placed a hold on the workflow item.

User Locality

The location of the user who placed a hold on the workflow item. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user who placed a hold on the workflow item.

Process

Process ID

The unique ID of the workflow process.

Process Description

The description of the workflow process.

Process Name

The name of the Perceptive Content workflow process.

Queue

Is Deleted

Indicates whether the workflow queue has been deleted from the workflow process.

Is Empty

Indicates whether the workflow queue contains workflow items.

Is Sub Queue

Indicates whether the workflow queue is a sub queue within a super queue.

Is Terminal

Indicates whether the workflow queue is a complete queue.

Process ID

The unique ID of the Perceptive Content workflow process associated with the workflow queue.

Queue ID

The unique ID of the workflow queue.

Queue Name

The name of the workflow queue.

Queue Type

The type of workflow queue. Possible values include Work queue, Super queue, Sub queue, and System queue.

Super Queue ID

The unique ID of the super queue associated with the sub queue.

Queue (Measures)

Completed Items

The total number of workflow items with a status of Complete in the workflow queue. This measure only applies to complete queues.

Contains Items

Indicates whether the queue contains workflow items.

Idle Items

The total number of workflow items in an Idle state in the workflow queue.

Items in Queue

The total number of workflow items in the workflow queue.

On Hold Items

The total number of workflow items with an On Hold status in the workflow queue.

Pending Items

The total number of workflow items with a Pending status in the workflow queue.

Working Items

The total number of workflow items with a Working status in the workflow queue.

Queue Start Time

Calendar Date

The date and time the workflow item was added or routed to the workflow queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the workflow item was added or routed to the workflow queue. For example, if a document was added to the queue on August 22, 2011, the Calendar Day (Queue Start Time) value is 22.

Calendar Hour

The hour of the day the workflow item was added or routed to the workflow queue. For example, if a document was added to the queue at 2:00 PM, the Calendar Hour (Queue Start Time) value is 14.

Calendar Key

The date and hour the workflow item was added or routed to the workflow queue. By default, values are formatted YYYYDDMMHH.

Calendar Month

The month of the year the workflow item was added or routed to the queue. For example, if a document was routed to the queue in April 2011, the Calendar Month (Queue Start Time) value is 4.

Calendar Month Key

The year and month the workflow item was added or routed to the workflow queue, formatted as YYYYMM. For example, if a document was added to the queue on June 15, 2011, the value is 201106.

Calendar Quarter

The quarter of the year the workflow item was added or routed to the workflow queue. For example, if an item was routed to the queue on August 9, 2011, the Calendar Quarter (Queue Start Time) value is 3.

Calendar Quarter Key

The year and quarter the workflow item was added or routed to the workflow queue, formatted YYYYQ. For example, if an item was added to the queue in November 2011, the value is 20114.

Calendar Year

The year the workflow item was added or routed to the queue. By default, the format is YYYY.

Day Name

The name of the day of the week the workflow item was added or routed to the workflow queue. Day names include Sunday through Saturday.

Day of Week

The number of the day of the week the workflow item was added or routed to the workflow queue, starting with Sunday as 1. For example, if an item was added to the queue on Monday, the Day of Week (Queue Start Time) is 2.

Month Name

The name of the month the workflow item was added or routed to the workflow queue, for example, December.

Week Number

The number of the week of the year the workflow item was added or routed to the workflow queue. For example, if an item was added to the queue December 4, 2011, the Week Number (Queue Start Time) value is 49.

Queue Start User

Is Active

Indicates whether the user who added or routed the item to the workflow queue is an active user.

Is Deleted

Indicates whether the user who added or routed the item to the queue is deleted from Perceptive Content.

User Category

The type of user who added or routed the item to the workflow queue. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content system, whether added or imported, appear as Regular users.

User First Name

The first name of the user who added or routed the item to the workflow queue.

User ID

The unique ID of the user who added or routed the item to the workflow queue.

User Last Name

The last name of the user who added or routed the item to the workflow queue.

User Locality

The location of the user who added or routed the item to the workflow queue. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user who added or routed the item to the workflow queue.

State Start Time

Calendar Date

The date and time the workflow item began its current workflow state. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Calendar Day

The day of the month the workflow item began its current workflow state. For example, if a document was marked Idle on August 22, 2011, the Calendar Day (State Start Time) value is 22.

Calendar Hour

The hour of the day the workflow item began its current workflow state. For example, if a document was marked Idle at 2:00 PM, the Calendar Day (State Start Time) value is 14.

