Smart Report Maker v.7.1.0

User Guide

Table of contents

1. Installation Process

1.1. If you are installing Smart Report Maker in your online remote server, please upload the directory "SRM7" to your server using your favorite FTP client. Otherwise, if you are installing the system in your local server, please make sure that your local server is up and running then please add the directory "SRM7" in your root directory.

If you are installing Smart Report Maker 7.1 on your local server, please note that : :

⚠ Root directory is wwwroot (IIS) or htdocs (apache, xampp) or something else like www or html, etc. It depends on your OS and web server.
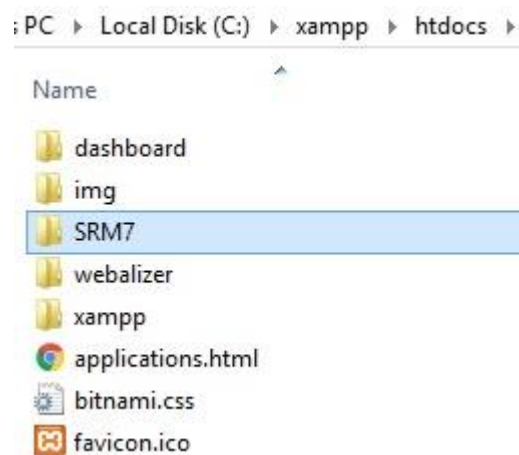
Adding the SRM7 in the root directory of the web server

⚠ You can make sure that your local server is running by typing http://localhost in your web browser, your browser will be directed to the root directory and the server will serve any index.html or index.php, etc.

1.2. Open your favorite web browser and point it to the location "/SRM7/install/index.php" . If you are installing the system on your online remote server, location would be something like: http://your-domain/path-to-SRM7/SRM7/install/index.php . Otherwise (if you are installing locally) location should be like : http://localhost/SRM7/install/index.php

1.3. Follow the instructions provided by the installation wizard.

1.3.1. The first step of the wizard contains two parts. The first part requires giving 755 read – write permissions for two directories

- Please make sure you give 755 permissions to the following diretories :

- SRM7/SRM/Reports7/
- SRM7/SRM/Reports7/shared/config/

1.3.2. The second part of the first screen of the installation wizard is highlighted in blue. It's for including legacy reports (created by an older version of Smart Report Maker) in this version. to do that you need to do the following three steps :

A. It is recommended that you back-up your existing (old) version of Smart Report Maker so that you can restore it if necessary.
B. Copy the /SRM/reports directory from the old version as shown in the following image
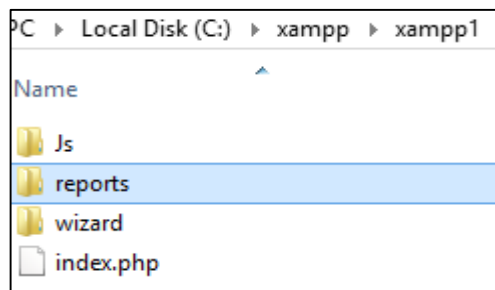
C. Paste the directory copied in the previous step, in the location /SRM7/SRM/reports in Smart Report Maker 7.0 as shown in the next image

3

1.3.3.   The second step in the installation wizard is for creating the "Admin" profile.

⚠ Please note that you will need this login information to login to the home page of smart report maker 7.0.


1.3.4.   If everything goes fine, you should receive the following confirmation screen. It confirms the completion of the installation process and prompt you to delete the installation directory at /SRM7/install/. Please note that you will not be able to logging to the system before doing that.

