opentext™ | File Reporter

# Client Tools Guide

Version 24.3

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# Third-Party Systems

The software is designed to run in an environment containing third-party elements meeting certain prerequisites. These may include operating systems, directory services, databases, and other components or technologies. See the accompanying prerequisites list for details.

The software may require a minimum version of these elements to function. Further, these elements may require appropriate configuration and resources such as computing, memory, storage, or bandwidth for the software to be able to perform in a way that meets the customer requirements. The download, installation, performance, upgrade, backup, troubleshooting, and management of these elements is the responsibility of the customer using the third-party vendor's documentation and guidance.

Third-party systems emulating any of these elements must fully adhere to and support the appropriate APIs, standards, and protocols for the software to function. Support of the software in conjunction with such emulating third-party elements is determined on a case-by-case basis and may change at any time.

# Contents

# About This Guide

This guide provides the procedures to install and use File Reporter 24.3 Client Tools. It is intended for network administrators who manage network storage resources, and for data owners who are responsible for reporting on metadata and permissions for unstructured data in Windows file systems and Microsoft 365 document libraries in OneDrive for Business, SharePoint Online, and Teams collaborative environments.

# 1 - Minimum Requirements

- Any 64-bit multi-core processor Windows workstation (the number and speed of available cores may directly impact significant workloads using the Data Analytics tool).
- .NET 8.0 Desktop Runtime (will be installed if not already present).
- A DirectX 10-compatible graphics card required for use with the Data Analytics tool.
- 8 GB RAM for Report Viewer (depending on the size of report loading, exporting, and processing, you may need significantly more RAM).
- 12 GB RAM for Data Analytics

**NOTE:** A minimum of 1 KB per scan data entry (or 1 GB per million entries) is required for the Data Analytics tool. Depending on the type of analysis conducted (e.g., Pivot Grid) and the number of entries in a single scan, you may need significantly more RAM.

- 250 MB disk space
- Report Designer and Data Analytics users must be members of the SrsAdmins group.

# 2 - Installing the Client Tools

1. Copy the FileReporter-ClientTools-24.3-x64-xx.exe file from the root of the `FileReporter-24.3.iso` image to all Windows workstations that will run the Client Tools.
2. Double-click FileReporter-ClientTools-24.3-x64-xx.exe from the Windows workstation.
3. Agree to the license terms and conditions, then click *Install*.
4. When notified that the setup was successful, click *Close*.

   Icons for Data Analytics and Report Designer icons are added to the Start menu.

# 3 - Installing the Report Viewer

1. From the root of the `FileReporter-24.3.iso` image, copy the `FileReporter-ReportViewer-24.3-x64-xx.exe` file to all Windows workstations where you will run the Report Viewer.
2. From the Windows workstation, double-click `FileReporter-ReportViewer-24.3-x64-xx.exe`.
3. Agree to the license terms and conditions, then click *Install*.
4. When notified that the setup was successful, click *Close*.

   The Report Viewer icon is added to the *Start* menu.

# 4 - Data Analytics Tools

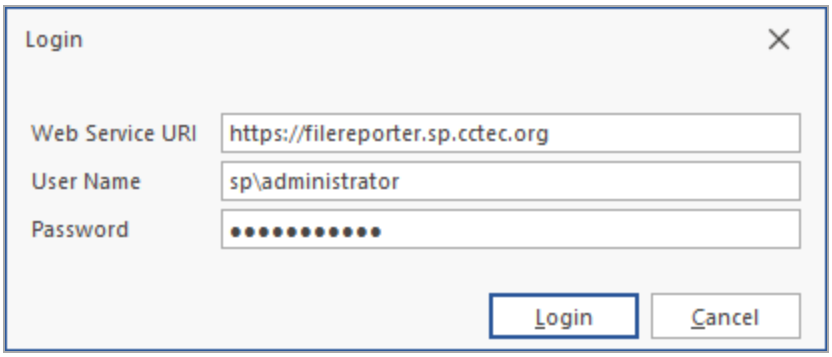
File Dynamics's Client Tools provide members of the administrators group expanded abilities to analyze data and design reports. Run from a Windows workstation, the integrated set of data visualization applications include a Dashboard, Pivot Grid, and Tree Map.

To use the Data Analytics Tools, you must first perform a File System metadata scan for each Scan Target you want to analyze —see Creating A Scan Policy in the *File Reporter 24.3 Administration Guide* for details on setting up a File System scan.

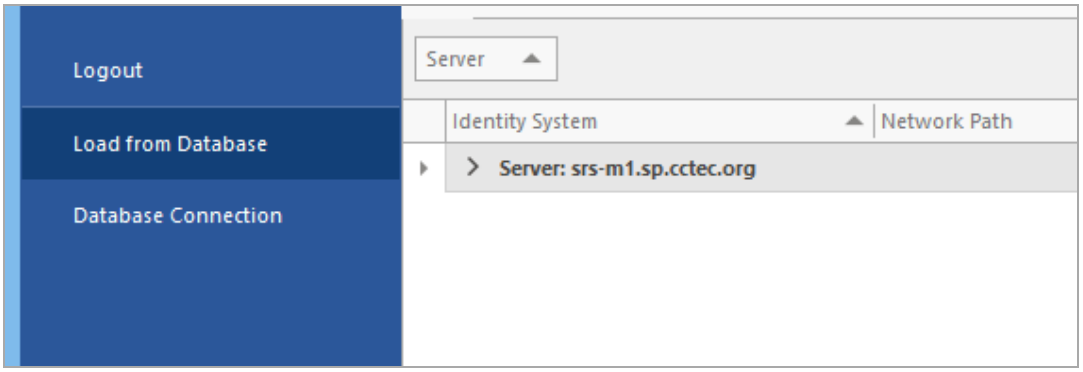
## 4.1 - Using the Analytics Tools

The following procedures introduce some of the capabilities of each application. You can discover more capabilities as you work with the applications.

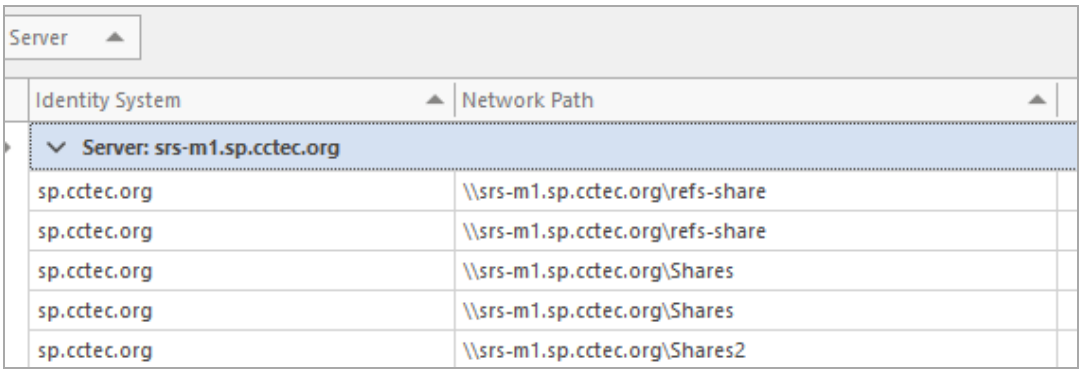
1. Select File Reporter 24.3 Data Analytics in the Start menu to open the login screen:



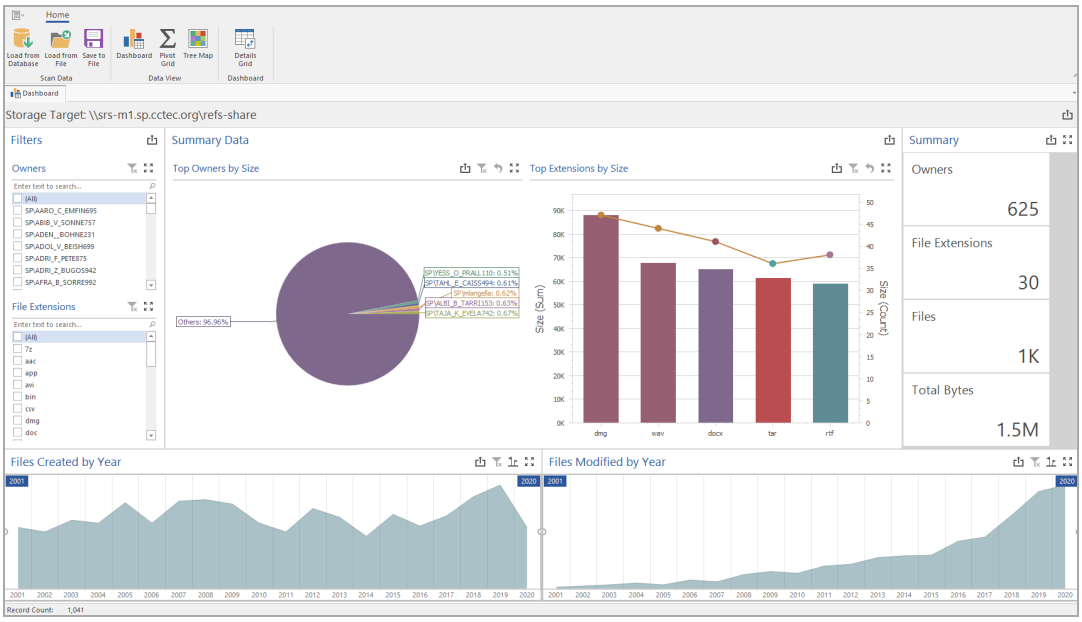

2. Enter your login credentials and click *Login* to open a selection dialog:




3. Expand the shares and volumes.




4. Double-click the File System scan you want to analyze to view the scan data in the Dashboard.




## 4.2 - Using the Dashboard

**NOTE:** The following exercises introduce the basic features of the Analytics Tools. Familiarize yourself with these features to become proficient enough with the tools to try more advanced features.

1. Uncheck one or two of the boxes in the *Filters* region of the Dashboard to observe how the changes are reflected in the *Summary Data*, *Top Extensions by Size*, and *Summary* regions.

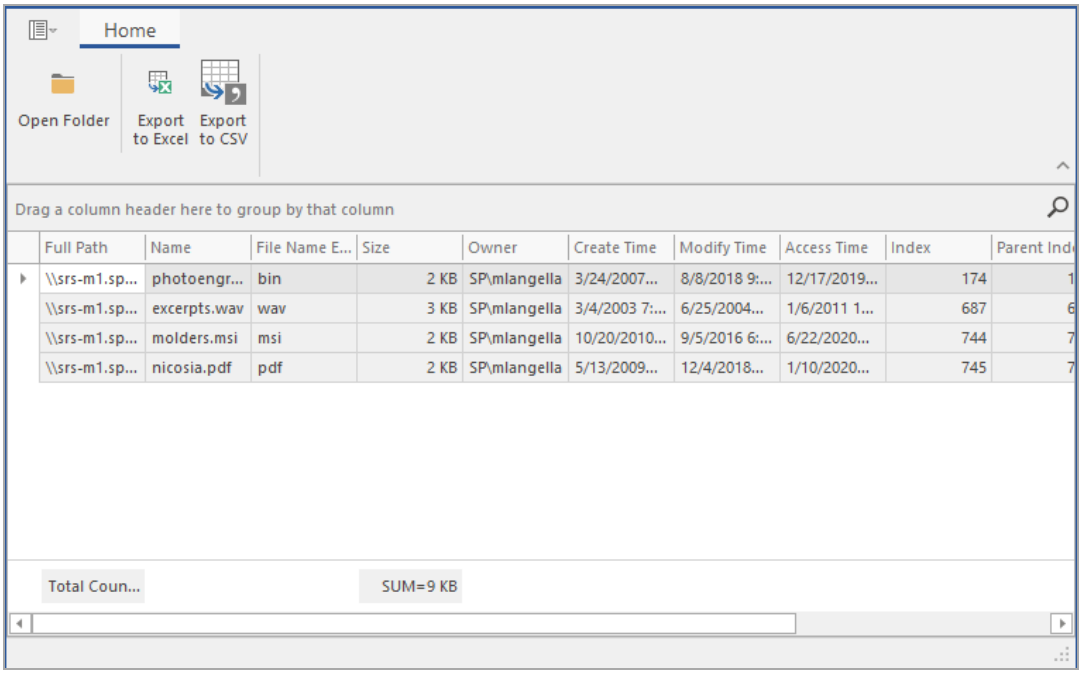
2. Click a specific year in the *Files Created by Year* region to observe the changes in the *Summary Data*, *Top Extensions by Size*, and *Summary* regions of the Dashboard.

