MICRO FOCUS®

Micro Focus File Reporter 4.1
Client Tools Guide

February 28, 2021

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About This Guide

This guide is written to provide procedural information for installing and using the Micro Focus File Reporter 4.1 Client Tools.

Audience

This manual is intended for network administrators who manage network storage resources as well as data owners 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.

Feedback

We want to hear your comments and suggestions about this manual and the other documentation included with this product. Please use the User Comment feature at the bottom of each page of the online documentation.

Documentation Updates

For the most recent version of the *Micro Focus File Reporter 4.1 Client Tools Guide*, visit the Micro Focus File Reporter Documentation Web site.

Additional Documentation

For additional Micro Focus File Reporter documentation, see the following guides at the Micro Focus File Reporter Documentation Web site:

- *Micro Focus File Reporter 4.1 Installation Guide*
- *Micro Focus File Reporter 4.1 Administration Guide*
- *Micro Focus File Reporter 4.1 Database Schema and Custom Queries Guide*

Documentation Conventions

In this documentation, a greater-than symbol (>) is used to separate actions within a step and items in a cross-reference path.

When a single pathname can be written with a backslash for some platforms or a forward slash for other platforms, the pathname is presented with a backslash. Users of platforms that require a forward slash, such as Linux*, should use forward slashes as required by your software.

When a startup switch can be written with a forward slash for some platforms or a double hyphen for other platforms, the startup switch is presented with a forward slash. Users of platforms that require a double hyphen, such as Linux, should use double hyphens as required by your software.

1 Minimum Requirements

1.1 Minimum Requirements for Installation

◆ Any 64-bit multi-core processor Windows workstation.

Note that significant analytic workloads with the Data Analytics tool might be directly impacted by the number and speed of available cores.

◆ .NET 6.0 Desktop Runtime (will be installed if not already present).

◆ A DirectX 10 compatible card is required to use the Data Analytics tool.

◆ Report Viewer: Minimum of 8 GB RAM.

Depending on the size of report loading, exporting, and processing, this number might need to be significantly increased.

◆ Data Analytics: Minimum of 12 GB RAM.

NOTE: For the Data Analytics tool, a minimum of about 1 KB per scan data entry (or 1 GB per million entries) is required.

Depending on the type of analysis, such as the Pivot Grid, and the number of entries in a single scan, this number might need to be significantly increased.

◆ Minimum of 250 MB disk space.

◆ Report Designer and Data Analytics users must be members of the SrsAdmins group.

2 Installing the Client Tools

1 From the root of the `FileReporter_4.1.iso` image, copy the `FileReporter-ClientTools-4.1-x64-xx.exe` file to all Windows workstations where you will run the Client Tools.

2 From the Windows workstation, double-click `FileReporter-ClientTools-4.1-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 Data Analytics and Report Designer icons are added to the **Start** menu.

3 Installing the Report Viewer

1 From the root of the `FileReporter_4.1.iso` image, copy the `FileReporter-ReportViewer-4.1-x64-xx.exe` file to all Windows workstations where you will run the Report Viewer.

2 From the Windows workstation, double-click `FileReporter-ReportViewer-4.1-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

The Micro Focus File Reporter Client Tools are designed to provide members of the administrators group expanded abilities in analyzing data and designing reports. The Client Tools are run from a Windows workstation.

The analytics tools are an integrated set of data visualization applications that include a Dashboard, Pivot Grid, and Tree Map.

To make use of the Data Analytics Tools, you must first have performed File System metadata scans for one or more Scan Targets you wish to analyze. For details on setting up File System scans, see Creating a Scan Policy in the *File Reporter 4.1 Administration Guide*.
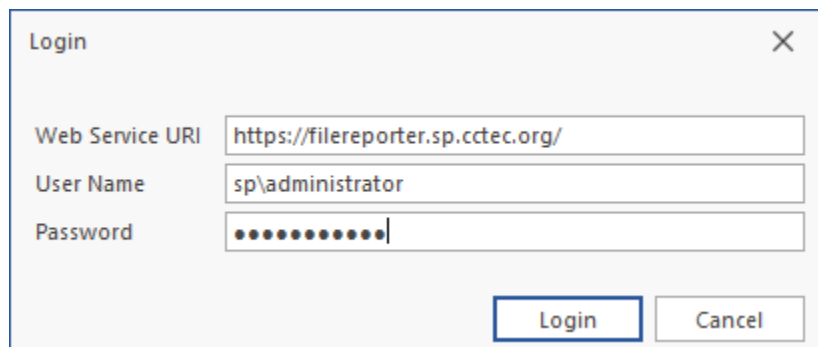
4.1 Using the Analytics Tools

These procedures briefly introduce you to some of the capabilities of each of the applications. You will discover more capabilities as you work with each of the applications on your own.

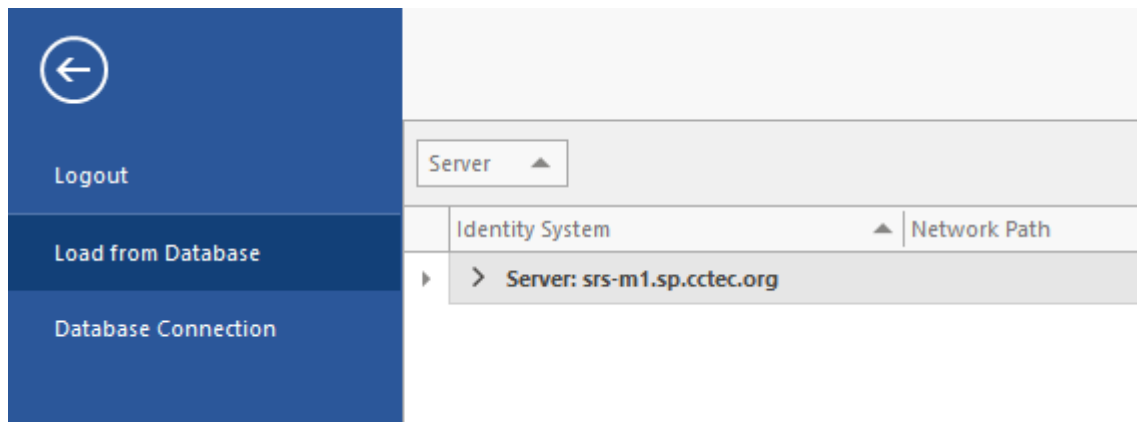1 From the **Start** menu, select **File Reporter 4.1 Data Analytics**.

   The login screen appears:

2 Enter your login credentials and click **Login**.

   A selection dialog box similar to the following appears:

3 Expand the shares and volumes.

4 Double-click the File System scan you want to analyze.

The data from the scan is presented in the Dashboard.
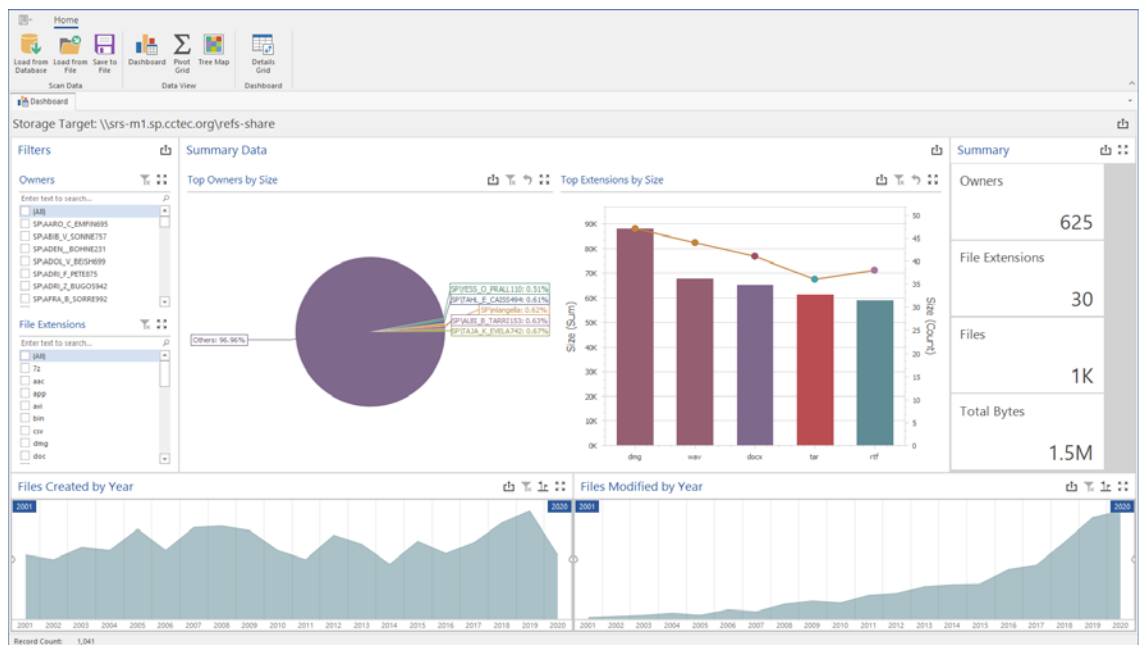
4.2   Using the Dashboard

NOTE: The exercises in the remainder of this chapter introduce you to some of the very basic analytical features of the Analytics Tools. Through familiarizing yourself with these basic features, you will become proficient enough with these tools to try more advanced features.

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

2 In the **Files Created by Year** region, click a specific year.

3 Observe the changes in the **Summary Data**, **Top Extensions by Size**, and **Summary** regions of the Dashboard.

The graphical displays in the **Summary Data**, **Top Extensions by Size**, and **Summary** regions of the Dashboard are driven by the **Filters** region and the selected years from the **Files Created by Year** and **Files Modified by Year** regions.

4 In the **Summary Data** region, place the cursor over a pie graph section and observe how sectional-specific information appears in a balloon.

5 Double-click the 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.

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

Full Path	Name	File Name E...	Size	Owner	Create Time	Modify Time	Access Time	Index	Parent Index	Path Depth	Path Type	Scan ID
\\srs-m1.sp...	FutureFile....	txt	48 bytes	BUILTIN\Ad...	9/21/2020...	9/21/2020...	9/21/2020...	6	5	2	File	241
\\srs-m1.sp...	file-dates.zip	zip	374 bytes	BUILTIN\Ad...	9/21/2020...	9/21/2020...	9/21/2020...	7	5	2	File	241
\\srs-m1.sp...	modifiedb...	txt	0 bytes	BUILTIN\Ad...	9/21/2020...	9/21/2019...	9/21/2019...	8	5	2	File	241
\\srs-m1.sp...	us-ssn.txt	txt	36 bytes	BUILTIN\Ad...	9/11/2024...	9/21/2023...	2/11/2020...	9	5	2	File	241
\\srs-m1.sp...	SQLDumpe...	exe	153 KB	BUILTIN\Ad...	9/21/2020...	10/4/2019...	9/21/2020...	19	12	5	File	241
\\srs-m1.sp...	as80.xsl	xsl	17 KB	BUILTIN\Ad...	9/21/2020...	6/3/2019 1...	9/21/2020...	22	21	6	File	241
\\srs-m1.sp...	as90.xsl	xsl	20 KB	BUILTIN\Ad...	9/21/2020...	6/3/2019 1...	9/21/2020...	23	21	6	File	241
\\srs-m1.sp...	db2v0801.xsl	xsl	30 KB	BUILTIN\Ad...	9/21/2020...	6/3/2019 1...	9/21/2020...	24	21	6	File	241
\\srs-m1.sp...	hive.xsl	xsl	80 KB	BUILTIN\Ad...	9/21/2020...	6/3/2019 1...	9/21/2020...	25	21	6	File	241
\\srs-m1.sp...	msjet.xsl	xsl	30 KB	BUILTIN\Ad...	9/21/2020...	6/3/2019 1...	9/21/2020...	26	21	6	File	241
\\srs-m1.sp...	Informix.xsl	xsl	31 KB	BUILTIN\Ad...	9/21/2020...	6/3/2019 1...	9/21/2020...	27	21	6	File	241
\\srs-m1.sp...	msql.xsl	xsl	126 KB	BUILTIN\Ad...	9/21/2020...	6/3/2019 1...	9/21/2020...	28	21	6	File	241
\\srs-m1.sp...	orcl7.xsl	xsl	94 KB	BUILTIN\Ad...	9/21/2020...	10/4/2019...	9/21/2020...	29	21	6	File	241
\\srs-m1.sp...	sql120.xsl	xsl	132 KB	BUILTIN\Ad...	9/21/2020...	10/4/2019...	9/21/2020...	30	21	6	File	241
\\srs-m1.sp...	sql2000.xsl	xsl	34 KB	BUILTIN\Ad...	9/21/2020...	6/3/2019 1...	9/21/2020...	31	21	6	File	241
\\srs-m1.sp...	sql70.xsl	xsl	32 KB	BUILTIN\Ad...	9/21/2020...	6/3/2019 1...	9/21/2020...	32	21	6	File	241
\\srs-m1.sp...	sql90.xsl	xsl	133 KB	BUILTIN\Ad...	9/21/2020...	6/3/2019 1...	9/21/2020...	33	21	6	File	241
\\srs-m1.sp...	sqlpdw.xsl	xsl	103 KB	BUILTIN\Ad...	9/21/2020...	6/3/2019 1...	9/21/2020...	34	21	6	File	241
\\srs-m1.sp...	Sybase.xsl	xsl	30 KB	BUILTIN\Ad...	9/21/2020...	6/3/2019 1...	9/21/2020...	35	21	6	File	241
\\srs-m1.sp...	trdtv2r41.xsl	xsl	103 KB	BUILTIN\Ad...	9/21/2020...	10/4/2019...	9/21/2020...	36	21	6	File	241
\\srs-m1.sp...	msmdsrvi.rll	rll	1 MB	BUILTIN\Ad...	9/21/2020...	10/4/2019...	9/21/2020...	40	38	7	File	241

7 From the grid, right-click a file and select **Open Folder** to open the folder where the file is located.

The Dashboard gives you the ability to easily access any files you might want to know about.