1.4. Start using smart report maker by logging to its home page at "/SRM7/HomePage/login.php". Once logging, you should see your legacy reports (if you copied them in this version <u>as shown in step 1.3.2.</u>
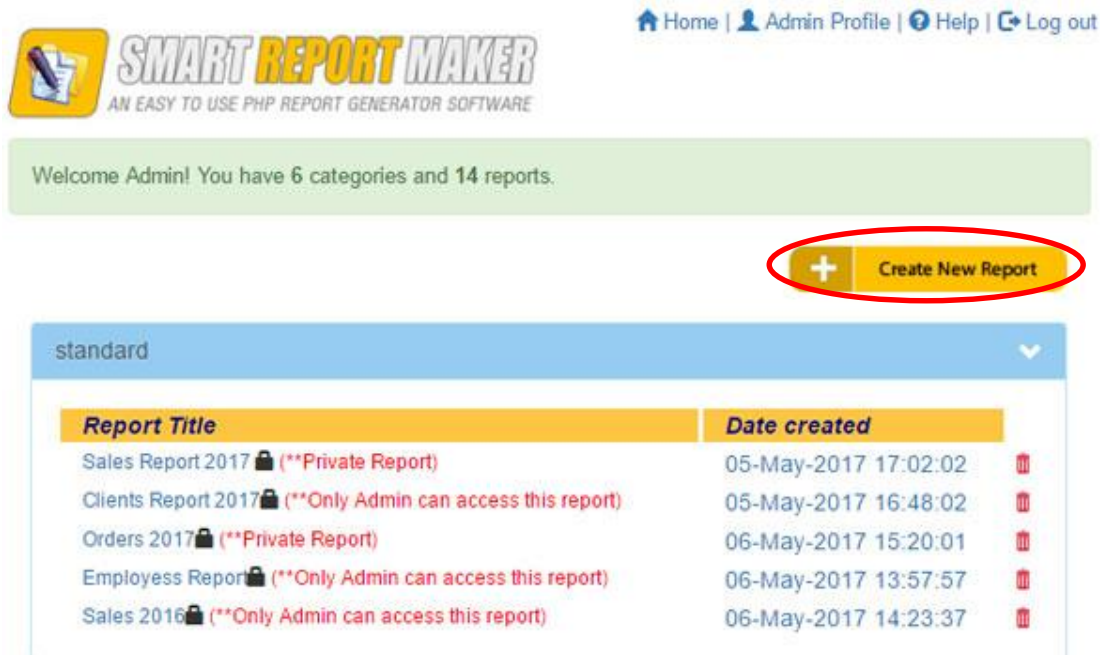
1.5. To create new reports please click the "Create New Report" button.
1.6. If you already are using smart report maker version 7.0.0 and have generated reports using it and now you like to move these legacy reports to this latest version of Smart Report Maker please do the following:

    1.6.1. It's important to back up your legacy and latest version files just in case anything goes wrong in the process.

    1.6.2. In your legacy version, please go to the following directory :
        /SRM7/SRM/Reports7/ You should find all your reports as subdirectories in this directory

    1.6.3. Please copy all your reports subdirectories. Please make sure NOT to copy the subdirectory 'shared' and the 'index.html' which should be found in the same directory along with your reports and should NOT be moved to the new version.

    1.6.4. In this latest version of Smart Report Maker please go to the same directory /SRM7/SRM/Reports7/   You should see only the 'shared' and the 'index.html' in this directory (assuming you haven't generate any new reports with this version yet) Please paste your reports folders from the previous step in here. Please make sure that you should NOT overwrite any files or folders in the process.

    1.6.5. Visit the home page of this latest version using your favorite browser, you should see all your legacy reports and be able to visit them to make sure they are working well in this version.
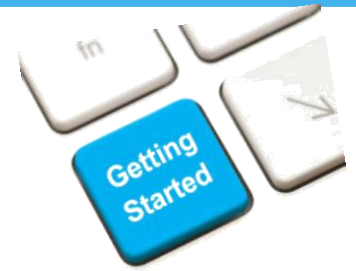
2. Create your first report

2.1. 1. Connect

In this step, you should enter the connection parameters for the database you intend to use to generate your charts.

- ☐ Server name or IP :Server
- ☐ User name and password: The user name should have only a "select" permission. Additional permissions are neither recommended nor required.
- ☐ Database: the database that you intend to use to create your report.

2.1.2. Loading a template:

A template is a generated report that you saved as a template.

The benefits of using template are :

A. Editing an existing report (if that report is saved as a template)
B. Creating multiple reports that will be essentially the same (or very similar) with a few changes. In this case if you save one report as a template, you will not need to go through all the exact same steps in creating the other reports which will save you ton of time.

How to load a saved template?

     A. Select the template which you want to load from the templates down menu then click the "Load template" button.

     B. You should receive a message confirming that the selected template is loaded successfully, and then you will notice that the left menu (which contains the steps) becomes fully enabled. Please **use only** this left menu to jump to the step which you want to change.

     ⚠ Please note that you shouldn't move to the step you want to change using the "Next" and "Back" button of the wizard. You can only do that using the steps (left menu)

     C. Once you performed the change which you want to do, you can get back to use the "Next" button for such change to be saved.

     ⚠Please note that passwords and the report name will not be saved in the template for security reasons, so you will be notified to enter this info for the new report.

2.2. Data Source step

In this step you can do the following :

Choose the table(s) you require for your Report. You can select Multiple tables by holding the "CTRL" key while selecting your tables.