   These graphical displays are driven by the *Filters* region and the selected years from the *Files Created by Year* and *Files Modified by Year* regions.

3. Move your cursor over a pie graph section in the *Summary Data* region to observe how specific information about the section appears in a balloon.

4. Double-click a pie graph section and observe how the Dashboard drills down to show data specific to the selected section in the *Summary Data*, *Top Extensions by Size*, and *Summary* regions.

5. Right-click a section of the new pie graph and select *Details Grid* to view the individual filenames.




6. Right-click a file from the grid and select *Open Folder* to open the folder where the file is located. The Dashboard provides the ability to access any files easily.

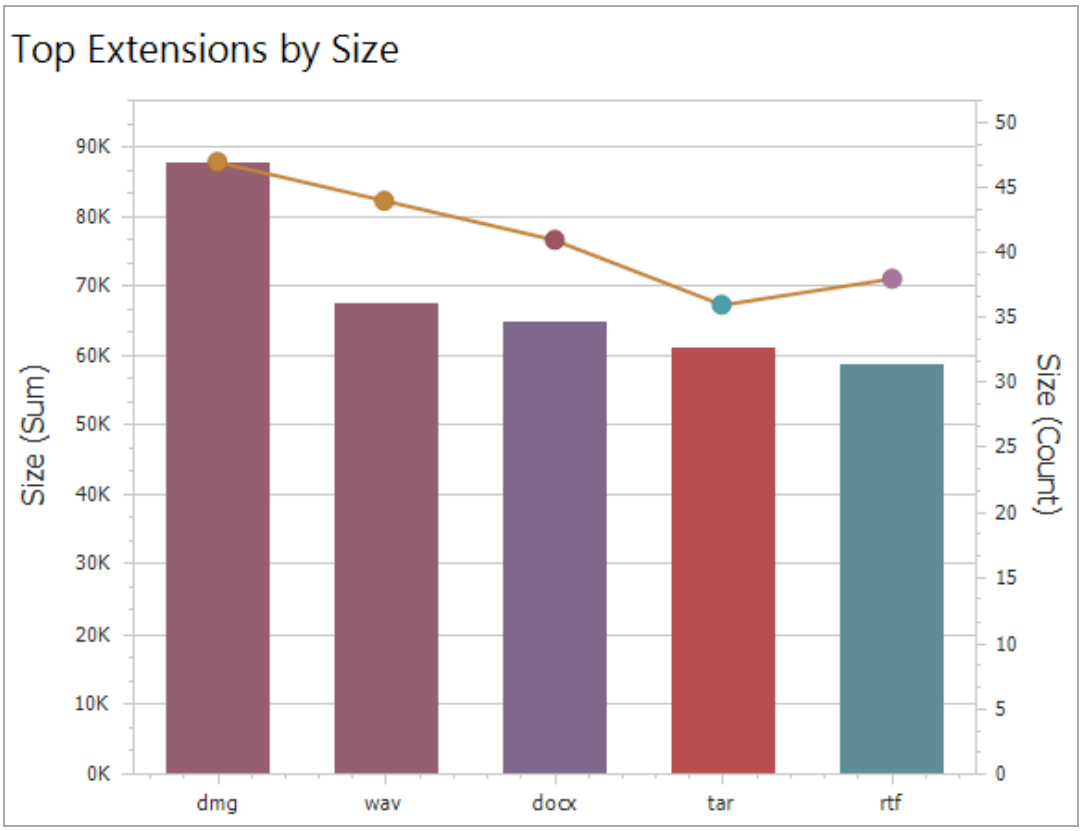
7. Close the grid.

8. Click the drill-up arrow ( ◂ ) for the *Summary Data* region of the Dashboard to return to the originally-displayed data.

9. Move your cursor over one of the bars in the *Top Extensions by Size* region to observe how specific information about the section appears in a balloon.

10. Right-click and select *Export to Image* in the *Top Extensions by Size* region.

11. Save the image to a location on your desktop to insert as a graphic in a presentation or report.

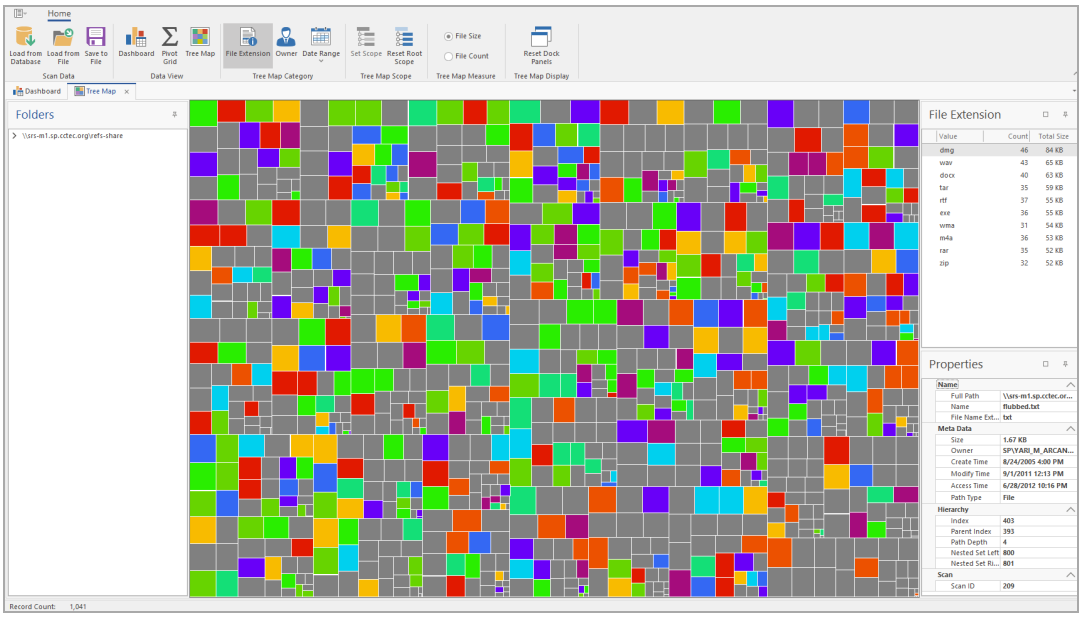



12. Double-click a year span in the *Files Created by Year* region to observe how the displayed data in the other regions is updated to data pertaining to the selected year.
13. Right-click the selected year span and select *Clear Master Filter* to view the graph span of all the years again.
14. Double-click a year span in the *Files Modified by Year* region to observe the change in the displayed data in the Dashboard.
15. Move your cursor over a bar in the *Top Extensions by Size* region, then right-click and select *Print Preview*. Note that you can save the graph as a PDF or email the graph, in addition to printing it.
16. Close the *Print Preview* page.

## 4.3 - Using the Tree Map

View graphical representations of hierarchical file system data in the Tree Map to gain insight quickly.

1. Click *Load from Database* in the Dashboard.
2. Double-click the desired file system scan.
3. Click *Tree Map*.



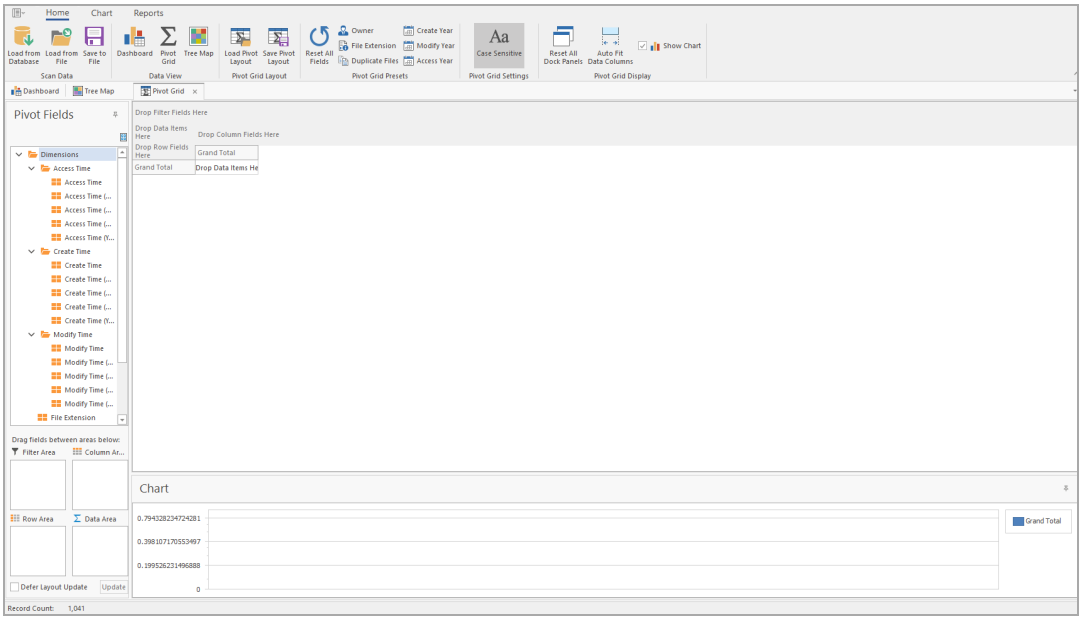

4. The Tree Map is presented according to file extension type with the specific color assignments detailed in the *File Extension* region. Each square in the Tree Map represents a single file in the scanned storage resource according to file size, relative to all other files in the scan.
5. Click a larger square to view the details of the file in the *Properties* region.
6. Right-click the file and select *Open Parent Folder* to open the folder in which the file resides.
7. Expand the file system so it is displayed in the *Folders* region.
8. Click one of the folders to see the group of files that reside in that folder. The files belonging to a selected folder are outlined in magenta.
9. Right-click a folder and select *Set Scope* to drill down and view the contents of the folder in the Tree Map.
10. Right-click the listed scan in the *Folders* region and select *Reset Root Scope*.
11. Click *Owner* to display files according to owners in the Tree Map and observe which users are storing the largest files according to the color classifications.
12. Click *Access Date* in the *Date Range* menu to view the data in the Tree Map according to when the files were last accessed. This is one of the most powerful methods in File Reporter of quickly determining the relevance of data being stored on network storage

resources.