8 Close the grid.

9 Drill up to the originally displayed data by clicking the Drill Up arrow pertaining to the **Summary Data** region of the Dashboard.

10 In the **Top Extensions by Size** region, place the cursor over one of the bars and observe how sectional-specific information appears in a balloon.

11 In the **Top Extensions by Size** region, right-click and select **Export to Image**.

12 Save the image to a location on your desktop.

The graphic can now be used in a presentation or report.
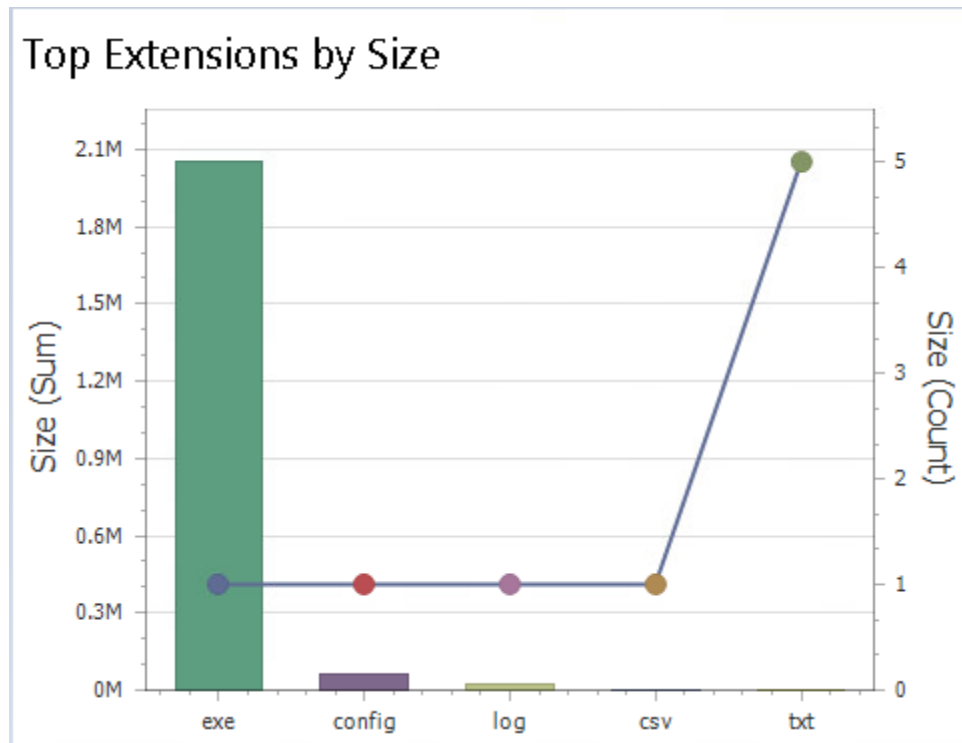
13 In the **Files Created by Year** region, double-click a year span and observe how the displayed data in the other regions is updated to data pertaining to the selected year.

14 Right-click the selected year span and select **Clear Master Filter** to have the graph span all of the years again.

15 In the **Files Modified by Year** region, double-click a year span and observe the change in the displayed data in the Dashboard.

16 Place the cursor over a bar in the **Top Extensions by Size** region, right-click and select **Print Preview**.

17 Observe that in addition to printing, you can save the graph as a PDF or email the graph.

18 Close the Print Preview page.

4.3   Using the Tree Map

The Tree Map lets you view graphical representations of hierarchical file system data and in the process, gain insight very quickly.

1   From the Dashboard, click **Load from Database**.

2   Browse to select the file system scan you want and double-click it.

3   Click **Tree Map**.
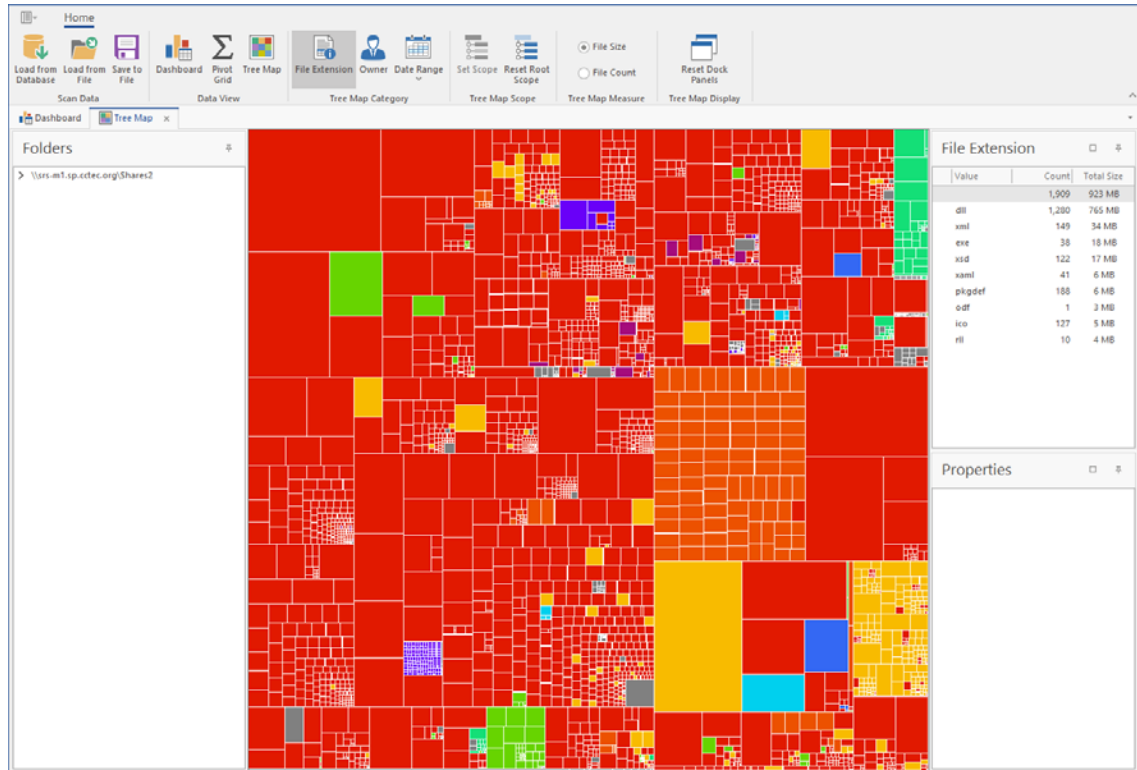
4   Observe how the Tree Map is presented according to file extension type with the specific color assignments detailed in the **File Extension** region.

Each of the squares in the Tree Map represents a single file in the scanned storage resource. The squares are represented according to the file size, relative to all of the other files in the scan.

5   Click one of the larger squares 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 where the file resides.

This gives you the ability to easily access any files you might want to know more about.

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 by a magenta colored outline.

9   Right-click a folder and select **Set Scope** to drill down and view the contents of the folder in the Tree Map.

10   In the **Folders** region, right click the listed scan and select **Reset Root Scope**.

11   Click **Owner**.

The Tree Map now displays files according to owners.

12 Using the color classifications in the **Owner** region, observe which users are storing the largest files.

13 Click **Date Range** > **Access Date**.

14 Observe how the data in the Tree Map is now classified according to when files were last accessed.

This is one of the most powerful means in File Reporter of quickly determining the relevance of data being stored on network storage resources.

4.4 Using the Pivot Grid

The Pivot Grid gives you the ability to visually analyze data according to combinations of variables.

1 From the Dashboard, click **Load from Database**.

2 Browse to select the file system scan you want and double-click it.

3 Click **Pivot Grid**.
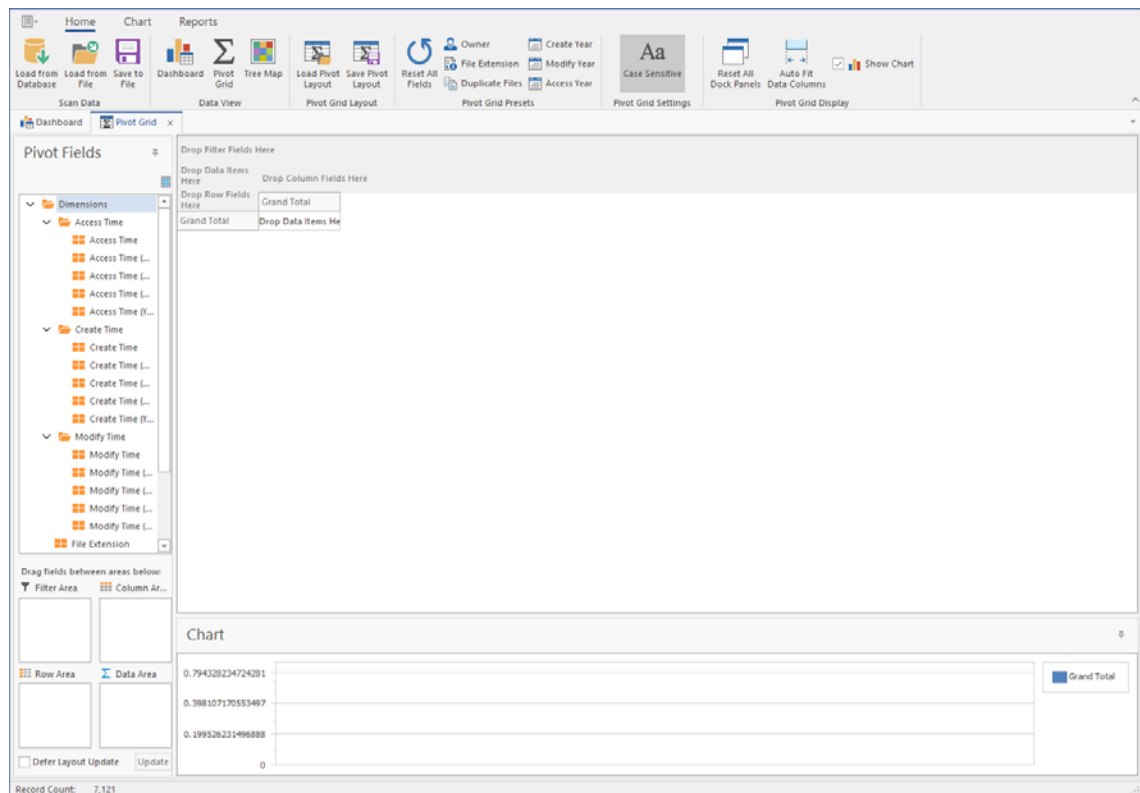
4 From the **Pivot Fields** region, select **Size** (residing in the **Measures** folder) and drag it up to the area marked **Drop Data Items**.

5 Again in the **Pivot Fields** region, select **Owner** and drag and place it in the area marked **Drop Row Fields Here**.

