End-User Reporting

This application will allow end-users to build reports and dashboards without engaging developers.

New Installation

1. Deploy plugins
   i. Regular Expression Functions
   ii. Zip File Utilities
   iii. Advanced Document Templating
   iv. Text Cache
   v. Content Tools - 1.7.3+
   vi. Date and Time Utilities - 1.3.0+
   vii. End-User Reporting Charts
2. Run `/sql/<db vendor>/new/End-User Reporting.sql` if upgrading, run relevant upgrade scripts
3. Deploy `application/new/End-User Reporting.zip` with `application/End-User Reporting.properties`
4. If using oracle, deploy `application/oracle-package.zip` and ensure `EUR Data Store` publishes

Minor Release Upgrade, e.g. 2.8.0

1. Run the correct `/sql/<db vendor>/upgrade/*.sql` files to upgrade to the current version
2. Deploy `application/upgrade/*.zip` files to upgrade to the current version, take note of inspection results and record any objects marked as **Conflict Detected**. These will also be visible in the Deployment view.
   i. Include the `application/upgrade/*.properties` file if present for the version
3. For each object with a conflict detected:
   i. Using versioning on the object, determine any changes made.
   ii. Merge the changes into the newest version of the object making sure the name of the object remains the same
4. If using oracle, deploy `application/oracle-package.zip`
5. Check for new version of End-User Reporting Charts plugin

Major Release Upgrade, e.g. 3.0.0

1. Follow the above minor release steps, take special note to revert the following rules:
   i. EUR_GetMapsByRecordType
   ii. EUR_SystemRecordTypes
   iii. EUR_RecordTypes
2. Check missing precedents and add back any missing objects, this might include:
   i. AH_recordType_* rules for each record type (if you so desire you can rename these to EUR_, but it's not required)
   ii. Reporting Groups created in dev environment
   iii. Custom format rules
   iv. Other customizations made to application

Quick Start

1. Create a package with the record types you would like to report on as well as any related record types.
   - If your record type is synced, you only need to include the record type
   - If you record type is not synced, but backed by a DSE you will need to include the data stores and cdts as well
2. Add yourself to the `AH Admins` group
3. Process record types
   i. On `Admin Tools` tab take `Upload System Record Types` action
   ii. Upload zip from step 1
4. Configure Record Type

i. On `Admin Tools` tab take `Configure Reporting Record Types` action
ii. Select record type from dropdown
iii. Select the fields, filters, and actions
iv. Click `Save <record type name>`
v. Click `Save Record Types`

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You can now create reports!
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Additional documentation can be found within the application.