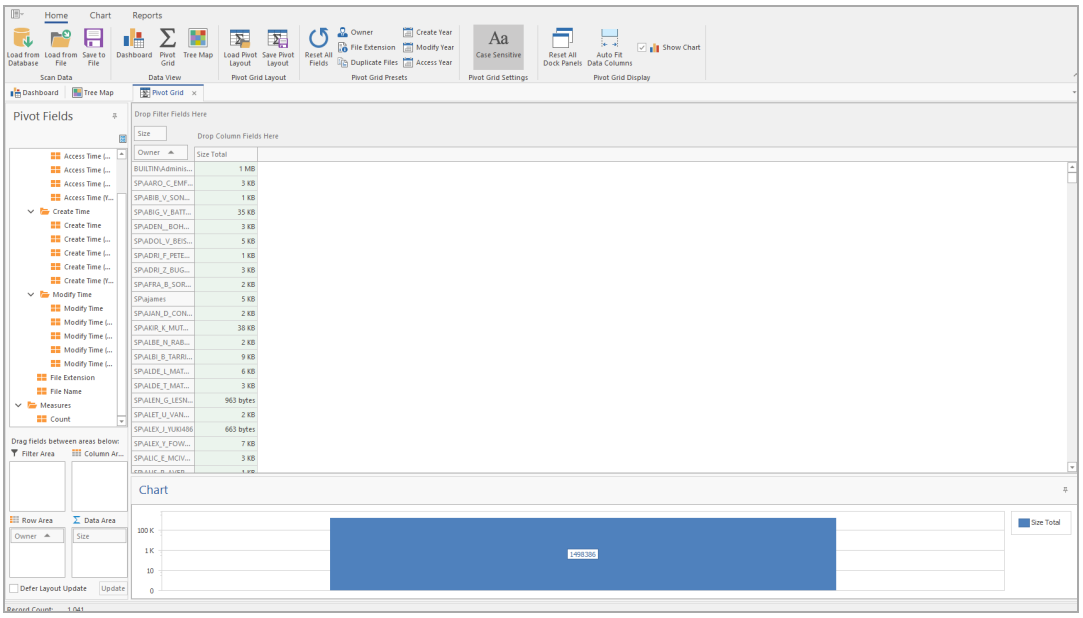
## 4.4 - Using the Pivot Grid

Visually analyze data according to combinations of variables in the Pivot Grid.

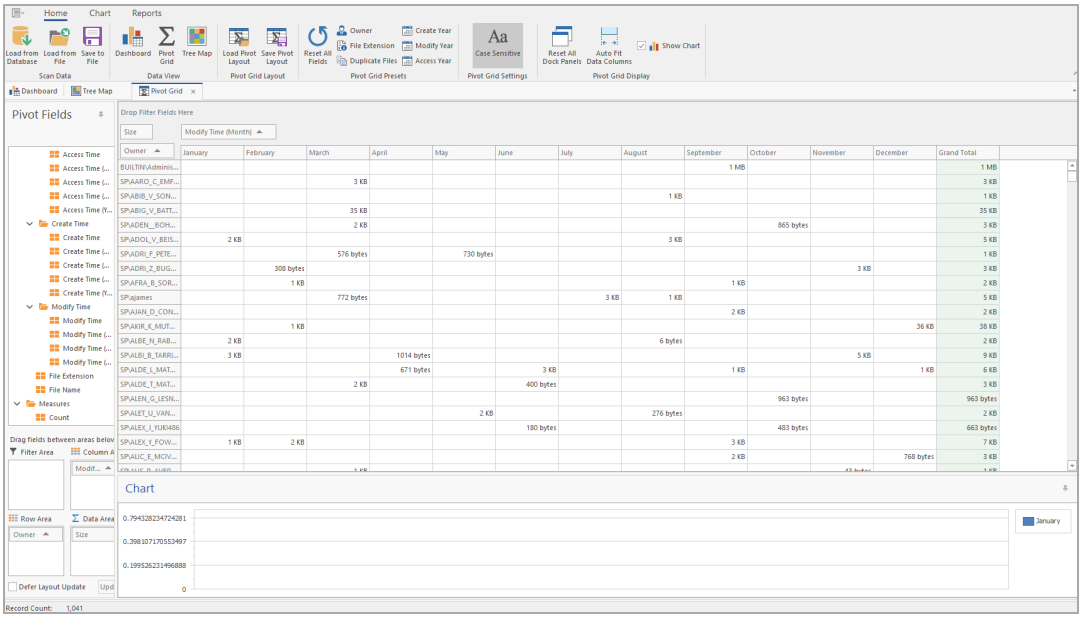
1. Click *Load from Database* in the Dashboard.
2. Double-click the desired file system scan.
3. Click *Pivot Grid*.



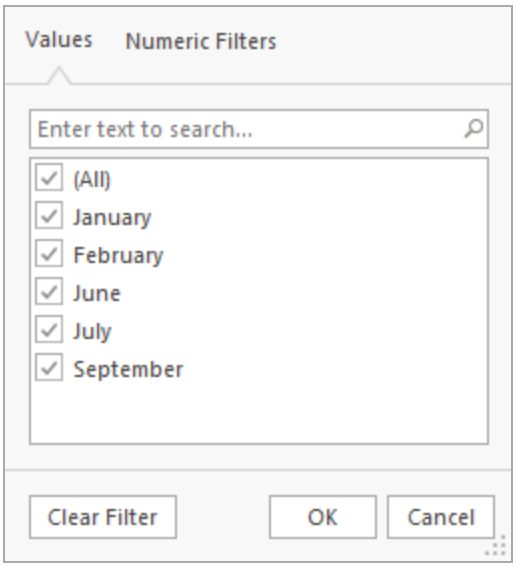

4. Select *Size* (residing in the *Measures* folder) from the *Pivot Fields* region and drag it to the area marked *Drop Data Items*.
5. Again in the *Pivot Fields* region, select *Owner* and drag it to the area marked *Drop Row Fields Here*.
6. Observe the totals now calculated for the two data variables.



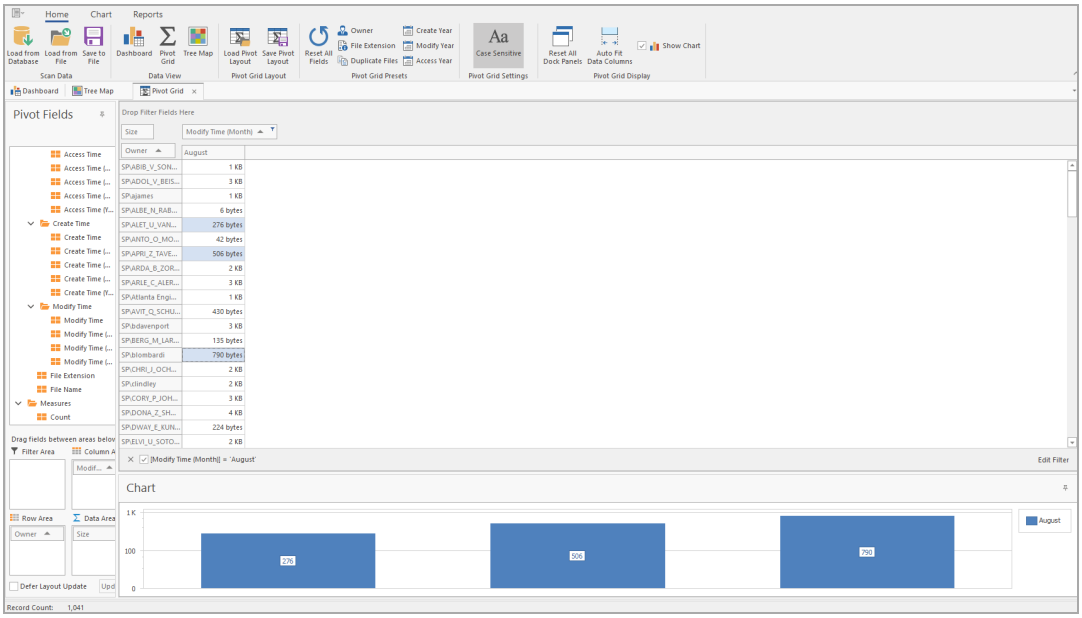
7. Expand *Access Time* to locate *Access Time (Month)* in the *Pivot Fields* region and drag it to the area marked *Drop Column Fields Here*.



8. Click the filter icon from the *Access Time (Month)* filter that you just placed.




9. Deselect all but one month and click *OK*.
10. Click the *Chart* tab.
11. Highlight three consecutive rows to view the data analyzed as graphs in the *Chart* region.




12. Experiment with different chart views of the data using the *Chart Presets* options.
13. Double-click a selected cell from the table to access the *Scan Data Details* table, which specifies all files accessed by that user during that month.

14. Right-click a file *From the Scan Data Details* table, and select *Open Folder* to open the parent folder and examine the file, move it to another location, or delete it.
15. Click the *Reports* tab.
16. Highlight three consecutive rows.
17. Click *Generate Report*.
18. You can print the report or export it to several different formats.

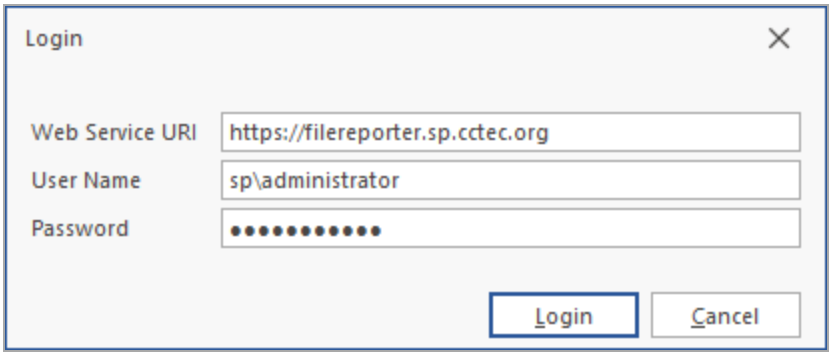
# 5 - Report Designer

Design reports locally from a Windows workstation and add significantly more design capabilities to the report features found in the browser-based administrative interface.

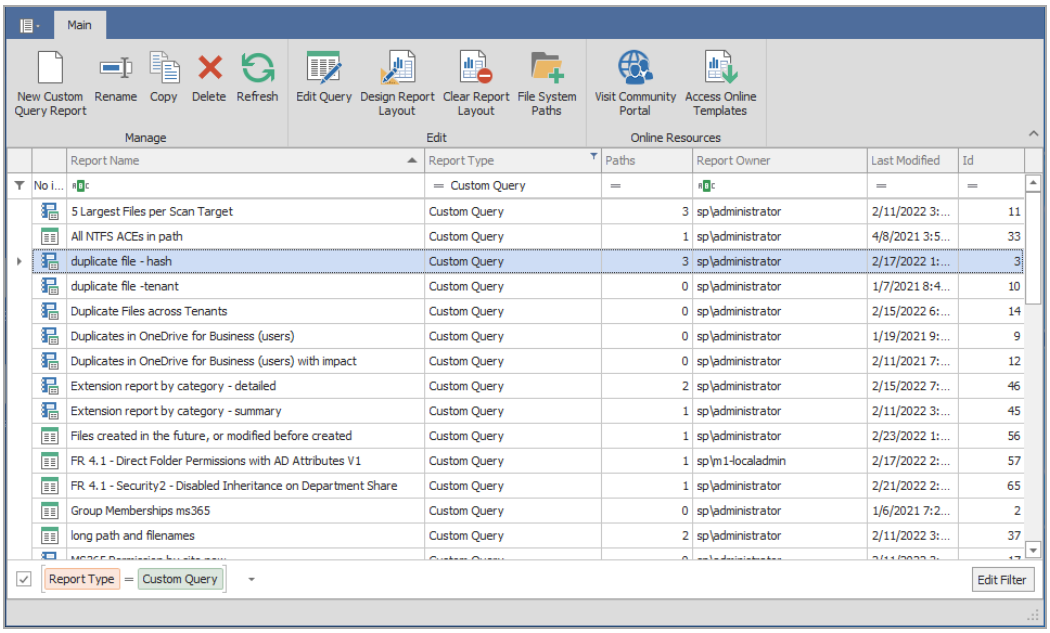
## 5.1 - Using Report Designer

**NOTE:** You must be a member of the SrsAdmins* group to use Report Designer. (*This is the default name of the File Reporter administrators group created during installation of the Engine, which you can change.)