6 Observe the totals now calculated for the two data variables.
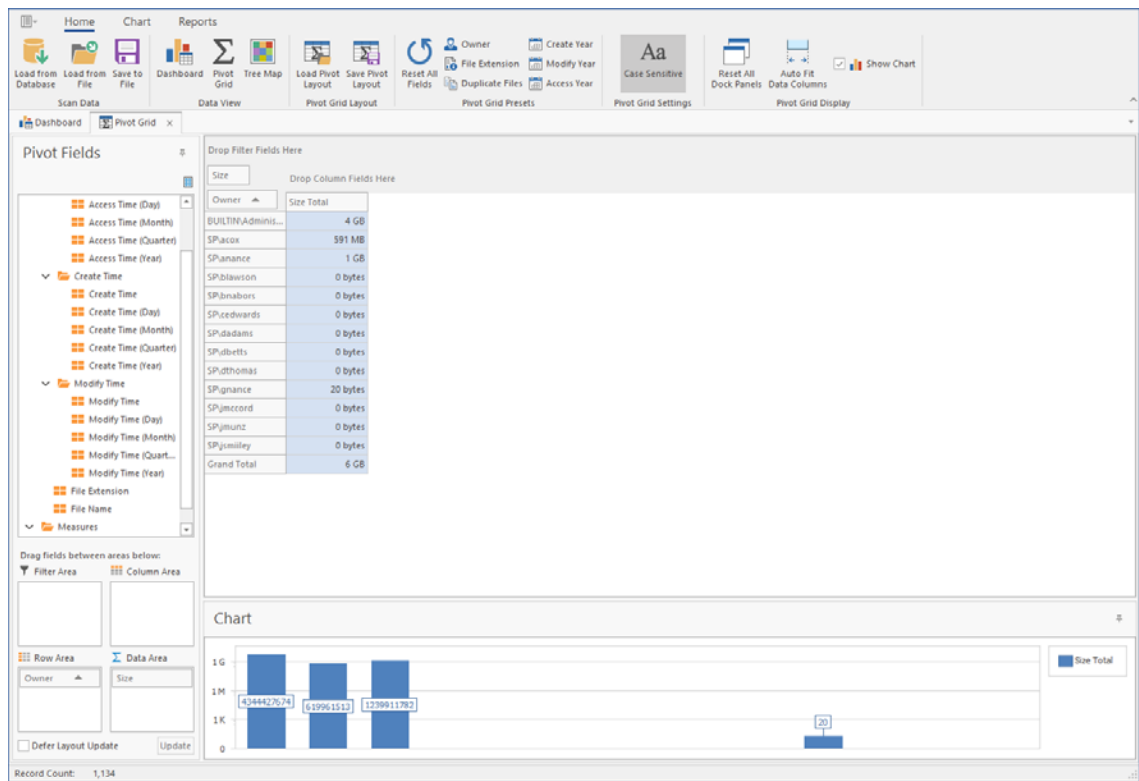
7   From the **Pivot Fields** region, expand **Access Time** to locate **Access Time (Month)** and drag it up to the area marked **Drop Column Fields Here**.
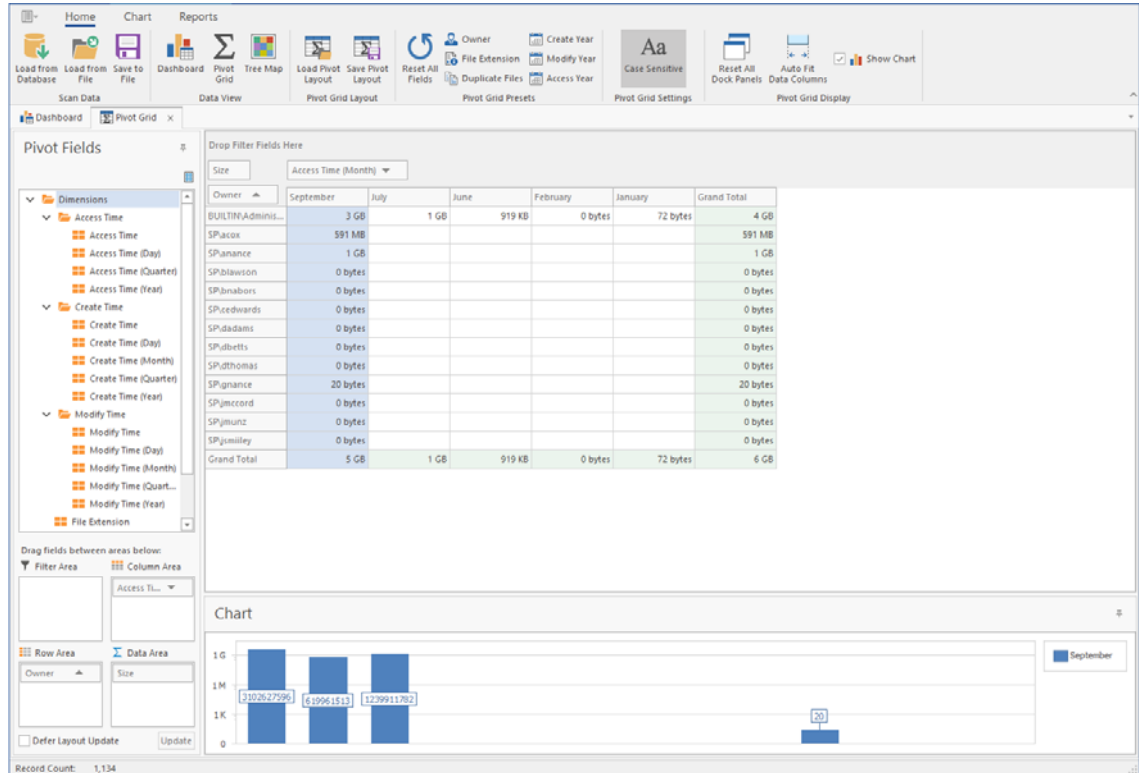
8   Click the filter icon from the **Access Time (Month)** filter that you just placed.
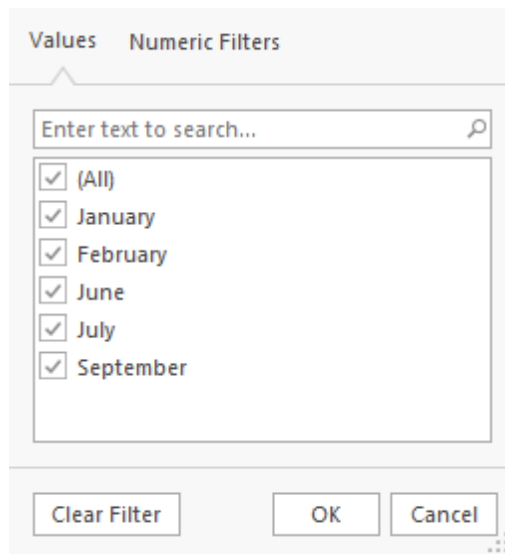
9 Deselect all but one month and **OK**.

10 Click the **Chart** tab.

11 Highlight three consecutive rows to view the data analyzed as graphs in the **Chart** region.
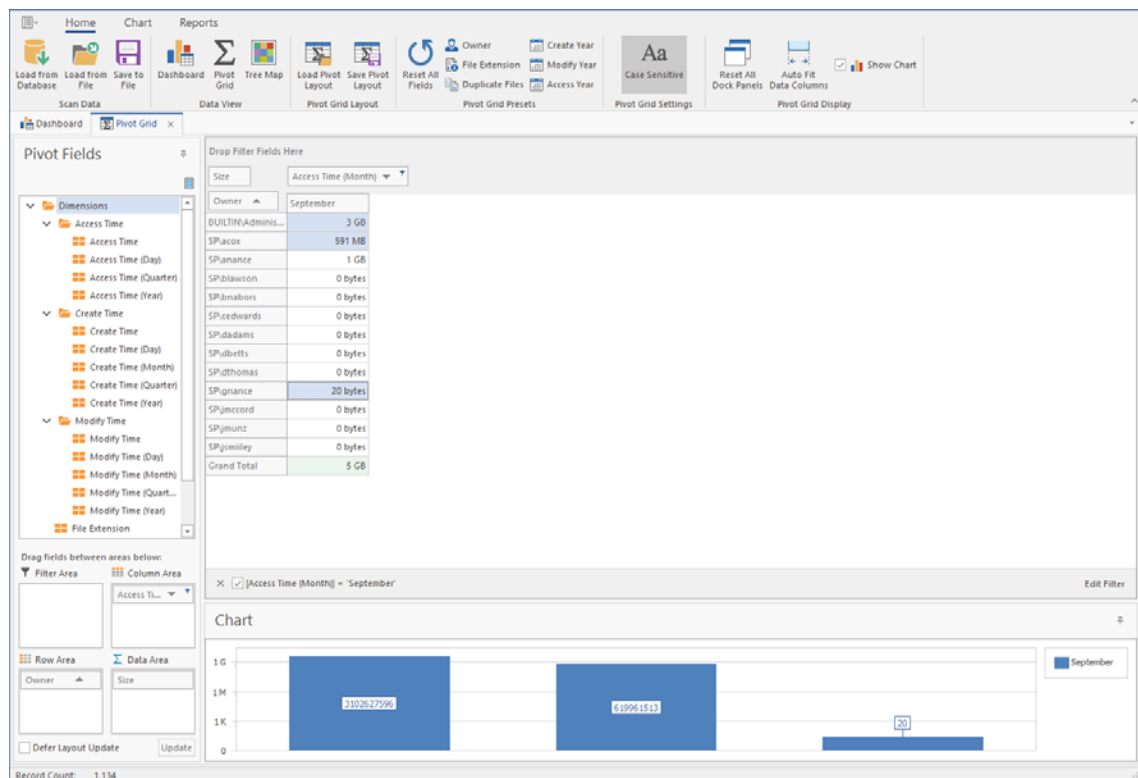
12 From the **Chart Presets** options, experiment with different chart views of the data.

13 Double-click a selected cell from the table to access the Scan Data Details table specifying all of the files accessed by that user during that month.

14 From the Scan Data Details table, right-click a file and select **Open Folder** to open the parent folder of the file.

With the parent folder open, you can examine the file, move it to another location, or delete it.

15 Click the **Reports** tab.

16 Again, highlight three consecutive rows.

17 Click **Generate Report**.

18 Observe that you have the option to print the report or export it to a number of different formats.

5 Report Designer

Report Designer allows you to design reports locally from a Windows workstation while offering significantly more reporting design capabilities to those of the browser-based administrative interface.

5.1 Using the Report Designer

NOTE: You must be a member of the SrsAdmins group to design reports using Report Designer. The name SrsAdmins is the default name (which you can change) of the File Reporter administrators group created during the installation of the Engine.

1 From the **Start** menu, launch the **File Reporter 4.1 Report Designer**.

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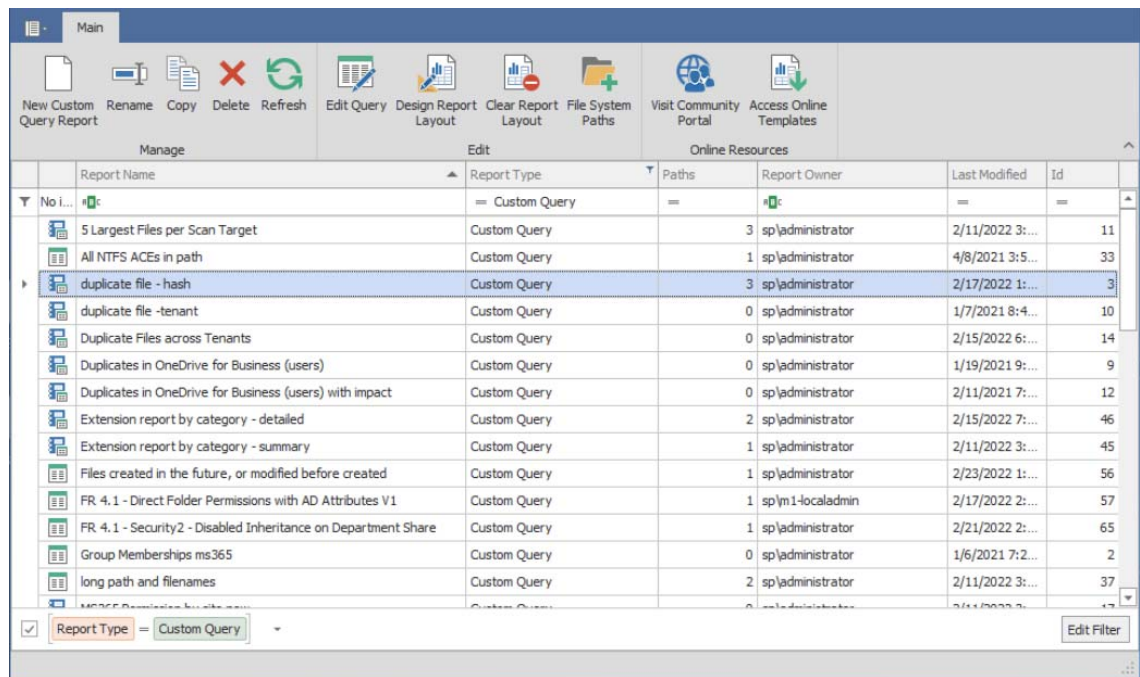
3 Familiarize yourself with the Report Designer interface.

All Custom Query Reports are listed. Those that have *not* been designed using the Report Designer Layout interface are displayed with the green-bannered text icon, while those designed using the Report Designer have the blue notebook icon.

All of the options on the toolbar are available by selecting a report and right-clicking.

New Custom Query Report: Click to create a new Custom Query Report by launching the Query Editor.

