

## Report Management Tool

The report management tool in Portal Config is used to upload new reports to the NorthStar database and Reporting Services.

### Downloading Reports

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Reports are available from the NorthStar website. If you do not have a site login, contact your CBS project manager or sales person.

Reports are available in the Downloads menu.

You will want to download the reports to a folder that the Portal Config utility can access.

### Access the Report Management Tool

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#### Portal Config

To access the Report Management Tool, you will need to open Portal Config. This utility exists on the Portal server.



You can typically access Portal Config from the NorthStar Startup Center. This icon should be located on the Desktop of the server.

1. Open the Northstar Startup Center.
2. Click the link to Portal Config.
3. Double click your company profile.
4. Click the Report Management link in the Server Tools menu.



5. Select the Report Server.
6. Select the Upload Path. Unless you have multiple companies using the Portal for reports, the upload path will likely be “/”.
7. Select the Data Source. In most instances the data source will be “/NorthStar”.
8. Browse to the report that you downloaded. The extension will be .nsr.
9. Click Upload.

## Portal Config (continued)

You will receive a message once the report has been uploaded.

Upload New Report

Select Report Server: http://localhost/ReportServer/

Select Upload Path: /

Select Data Source: /NorthStar

Select Report Package: C:\Documents and Settings\Administrator\Desktop\CommitmentDaily\_07-1: [Browse]

[Upload]

## Adding Reports to a Reports Viewer Module

Once reports have been uploaded, they need to be configured in a reports viewer module to display for end users.

1. Login to the NorthStar Portal using an administrator login, or a login that has edit rights to the reports viewer module.
2. From the reports viewer module, click the admin link.

For: Unit: 01 - New York City By: Day Day: 10/1/2008 Run Report | Admin |

3. From the Template drop down menu, select the report.
4. Give the report a user friendly title.
5. Click Add.
6. Scroll down the Reports list and highlight the correct report.
7. Configure the settings in the Report Settings menu.

### Title

This is a user friendly title that should identify the report for end users.

### Template

This is the report template.

### Format

This will be the format displayed when a user selects the report. There are currently three default formats to choose from:

- a) Default: This is the Reporting Services default.
- b) Excel
- c) PDF

## Adding Reports to a Reports Viewer Module (continued)

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### **Sort Order**

This field sets the order that reports are displayed to end users.

### **Permissions**

Select the portal roles that will be granted access to the report. By default only the Admin role is added.

8. Click Update when the report settings are configured.
9. Close out of the reports editor window to return to the portal.