1. Launch the File Reporter 24.3 Report Designer in the *Start* menu.




2. Enter your login credentials and click *Login*.
3. Familiarize yourself with the Report Designer interface.




All Custom Query reports are listed. Those not designed with the Report Designer Layout interface have a green-banner text icon, while those designed using Report Designer have a blue notebook icon.

4. Right-click a report to access all toolbar options for that report.

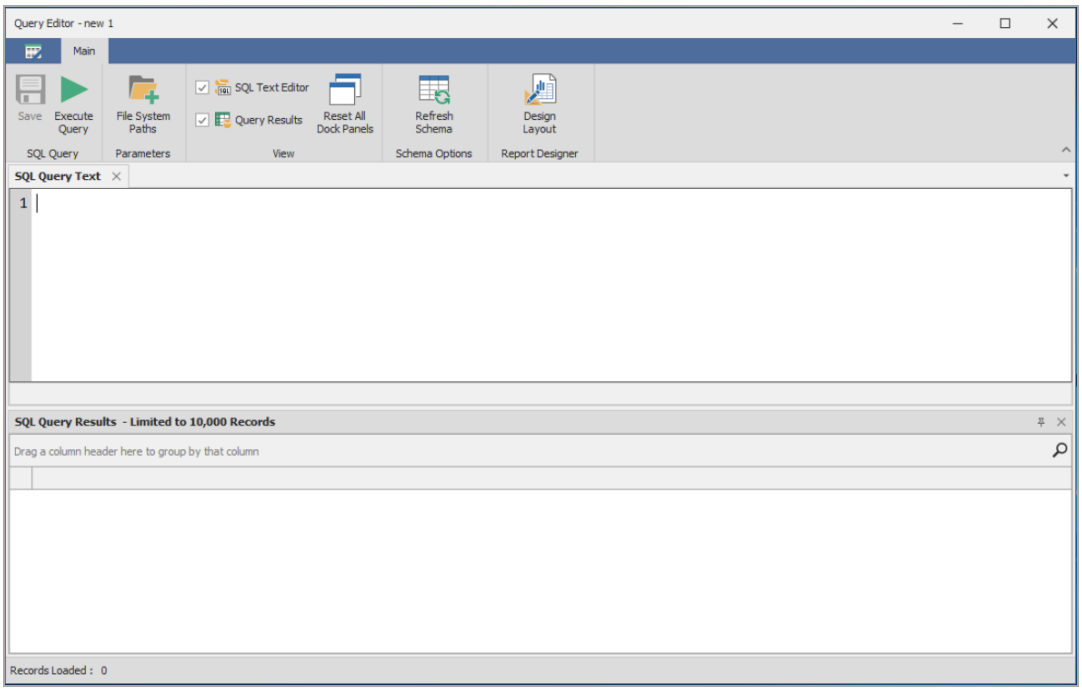
    - **New Custom Query Report:** Launch the Query Editor to create a new Custom Query report.
    - **Rename:** Change the selected report's name.
    - **Copy:** Create a copy of the selected report's definition.
    - **Delete:** Delete the selected report.
    - **Refresh:** Reload the list of saved reports.
    - **Edit Query:** Launch the Query Editor to make changes to the SQL query for the selected report.
    - **Design Report Layout:** Launch the Report Designer Layout interface —see *Custom Query Report Layouts (page 26)* for details.
    - **Clear Report Layout:** Delete the custom design settings created for the selected report using the Report Designer Layout interface (NOTE: Use caution —this procedure is irreversible).
    - **Visit Community Portal:** Access the File Query Cookbook, a community website for sharing Custom Query reports and layouts created through the Report Designer.

- **Access Online Templates:** Open the list of all available Custom Query reports shared on the File Query Cookbook website. From the Custom Query Recipes page, you can filter your search by category, database host, and more. Simply copy or download the SQL query from a shared Custom Query report recipe to use it.
- **Filter:** The cell directly below the *Report Name* column heading is a filter that lists saved reports according to one or more words you enter (e.g., enter the word `access` to display only reports with that word in the file name).
- **[Report Type]:** This box is checked by default to display only Custom Query reports, which are the only reports that can be designed using the Design Editor. Uncheck the box to view all of your reports.
- **Edit Filter:** Further refine your filtering with Boolean operators.

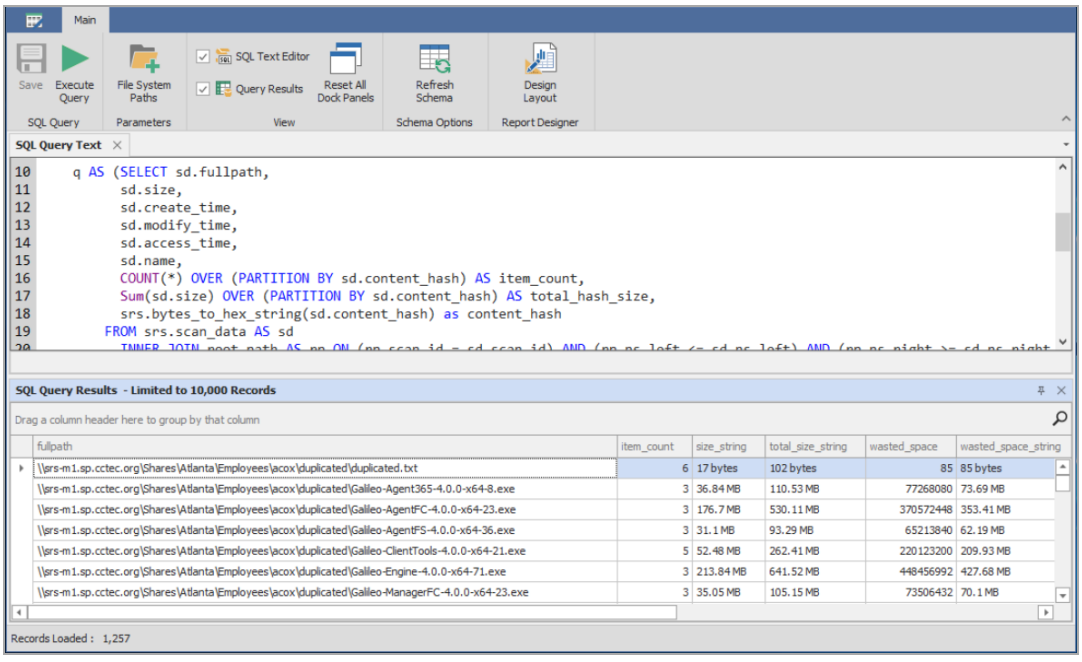
## 5.2 - Creating a Report

**NOTE:** Refer to the *File Reporter 24.3 Custom Query Guide* for details and examples of the supported database functions, tables, and views you can utilize in Custom Query reports.

1. Click *New Custom Query Report*.
2. Enter a descriptive name and click *Create* to launch the Report Designer Query Editor.




3. Update the query as desired in the text editor.
4. Click *Execute Query* to preview the Custom Query report.



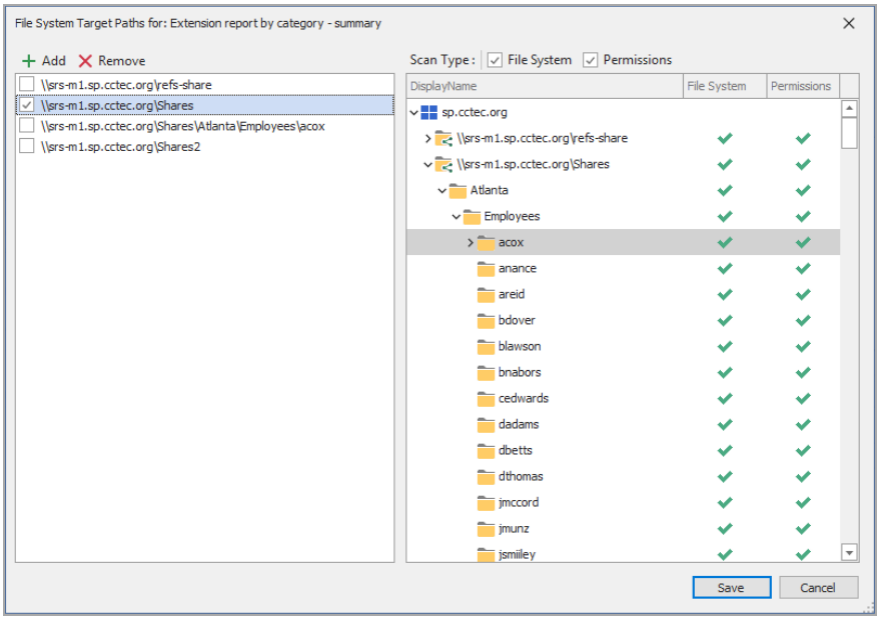

5. Click *Save*.
6. Close the Query Editor.

# 5.3 - File System Paths Selector

## 5.3.1 - Overview

File Reporter includes a *File System Paths* selector for use with Custom Query reports. This feature provides:

- An easy-to-use approach to changing target paths for complex Custom Queries.
- A convenient interface to add or change target paths for existing Custom Queries without modifying any SQL text.
- A powerful interface that enables advanced report users to create manageable report templates for Data Owners.




- **Add** the selected path to the target paths list from the tree list.
- **Remove** the selected path from the target paths list.
- **File System:** Select to include File System scan paths in the tree list.
- **Permissions:** Select to include Permissions scan paths in the tree list.
- **Save** changes made to the target paths list.
- **Cancel** any current edits.

## 5.3.2 - Assigning Paths to a Report Definition

To assign one or more file system paths to a Custom Query report definition:

1. Click the *File System Paths* ribbon item  to open the *File System Target Paths* dialog. This ribbon item may be found in the following locations:
    - The *Edit* ribbon page group of the Main form containing the Custom Query reports list;
    - The *Parameters* ribbon page group of the Query Editor form; and

      The *Report Data* ribbon page group of the Report Layout Designer form.
2. Select one or more target paths by using one of the following methods:
    - Double-click a path entry in the tree list on the right.
    - Select (highlight) one or more path entries in the tree list on the right then click *Add* in the toolbar on the left.
    - Drag-and-drop one or more selected path entries from the tree list on the right into the selected paths list on the left.
3. Click *Save*.