Rename: Click to rename a selected Custom Query Report.

Copy: Click to create a copy of the report definition of a selected report.

Delete: Click to delete a selected Custom Query Report.

Refresh: Click to refresh the list of saved reports.

Edit Query: Click to edit the SQL commands pertaining to a selected Custom Query Report through the Report Designer's Query Editor.

Design Report Layout: Launches the Report Designer Layout interface. For more information on the Report Designer Layout interface, see Section 5.5, "Custom Query Report Layouts," on page 28.

Clear Report Layout: Click to clear custom design settings created using the Report Designer Layout interface. This is a nonreversible procedure.

Visit Community Portal: Click to access the File Query Cookbook website.

File Query Cookbook is a community website for sharing Custom Query reports and layouts created through the Report Designer. You can utilize a shared Custom Query report by simply copying the SQL commands in a shared Custom Query report "recipe." You can also download shared layouts created through the Report Designer.

Access Online Templates: Click to directly access 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.

Filter: The cell directly below the **Report Name** column heading is a report filter that lists saved Custom Query reports according what you enter. For example, if you were to enter the word `access`, the listed Custom Query reports would be only those with the word `access` in the report name.

[Report Type]: By default, this check box is selected so that it displays only Custom Query Reports, which are the only reports that can be designed using the Design Editor. You can deselect the check box to view all of your reports.

Edit Filter: Use this button to further refine your filtering using Boolean operators.

5.2 Creating a Report

NOTE: For details and examples of the supported database functions, tables, and views that you can utilize in Custom Query reports, refer to the *Micro Focus File Reporter 4.1 Database Schema and Custom Queries Guide*.

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1 Click **New Custom Query Report**.

2 Specify a descriptive name, then click **Create**.

The Report Designer Query Editor is launched.
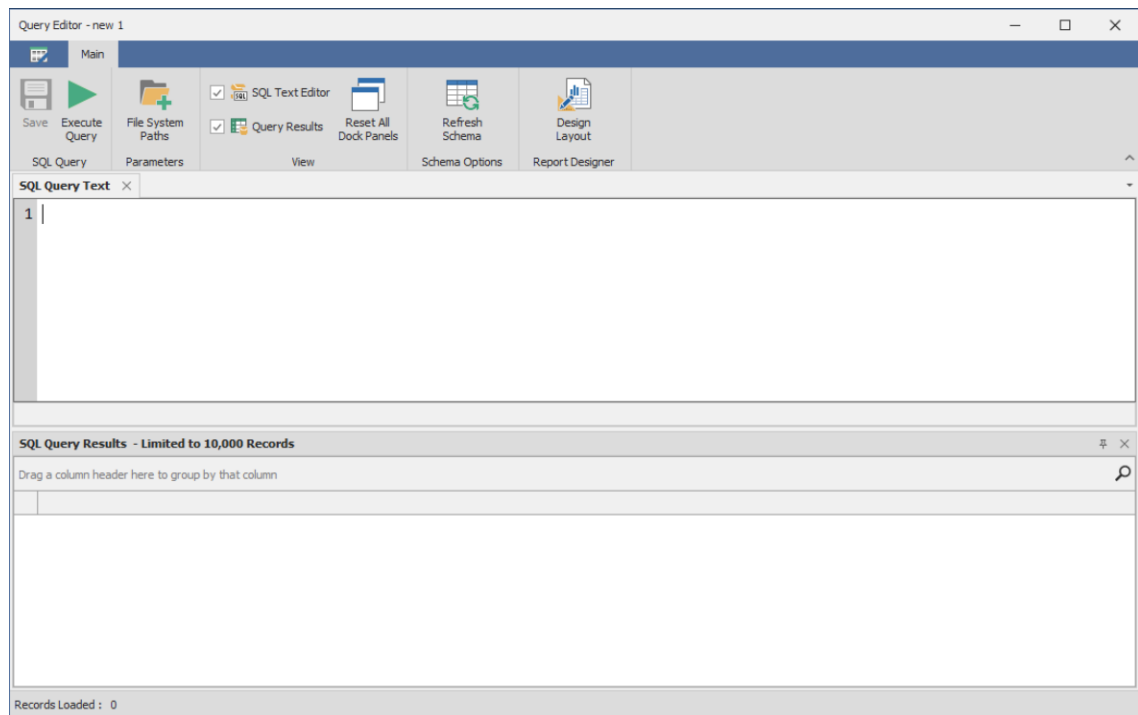
3 Update the query as desired in the text editor.

4 Click **Execute Query** to get a preview of the Custom Query Report.
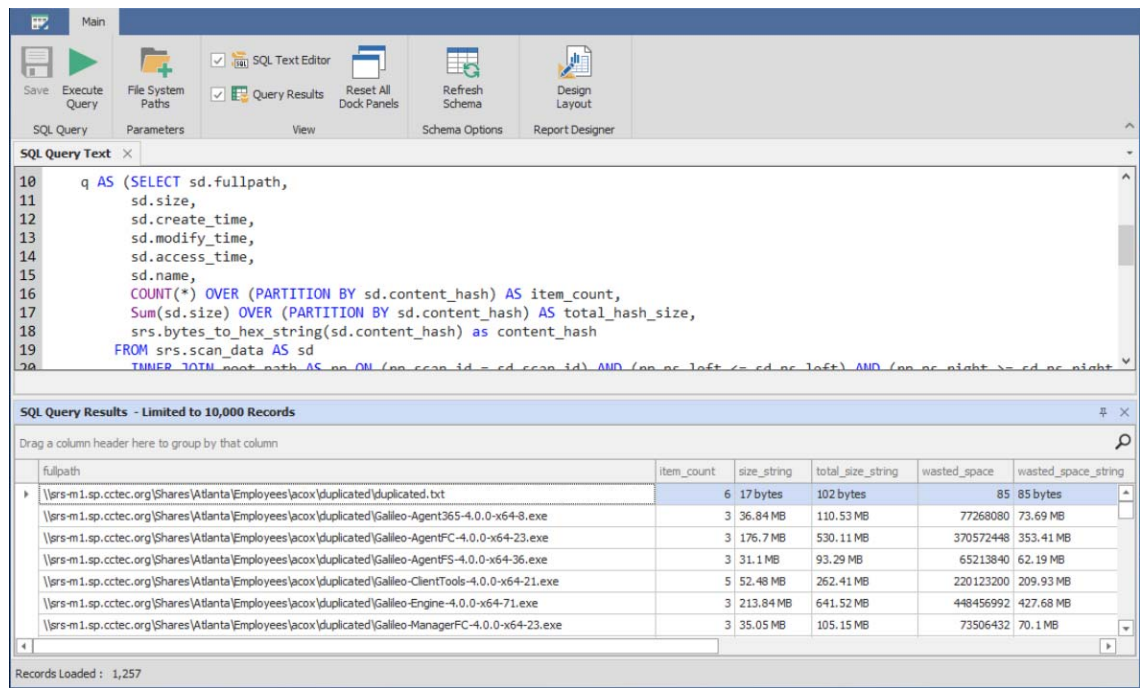
5 Click **Save**.

6 Close the Query Editor.

5.3   File System Paths Selector

5.3.1   Overview

File Reporter 4.1 introduces a File System Paths selector for use with Custom Query reports.

This feature provides the following benefits for Custom Query report design:

+ An easy-to-use approach for changing target paths for complex Custom Queries.

+ A convenient interface for adding or changing target paths for existing Custom Queries without needing to modify any SQL text.

+ A powerful interface for advanced report users to create manageable report templates for Data Owners.
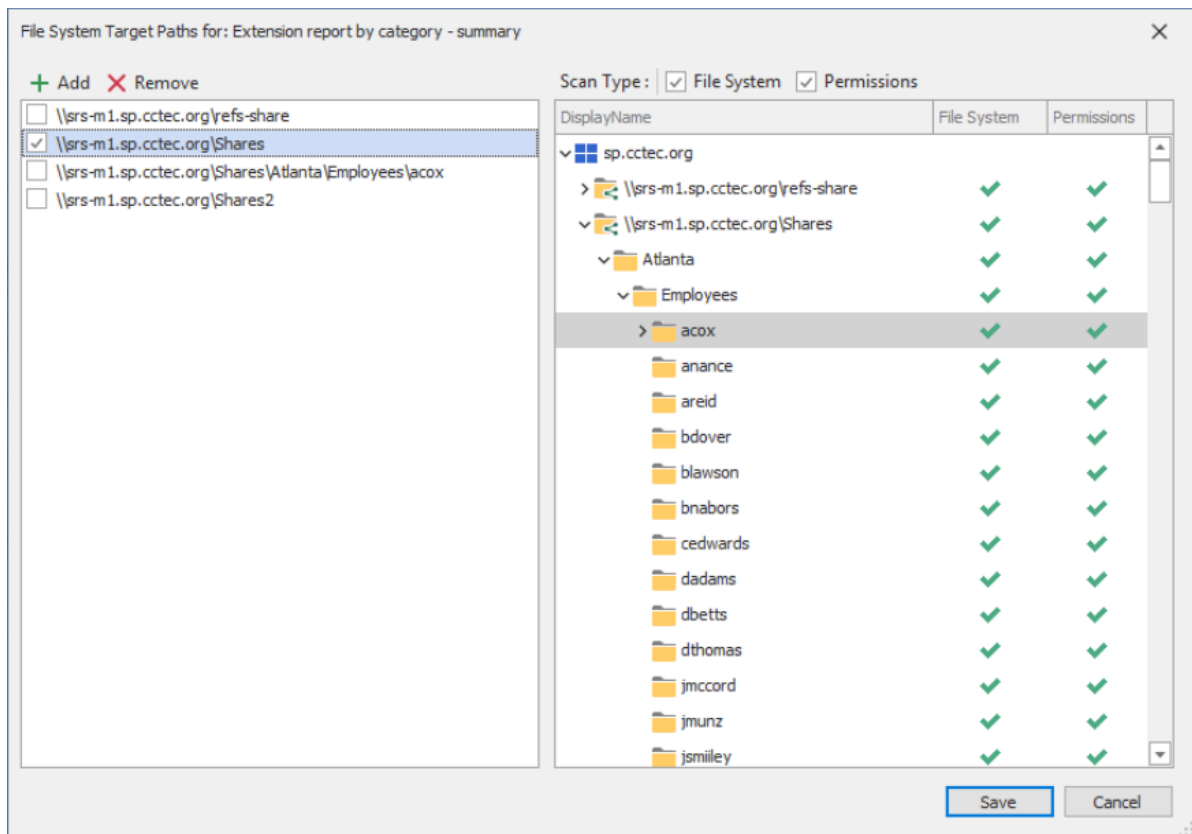
Add: Click to add selected path from the tree list to the target paths list.

Remove: Click to remove a 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: Click to save the changes made to the target paths list.

Cancel: Click to 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 box.

   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.

   ◆ 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 assign File System paths from a Custom Query Report definition:

1 Open the File System Target Paths dialog box.

For details, see Step 1 in Section 5.3.2, "Assigning Paths to a Report Definition," on page 25.

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 Types" on page 26
- ◆ "Filter by Scan Type" on page 26

Understanding Scan Types

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

The paths tree list is populated from 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.

Note that the path indicator does not determine the type of Custom Query itself, but rather provides feedback indicating which scan data is currently 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 only defined around data collected solely from a File System or Permissions scan, it may be useful to filter the paths tree list by that scan type.

By default, both scan types are enabled and paths from the latest scans of both types are displayed.

To filter by a specific scan type, simply deselect the scan type you wish to hide. For example, to only display paths from current Permissions scans:

1 Deselect the **File System** check box at the top of the paths tree list.

2 Verify the **Permissions** check box remains selected.

5.3.5 Understanding the Relation to Custom Queries

File System Target Paths provides a list of target paths for the associated Custom Query. How the Custom Query makes use of these paths is determined by the associated SQL queries themselves.

During execution of a Custom Query within the tools provided by File Reporter, a temporary table is injected into the SQL session providing the select paths along with metadata which the SQL query can make use of for shaping the query results based on those paths.

For more information on File System Target Paths injection with Custom Query reports, see File System Target Paths in the *File Reporter 4.1 Custom Query Guide*.

5.4 Report Layout Templates

5.4.1 Saving the Layout as a Template

When working with the Report Designer, you might create a layout design that you want to utilize as a template for future Custom Query Reports. You can do so using **Save As File**.

1 In Report Designer, open the Custom Query Report whose design you want to save as a template.

2 Select **Save** > **Save As File**.

3 Name and save the layout.

The layout is saved 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 the sample report layouts and SQL queries that are available from the File Query Cookbook website. Both the SQL queries and report layouts can be customized as needed.

You can access the File Query Cookbook at https://filequerycookbook.com.

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1 In Report Designer, open the Custom Query Report you want to design using a saved template.

