Reporting Center

Table of Contents

Introduction

The *reporting center* is a centralized, in-platform reporting solution that allows Total Expert users to download the most commonly requested data sets on demand. Instead of submitting requests for custom reports and waiting for fulfillment, you have access to pre-built, ready-to-use data templates derived from more than 8,000 historical reporting requests.

The reporting center is powered by a unified back end that includes:

- Curated reporting templates exposed through the reporting center UI
- A secure download link that requires a user to be authenticated to access the data
- An asynchronous SQL extraction service (report requests that take longer than expected run in the background without a timeout)

Together, these components deliver scalable, secure, self-service access to business-critical data.

Historically, TE users ave relied on ad hoc and custom-built reports to meet their analytics needs, creating delays and operational overhead. The reporting center addresses this by:

- Enabling on-demand access to multiple data sets without needing to request a custom report
- Providing access to a wide variety of data with flexibility to set the parameters of the data you are looking for
- Allowing for rapid availability of data needs
- Ensuring data access remains secure and governed

How the Reporting Center Fits in the Total Expert Ecosystem

The reporting center is part of the broader Total Expert data and analytics platform:

- **Data lake and gold layer** – Curated, governed source data in Databricks, which provides the foundation for a modern data platform
- **Reporting center** – Curated extracts surfaced as templates, optimized for self-service and external consumption
- **Embedded analytics and data assistant** – In-platform interactive analytics and conversational data exploration

Relevant Users

The reporting center is for:

- Administrators
- Marketing administrators
- Operations and analytics users (users who are responsible for reporting and insights)

Note
While the reporting center can be enabled for all users, it is mainly suited for administrators and marketing administrators, because it provides organization-wide data access. Typically, this would not be enabled for managers, loan officers, or other users.

Example Use Cases

- Nightly export of journey contact engagement into your BI warehouse.
- Weekly regulatory and compliance audits delivered to a secure server.
- Monthly summary of campaign performance piped into internal reporting systems.

Understanding Templates

A *template* in the reporting center is a predefined, curated query, schema, and output definition representing a common reporting need.

- Templates are built on the most common and high-impact use cases (including audits, journey data, engagement, and contacts).
- Each template includes:
    - Name and description
    - Data domain (for example, journeys, audits, or contacts)
    - Available filters and parameters
    - Usage guidance or examples (where provided)

Running a Report from a Template

1. Navigate to **Reporting & Analytics → Reporting Center**.
2. On the Templates tab:
    a. Use the search bar on the right side to search by template name, data domain, or keywords.
    b. (if implemented) Use filters to find templates by category (for example, audits, journeys, contacts), release phase, or owner.
3. Click a section with a pre-built reporting template to expand it. This includes:

    a. A high-level summary of what the template returns
    b. Any data caveats (for example, historical coverage, latency, or tenant-specific behavior)
    c. (if implemented) A list of columns (fields) returned and their definitions
4. Click the **Select** button for a specific template.
5. (if applicable) Provide required parameters (such as date range or filters).
6. Click the **Run Report** button. The reporting center sends a request to generate the data set.
7. Wait for processing to complete (processing occurs in the background).
8. Click the **My Reports** tab. Use the search bar or Category drop-down list to filter the list. Reports with the COMPLETED label in the Status column are available to download.
9. Click the name of the report you want to download.
10. In the pop-up box, click the download icon on the right side and follow the prompts to save the .csv file to your computer.

Note
Selecting and downloading multiple reports at once (as a zip file) is a planned enhancement, as are additional configuration options.

The data in the report is designed to be immediately usable and customizable after download. You can

- Open the .csv file with Excel, Google Sheets, or your BI tools (for example, Power BI, Tableau).
- Load them into your data warehouse, data lake, or internal systems for further analysis.
- Join multiple templates if you understand their keys/grains (refer to local data modeling documents where available).

Operational Notes

- Data latency – Data is generated from snapshots taken at approximately 6pm CT the previous day. Plans exist to reduce latency in future iterations.
- File size limits – Current maximum export size is 50 GB. This covers >99% of reporting use cases.
- Asynchronous processing – All reports run asynchronously. Status updates refresh automatically on focus or at regular intervals (approximately every 5 mins).
    - It is expected that large reports will require extended processing time.

Security and Governance

The reporting center is designed to use Total Expert platform authentication and follow enterprise-grade security practices:

- Authentication and authorization
    - Only authenticated platform users can access the reporting center.
    - Template access can be restricted as appropriate.
- Data protection
    - Data is generated from curated internal sources.
    - Internal policies govern data retention, personally identifiable information (PII) handling, and downstream access.
- Operational controls

- Internal teams monitor usage, performance, and cost.
- Enhancements go through standardized product and security reviews.

Troubleshooting and FAQs

Why isn't the reporting center visible in my account?

Ensure that the correct permissions are switched on for your user role. Check with your implementation manager or customer support.

Why is the file I downloaded blank?

This is most likely due to opening a report that is >1 million rows in Microsoft Excel (this is beyond Excel's row limit). Use more robust data tools or BI platforms to review the data, or adjust the parameters and rerun the report for less data per file.

Is the data secure?

Yes. All access is tenant-scoped and authenticated using platform security standards.

What is the expected data latency for the reporting being pulled?

The data being generated out of the reporting center is from 6pm CT the previous day.

Is there a reporting file size limit?

Yes. The current limit is 50 GB. This is expected to handle over 99% of reporting requests.

Do reports have a specific timeout period?

No. There is no timeout period, but note that larger reports will take a longer time to complete. The download time of reports will depend on your Internet connection speed.

How is the reporting center different from existing reports or embedded analytics?

Embedded analytics focuses on in-app dashboards and visuals. The reporting center focuses on trusted, exportable datasets (CSV/SFTP) designed to integrate with your existing analytics and operational workflows.

Can I create my own templates?

Today, templates are centrally defined and curated by Total Expert. Requests for new templates and changes will be considered.