    2.2.3.   Define inner table relationships if multiple tables are selected.

       For each relation you should select:

- ☐ The parent table from the "Left Table" list
- ☐ The primary key from the "Left Field" list
- ☐ The related/child table from the "Right table" list
- ☐ The foreign key from the "Right Field" list.
- ☐ "Inner Join" is the default "join"
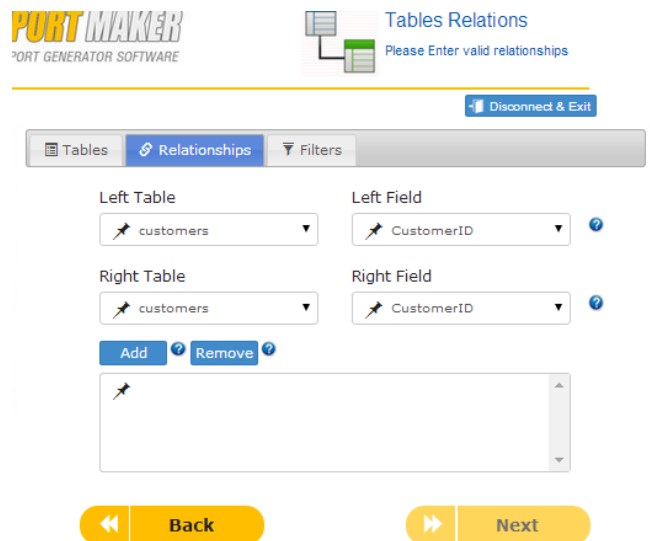
## 2.3. Creating Data filter(s) and Parameterized Reports

For those users who desire more control, you can create multiple data filters and select the exact data you wish to include in your report.

Your Filters will depend on the data type of the filtered field. For example, if you want to filter a column with a textual data type, you will find only textual filters, such as like, No like, begin

with, etc

Starting from version 7.1.0, smart report maker supports the ability of creating parameterized reports. Defining report's parameter is done in the filters page, the only difference is that instead of entering the filter value(s), after selecting the filter you want, you just click the "Ask users" button as in the following screenshot, then click the "Add" button to save this dynamic filter.
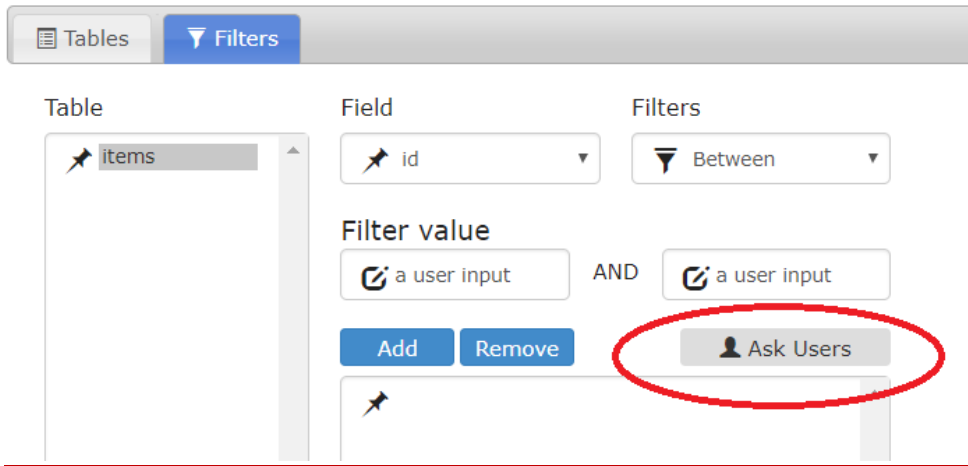
When users open the reports they will first see the "parameters" window to enter the filtering values they want as shown in the following screen shot

After clicking the "RUN" button they will be able to see the report's data filtered as per their needs, then they can delete their entered filters value and enter new once by clicking the "Filter" icon in the menu

2.4. Columns


In this step you can do the following :

2.4.1. Select The columns that you intend to use in your report (Required)

2.4.2. "Label" your fields to make them more user-friendly with more recognizable / relavent names   instead of their SQL names .For example, you might use

All copyrights are reserved to StarSoftinc

"Customer Number" instead of "CustomerID" (Optional)
2.4.3. Use Aggregation functions (Optional)
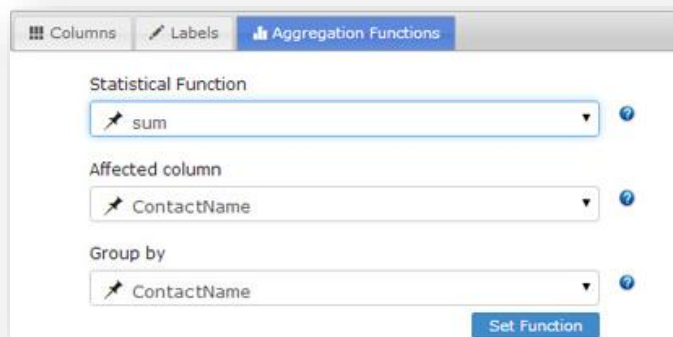
To use aggregation functions on your report, you should select the following:
- [ ] The function you want to apply
- [ ] The affected column : the column on which you want to apply the selected aggregation function. (it should have a numeric data type)
- [ ] The "group by" column

For example, if you want to generate a report for the average salary of male and female employees, "Function" should be "AVG".   Affected column should be "Salary", Grouped by "Gender".