## 5.3.3 - Removing Paths from a Report Definition

To remove one or more assigned File System paths from a Custom Query report definition:

1. Open the *File System Target Paths* dialog. (See Step 1 from *Assigning Paths to a Report Definition (page 23)*.)
2. Select the paths to remove in the selected path list on the left.

   To select a path to remove, select (highlight) the entries for selection then click an associated check box.
3. Click *Remove* to remove the selected items from the paths list.
4. Click *Save*.

## 5.3.4 - Scan Types

**Understanding Scan Type**

The File System and Permissions columns in the paths tree list indicate whether the associated path is available currently as a File System metadata scan entry and/or a Permissions scan entry.

The paths tree list is populated by data obtained from the most recent File System or Permissions scans. If a share or path is not visible in the tree list, a new File System or Permissions scan must be performed before that path will appear.

The path indicator does not determine the type of Custom Query; rather, it indicates which scan data is available. Depending on the nature of the Custom Query, one or both scan types may be desired.

**Filter by Scan Type**

If a particular Custom Query is defined around data collected solely from either a File System scan or a Permissions scan, it may be useful to filter the paths tree list by that scan type.

Both scan types are enabled by default, displaying paths from the latest scans of both types.

To filter the list by a specific scan type, deselect the scan type you want to exclude. For example, to only display paths from current Permissions scans:

1. Uncheck the *File System* box at the top of the paths tree list.
2. Verify that the *Permissions* box remains checked.

### 5.3.5 - Understanding the Relation to Custom Queries

*File System Target Paths* lists the target paths for the associated Custom Query. How the Custom Query uses these paths is determined by the associated SQL queries.

While executing a Custom Query, File Reporter injects a temporary table into the SQL session that provides the select paths along with metadata the SQL query can use to shape the query results based on those paths —see File System Target Paths in the *File Reporter24.3 Custom Query Guide* for details.

## 5.4 - Report Layout Templates

### 5.4.1 - Saving the Layout as a Template

When you design a Custom Query report layout you want to use again for future reports, you can save it as a template:

1. Open the Custom Query report with the desired layout in Report Designer.
2. Select *Save As File* in the *Save* menu.
3. Enter a name for the template and click Save to save the layout as a `.repx` (Report Definition XML) file.

### 5.4.2 - Using a Saved Template

You can use saved `.repx` files as design templates for Custom Query reports.

**NOTE:** You can also use sample report layouts and SQL queries available from the File Query Cookbook website (https://filequerycookbook.com), which can be customized as needed.

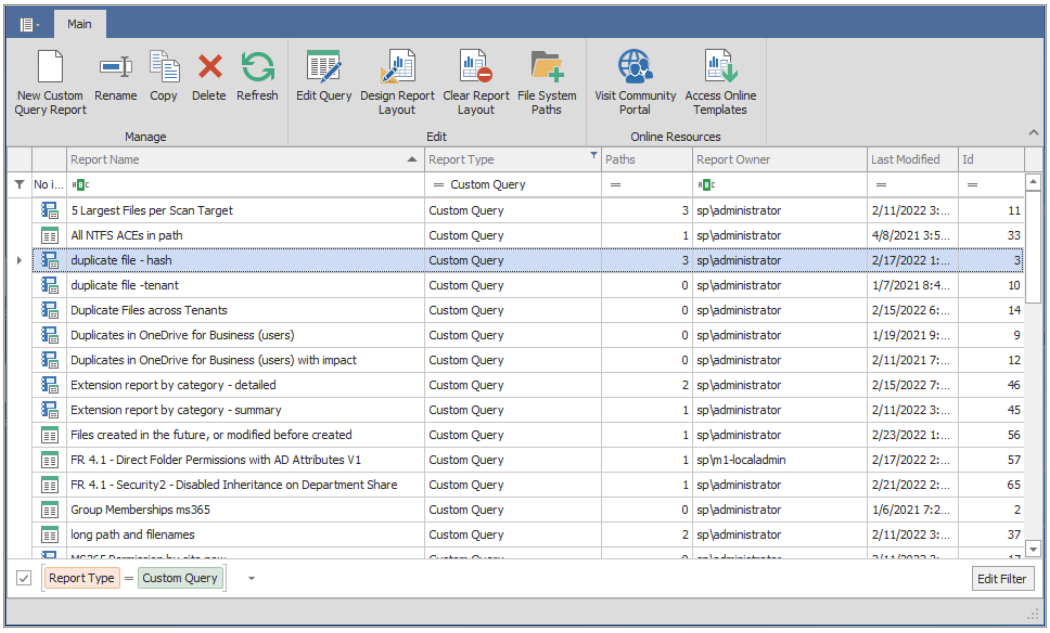
1. Open the Custom Query report you want to use with a saved template in Report Designer.
2. Click *Open* and select the desired `.repx` file to apply the design template to your report.

# 5.5 - Custom Query Report Layouts

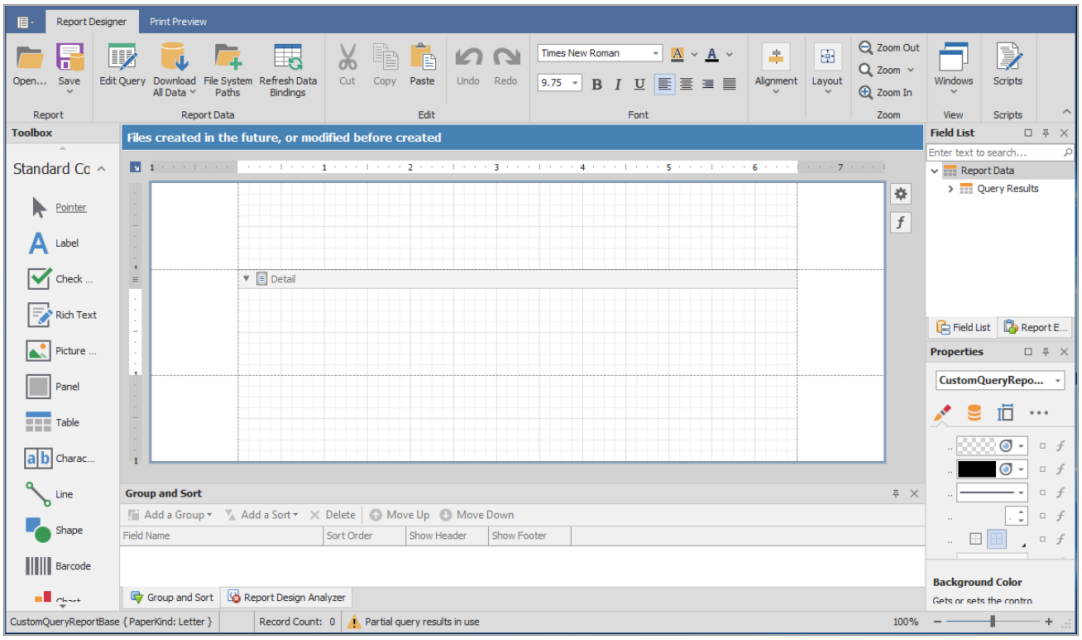
After creating a Custom Query report through either the Report Designer Query Editor or the Query Editor built into the browser-based administration interface, you can then design the report layout.

**NOTE:** This exercise introduces Report Designer's basic design features. Familiarize yourself with these basic features to become proficient enough in the interface to try more advanced features. Refer to the *Report Designer for WinForms* in the following document: https://devexpress.github.io/dotnet-eud/interface-elements-for-desktop/articles/report-designer.html for a detailed overview of Report Designer's features.

1. Select the desired Custom Query report to design from the list.

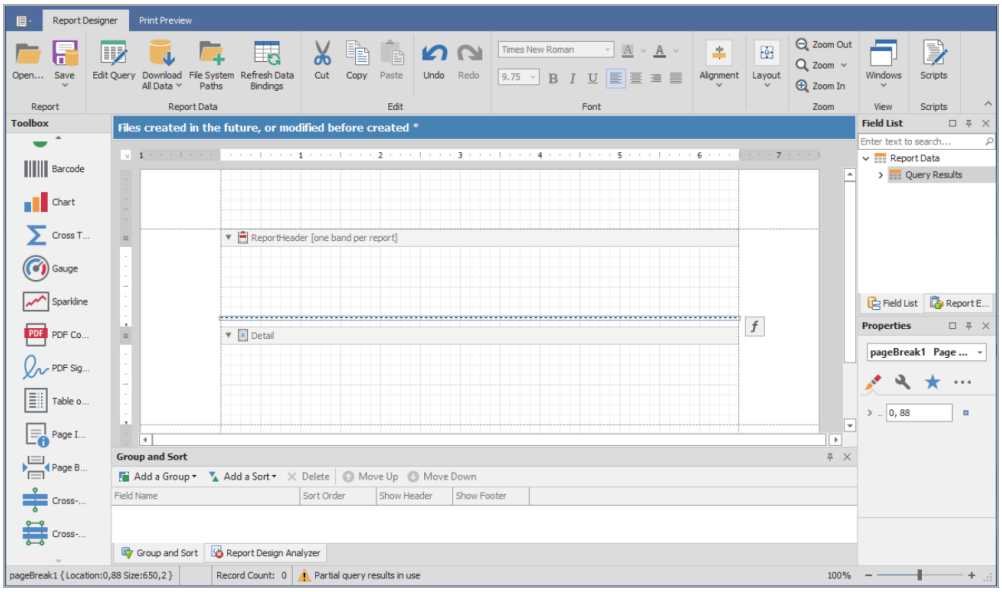


2. Click *Design Report Layout*.



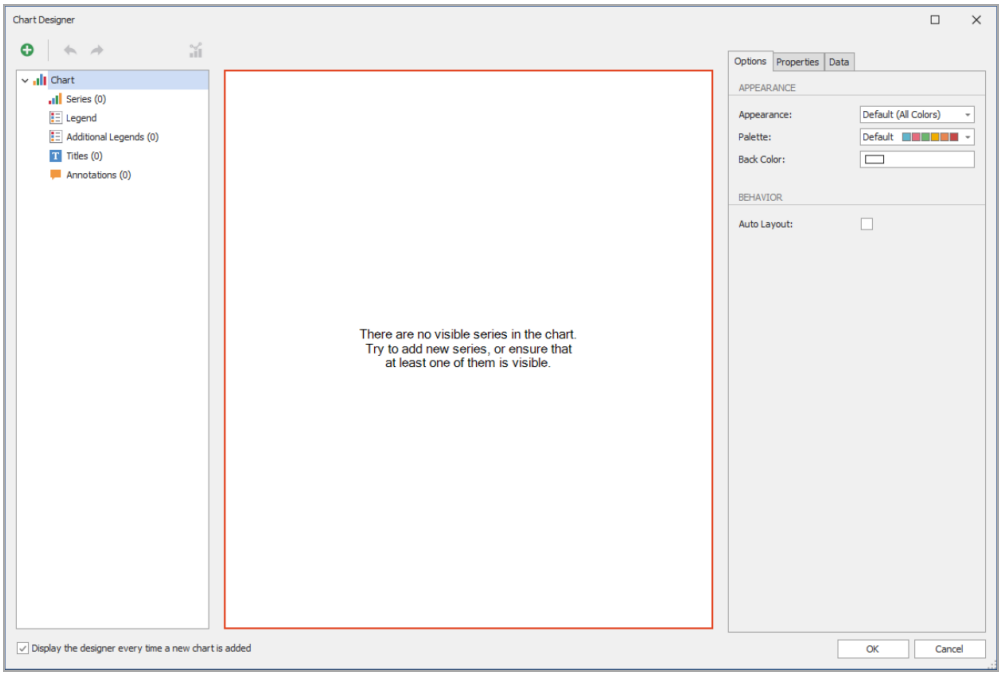

3. Create a report header.
    a. Place the pointer in the upper section of the layout grid.
    b. Right click and select *Report Header* in the *Insert Band* menu. A new Report Header band appears on the grid.
4. Resize Page 1 and add a page break.
    a. Place the mouse pointer on the bottom border of the new band and, using the vertical ruler as a guide, extend the band to fill the first page (e.g., you can extend the border down to the 8" mark to fill the first page).

b. Click and drag a *Page Break* from the *Standard Controls* region to the bottom of the band.