2 Click **Open**, then select the `.repx` file you want to use for designing your report.

The report is updated with the design from the `.repx` file.
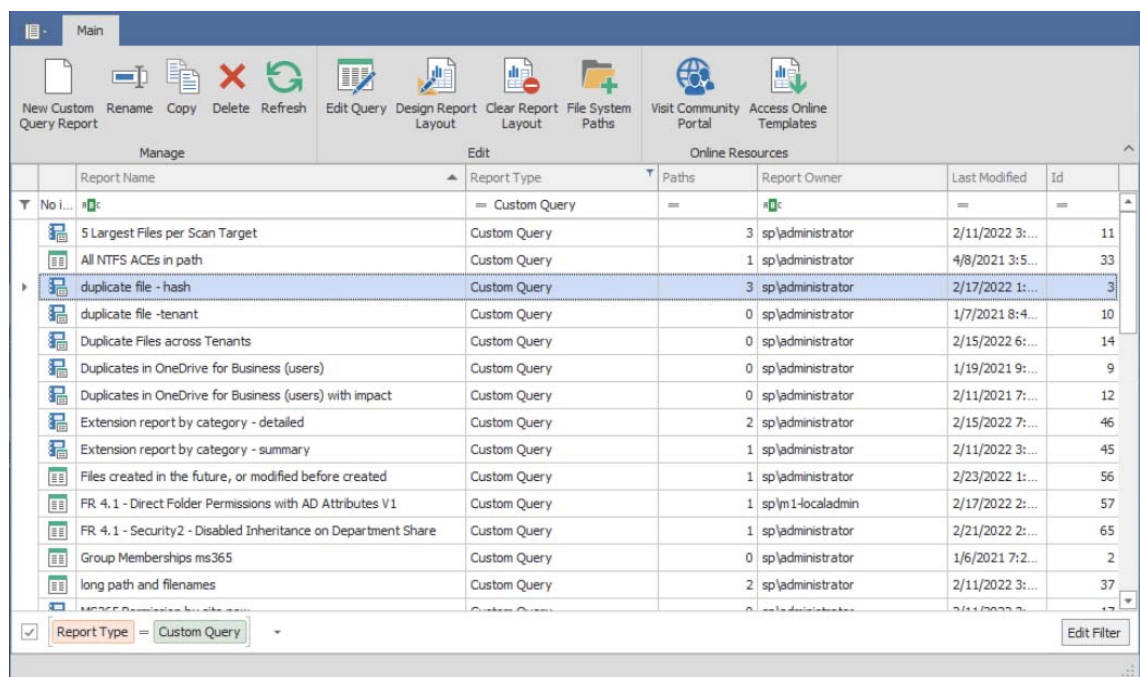
5.5 Custom Query Report Layouts

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


NOTE: This exercise introduces you to some of the very basic design features of the Report Designer. Through familiarizing yourself with the basic features, you will become proficient enough in the interface to try more advanced features.

For a more detailed explanation of features in the Report Designer, refer to the Report Designer for WinForms section referenced in this documentation: https://devexpress.github.io/dotnet-eud/interface-elements-for-desktop/articles/report-designer.html.

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1 From the listed Custom Query Reports, select the one you want to design.

2 Click **Design Report Layout**.
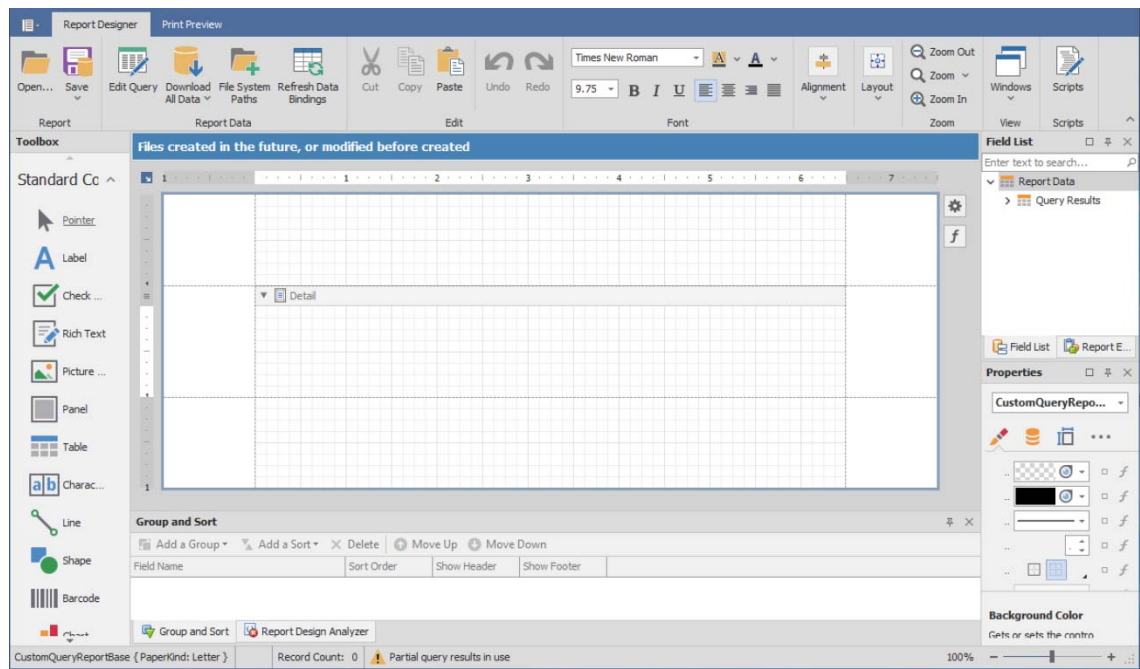
3 Create a report header.

  3a Place the pointer in the upper section of the layout grid.

  3b Right click and select **Insert Band** > **Report Header**.

    A new ReportHeader band appears on the grid.

4 Resize Page 1 and add a page break.

  4a Place the 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.
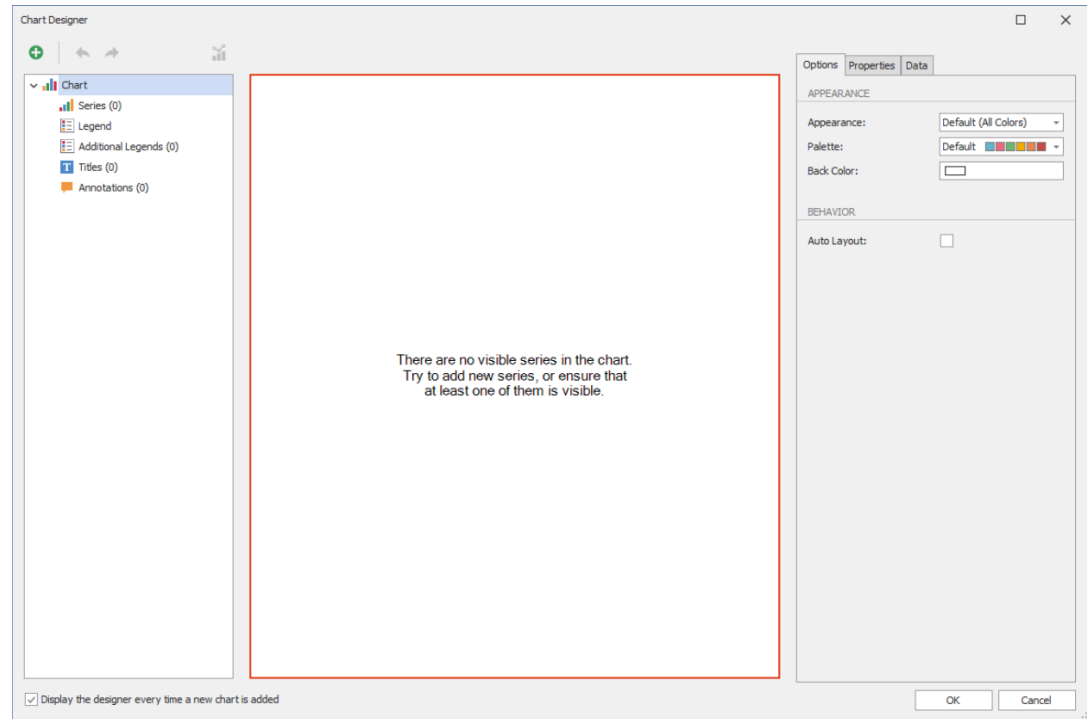
    For example, to fill the first page, you might extend the border down to the 8" mark.

  4b From the **Standard Controls** region, click and drag a **Page Break** to the bottom of the band.
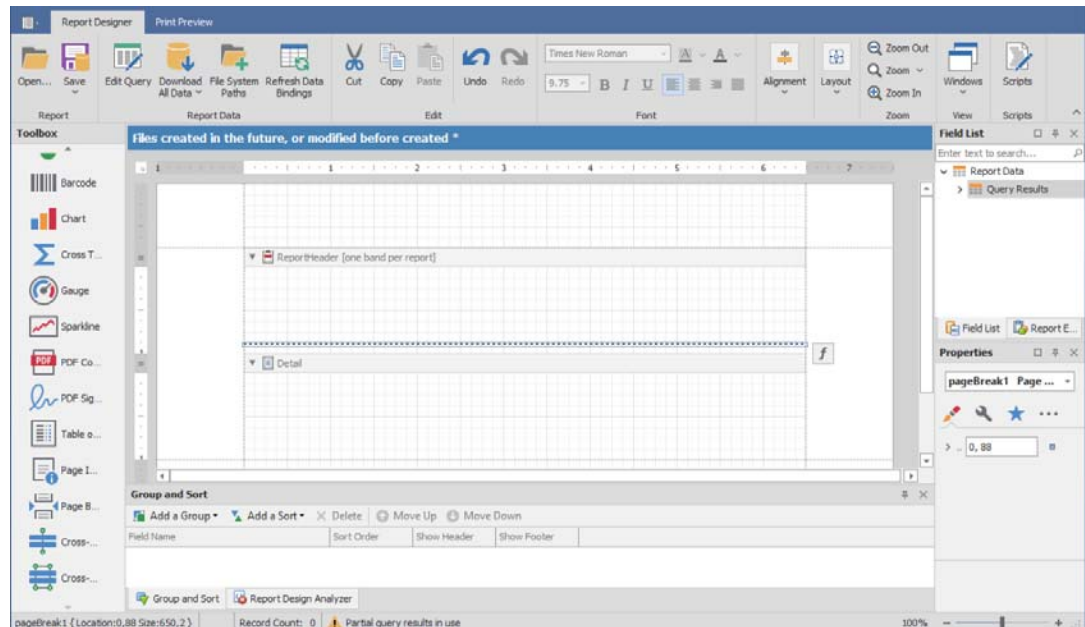
5 Insert and design a chart.

5a From the **Standard Controls** region, click and drag a **Chart** to the band.

The Chart Designer is launched.