2.5. Cell types:

In this step you should select the cell type that you want to use for each field in your report. Available types are :

A. **Standard Cell:** The default type, will just display the data stored in your field without any modifications.
B. **Image Cell:** Can be used in the fields that store image filenames. This type will load the actual images as thumbnails in your report. By clicking the image thumbnail, you will get the image loaded in its full size in a pop up window

C. **Rating Star Cell:** Can be used in the fields that store ratings, which you want to show as stars in your report.
D. **Link Cell :** can be used in the fields that store URLS
E. **True Or False Cell:** This type can be used for fields with 'BIT' data type
F. **Country Flag Cell:** Can be used in fields that store country names. It should display the country's flag as a thumbnail beside its name.
G. **Append a text**: It should add a fixed text (such as miles or pounds) at the end of the saved data.

A Report with different cell types generated by Smart Report Maker 7.0
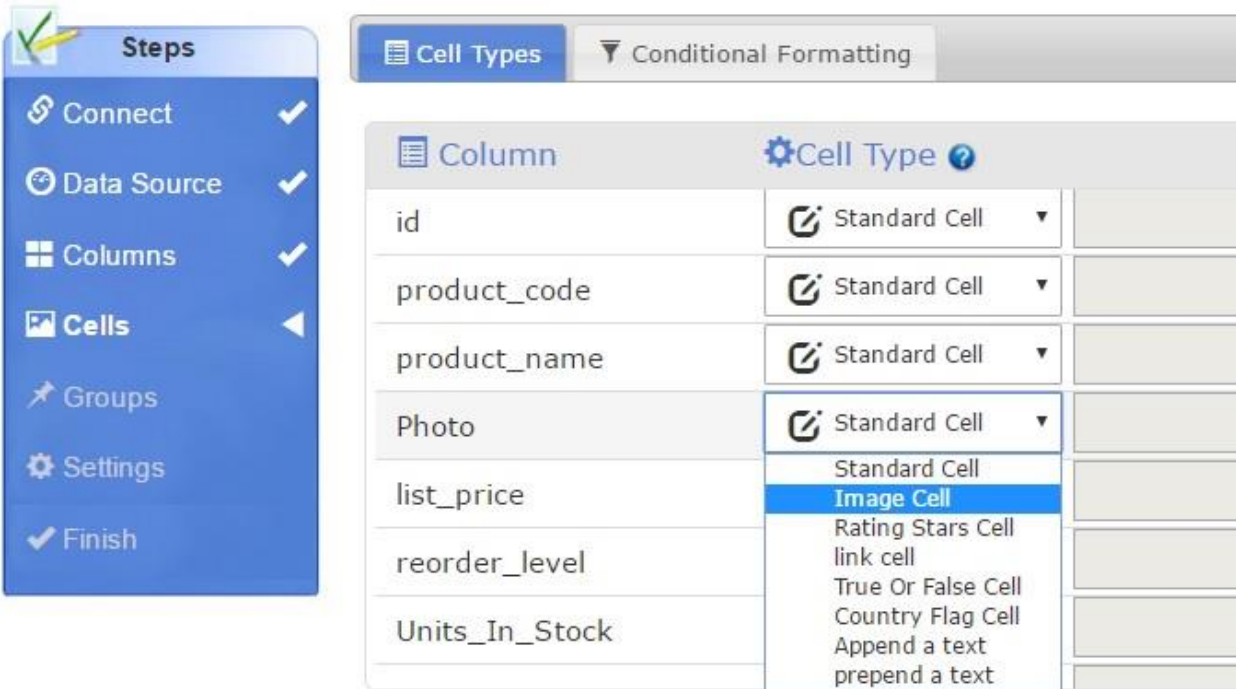
The Cell Types Step

2.6. Conditional Formatting

This feature allows you to apply special formats to a field, and have that formatting change depending on the value of the field. For example, you can have a certain field colored with a certain color only when its value is greater than 100.