Calendar Key

The date and hour the workflow item began its current workflow state. By default, values are formatted YYYYDDMMHH.

Calendar Month

The month of the year the workflow item began its current workflow state. For example, if a document was marked Idle in April 2011, the Calendar Month (State Start Time) value is 4.

Calendar Month Key

The year and month the workflow item began its current workflow state, formatted as YYYYMM. For example, if an item was marked Idle on June 15, 2011, the value is 201106.

Calendar Quarter

The quarter of the year the workflow item began its current workflow state. For example, if an item was marked Idle on August 9, 2011, the Calendar Quarter (State Start Time) value is 3.

Calendar Quarter Key

The year and quarter the workflow item began its current workflow state, formatted YYYYQ. For example, if an item was marked Idle in November 2011, the value is 20114.

Calendar Year

The year the workflow item began its current workflow state. By default, the format is YYYY.

Day Name

The name of the day of the week the workflow item began its current workflow state. Day names include Sunday through Saturday.

Day of Week

The number of the day of the week the workflow item began its current workflow state, starting with Sunday as 1. For example, if an item was marked Idle on Monday, the Day of Week (State Start Time) is 2.

Month Name

The name of the month the workflow item began its current workflow state, for example, December.

Week Number

The number of the week of the year the workflow item began its current workflow state. For example, if an item was marked Idle on December 4, 2011, the Week Number (State Start Time) value is 49.

State User

Is Active

Indicates whether the user who changed the item to its current workflow state is an active user.

Is Deleted

Indicates whether the user who changed the item to its current workflow state is deleted from Perceptive Content.

User Category

The type of user who changed the workflow item to its current state. Possible values include Regular, System, Pooled, and Auto update. All users configured in your Perceptive Content environment, whether added or imported, appear as Regular users.

User First Name

The first name of the user who changed the workflow item to its current workflow state.

User ID

The unique ID of the user who changed the workflow item to its current workflow state.

User Last Name

The last name of the user who changed the workflow item to its current workflow state.

User Locality

The location of the user who changed the workflow item to its current workflow state. Locations are configured as part of the user contact information in the Perceptive ContentManagement Console.

User Name

The user name of the user who changed the workflow item to its current workflow state.

Workflow Fact

Completion Time

The date and time the workflow item entered a complete queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Completion Time (Calendar Key)

The date and time the workflow item entered a complete queue, formatted YYYYMMDDHH.

Counter

An item you can use with any workflow report item to act as a measure.

Creation Time

The date and time the workflow item was created. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Creation Time (Calendar Key)

The date and time the workflow item was created, formatted YYYYMMDDHH.

Creation User ID

The unique ID of the user who created the workflow item.

Finish Time

The date and time the workflow item left the workflow queue. By default, values are formatted Month DD, YYYY HH:MM:SS AM or PM.

Finish Time (Calendar Key)

The date and hour the workflow item left the workflow queue. By default, values are formatted YYYYDDMMHH.

Finish User ID

The unique ID of the user who routed the workflow item out of the workflow queue.

First View TIme

The first time the workflow item was viewed.

Hold User ID

The unique ID of the user who placed a hold on the workflow item.

Item ID

The unique ID of the workflow item.

Item Location

Whether the item is in the active workflow process or in the workflow archive.

Item State

The current workflow item state. Possible values include Any, Idle, Working, Holding, Pending, Finished, Completed, Waiting for routing, Waiting for siblings, Waiting for inbound action, and Error.

Object ID

The document ID or folder ID associated with the workflow item.

Priority

The priority assigned to the workflow item. Possible values are low, normal, and high.

Queue ID

The unique ID of the queue associated with the workflow item.

Queue Start Time

The time the workflow item was added or routed to the workflow queue.

Queue Start Time (Calendar Key)

The date and time the workflow item was added or routed to the workflow queue, formatted YYYYMMDDHH. For example, if the item was routed forward on March 12, 2011, at 1:00 PM, the Queue Start Time (Calendar Key) value is 2011031213.

Queue Start User ID

The unique ID of the user who added or routed the workflow item to the workflow queue.

State Detail

The last workflow action performed for an item. Possible values are Unknown, Routed in, Routed out, Marked routable, Created, Cancelled, Put on hold, Set to work, Finished, Split, Joined, Priority changed, and Recalled.

State Start Time

The date and time the workflow item began its current workflow state.

State Start Time (Calendar Key)

The date and hour the workflow item began its current workflow state. By default, values are formatted YYYYDDMMHH.

State User ID

The unique ID of the user who changed the workflow item to its current workflow state.

