Using PowerCenter Reports

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Informatica PowerCenter Using PowerCenter Reports

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Preface

PowerCenter reports include PowerCenter Repository Reports, Metadata Manager Reports, and Data Analyzer Data Profiling Reports. To set up these PowerCenter reports, use the Administration Console or Configuration Assistant to create a Reporting Service and grant users access to the reports. You can run the reports from multiple PowerCenter applications. This document contains the steps to create a Reporting Service, grant users access to the reports, and run the reports.

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CHAPTER 1

Setting Up and Running PowerCenter Reports

Overview

PowerCenter reports are prepackaged Data Analyzer dashboards and reports that allow you to analyze PowerCenter metadata. PowerCenter reports include PowerCenter Repository Reports, Metadata Manager Reports, Data Analyzer Data Profiling Reports, and Data Analyzer Administrative Reports.

The steps you use to set up PowerCenter reports depend on the following report packages that you want to run:

- **PowerCenter Repository Reports, Metadata Manager Reports, and Data Analyzer Data Profiling Reports.** Use the Administration Console or Configuration Assistant to create a Reporting Service. After you create and enable the service, Data Analyzer imports and sets up one report package based on the data source you select for the Reporting Service. After you enable the service, grant users access to run reports by assigning them the required privileges and permissions.
- **Data Analyzer Administrative Reports.** Use Data Analyzer to create a data source for the Data Analyzer repository and then import the reports into the repository. This document does not include instructions to set up the Data Analyzer Administrative Reports. For more information about setting up these reports, see the *Data Analyzer Administrative Guide*.

You can run PowerCenter reports from multiple PowerCenter applications. The following table lists the PowerCenter applications you can use to run each report package:

Report Package	PowerCenter Applications
PowerCenter Repository Reports	- Data Analyzer - Administration Console - PowerCenter Client
Metadata Manager Reports	- Data Analyzer - Administration Console - Metadata Manager
Data Analyzer Data Profiling Reports	- Data Analyzer - Administration Console

When you run reports, you can display the results on the Data Analyzer View or Analyze tab. The View tab displays dashboards and provides a formatted view of reports. The Analyze tab provides an interactive view of reports. The tab you use depends on the following Data Analyzer objects that you are displaying:

- **Dashboards.** Display on the View tab. Dashboards provide easy access to information. Some dashboards include links to multiple reports. Click a report name to run the report.
- **Composite reports.** Display on the View tab. Composite reports include a set of subreports. Click a subreport name to open the individual subreport on the Analyze tab.

- **Analytic workflows.** Display on the Analyze tab. Analytic workflows contain a list of reports linked together in a hierarchy. The first report in the hierarchy is the primary report, which contains data you want to analyze to answer business questions. The workflow reports are the other reports in the hierarchy.
- **Standalone reports.** Display on the View or Analyze tab. Standalone reports are reports that you run independent of other reports.

Note: This document includes instructions to edit the permissions and subscriptions for the prepackaged reports and dashboards. To edit the metrics or attributes in a report or to create custom reports, see the Data Analyzer documentation. Custom reports and edits you make to prepackaged reports are not maintained when you upgrade.

PowerCenter Repository Reports

PowerCenter Repository Reports are prepackaged dashboards and reports that allow you to analyze the following types of PowerCenter repository metadata:

- **Source and target metadata.** Includes shortcuts, descriptions, and corresponding database names and field-level attributes.
- **Transformation metadata in mappings and mapplets.** Includes port-level details for each transformation.
- **Mapping and mapplet metadata.** Includes the targets, transformations, and dependencies for each mapping.
- **Workflow and worklet metadata.** Includes schedules, instances, events, and variables.
- **Session metadata.** Includes session execution details and metadata extensions defined for each session.
- **Change management metadata.** Includes versions of sources, targets, labels, and label properties.
- **Operational metadata.** Includes run-time statistics.

For a description of each report in PowerCenter Repository Reports, see the *PowerCenter Repository Reports Reference*.

Metadata Manager Reports

Metadata Manager Reports are prepackaged dashboards and reports that allow you to perform several types of analysis on metadata stored in the Metadata Manager warehouse. The reports analyze the following areas:

- **Business intelligence.** Includes business intelligence objects such as metrics, attributes, reports, and schemas.
- **Data modeling.** Includes data modeling tool metadata, such as tables, views, triggers, indexes, and procedures for each model.
- **Data integration.** Includes data integration objects such as transformation ports, mappings, and workflows.
- **Database management.** Includes database objects, such as constraints, procedures, functions, synonyms, tables, views, triggers, and indexes, and the relationships among them.
- **Metamodel.** Includes models defined in Metadata Manager, such as the number of objects in each class of a particular repository and which associations and classes are not used in each repository instance.