To add a conditional formatting rule, all you have to do is :

A. Selecting the field (to which you want to apply the conditional formatting rule) from the "Field" drop down menu

B. Select the filter you want from the "Filters" drop down menu

C. Add the filter value
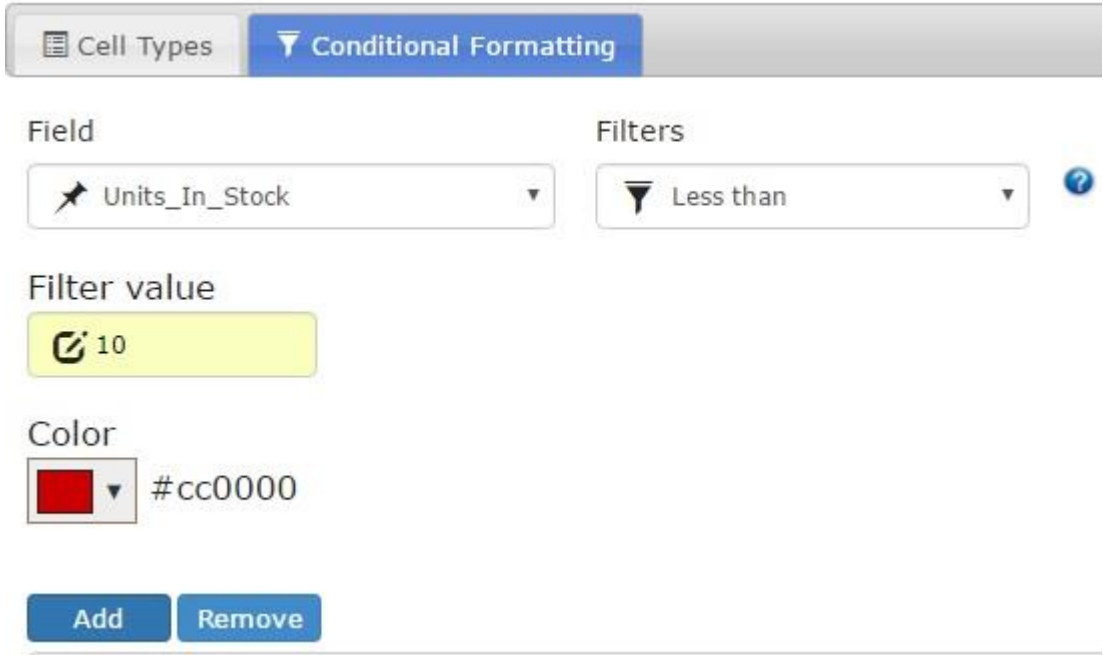
D. Select the background color which should be applied to the field if the conditional formatting rule is met

E. Click the "Add" button.

2.7. Grouping

In this step you can do the following

2.7.1. Define Multiple grouping levels.

For example, you can group your customers by country in order to get the customer details for each country. See the report in the following image:
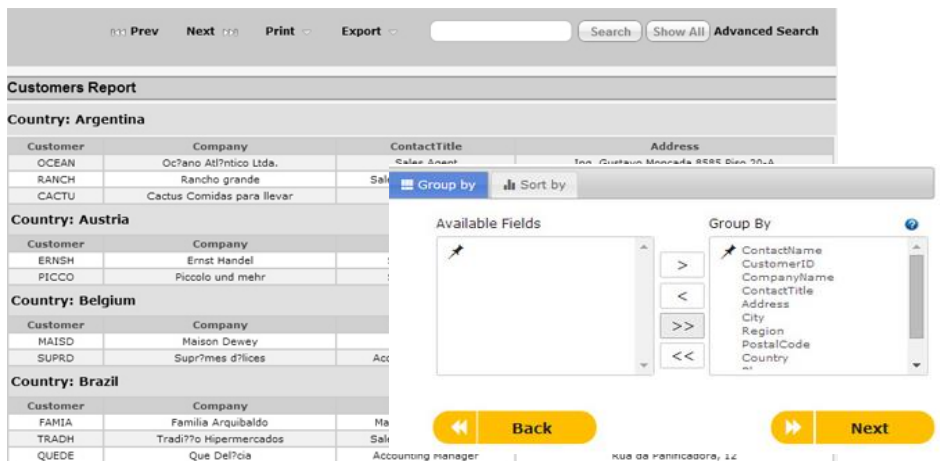
2.7.2. Sorting data according to any specific column(s) in ascending OR descending order.

