



File Access Manager Generating Reports

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Reports

File Access Manager provides advanced report generation capabilities. Reports can be generated using report templates in the File Access Manager website, or initiating reports from tables in the File Access Manager Administrative Client.

Regardless of where reports are generated, all reports can be retrieved in the File Access Manager website.

Reports make processed data available to the appropriate data owners.

Editing Scheduled Reports in the Administrative Client

Scheduled reports that are created in the Administrative Client can be edited in the Reports table.

The following fields can be modified:

Name

Name of the report

Description

Information about the report

Viewable by

Audience with which the report is shared. The users (or groups of users) that would be able to view the report.

Scheduling

Available to users who have the permission `Report Templates Administrator`

Sharing

Available to users who have the permission `Report Templates Administrator`

Displayed column

Available on certain types of reports

Using Report Templates

Report templates are available to provide built-in reports targeting the type of user accessing them. For example, administrators and users who have the permission Report Templates Administrator see all report templates, while data owners see only templates that are shared with data owners. Users who are non-administrators or non-data owners do not see any report templates.

Web Client

Navigate to the **Reports > Report Templates** screen on the File Access Manager website to use File Access Manager's built-in report templates for standard and customized reports.

Manage Report Tags

You can assign one or more tags per report to help find them later.

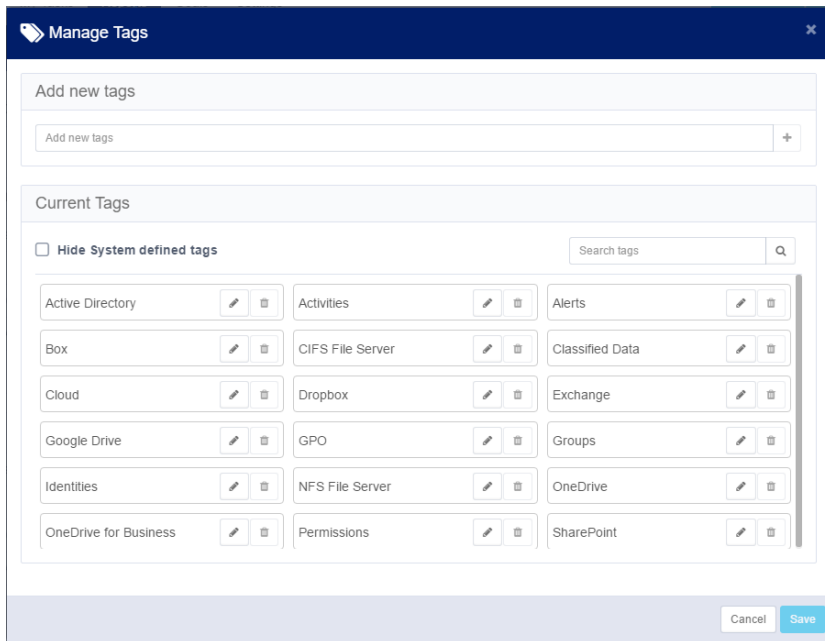
Managing Tags

Note: This option is available by default to the Administrator capability only.

Note: System tags cannot be deleted. The Delete option - a trash can icon - is disabled for system tags.

1. Click **Manage Tags** to change or delete report tags.
The Tag Management screen displays.
2. Available options are:
 - Hide system-defined tags (by checking the checkbox)
 - Search for tags
 - Edit tags
 - Add customized tags
3. Click the **Edit** option (a pencil icon) next to a non-system tag to edit that tag. It is not possible to use a name that already exists or to have a blank tag.
4. Click **Save** to the right of the edited tag to save it.