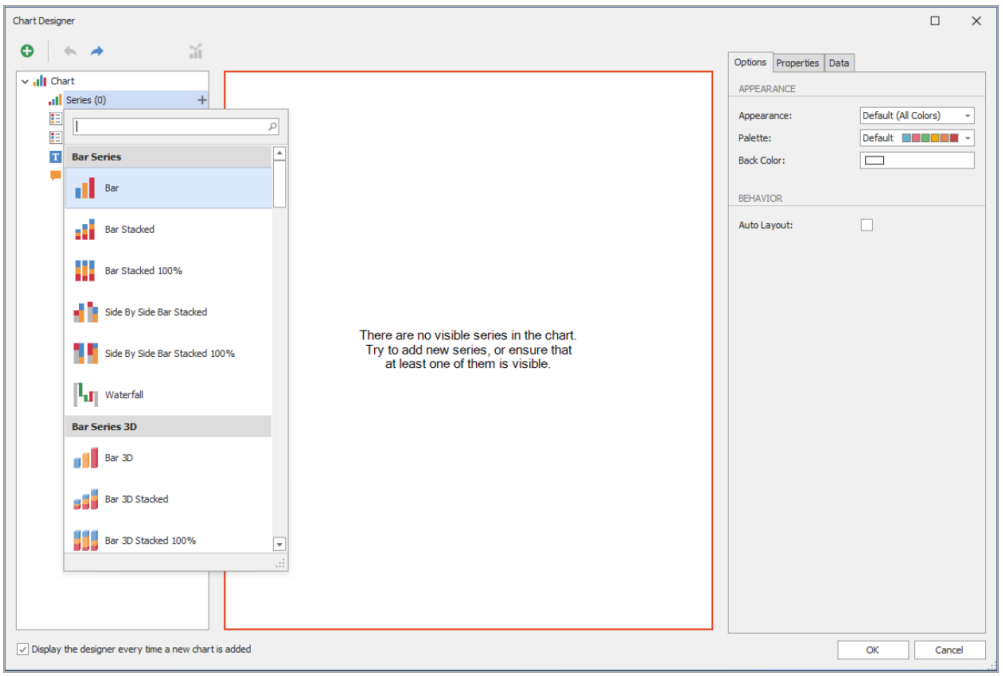


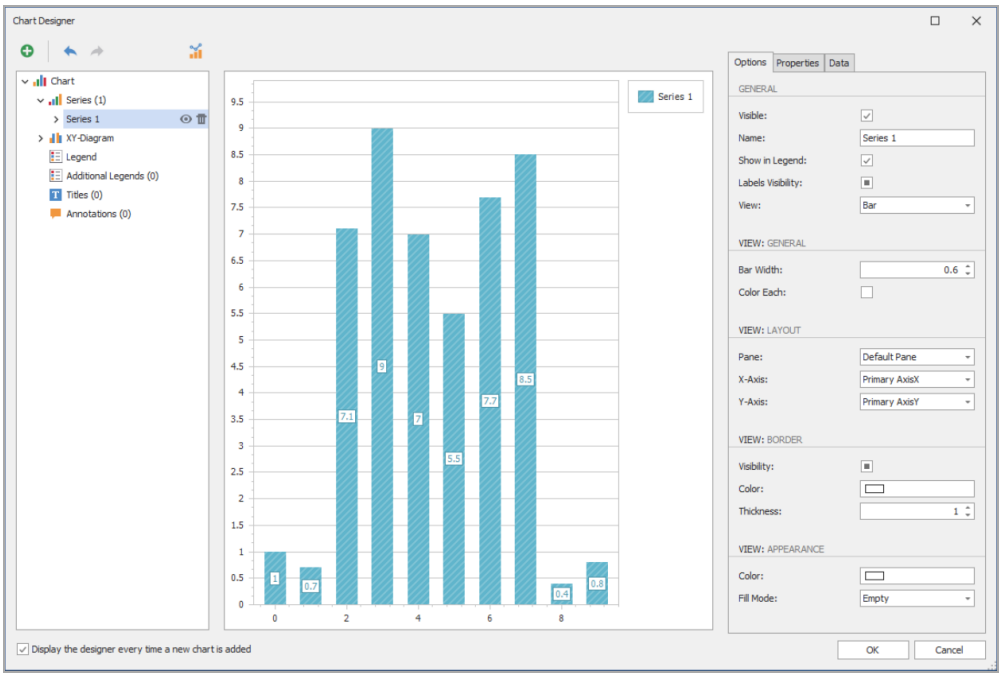

5. Insert and design a chart.

a. Click and drag a *Chart* from the *Standard Controls* region to the band to launch the Chart Designer.



b. In the Chart Designer below the *Chart* menu, click the + that pertains to the *Series* option and select the *Bar* option.




c. Click the *Data* tab and expand *Query Results*.

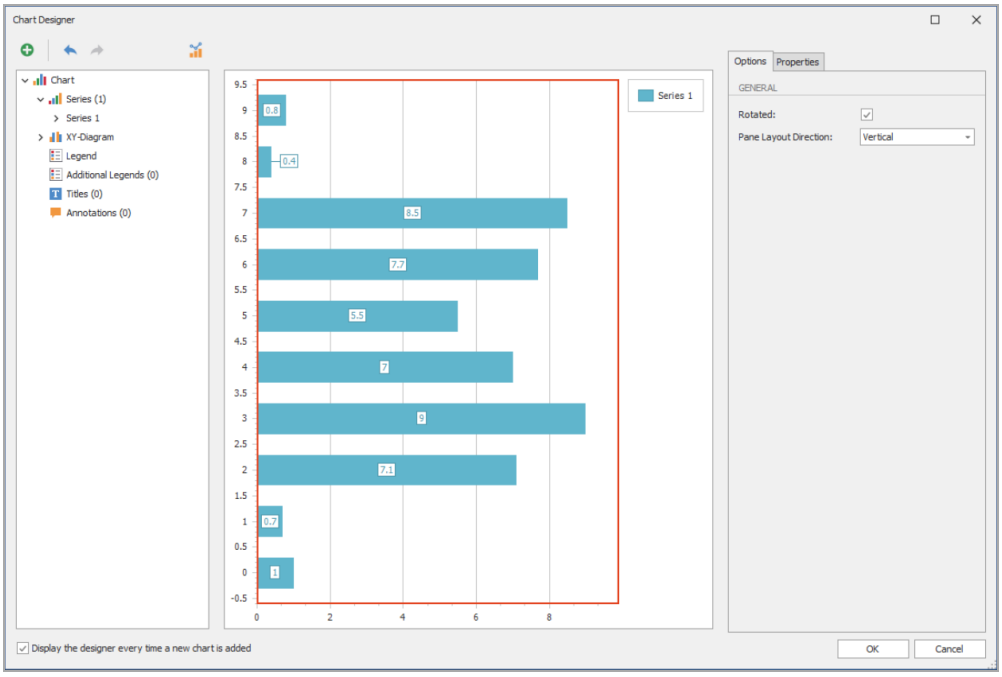
d. Click and drag *Category* to the *Argument* cell.

e. Click and drag *cat_size* to the *Value* cell.

f. Click the *Options* tab and replace `Series 1` with `Category Size` in the *Name* field.

g. Click the *XY-Diagram* option below the *Chart* menu.

h. Check the *Rotated* box in the *Options* tab.



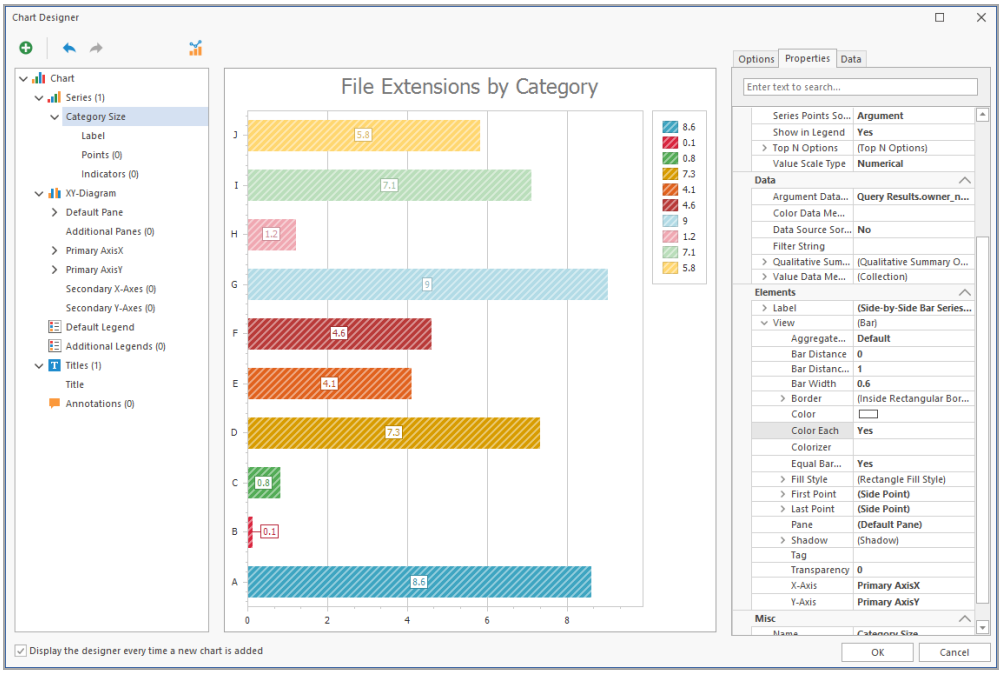

i. Select *Titles* below the *Chart* menu, then click the +, and select *Title*.

j. Replace `Chart Title` in the *Lines* field under the *Options* tab with a more descriptive name (e.g., `File Extensions by Category`).

