TIPS & TRICKS IN CONNECT:
Managing Migrated Ad Hoc Reports in Reportal

Introduction

Connect's Reportal has been updated and migrated to a new version. This job aid serves as a helpful guide in resaving your migrated reports in the new version of Reportal.

During the transition, all user-designed and built Ad Hoc reports from the previous version of Reportal were converted to both an Ad Hoc View and Ad Hoc Report in the new version.

Ad Hoc View Functionality: Ad Hoc Views is available and can be fully utilized.

Ad Hoc Report Functionality: In order to successfully utilize migrated Ad Hoc Reports in the updated version of Reportal, you will need to open the Ad Hoc View and resave your reports before running them. (The steps in this document detail this process.)

Key Points
❖ The **View / Reports** section of Reportal is the same as the prior version of Reportal. This is still where you will open/update/run Ad Hoc Views and Reports in the new version of Reportal.   ❖ Once the migrated reports have been accessed via the Ad Hoc View and saved to Reports, you will manage them exactly as you did before in Reportal.

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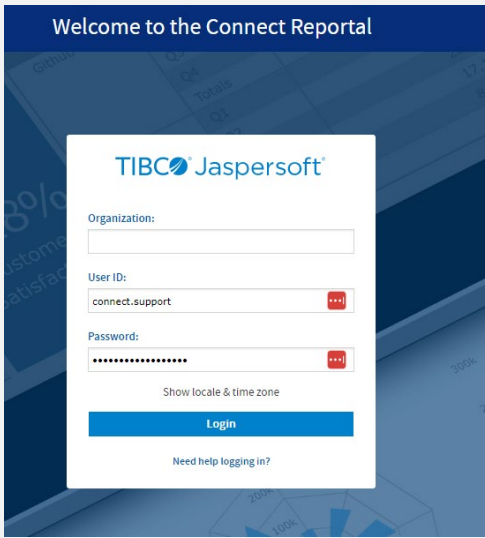
Resaving Migrated Ad Hoc Reports

Logging In

To access Reportal and your Ad Hoc reports.

Step-by-Step Guide

LOGGING IN

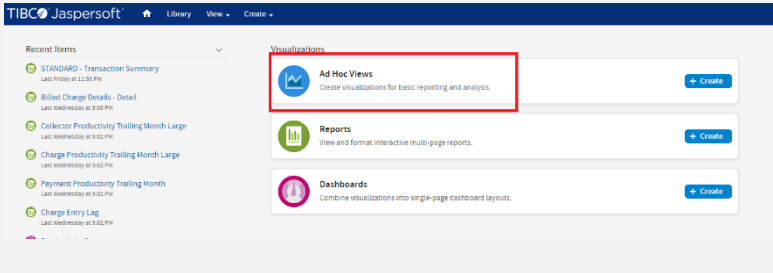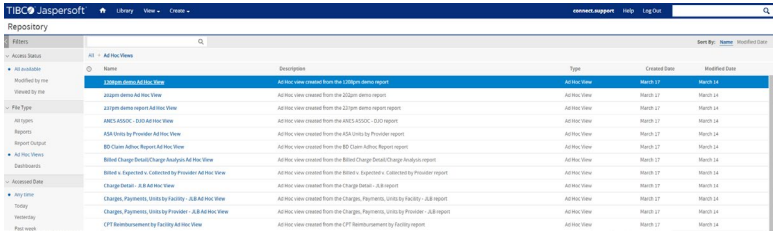| STEP	INSTRUCTIONS	SCREENSHOTS
1	Navigate to the N**ew Reportal URL:** https://demo.basconnect.net/jasperserver-pro/login.html **NOTE:** *Replace "demo" in the URL above with your instance name, just like you do when accessing Connect for the first time.*	Welcome to the Connect Reportal TIBCO Jaspersoft® Organization: User ID: connect.support Password: •••••••••••••••••• Show locale & time zone Login Need help logging in?
2	Enter your **User ID** and **Password** that you use to log into Connect Back Office. **NOTE:** *Leave the **Organization** field blank.*	
3	Click **Login.**	

Saving Views as Reports

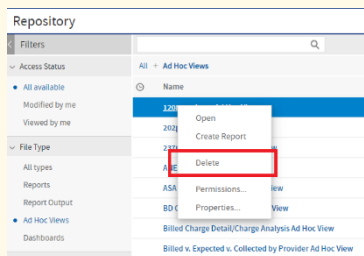Ad Hoc Views must be accessed and resaved as Reports in order to be successfully run in the new version of Reportal.