5b In the Chart Designer, below the **Chart** menu, click the **+** that pertains to the **Series** option and select the **Bar** option.
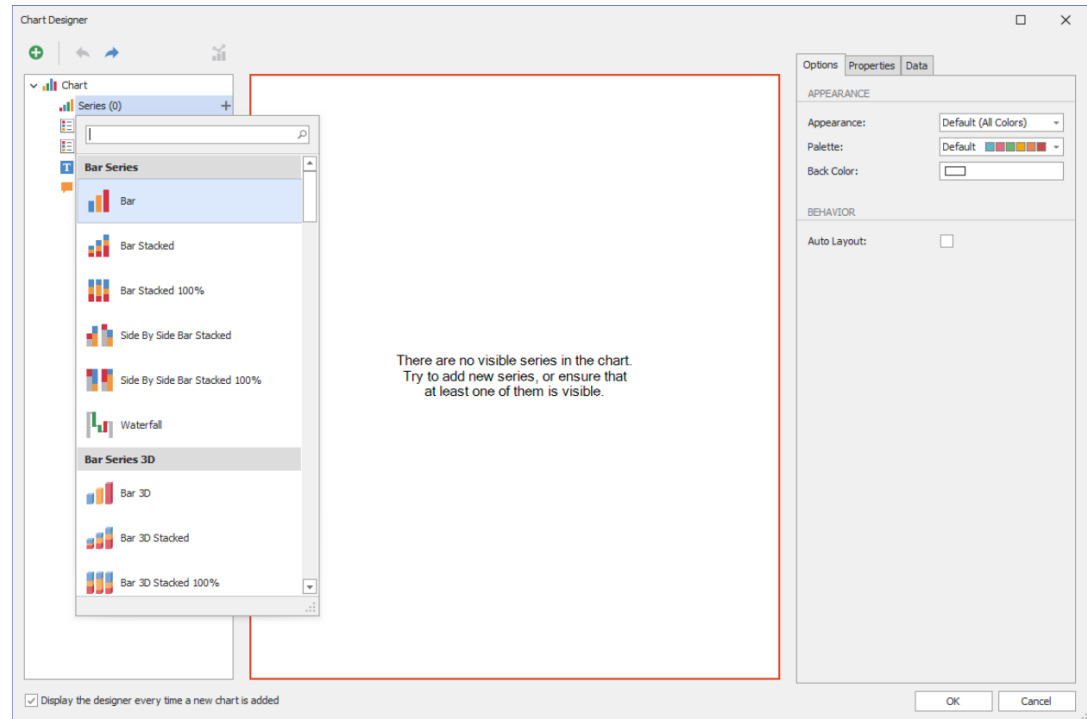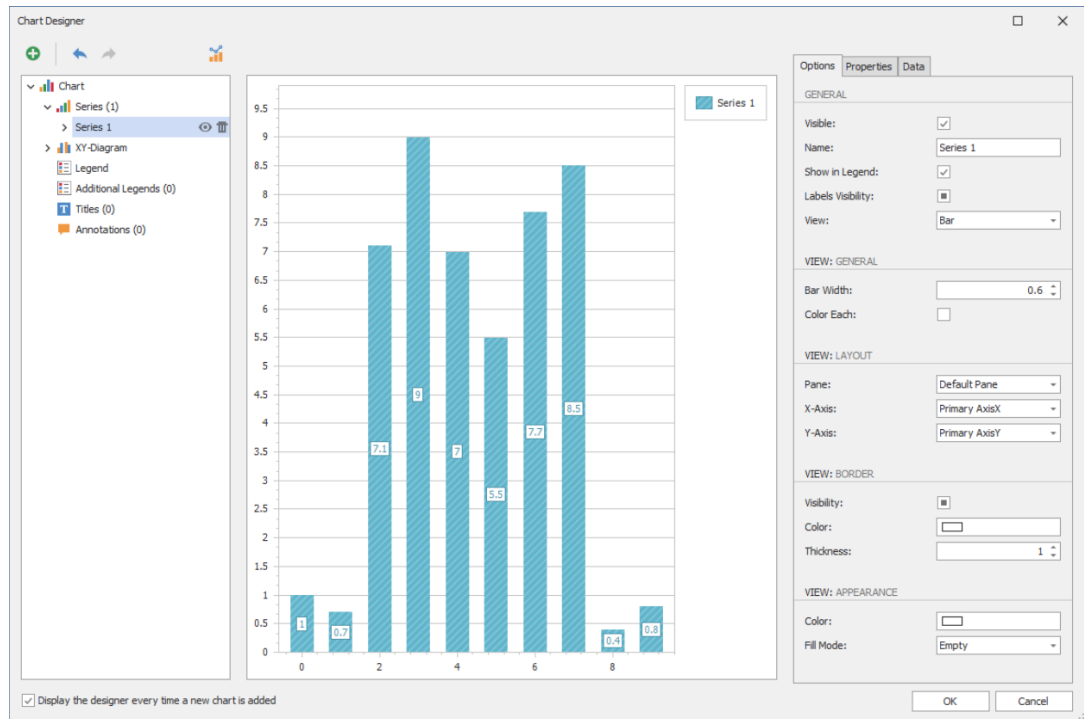
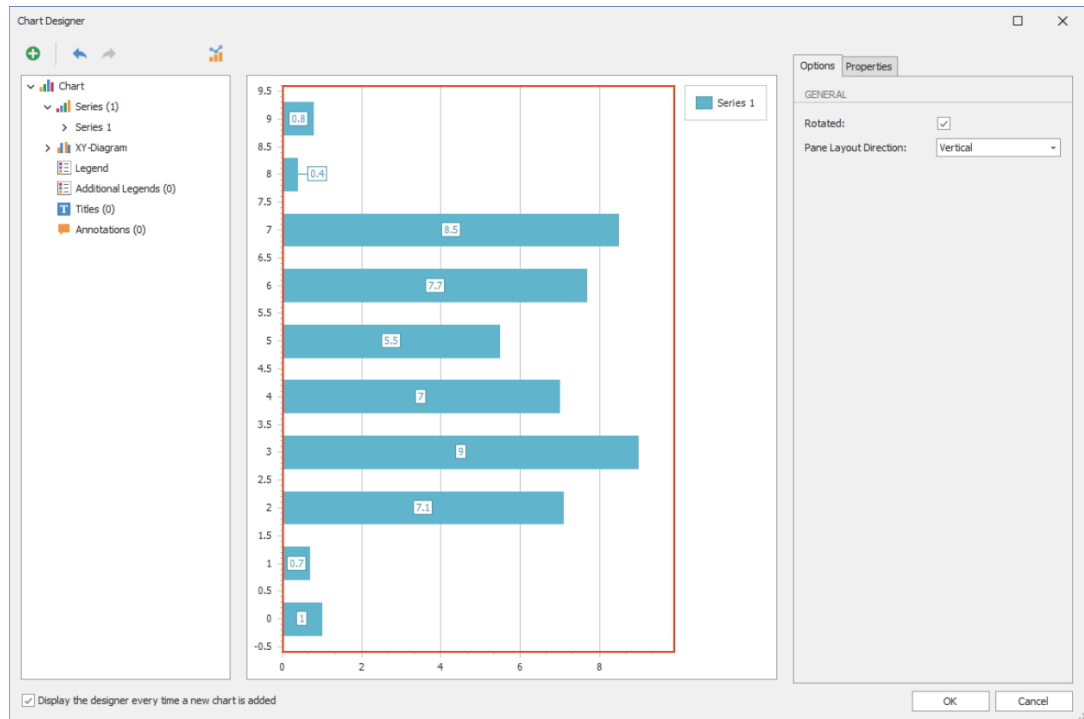**5c** Click the **Date** tab and expand **Query Results**.

5d Click and drag **Category** to the **Argument** cell.

5e Click and drag **cat_size** to the **Value** cell.

5f Click the **Options** tab and in the **Name** field, replace `Series 1` with `Category Size`.

**5g** Below the **Chart** menu, click the **XY-Diagram** option.

5h In the **Options** tab, select the **Rotated** check box.

5i Below the **Chart** menu, select **Titles**, click the **+**, and select **Title**.

5j In the **Options** tab, in the **Lines** field, replace `Chart Title` with a more descriptive name. For example, `File Extensions by Category`.

5k Below the **Chart** menu, select **Category Size**.

5l Click the **Properties** tab, scroll down and under the **Elements** heading and expand **View**.

5m Change the **Color Each** setting to **Yes**.
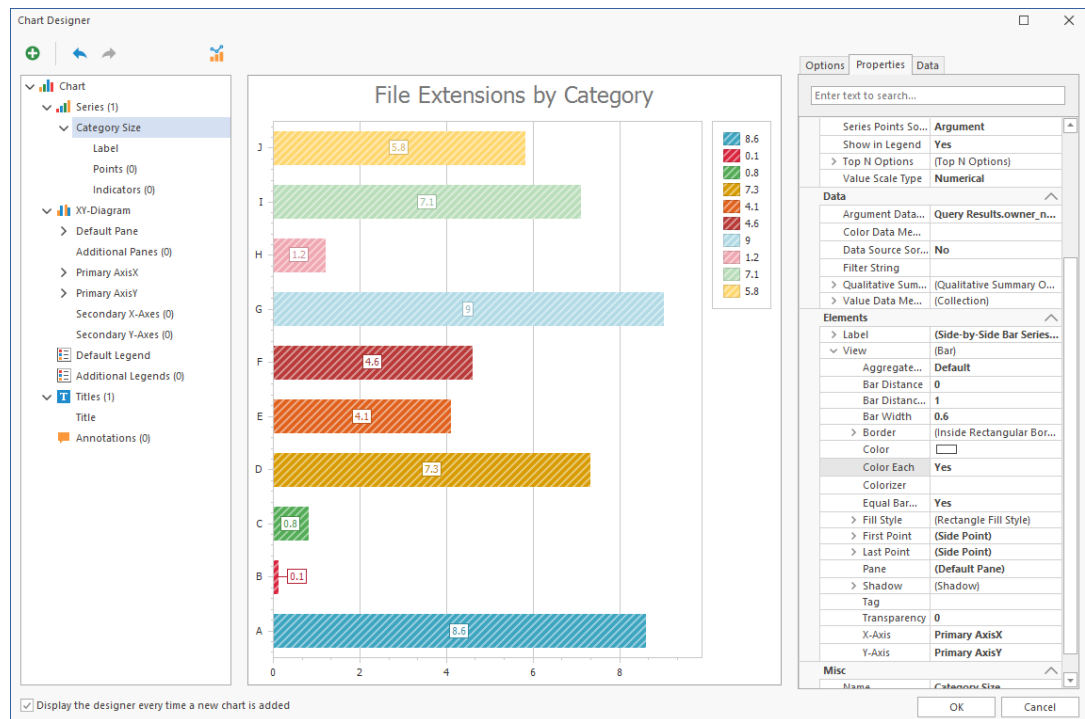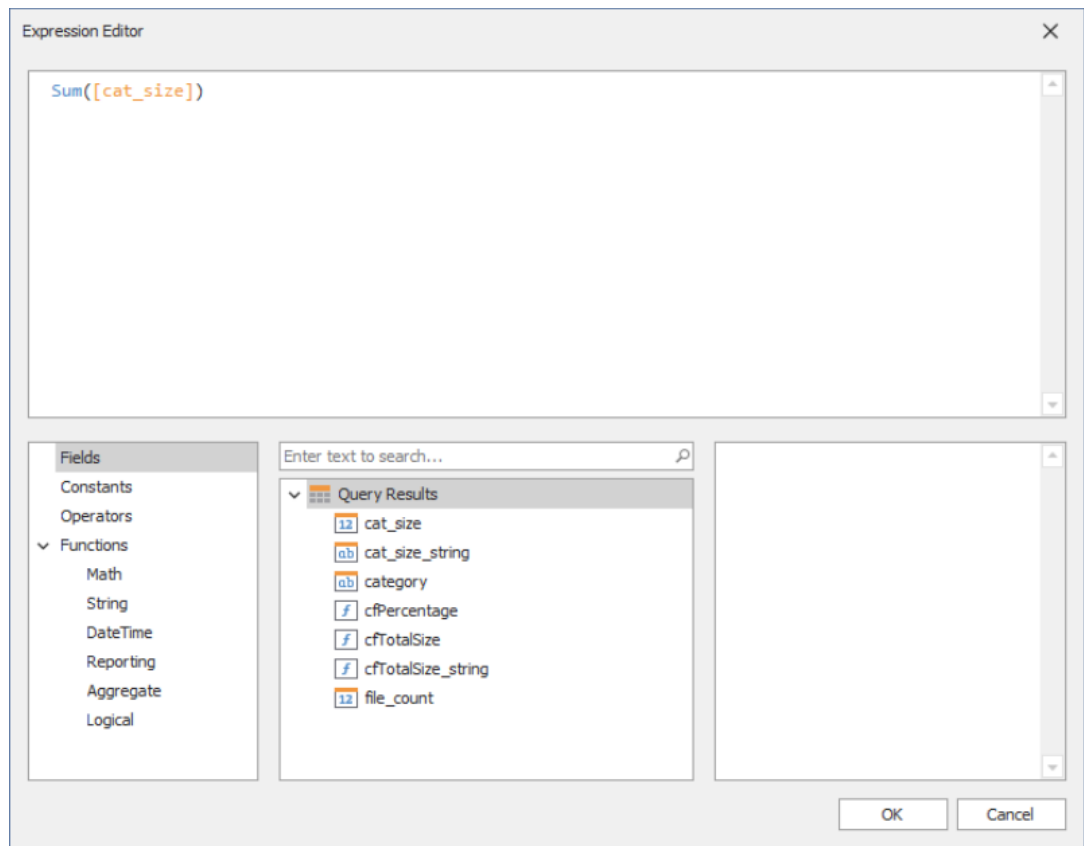
5n Click **OK**.
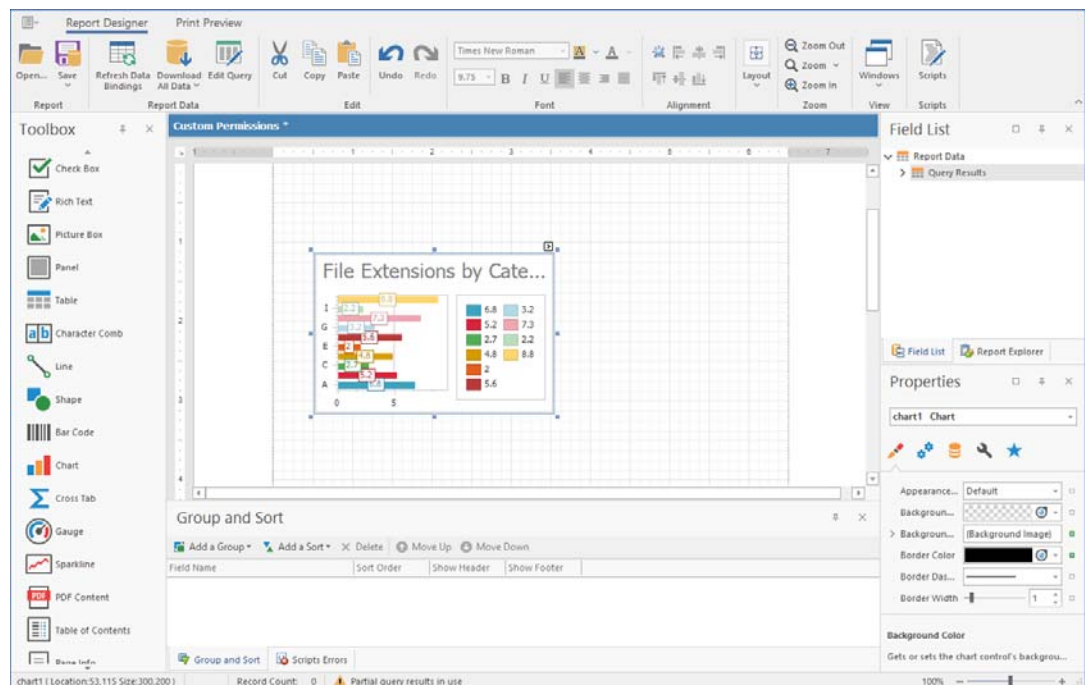
5o In the upper right-hand corner of the newly-placed chart, click the arrow to access the **Chart Tasks** menu and select **Run Designer**.