2.8. Settings
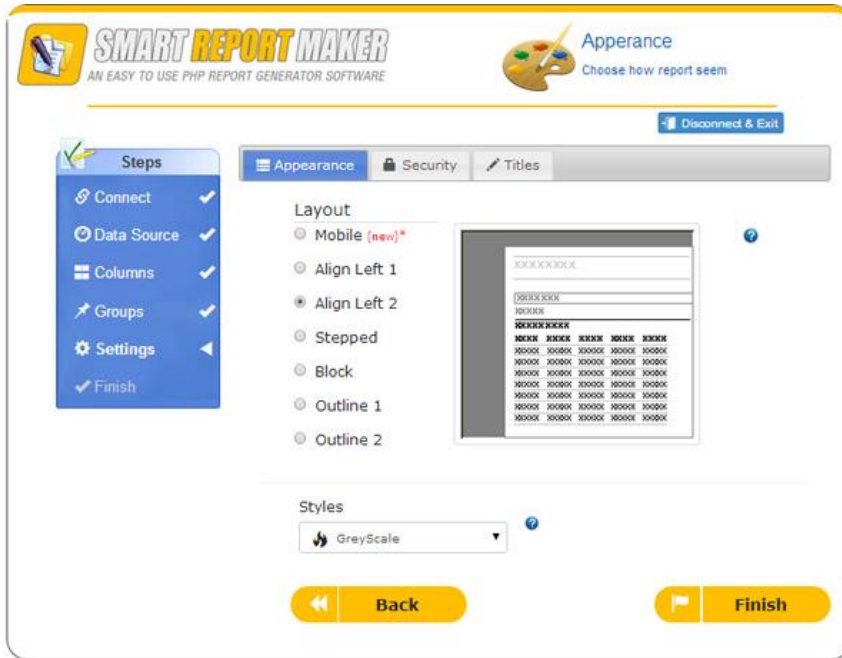
In this step you can set the following :

2.8.1. The appearance settings :
The appearance of your report is very customizable. You can select both the layout and style of your report.

2.8.2. The security settings:
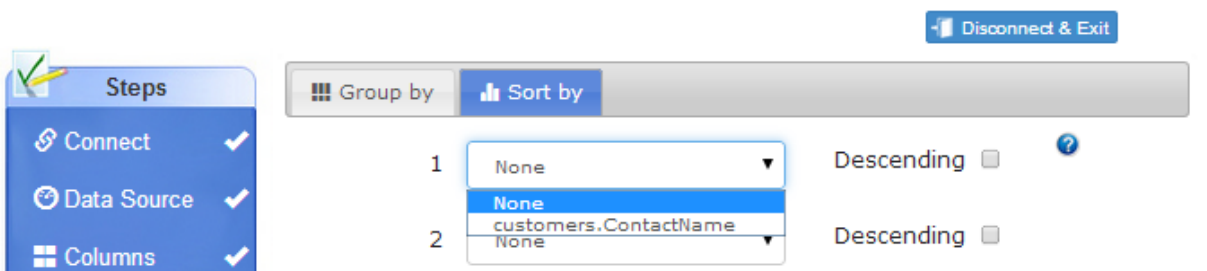In this section you should define who should access your report.

⚠ Please note that the admin can access any generated report in the system

Smart Report Maker 7.0 supports three access options for your generated report :

Access option	The Admin	A Registered User		Anonymous (any one on the internet)
		User Account	Saved Member	
Admin Only	✓	☒	☒	☒
Admin and Users	✓	If activated	If activated	☒
Public	✓	✓	✓	✓

14

A. Admin Only

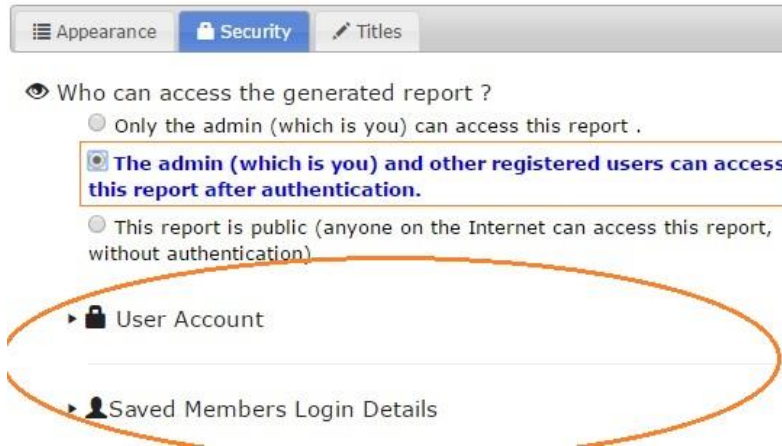If this access option is selected then the generated report could be accessed only using the admin username and password. This option is ideal if you want to create a report intended only for your own use, and no one else should see it.

B. The Admin and other registered users can access it after authentication

If this option is selected then the generated report can be accessed by both the admin and the registered users who have been given access to this report.

⚠ As shown in the figure above, once you choose this access option a hidden part of the screen is displayed to allow setting the users that can access this report. You can do that through two features (you can activate the two features for the same report)

⚠ Defining the registered users who can access the report :

- The User Account :

  Defining a username and password for a user (**NOT** the admin) who can access this report. This method is ideal if you want to give access to a single user or a group of users who can access this report using the exact same login information.