For a description of each report in Metadata Manager Reports, see the *Metadata Manager Reports Reference*.

Data Analyzer Data Profiling Reports

Data Analyzer Data Profiling Reports are prepackaged dashboards and reports that provide a historic view of data in a Data Profiling warehouse. They also display information about rejected rows in the profile results. Use Data Analyzer Data Profiling reports to monitor data quality during production.

Use the PowerCenter Data Profiling Dashboard to access the Data Profiling Reports. Data Profiling Reports include the following report types:

- **Composite reports.** Display a set of subreports and the associated metadata. The subreports can be multiple report types in Data Analyzer.

- **Metadata reports.** Display basic metadata about a data profile. The Metadata reports provide the source-level and column-level functions in a data profile, and historic statistics on previous runs of the same data profile.
- **Summary reports.** Display data profile results for source-level and column-level functions in a data profile.

For a description of each report in Data Analyzer Data Profiling Reports, see the *PowerCenter Data Profiling Guide*.

Setting Up PowerCenter Reports

To set up PowerCenter Repository Reports, Metadata Manager Reports, and Data Analyzer Data Profiling Reports, complete the following steps:

1. Create and enable a Reporting Service.
2. Grant users access to reports.

Step 1. Create and Enable a Reporting Service

The Reporting Service is an application service that runs the Data Analyzer application in a PowerCenter domain.

After you create and enable a Reporting Service in the Administration Console or Configuration Assistant, Data Analyzer imports and sets up one report package based on the following data sources you select for the Reporting Service:

- **PowerCenter repository.** Imports and sets up PowerCenter Repository Reports.
- **Metadata Manager warehouse.** Imports and sets up Metadata Manager Reports.
- **Data Profiling warehouse.** Imports and sets up Data Analyzer Data Profiling Reports.

Create a Reporting Service for each report package you want to run. For example, you want to run PowerCenter Repository Reports and Metadata Manager Reports. Create one Reporting Service to report on the PowerCenter repository and another Reporting Service to report on the Metadata Manager warehouse.

For more information about creating and enabling a Reporting Service, see the *PowerCenter Administrator Guide*.

Step 2. Grant Users Access to Reports

To grant users access to reports, complete the following tasks:

- **Assign users privileges.** Use the Administration Console to assign users and groups privileges to access reports and dashboards. You can grant users access to all reports and dashboards or to specific reports and dashboards.
- **Grant users read permission on dashboards.** Use Data Analyzer to grant users read permission on the prepackaged dashboards.
- **Subscribe users to specific reports and dashboards (optional).** If you are granting users access to specific reports and dashboards, use Data Analyzer to subscribe users to reports and dashboards. Users can view their subscriptions from the Data Analyzer View tab.

Assigning Users Privileges

When you assign privileges to users and groups for the Reporting Service, you can grant users access to all reports and dashboards or to specific reports and dashboards.

If users run reports from the Administration Console, PowerCenter Client, or Metadata Manager, you also must assign them the required privileges and permissions for the domain, Repository Service, or Metadata Manager Service.

For more information about assigning privileges to users and groups, see the *PowerCenter Administrator Guide*.

To assign users privileges:

1. Log in the Administration Console.
2. Click the Configure Security icon to view the Security page.
3. Select a user or group in the Navigator.
4. Click the Privileges tab.
5. Click Edit.

   The Edit Roles and Privileges dialog box appears.
6. Click the Privileges tab.
7. Expand the Reporting Service and select the required privileges.

   The following table lists the privileges that are required to grant users access to all reports and dashboards or to specific reports and dashboards:

Access Level	Reporting Service Privileges
All reports and dashboards	- Access Content Directory - View Reports - Analyze Reports - View Dashboards
Specific reports and dashboards	- View Reports - Analyze Reports - View Dashboards

8. If users run reports from the Administration Console, PowerCenter Client, or Metadata Manager, expand the domain, Repository Service, or Metadata Manager Service and select the required privileges.

   The following table lists the privileges and permissions that are required to run reports from applications other than Data Analyzer:

Application to Run Reports	Service	Privileges	Permissions
Administration Console	Domain	Access Administration Console	Permission on Reporting Service
PowerCenter Client	Repository Service	- Access Designer - Access Workflow Manager	Read on folder containing the repository object to report on
Metadata Manager	Metadata Manager Service	View Reports	N/A

9. Click OK.
10. If users run reports from the Administration Console or PowerCenter Client, log in to the application and assign the user the required permissions listed in the table in step 8.

    For more information about permissions in the Administration Console, see the *PowerCenter Administrator Guide*. For more information about permissions in the PowerCenter Client, see the *PowerCenter Repository Guide*.