Total Hold Time

The total amount of time a workflow item spent on hold.

Workflow Filters

Workflow Item Facts - Exclude Active

When this filter is applied to a query, it excludes items that were last routed prior to 1/1/1970 or items that have never been routed out of the queue they were originally added to.

Workflow Queue - Is NOT Deleted filter

This filter excludes deleted queues from the report results.

Workflow Queue Attribute - Is Terminal

This filter excludes complete queues from the report results.

Implement Drawer Security Filter for Cognos Reports

What is Drawer Security Filter?

When viewing the results within the Perceptive Content explorer grid, several privilege checks are done behind the scenes to determine the output of data a user can see. To mimic this filtering of data within a report, a new Drawer Security Filter has been added that displays the output of data for the user running the report. The filter checks if the user has the Open and Search privilege for the drawers in question and presents the appropriate data based on their access.

For example, Jane Doe is a report user wanting to run a report on documents in Perceptive Content. Three drawers exist in the system, and Jane's resolved privilege set is in the table below.

Drawer Name	Open Priv	Search Priv
Sample AP		
Sample Invoice		
Sample Returns		

Without applying the Drawer Security Filter, Jane would be able to see all documents in all drawers. When the new Drawer Security Filter is applied, since she has grant privilege for both Open and Search for only the Sample Invoice drawer, she would only see data from the Sample Invoice drawer.

Apply Drawer Security Filter to reports

The Drawer Security Filter can be easily applied to stock Cognos reports or added to new reports created by a report author. Two example reports (Documents With Annotations - Drawer Security Filtering and Documents Viewed Audit Report - Drawer Security Filtering) have been created as part of the stock library of reports to demonstrate how to use the filter.

You can modify an existing report while implementing the Drawer Security Filter or you can add the Drawer Security Filter when you create a new report.

Create a new report

To create a new report, complete the following steps. After you create the report, log in to Cognos with a test user with varying drawer privilege access levels to ensure the filter is working as expected.

1. Log in as a report author.
2. Open Report Studio.
3. Select a package to report against. For this exercise, select the **Data Source View**.
4. Click the **Create new** button.
5. On the **New** wizard, select **List** and click **OK**.
6. From the **Source** pane, expand **Data Source View > Instantiatable Objects > Model Query Subjects** and drag the following items to the list.
    1. DocumentFact.Document ID.
    2. DocumentFact.Name
    3. DocumentFact.Field1
    4. DocumentFact.Field2
    5. Drawer.DrawerName
7. In the **Source** pane, scroll down and expand the **Filter** folder
8. Click and drag **Drawer Security Filter** onto the list. It does not matter where the filter is dropped, just that it is dropped onto the list.
9. A message displays stating that "The query "Query1" is now filtered by ‘Drawer Security Filter’."
10. Click **OK**.
11. Run the report.

Modify an existing report

To modify an existing report, complete the following steps. After you create the report, log into Cognos with a test user with varying drawer privilege access levels to ensure the filter is working as expected.

1. Log in as a report author.
2. Navigate to **Public Folders > Workflow** and make a copy of the Document Queue Entry to First View report.
3. Rename the copy of the report to Document Queue Entry to First View - Drawer Filter.
4. Open the Document Queue Entry to First View - Drawer Filter report in Report Studio.
5. On the **Menu** bar, click **View > Queries**.
6. Double-click the **Parameter Drawer** query.
7. Notice in the **Detail Filters** that there are already two filters in place, one of which is called [Document Star Schema].[No Systems Drawers].
8. In the **Source** pane, expand the tree as follows: **Business Logic View > Business Logic View > Document Star Schema > Object Filters**.
9. Click and drag **Drawer Security Filter** to the **Detail Filters** pane.
10. Run the report.

Link reports to documents and folders

Link reports to documents and folders

About creating document and folder report hyperlinks

You can configure any report that includes a Document ID or Folder ID column to contain hyperlinks for each document or folder ID. The links open the document or folder in the viewer.

In Report Studio, to create hyperlinks to documents and folders from the report, you must manually drag the Perceptive Content Connector from the Toolbox into the report.

You can only launch documents and folders from a scheduled or saved output version of a report. To use a hyperlink in a report, the report must also be rendered in HTML format. Document and Folder IDs do not appear as hyperlinks in PDF, XML, or Excel format. This feature is only available for reports created in Report Studio. Reports created in Query Studio must be modified in Report Studio to enable this feature.

Create a hyperlink to display documents or folders

To configure a report that includes document ID or folder ID data to create active hyperlinks for the document IDs that open in the viewer, complete the following steps.