**5p** Click the legend and from the **Options** tab, deselect the **Visibility** check box so the legend no longer appears.

5q Click **OK**.

5r In the Report Designer, expand the view of the chart to take up more of the page.

6 Insert labels.

6a From the Toolbox, click and drag **Label** to a position centered below the chart.
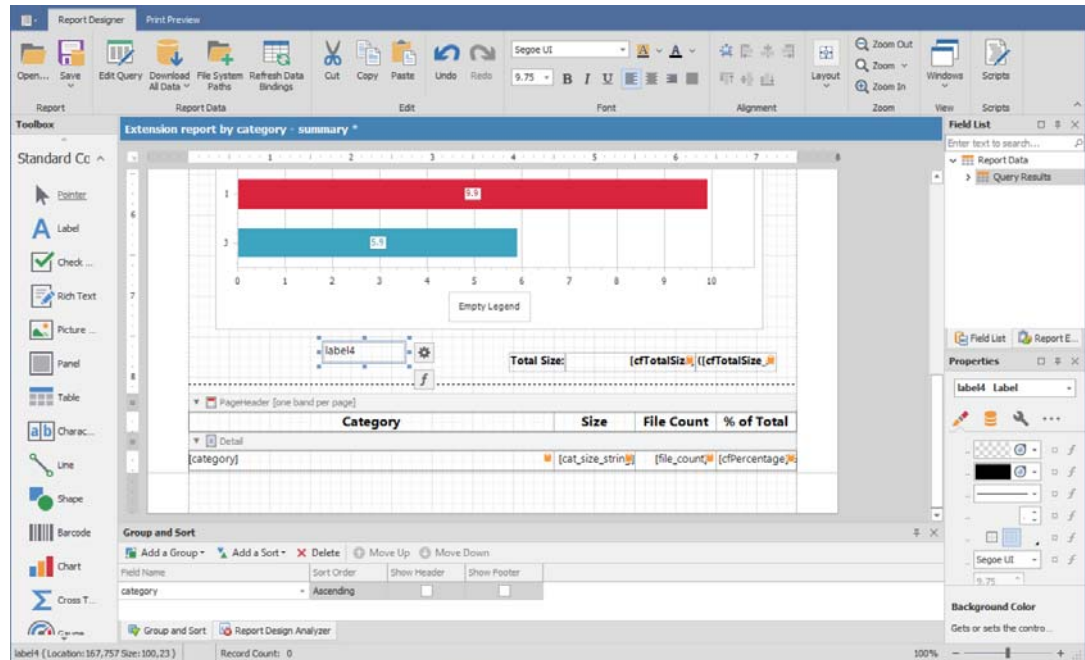
6b Double-click within the label and specify the label name.

For example, `Total Size`.

6c Adjust the font size and style to your preferences.

7 Create new fields.

7a From the **Field List**, expand the **Query Results**.

7b Right-click **Query Results** and select **Add Calculated Field**.

7c In the **Design** region of the **Property Grid** for `claculatedField1`, change the **(Name)** setting to `cfTotalSize`.

7d While still in the **Property Grid**, under the **Data** heading, click the ellipses (...) pertaining to the **Expression** field.

This launches the Expression Editor.

7e In the bottom-left column, select **Functions**.

7f In the empty field at the top of the middle column, type `sum` to locate the **Sum** function, then double click **Sum** to place the function in the top text box of the Expression Editor.

7g In the bottom-left column, select **Fields** and then in the middle column, double-click **cat_size**.

7h Click **OK** to save the new filed and close the Expression Editor.

7i Right-click **Query Results** and select **Add Calculated Field**.

7j In the **Design** region of the **Property Grid** for `claculatedField1`, change the **(Name)** setting to `cfTotalSize_String`.

7k While still in the **Property Grid**, under the **Data** heading, click the ellipses (...) pertaining to the **Expression** field.

7l In the top text box of the Expression Editor, type `Byte` so that **ByteString()** appears.

7m From the middle column, double-click **cfTotalSize** that you created earlier and click **OK**.

8 Place the new fields.

8a From the **Field List**, hold down the Control key, select the two new fields you just created, then drag them to the `Total Size` label on the grid.

**8b** Adjust the size so that both fields will appear to the right of the `Total Size` label.
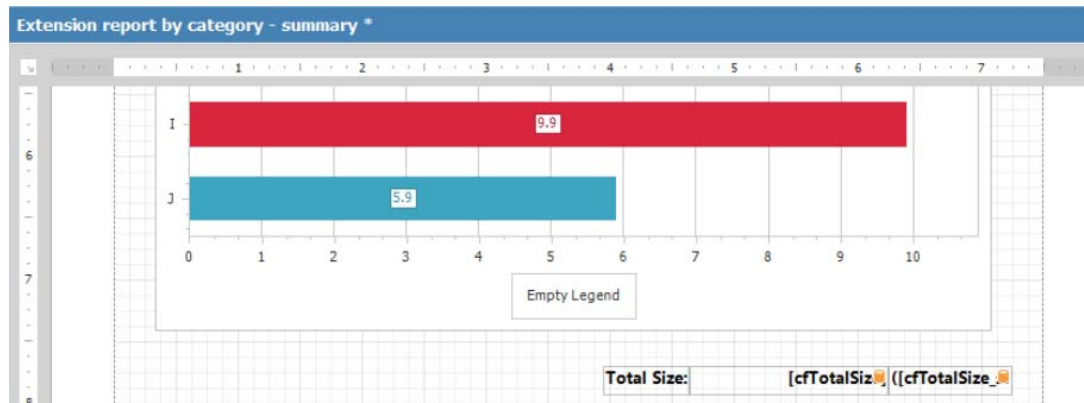
8c Adjust the font size and style to your preferences.

9 Preview the report.

9a Click **Download All Data**.

9b When the warning dialog box appears, click **Yes**.

9c Click the **Print Preview** tab to observe how the report is going to look at this point.

9d Make any desired format changes.

10 Create a header for Page 2.

10a Click the **Report Designer** tab.

10b In the Report Designer, scroll down below the page break so that you are working on Page 2 of the report.

10c At the top of the page, right-click and select **Insert Band** > **PageHeader**.

10d From the **Tool Box**, click and drag a **Table** to the location of the new page header.

10e Replace the names of the three new table cells with the following names:

- Category
- Size
- File Count

10f Select the `File Count` cell, right-click, then select **Insert** > **Column to Right**.

10g Change the table cell name to `Percent of Total`.

10h Resize the table cells to your preferred width.

10i Adjust the font size and style to your preferences.

10j 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`.

11a Right-click **Query Results** and select **Add Calculated Field**.

11b In the **Design** region of the **Property Grid** for `claculatedField1`, change the **(Name)** setting to `cfPercentofTotal`.

11c While still in the **Property Grid**, under the **Data** heading, click the ellipses (...) pertaining to the **Expression** field.

11d From the middle column of the Expression Editor, double-click **cat_string**.

11e Hit the space bar and then enter the following string: `* /100`

11f Complete the string by double-clicking **cfTotalSize** from the middle column of the Expression Editor.
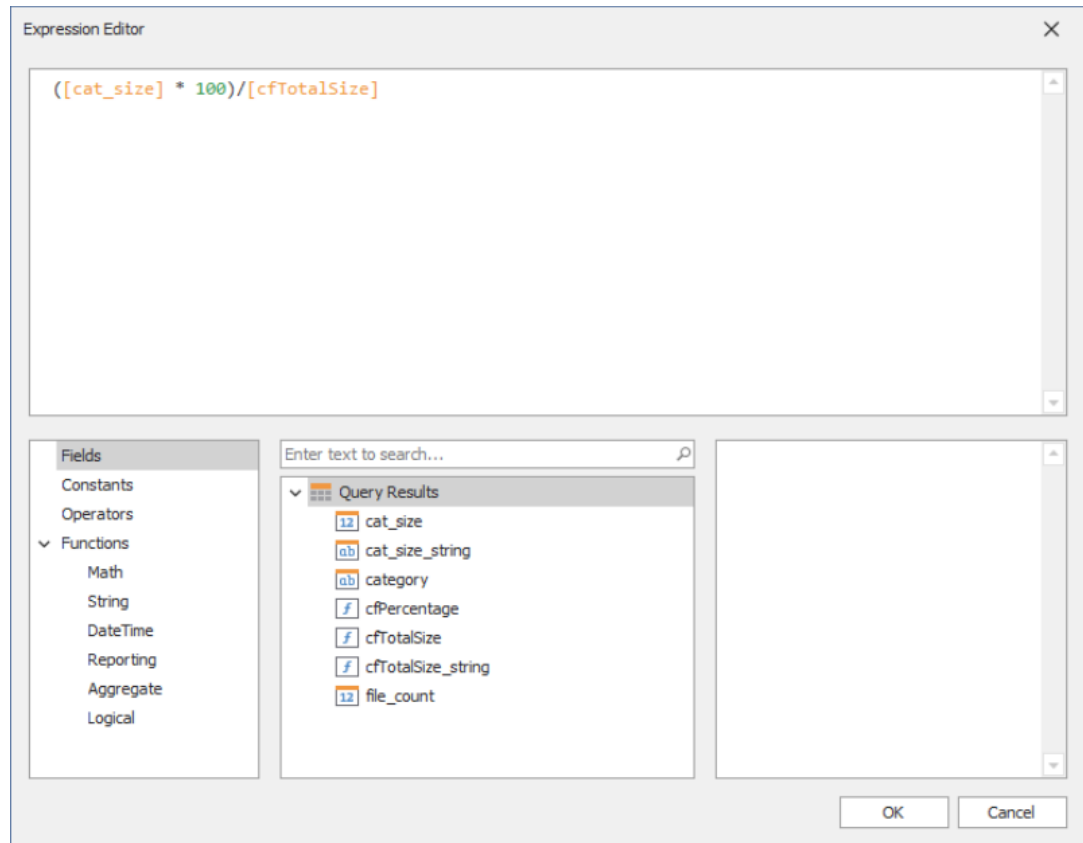
11g Click **OK**.

12 Insert the table content.

12a 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

12b Drag the fields to a location below the header.