The "User Account" Feature

- **Saved Members:** Allowing your member (Users who are already saved in your database) to access this report. This feature is ideal if you already have users login information saved in some table in your database and you want to give these users access to your report. If that's the case then all you need to do to activate this feature are the following few steps :
  a)   Check the "Allow members box"
  b)   Select the table and fields that contain the login information of your members (The username, password and email)
  c)   If the passwords of your members are encrypted, please select the PHP function. This will allow for the encryption process.

2.8.3.   Titles

In this step, you can do the following :

- ✓ Customize your report by adding a title, a header, and footer to your report .
- ✓ Selecting or adding new category for your report
- ✓ Selecting the language of your report
- ✓ Specifying the number of records you want to display on each page.
- ✓ Save your report as a template
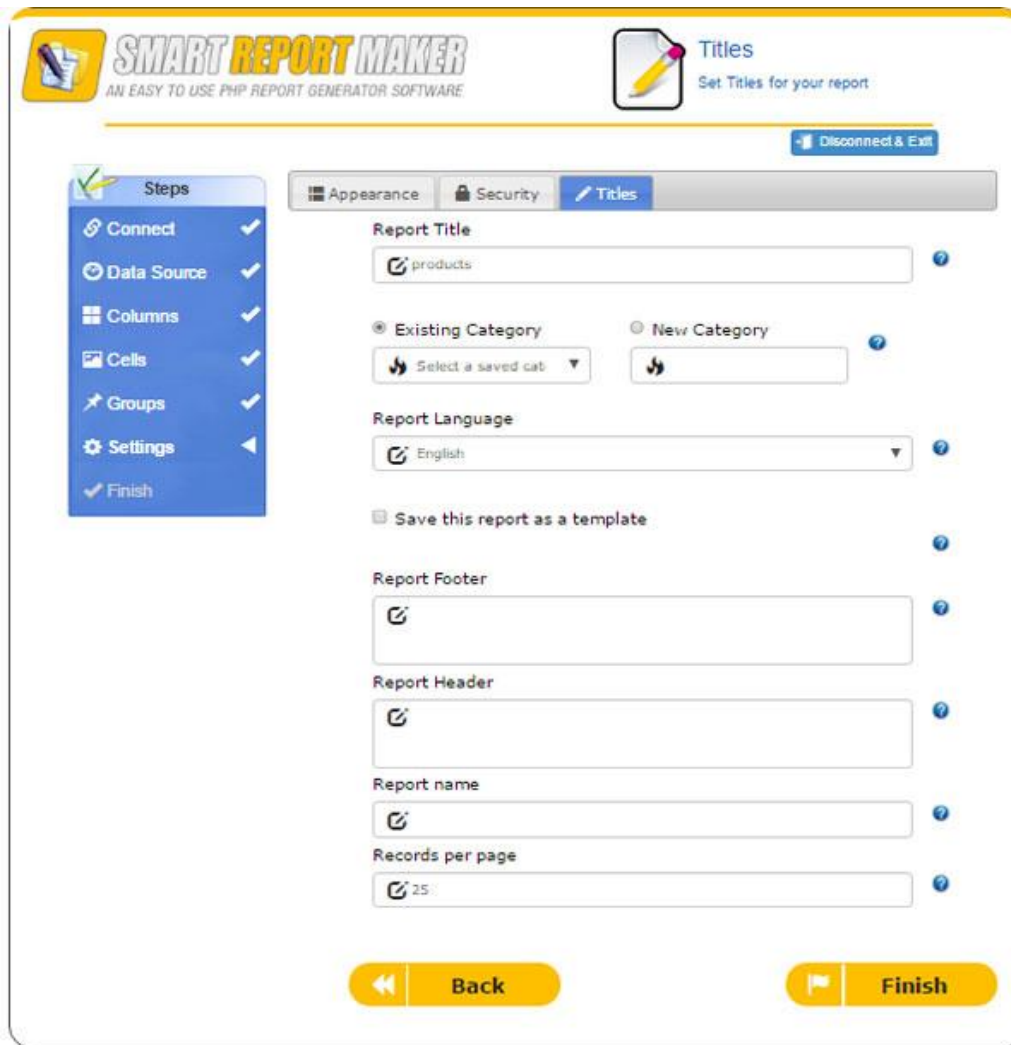
3. Trouble shooting your generated report:

Smart Report maker 7.0 support a troubleshooting mechanism that help find the root cause of any error(s) in the
Generated report. The following are the trouble shooting steps :

    i. Connect to the published version of Smart Report Maker using FTP .
    ii. Download the configuration file of the generated report
       (can be found at : / SRM7/SRM/Reports7/report name/config.php)
    iii. Open the file which you downloaded in the previous step, then please use your favorite text edito
       as notepad++) to add your email address in the following line of code (which should be existed in
       config file)
       $maintenance_email= '';