Granting Users Read Permission on Dashboards

By default, only the Administrator user account is granted access to the prepackaged dashboards. To grant other users access to a dashboard, log in to Data Analyzer as Administrator and grant users permission to read the dashboards.

By default, all users are granted read permission on all reports. You do not need to edit report permissions.

To grant users read permission on dashboards:

1. Log in to Data Analyzer using the default Administrator user account.

   For more information, see "Logging in to Data Analyzer" on page 9.

2. Click the Find tab.

   The dashboards are organized into folders. The following table lists the available dashboards and the folder location for each report package:

Report Package	Folder Location	Dashboards
PowerCenter Repository Reports	Public Folders > Dashboards	- PowerCenter Object Statistics - PowerCenter Operations Dashboard
Metadata Manager Reports	Public Folders > Dashboards	- Business User Dashboard - Technical User Dashboard
Data Analyzer Data Profiling Reports	Public Folders > PowerCenter Data Profiling	PowerCenter Data Profiling Dashboard

3. Navigate through the folders to select a dashboard.
4. In the dashboard properties, click the Permissions button.

   The Access Permissions page appears.

5. To grant read permission to all users, click Yes with Permissions to Read from the General Permissions area.
6. To grant read permission to specific users or groups, search for a user or group, click Read permission, and then click Include.
7. Click OK.

Subscribing Users to Specific Reports and Dashboards (Optional)

If you are granting users access to specific reports and dashboards, subscribe the users to reports and dashboards. When you subscribe a user to a report or dashboard, the user can access the report or dashboard from the Data Analyzer View tab.

If you assigned users the Access Content Directory privilege for the Reporting Service to grant users access to all reports and dashboards, you do not need to subscribe users to reports or dashboards. The Access Content Directory privilege allows users to access the Data Analyzer Find tab and navigate the folders to view all reports and dashboards. Users can then choose to subscribe to any of these reports and dashboards.

To subscribe users to specific reports and dashboards:

1. Log in to Data Analyzer using the default Administrator user account.

   For more information, see "Logging in to Data Analyzer" on page 9.

2. Click the Find tab.

The reports and dashboards are organized into folders. The following table lists each report package and the folder location for reports and dashboards:

Report Package	Report Folder Path	Dashboard Folder Path
PowerCenter Repository Reports	Public Folders > PowerCenter Repository Reports	Public Folders > Dashboards
Metadata Manager Reports	- Public Folders > Business Intelligence - Public Folders > Data Integration - Public Folders > Data Modeling - Public Folders > Database Management - Public Folders > Metamodel	Public Folders > Dashboards
Data Analyzer Data Profiling Reports	Public Folders > PowerCenter Data Profiling	Public Folders > PowerCenter Data Profiling

3. Navigate through the folders to select a report or dashboard.
4. Click Edit.

   The Create Report Wizard or Create Dashboard Wizard appears.
5. Click Publish > Subscriptions.
6. Select the user names you want to subscribe, and click Subscribe.
7. Click Save.

Running PowerCenter Reports

You can run PowerCenter reports from Data Analyzer or the PowerCenter Client. You can access Data Analyzer from the Administration Console or Metadata Manager and then run reports from Data Analyzer.

Running All Reports from Data Analyzer

You can run all PowerCenter reports from Data Analyzer.

To run all PowerCenter reports from Data Analyzer:

1. Log in to Data Analyzer.

   For more information, see “Logging in to Data Analyzer” on page 9.

   The View tab appears.
2. From the Subscriptions menu, select the report or dashboard you want to view.
3. If the dashboard contains links to reports, click the name of the report you want to run.
4. To run additional reports, click the Find tab.

   The reports are organized into folders. The following table lists each report package and the folder location:

Report Package	Report Folder Path
PowerCenter Repository Reports	Public Folders > PowerCenter Repository Reports

Report Package	Report Folder Path
Metadata Manager Reports	- Public Folders > Business Intelligence - Public Folders > Data Integration - Public Folders > Data Modeling - Public Folders > Database Management - Public Folders > Metamodel
Data Analyzer Data Profiling Reports	Public Folders > PowerCenter Data Profiling

5. Navigate through the folders to select a report.
6. Click View or Analyze.

   Data Analyzer displays the report on the View or Analyze tab.

Running PowerCenter Repository Reports from the PowerCenter Client

You can run PowerCenter Repository Reports from the PowerCenter Client. In addition to the required Reporting Service privileges, you must have privileges for the Repository Service.

You can run PowerCenter Repository Reports for the following repository objects:

- **Mapplets and mappings.** Run mapplet and mapping reports from the Designer to get more information about the sources, targets, ports, and transformations in mappings and mapplets.
- **Workflows.** Run the Workflow Composite Report from the Workflow Manager to get more information about the workflow tasks, events, and variables in a workflow.