12c Line up the tables cells with the headings.
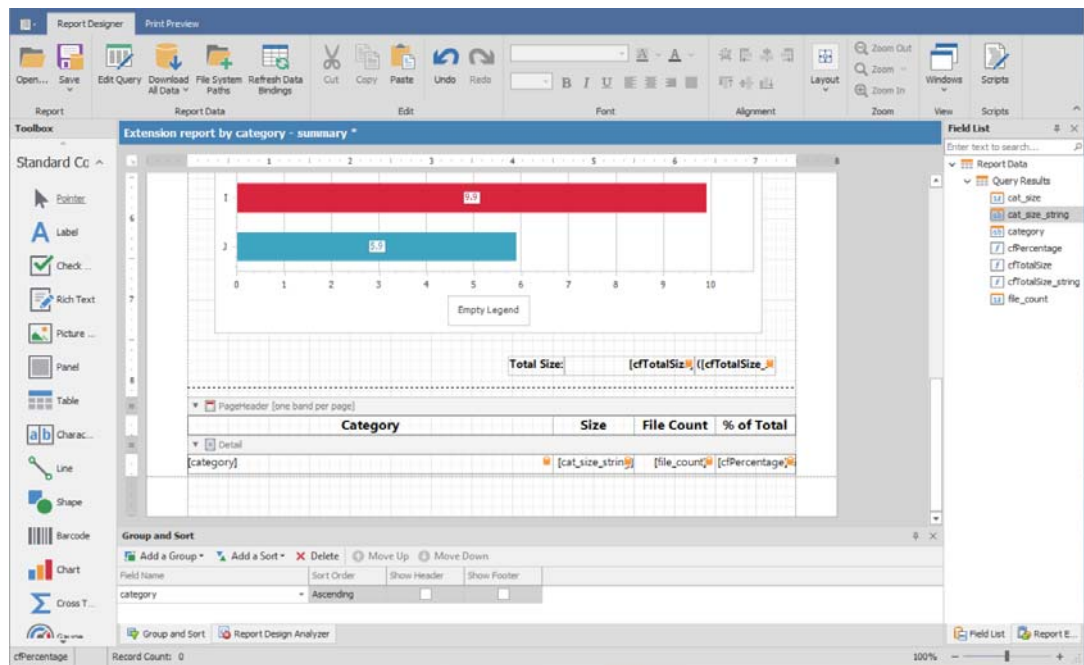
12d Click the **Print Preview** tab to view how the report will look.

12e Make any needed adjustments.

13 Click **Save** > **Save to Database**.

By saving the report to the database you enable the File Reporter Report Generator to use the report design for updated reports.

In addition to saving the report to the database, you can save the report as a file where you can import it into another file, such as a Word file or PowerPoint presentation.

6 Report Viewer

The Report Viewer lets you to view all stored reports locally from a Windows workstation. Because the Report Viewer utilizes the resources of the Windows workstation, rather than those of the Engine, the Report Viewer 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. For example, with the Report Viewer you can change the visual display parameters of the report.

1 Launch the File Reporter File Viewer application.
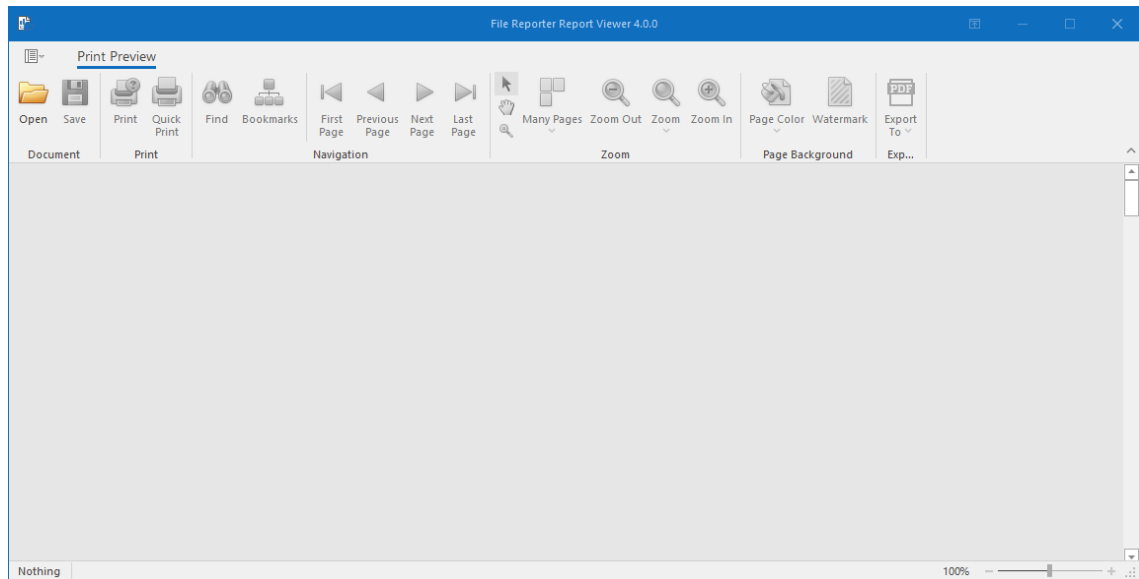
2 Click **Open**, browse to the location of your stored reports, then click **Open**.

To determine where stored reports are located, in the File Reporter administrative interface, select **Configuration** > **Stored Reports** and view the location in the **Stored Reports Folder** field.
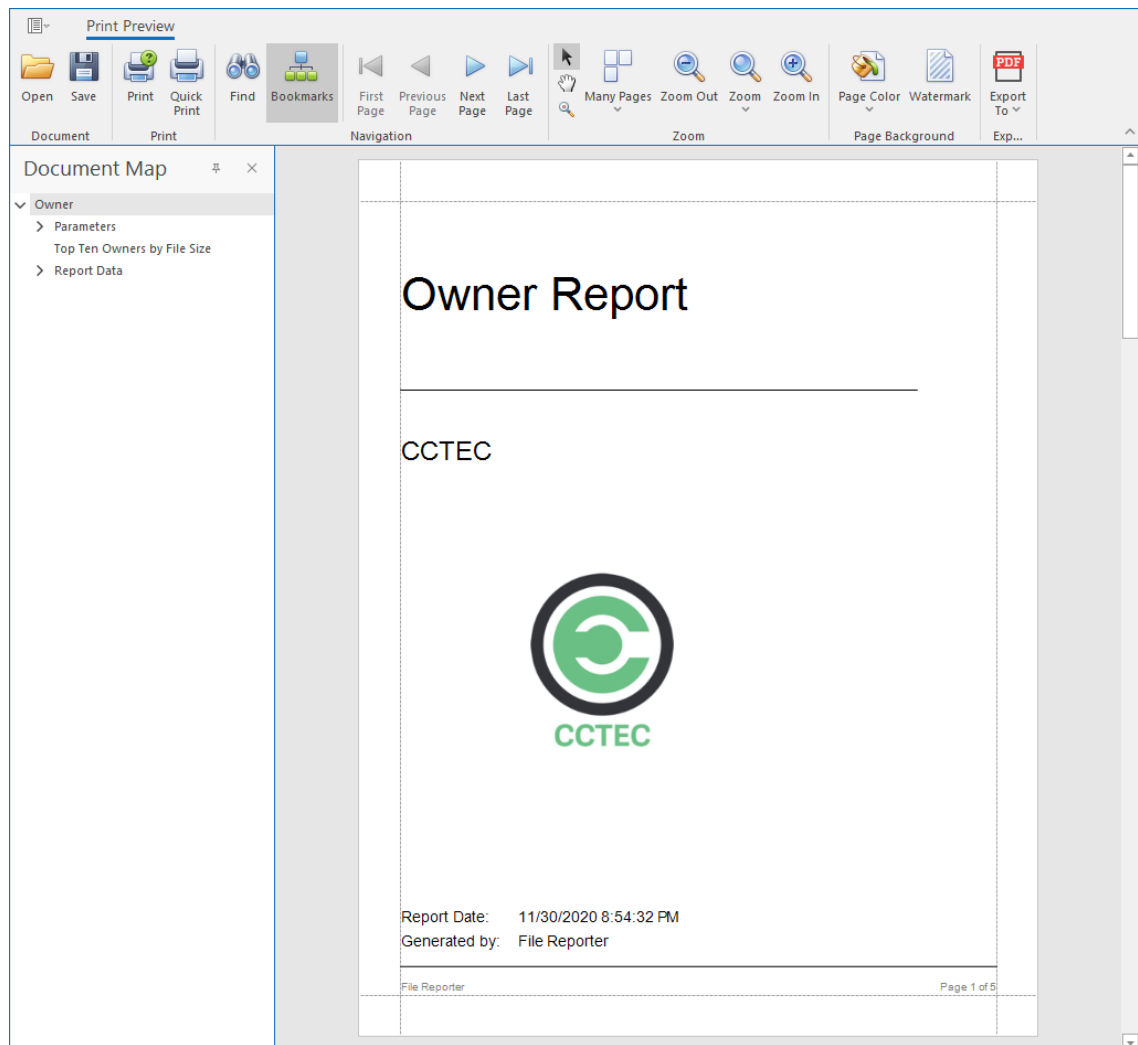
3 (Optional) Adjust the view to your preferences using the tools discussed below.

Bookmarks: Click to toggle between the report **Document Map** being displayed and not displayed.

Many Pages: Click to specify the number of pages you want displayed.

**Zoom Out:** Click to see more of the report page at a reduced size.

Zoom: Click to change the zoom level of the report preview.

Zoom In: Click to get a close-up view of the report.

Page Color: Click to change the color for the background of the report pages.

Watermark: Click to insert a ghosted text or image behind the content of each page of the report. A watermark is often used to indicate how a document is to be treated specifically.
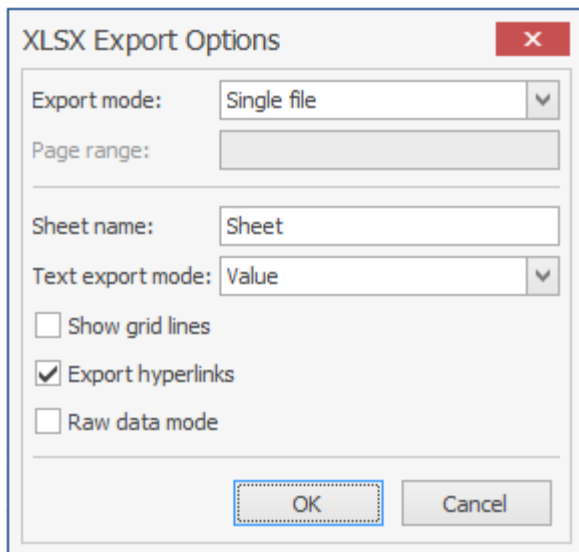
The Watermark dialog box lets you specify your watermark settings. Your watermark can either be in text or graphic form.
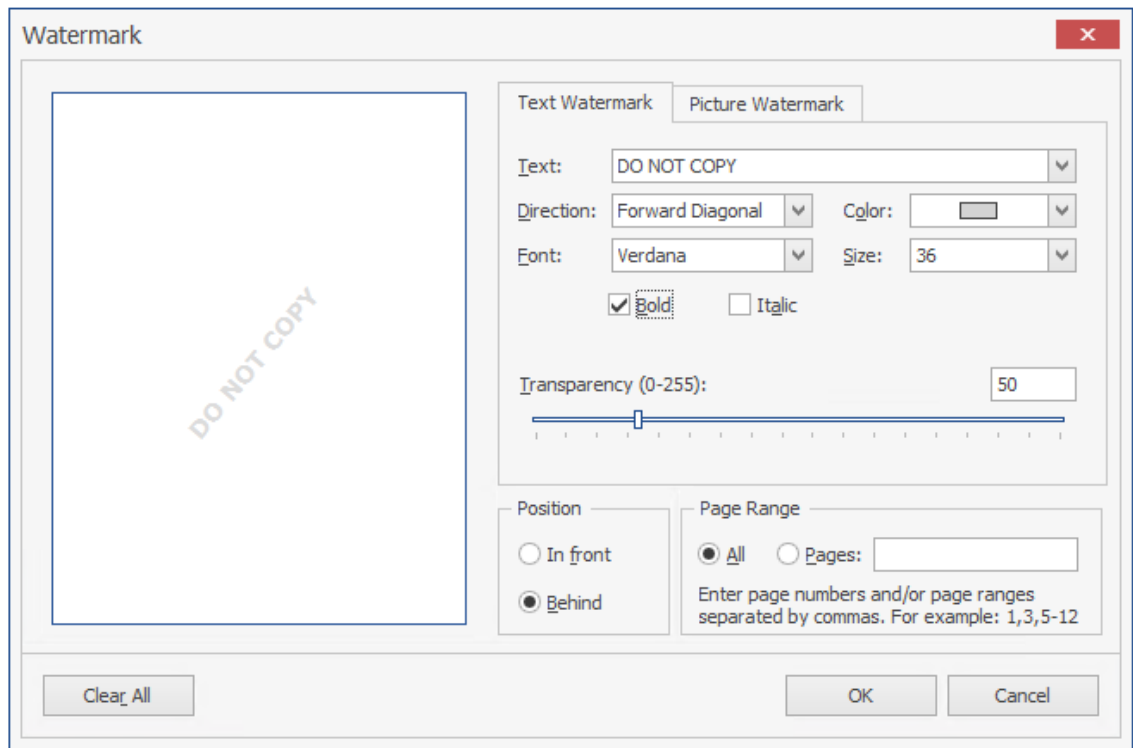
4 (Optional) Save the Report using the tools discussed below.

Save: Click to save the report. The report is saved as a `.PNRX` file, meaning that in this format, the report can only be opened through the Report Viewer.

Export To: Click to export the report to a new format. Each selected format option brings up a dialog box where you can provide specifics on how you want the report exported.

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