5. Click **Save** at the bottom of the Manage Tags screen to save all changes.



Filter Reports by Tags

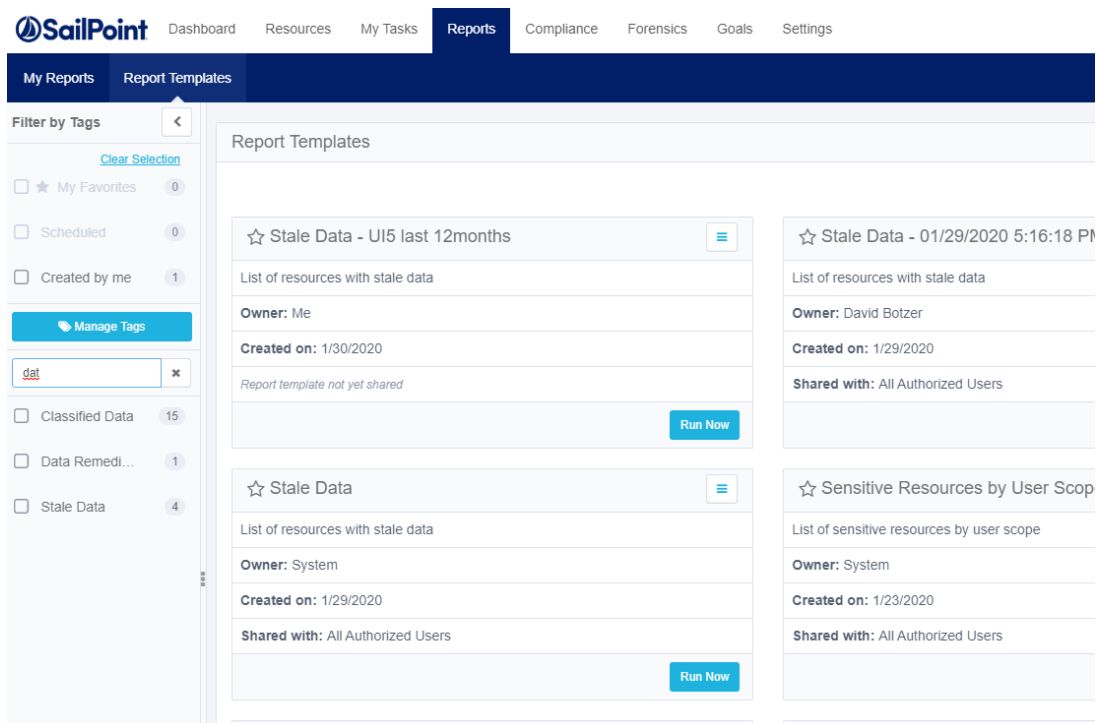
The **Filter by Tags** panel on the left can be used to filter out relevant report templates.

Search field

1. Type in the report tag. Available tags will be filtered out as you type.
2. Select one of the available tags to filter the report templates displayed.

Created by me

Select this checkbox to filter out your own report templates



Run a report or create a scheduled report

1. To run the report with settings other than the default parameters, select **Duplicate** from the template menu. *The Duplicate Template panel opens.*
2. Set the desired report parameters, scheduling times, and other setup fields.

Note: When scheduling a report, be aware that time is only reflected in UTC, not local time.

3. Click **Run Now** to run the report now.
4. Click **Save** to save the template for future use of this template.

My Reports **6** Report Templates

Duplicate Template

Template Type: *Identities*

Template Name * Description *

User Domain **No filters applied** Clear Selection User Name **No filters applied** Clear Selection

Department **No filters applied** Clear Selection

Tagging

Sharing

Scheduling

Sharing Reports

File Access Manager sends reports to the recipients defined in the **Viewable by** section of the report.

The system sends an email with a link to the report only to recipients with permission to download the report. If a recipient forwards that link to a user without permission to download a report, the recipient will not be able to download the report.

Deleting Reports

To open the report management screen, navigate to **Reports**.

1. Double click on a report to display report details. The Report Details window will display under the Reports window.
2. Click **Refresh** to refresh the Reports list.
3. Click **Delete** to delete a selected report.

Note: This option is available only to users with the **System>Reports>Delete** permission.