1. In the workspace, verify that the **Document ID** or **Folder ID** column appears in the report. Add the column if necessary.
2. To add the Perceptive Content Connector toolbox item to the report, complete the following substeps.
    1. In the **Insertable Objects** pane, click the **Toolbox** tab.
    2. Drag the **Perceptive Content Connector** item to the report header or footer.

    Adding this item to the header or footer ensures that the document or folder links appear on all report pages.
3. Unlock the report items.
4. In the workspace, select the cell text of the **Document ID** or **Folder ID** column.
5. In the **Properties** pane, under **Miscellaneous**, double-click the **Classes** ellipsis button.
6. In the **Properties** pane, verify that the title bar appears as **Properties - Text Item**. If the title appears as **Properties - List Column Body**, verify the report is unlocked and select the cell text inside the column so that **Properties - Text Item** appears in the title bar.
7. Under **Miscellaneous**, double-click the **Classes** ellipsis button.
8. Complete one of the following actions.
    - To select documents, under **Global classes**, select **Open Document by Document ID**.
    - To select folders, under **Global classes**, select **Open Folder by Folder ID**.
9. Click the right arrow to move the selection to the **Selected classes** list.
10. Click **Apply** and click **OK**.
11. Optional. To preview the link, in Perceptive Content, run the report in HTML format.

Distribute reports

Distribute reports

About distributing reports

In Report Studio, you can distribute, or burst, a report to a specified list of recipients.

When you distribute a report in Report Studio, you run the report once and then divide the results for recipients who view separate subsets of the data. For example, for a workflow report, you can send each queue lead the information that pertains to that user's workflow queues. This feature is not supported for crosstab reports.

You can distribute burst reports via email, or you can save them to a directory for viewing in Report Studio.

Enable report distribution

To enable report distribution by bursting the report to a defined list of recipients, complete the following steps.

Prerequisite The query and recipients must be defined for the report.

1. Click **File** > **Burst Options**.
2. In the **Burst Options** dialog box, select the **Make report available for bursting** check box.
3. Under **Burst Groups**, complete the following substeps.
    1. In the **Query** list, select the query created for distribution.
    2. In the **Label** list, select the report item to use to label each burst report.
4. Under **Groups**, click **Edit**.
5. In the **Grouping and Sorting** dialog box, under **Data Items**, drag the report item used to distribute the report to the **Groups** folder.
6. Optional. To specify the sort order of data in each group, drag report items to the **Sort List** folder, and then click **Sort**.
7. In the **Grouping and Sorting** dialog box, click **OK**.
8. Under **Burst Recipient**, complete the following substeps.
    1. In the **Query** list, select the distribution query.
    2. In the **Data Item** list, select the report item created for the recipients.
    3. In the **Type** list, select one of the following options:
    - To use the report item to determine whether to email reports or send them to a directory, select **Automatic**.
    - To distribute reports by email, select **E-mail addresses**.
    - To distribute reports to a directory that recipients can access in Business Insight, select **Directory entries**.
9. If your distribution query is linked to a data container or uses a master-detail relationship, click the **Master detail relationships** ellipsis button, and then create the master-detail relationship.

10. In the **Burst Options** dialog box, click **OK**.
11. Run the report to test the distribution.

Define the report recipients

To define the recipients for a burst report by creating a query and data item to specify the distribution list, complete the following steps.

1. In the **Query Explorer** pane, click **Queries**.
2. In the **Insertable Objects** pane, from the **Toolbox** tab, drag **Query** to the workspace.
3. Optional. Rename the query to indicate that the query is used for distribution, such as burst query.
4. In the workspace, double-click the query you created.
5. In the **Insertable Objects** pane, from the **Source** tab, drag the report items you want to use to divide the report to the **Data Items** pane in the workspace.

   Example To distribute a workflow report containing information about the number of items in a workflow queue to the user that routed the items forward to that queue, drag the **Queue Name** and **Item Count** report items to the query.

6. From the **Toolbox** tab, drag **Data Item** to the **Data Items** pane in the workspace.
7. In the **expression editor**, create an expression that will generate the list of recipients and then click **OK**.

   Example The following expression builds a list of the email addresses of the users who routed the items to the workflow queue or added the items to the workflow queue: `[Workflow].[Queue Start User].[User First Name] + '.' + [Workflow].[Queue Start User].[User Last Name] + '@perceptivesoftware.com'`

8. Optional. Rename the data item to indicate distribution recipients, such as Recipients.