When you run a report, the Designer or Workflow Manager launches the Data Analyzer application in a browser window and displays the report.

Running a Mapplet Composite Report

The Mapplet Composite Report includes the following information about a mapplet:

- **All objects.** Information about all objects in the mapplet.
- **Lookup transformations.** Lookup transformations in the mapplet.
- **Dependencies.** Mappings that use the mapplet.
- **Ports.** Port details for the input and output ports.
- **Sources.** Source instances in the mapplet.
- **Transformations.** Transformations used in the mapplet.

To run a Mapplet Composite Report from the PowerCenter Client:

1. In the Designer, open a mapplet.
2. Right-click in the workspace and choose View Mapplet Report.

   The Designer launches Data Analyzer in the default browser for the client machine and runs the Mapplet Composite Report.

Running a Mapping Composite Report

The Mapping Composite Report includes information about the following components in the mapping:

- **Source and target fields.** Fields used in mapping sources.
- **Port connections.** Port-level connections between objects.
- **Transformation ports.** Transformation ports for each transformation in the mapping.
- **Unconnected ports.** Unconnected ports in mapping objects.

- **Object-level connections.** Connections between all objects in the mapping.

To run a Mapping Composite Report from the PowerCenter Client:

1. In the Designer, open a mapping.
2. Right-click in the workspace and choose View Mapping Report.

   The Designer launches Data Analyzer in the default browser for the client machine and runs the Mapping Composite Report.

Running a Workflow Report

The Workflow Composite Report includes information about the following components in a workflow:

- **Tasks.** Tasks contained in the workflow.
- **Link conditions.** Links between objects in the workflow.
- **Events.** User-defined and built-in events in the workflow.
- **Variables.** User-defined and built-in variables in the workflow.

To run a Workflow Composite Report from the PowerCenter Client:

1. In the Workflow Manager, open a workflow.
2. Right-click in the workspace and choose View Workflow Report.

   The Workflow Manager launches Data Analyzer in the default browser for the client machine and runs the Workflow Composite Report.

Accessing Data Analyzer from the Administration Console

You can access Data Analyzer from the Administration Console and then run all reports from Data Analyzer. In addition to the required Reporting Service privileges, you must have privileges for the domain.

To access Data Analyzer from the Administration Console:

1. On the Administration Console Domain page, select the Reporting Service in the Navigator.
2. Click the Data Analyzer URL.

   The Administration Console launches Data Analyzer in a browser window and displays the View tab.
3. To run a report, see "Running All Reports from Data Analyzer" on page 6.

Accessing Data Analyzer from Metadata Manager

You can access Data Analyzer from Metadata Manager and then run Metadata Manager Reports from Data Analyzer. In addition to the required Reporting Service privileges, you must have privileges for the Metadata Manager Service.

To access Data Analyzer from Metadata Manager:

1. On the Metadata Manager Browse page, click Reports in the toolbar.

   Metadata Manager launches Data Analyzer in a browser window and displays the View tab.
2. To run a report, see "Running All Reports from Data Analyzer" on page 6.

Logging in to Data Analyzer

You must have a user account with privileges for the Reporting Service to log in to Data Analyzer.

To log in to Data Analyzer:

1. Open a browser.
2. Enter the URL in the address field of the browser.

   See the system administrator for the Data Analyzer URL. The Data Analyzer URL has the following format:

   ```
   http://host_name:port_number/<ReportingServiceName>
   ```

   ReportingServiceName is the name of the Reporting Service that runs the Data Analyzer instance. For example, PowerCenter runs on a machine with host name fish.ocean.com and has a Reporting Service named FinancialReporting with port number 18080. Use the following URL for Data Analyzer:

   ```
   http://fish.ocean.com:18080/FinancialReporting
   ```

   The Login page appears.
3. Enter the user name and password.
4. Select Native or the name of a specific security domain.

   The Security Domain field appears when the PowerCenter domain contains an LDAP security domain. If you do not know the security domain that your user account belongs to, contact the PowerCenter domain administrator.
5. Click Login.

   The Data Analyzer View tab appears.

Setting the Default Report or Dashboard on the View Tab

You can select the default report or dashboard to display on the View tab. Every time you access Data Analyzer, the default report or dashboard appears on the View tab.

To set the default report or dashboard:

1. On the Data Analyze View tab, select the report or dashboard you want to view from the Subscriptions menu.

   -or-
2. Click the Find tab, navigate through the folders to select a report or dashboard, and click View.

   The report or dashboard displays on the View tab.
3. Click Set as Default.

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