Editing Reports

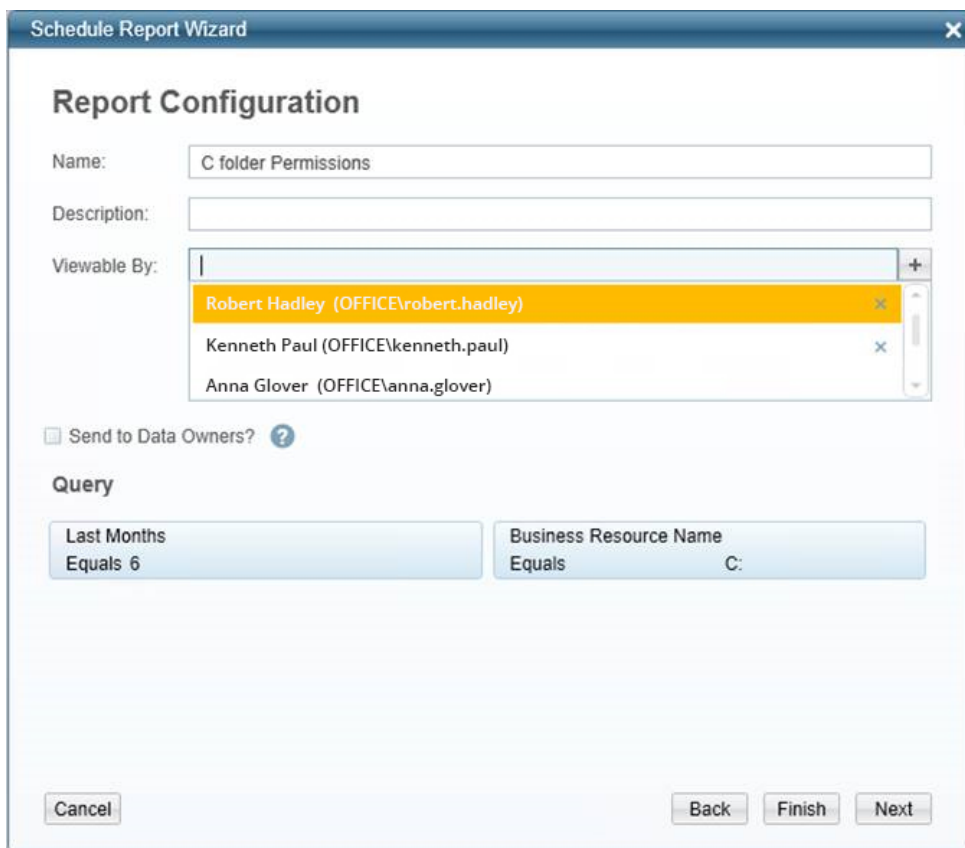
The following fields are available to edit a customized report:

- Custom fields to display (where supported)
- Recipients list
- Name
- Description
- Scheduling

Note: It is not possible to change the query filter of a saved customized report.

To edit report parameters for a customized report:

1. Navigate to Reports.
2. Select a scheduled report from the list to edit.
3. Click **Edit**.
The Welcome to the Schedule Report Wizard screen displays.
4. Click **Next** on the Schedule Report Wizard Welcome page.
5. The Report Configuration screen of the Schedule Report Wizard already displays the name in the **Name** field.



6. Type a description in the **Description** field.
7. Double click in the **Viewable By** field to view a list of users who can view the report.
8. Click on a user's name and click the **+** sign.
9. The user's name appears in the box under the **Viewable By** field.
10. Check the **Send to Data Owners** check box to send the report to data owners.
11. Relevant queries appear in the **Query** section of the **Report Configuration** screen.
12. To send the configuration to the system without configuring a report schedule, click **Finish**.
 - a. If you click **Finish**, the following Confirmation popup displays: "You are creating a report without a scheduler. Do you wish to continue?"
 - b. Click **Yes** to save the report without configuring a report schedule, or **No** to return to the **Report Configuration** screen.

- c. If you click **Yes**, and the following Warning popup displays: “This action can only run by a File Access Manager user that is associated with a user from the authentication store. The action will not be executed.” This means that you logged into the client with a local File Access Manager user, rather than with an Active Directory user from the Authentication Store. Only Active Directory users can create reports, since File Access Manager needs the email address of the user and the user’s identity to generate the report.
13. To schedule the configured report, click **Next**.
14. The Report Configuration screen displays.
15. Check the **Create a Schedule** check box to create a schedule, or click **Finish** to send the report configuration to the system without a schedule.
16. If you click **Finish**, the following Confirmation popup displays: “You are creating a report without a scheduler. Do you wish to continue?”
17. Click **Yes** to send the configuration to the system without configuring a report schedule, or **No** to return to the **Report Configuration** screen.
18. If you click **Yes**, the following Warning popup displays: “This action can only run by a File Access Manager user that is associated with a user from the authentication store. The action will not be executed.”

Report Actions

Navigate to Reports to view the various report actions.

Note: It is not possible to delete a scheduled report.

- (Right click) **Run Now** – run the report and send it to all recipients.
- (Right click) **Run now and send only to me** – run the report and send it to the current user who is active.

Report Operations

Open the report management screen to manage report operations:

1. Navigate to **Reports**.
2. Double click on a report to display report details. The Report Details window will display under the Reports window.
3. Click **Refresh** to refresh the Reports list.
4. Click **Delete** to delete a selected report.

Note: This option is available only to users with the **System>Reports>Delete** permission.