Step-by-Step Guide

ACCESSING AD HOC VIEWS

STEP	INSTRUCTIONS	SCREENSHOTS
1	Click **Ad Hoc Views** from the Home page.	
2	The **Repository** opens with a filtered view of your Ad Hoc Views migrated from the previous version of Reportal. **NOTE:** *Ad Hoc Views that were created in the migration will contain the Description "Ad Hoc view created from the XXX report".*	
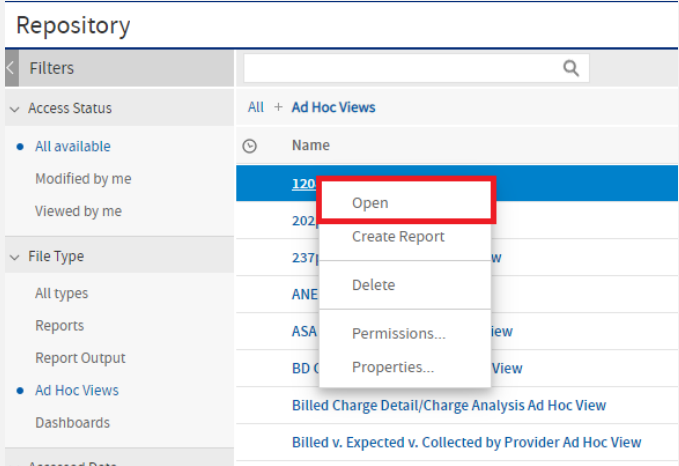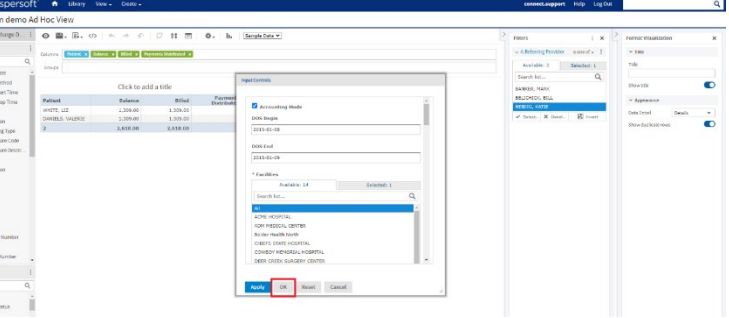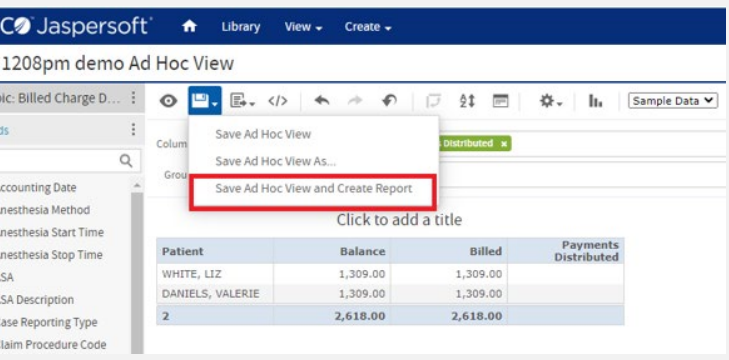
Key Points

❖ It is strongly recommended to take the time to clean up and organize your Ad Hoc Views. Delete any outdated, or no longer needed, Ad Hoc Views from this page. Simply right-click on the Ad Hoc View Name and select **Delete** from the menu.
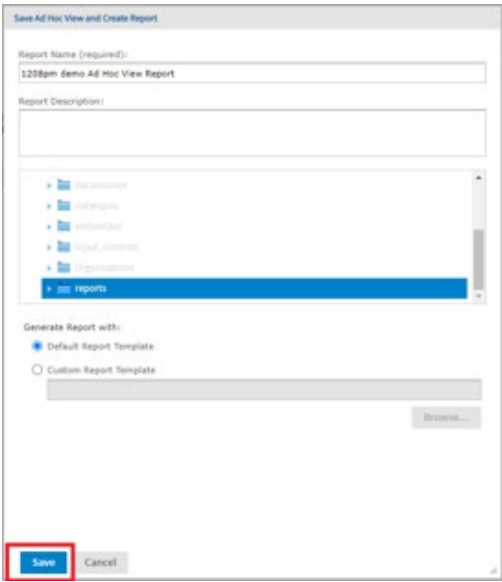
UPDATING/SAVING AS AD HOC REPORTS

STEP	INSTRUCTIONS	SCREENSHOTS
1	Right-click the desired Ad Hoc View from the list and select **Open** from the menu.	
2	From the **Ad Hoc View Designer**, update the report's **Input Controls** and click **OK.** **NOTE:** *If no updates are needed, just click **OK.***	
3	From the Ad Hoc View Designer toolbar, open the **Save (💾▾)** dropdown menu and select **Save Ad Hoc View and Create Report.**	

UPDATING/SAVING AS AD HOC REPORTS

STEP	INSTRUCTIONS	SCREENSHOTS
4	From the **Save Ad Hoc View and Create Report** window, update the **Report Name.**	
5	[Optional] Add a **Report Description.**	
6	Click **Save.** **NOTE:** *The Report folder and Default Report Template options are automatically selected by the system and should not be changed.*	
7	Navigate to the **View** menu and select **Reports** to see your saved reports.	

RETURNING TO AD HOC VIEWS / CONTINUING

STEP	INSTRUCTIONS	SCREENSHOTS
1	Open the **View** menu and select **Reports.**	
2	From the **Filters** pane, select *Ad Hoc Views* under **File Types.**	
3	Repeat the process for each of the Ad Hoc Views, as needed.	

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