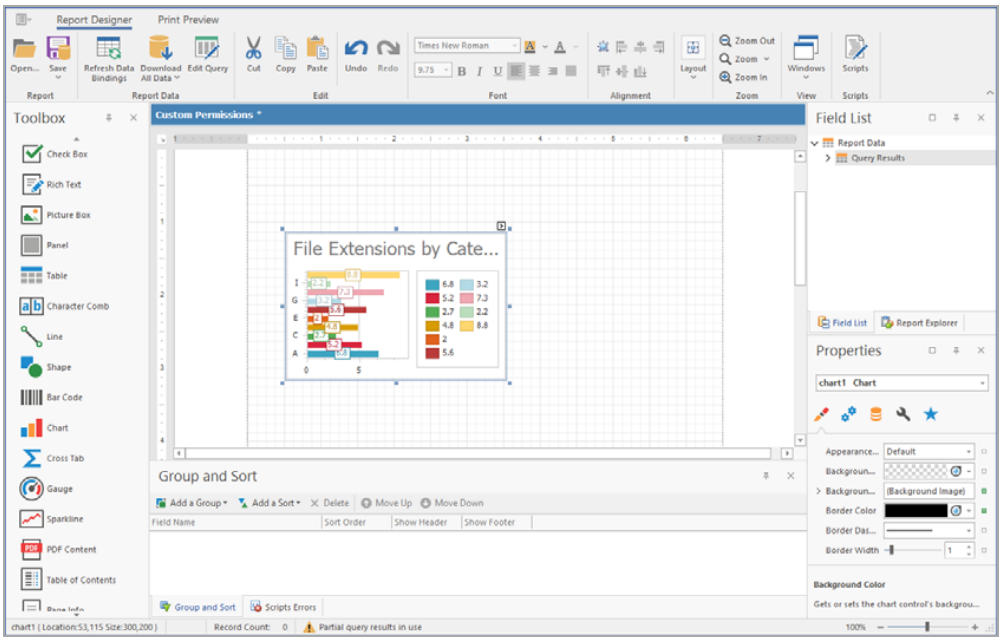
k. Select *Category Size* below the *Chart* menu.

l. Click the *Properties* tab, then scroll down and expand *View* under the *Elements* heading.

m. Change the *Color Each* setting to *Yes*.




n. Click *OK*.




o. Click the arrow in the upper right-hand corner of the newly-placed chart to access the *Chart Tasks* menu, then select *Run Designer*.

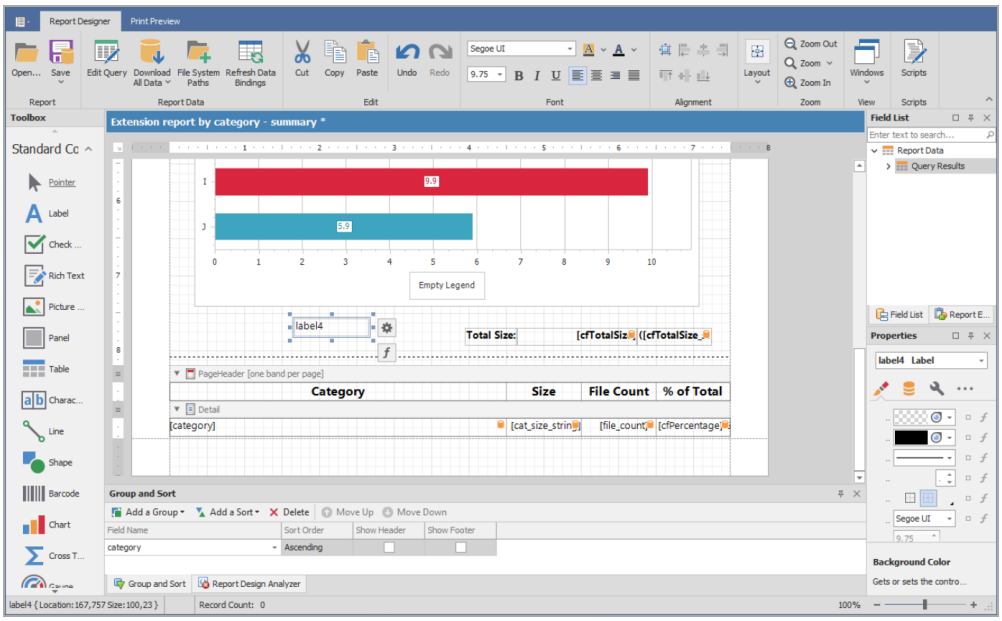
p. Click the legend and uncheck the *Visibility* box under the *Options* tab so that the legend no longer appears.

q. Click *OK*.

r. Expand the view of the chart in the Report Designer to take up more of the page.

6. Insert labels.

a. Click and drag *Label* from the Toolbox to a position centered below the chart.




b. Double-click within the label and specify the label name (e.g., `Total Size`).

c. Adjust the font size and style to your preferences.

7. Create new fields.

a. Expand the *Query Results* from the *Field List*.

b. Right-click *Query Results* and select *Add Calculated Field*.

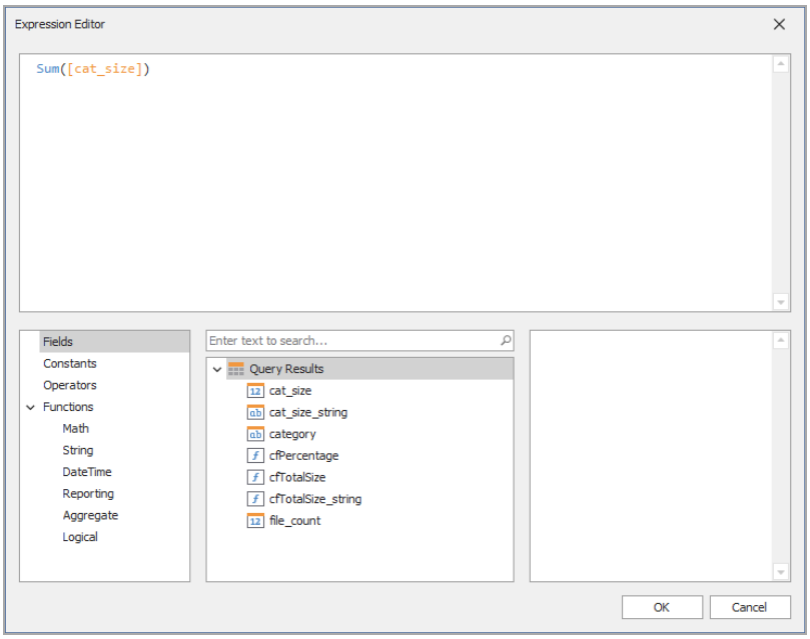
c. In the *Design* region of the *Property Grid* for `calculatedField1`, change the *(Name)* setting to `cfTotalSize`.

d. While still in the *Property Grid*, click the ellipses (...) pertaining to the *Expression* field under the *Data* heading to launch the Expression Editor.

e. Select *Functions* in the bottom-left column.

f. Type `sum` in the empty field at the top of the middle column to locate the *Sum* function, then double click *Sum* to place the function in the top text box of the Expression Editor.

g. Select *Fields* in the bottom-left column, then double-click *cat_size* in the middle column.




h. Click *OK* to save the new field and close the Expression Editor.

i. Right-click *Query Results* and select *Add Calculated Field*.

j. In the *Design* region of the *Property Grid* for `claculatedField1`, change the *(Name)* setting to `cfTotalSize_String`.

k. While still in the *Property Grid*, click the ellipses (...) by the *Expression* field under the *Data* heading.

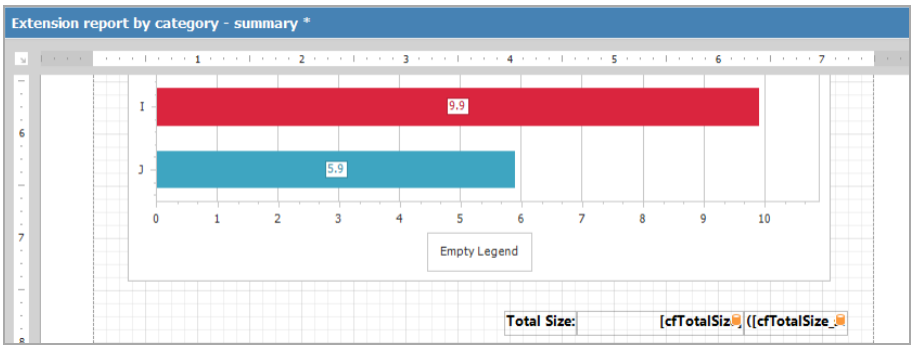
l. Type `Byte` in the top text box of the Expression Editor so that *ByteString()* appears.

m. Double-click *cfTotalSize* you created earlier from the middle column and click *OK*.

8. Place the new fields.

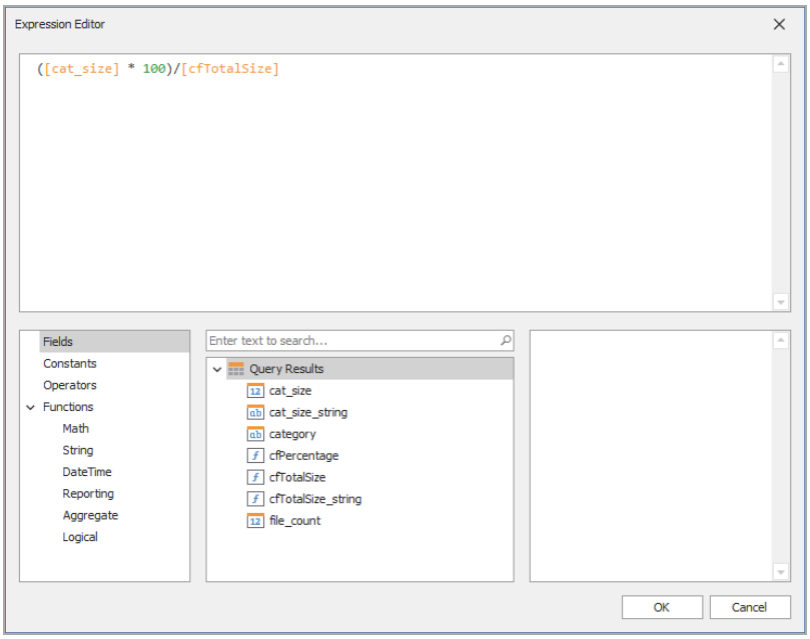
a. From the *Field List*, hold down the Control key and select the two new fields you just created, then drag them to the `Total Size` label on the grid.

b. Adjust the size so that both fields appear to the right of the `Total Size` label.

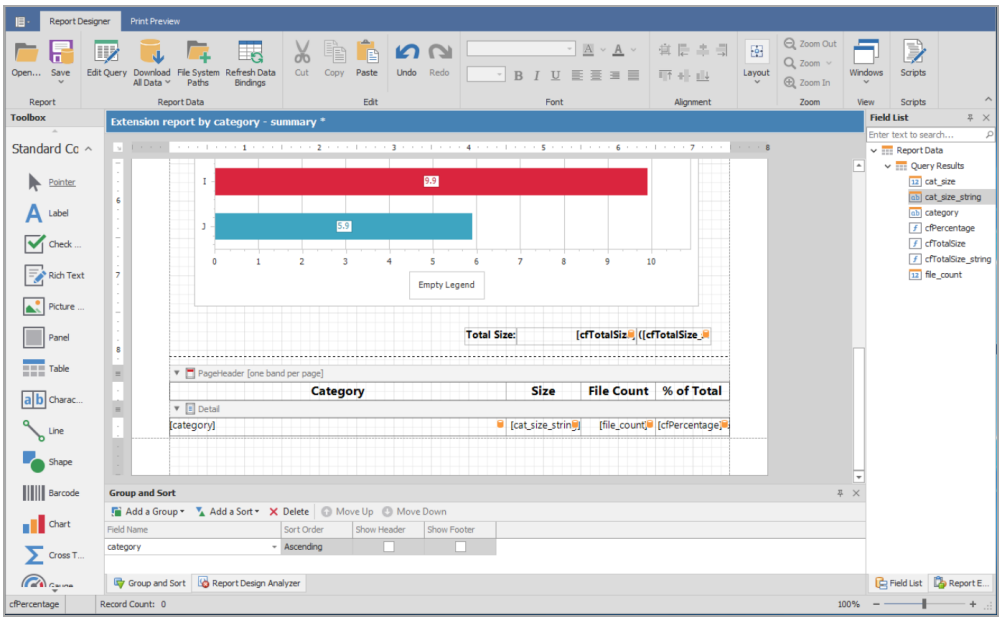


c. Adjust the font size and style to your preferences.