       Please note that after editing this line, it should become something like the following :
       $maintenance_email= 'Your email address';
    iv. Save the config file, and upload it back to the exact same location .

v. Open the generated report using your browser, add the following parameters at the end of its UR
? DebugMode7=1701
Please note that the URL should be something like the following :
http://your-domain/Path-to-SRM7/SRM7/SRM/Reports7/rep/ rep.php ?DebugMode7=1701
where rep is your report .

vi. Click refresh so the report with the new URL be refreshed (<u>if you have the error when doing speci</u>
<u>action like search or export please do this action so the error get logged</u>)
vii. You should receive an email with the log info needed for the debugging process.
Please check both index and spam folders.
viii. Send the log data to us in a support ticket then delete the email from your mail box.
Our support ticketing can be found at : http://mysqlreports.com/open-ticket/
ix. Open the configuration file of the report again, and remove your email address from it, which mea
changing the line : $maintenance_email= 'Your email address';
to $maintenance_email= "";   **as it was before debugging**

x. Re-upload the config file to the exact same location.

We know it is a little complicated, but we choose this way to secure the logging data which includes
the quires used to generate the report .

4. Resetting the admin password

⚠ Please note carefully that the same password has two forms
- The plain / unencrypted form (which you entered to the system in the previous step): is
the one that the admin should use when login

- The encrypted version (which you copied from the system in the previous step) : is only
used to save the password in the system files in a secure way.

The following steps to reset the admin password:
i. Please open the link :
http://Your domain/Path-to-SRM7/SRM7/SRM7/SRM/Reports7/shared/config/enc.php

ii. You should be asked to enter both your registered admin email address, and an answer to your
saved security question, you will be able to enter the new password, then finally the page will
print the encrypted version of your new password, please copy this value, it will be used later.

iii. Login to your published version of smart report maker via FTP and download only the following
PHP file : /SRM7/SRM/Reports7/shared/config/admin.php

iv. Open the php admin file (which was downloaded in the previous step) using any text editor like
notpad or notepad++.then search for $admin_password .

You should find it assigned to an encrypted value (a long list of numbers and letters) like this : $admin_password = "c89eefe899b65fef69bdd7291b06e35ea80";

v. Please replace the existing encrypted value with the one which you copied in step 2. It should become like the following
$admin_password = "The new encrypted value you got from step 2 goes here";

vi. Save the modified php admin file then upload it back to your site in the exact same location
 (i.e. /SRM7/SRM/Reports7/shared/config/admin.php)

vii. Finally, Test the new password (with its plain form) on the login screen.

5. FAQ:

5.1. How can I edit a created report?

To edit a report, you need to save it as a template by checking the "save this report as template" in the last step of the wizard. Once you saved your report as a template, you can load it for editing. [Click here](#) for the exact steps

Additionally, you can edit an existing report by editing its configuration file located at : /SRM7/SRM/Reports7/The Generated Report Name/config.php

5.2. I want to create many reports that will be essentially the same with a few changes, how can I do that with smart report maker, so that I don't go through the exact same steps each time?

You can do that by saving one of your similar reports as a template, then, you can just load the saved templates whenever you want to create new reports that are similar to the saved template.

5.3. How can I upgrade from an old version of smart report maker?

Here is what you need to do in order to include your legacy reports in the current version of Smart Report Maker.

5.4. What is new in Smart Report Maker version 7.0 ?

The new version of Smart Report Maker has many new features such as :
- Report templates to save your time!
- Ability to create multilingual reports. The current version supports 6 languages
- Conditional formatting
- Much better looking reports.
- Different cell types (image cells, country flags cells, star rating cells, link cells, and more)
- Ability to append or prepend a saved text to the stored data
- Report categorization
- Enhanced security access rules
- Ability to change the layout and the style of the report dynamically
- Ability to show and print any record from any report in a detailed view.
- Full compatibility with the new PHP 7.0
- More

5.5. If I am getting an error in one of my report, what should I do?
If it is a permission error, please make sure you get 755 permissions to the following two directories
/SRM7/SRM/Reports7/
/SRM7/SRM/Reports7/shared/config/
Otherwise, (If you are certain it's not a permission error) Please apply these trouble shooting steps to the generated report.

- ### 5.6. Can't connect to my database, what can I do?
You are getting this error because the script cannot connect to your database with the information you have provided. Make sure you have the correct username and password, if you are sure you have the correct login and password with the right Privileges, then you need to check with your administrator because you definitely have either the wrong log in or Privileges and that's why your script cannot connect to your MySQL database.

    .

-