9. Preview the report.
    a. Click *Download All Data*.
    b. When the warning dialog box appears, click *Yes*.
    c. Click the *Print Preview* tab to view how the report will look at this point.
    d. Make any desired format changes.
10. Create a header for Page 2.
    a. Click the *Report Designer* tab.
    b. Scroll down below the page break so that you are working on Page 2 of the report.
    c. Right-click at the top of the page and select *PageHeader* in the *Insert Band* menu.
    d. Click and drag a *Table* from the *Tool Box* to the location of the new page header.
    e. Replace the names of the three new table cells with the following names:
        - Category
        - Size
        - File Count
    f. Select and right-click the `File Count` cell, then select *Column to Right* in the *Insert* menu.
    g. Change the table cell name to *Percent of Total*.
    h. Resize the table cells to your preferred width.
    i. Adjust the font size and style to your preferences.
    j. Resize the depth of the page header so it is limited to the depth of the table.
11. Create a new calculated field for `Percent of Total`.
    a. Right-click *Query Results* and select *Add Calculated Field*.
    b. Change the *(Name)* setting for `calculatedField1` in the *Design* region of the *Property Grid* to `cfPercentofTotal`.
    c. While still in the *Property Grid*, click the ellipses (...) by the *Expression* field under the *Data* heading.
    d. Double-click *cat_string* from the middle column of the Expression Editor.
    e. Hit the space bar and then enter the following string: `* /100`.
    f. Double-click *cfTotalSize* from the middle column of the Expression Editor to complete the string.
    g. Click *OK*.




12. Insert the table content.
    a. Click below the header, hold down the Control key, and from the *Field List*, select the following fields in this order:
        - `category`
        - `cat_size_string`
        - `file_count`
        - `cfPercentofTotal`
    b. Drag the fields to a location below the header.
    c. Line up the tables cells with the headings.




d. Click the *Print Preview* tab to view how the report will look.

e. Make any necessary adjustments.

13. Click *Save to Database* in the *Save* menu.

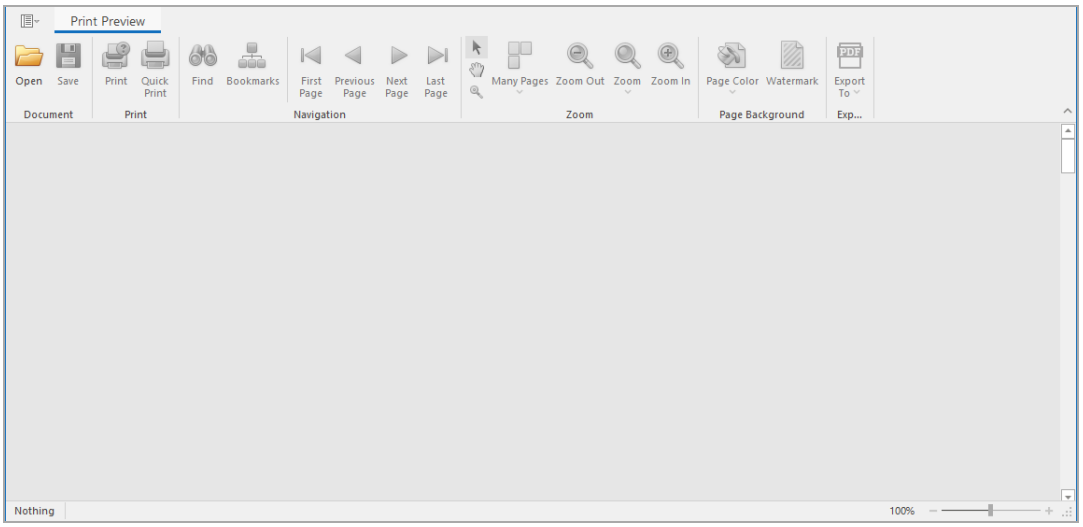
By saving the report to the database, you enable the File Reporter Report Generator to use the design for updated reports. You can also save the report as a file to import it into another file, such as a Word document or PowerPoint presentation.

# 6 - Report Viewer

View all stored reports locally from a Windows workstation. The Report Viewer utilizes the workstation's resources rather than those of the Engine, so it can display stored reports much faster in most instances.

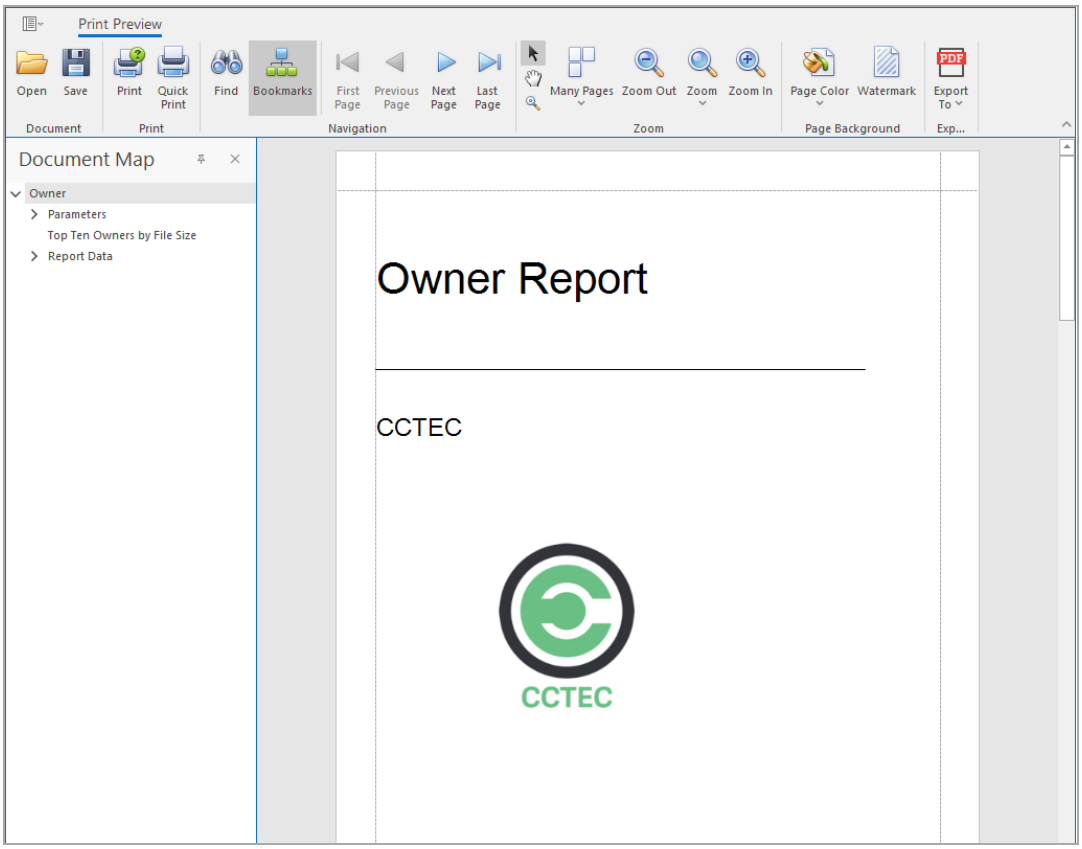
In comparison to the viewing capabilities of the browser-based administrative interface, the Report Viewer offers more capabilities. With the Report Viewer, for example, you can change the visual display parameters of the report.

1. Launch the File Reporter Report Viewer application.

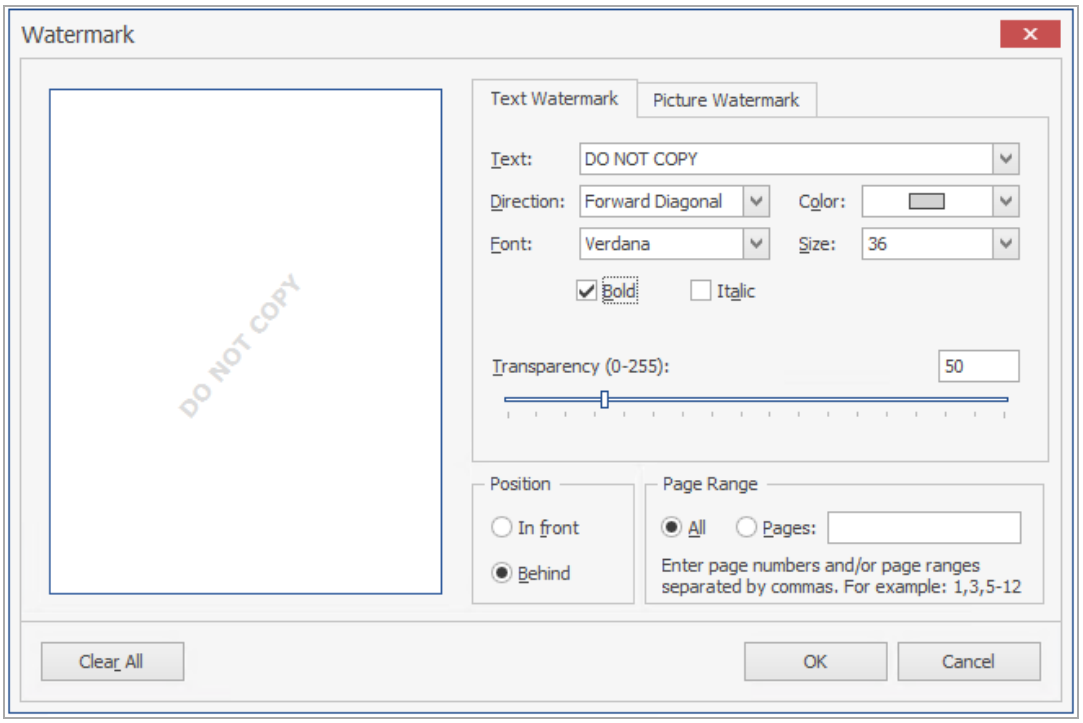



2. Click *Open* and go to the location of your stored reports, then select the reports folder and click *Open*.

   To determine where your stored reports are located, select *Configuration* in the File Reporter administrative interface, then click *Stored Reports* to view the location in the *Stored Reports Folder* field.




3. (Optional) Adjust the view to your preferences using the following tools:
    - **Bookmarks**: Toggle the display for the report Document Map.
    - **Many Pages**: Specify the number of pages to display.
    - **Zoom Out**: Reduce the size of the report page to view more on the screen.
    - **Zoom**: Change the zoom level of the report preview.
    - **Zoom In**: Increase the size of the report page to get a close-up view.
    - **Page Color**: Change the background color of the report pages.
    - **Watermark**: Insert a semi-transparent text or image behind the content of each page of the report. The Watermark dialog lets you specify your watermark's settings.




4. (Optional) Save the report using the following tools:

    - **Save** Save the report as a `.prnx` file which can be opened through the Report Viewer.
    - **Export To** a new report format. Each selected format option brings up a dialog to provide specifics on how you want to export the report.