

Kenta / Using Kenta

Issue controlled reports and configure delivery schedules

Preview governed data, generate a retained report version and distinguish generation, private download access and external delivery readiness.

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► Applicability

Before you begin

- Current source permissions and report_admin for template/schedule administration.
 - An authorized subject/query, reporting cutoff and selected template version.
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Current capability and authority

Preview governed data, generate a retained report version and distinguish generation, private download access and external delivery readiness.

Clearly labeled synthetic example

Synthetic report R-01 retains 650,000 commitments and 80,000 included pending exposure; R-02 after approval retains 730,000 and zero. Both preserve the same 1,030,000 management forecast on their own source basis.

Control the issued layout and freeze a portfolio bundle

In Reports, choose an available report basis, enter the Report title and use Report layout to arrange the allowed columns with Add column, Move up, Move down and Remove column. Record and Value

remain required. Preview the selected table or supported chart and sorting before issuing; the retained report artifact uses that layout. Donut charts require mutually exclusive categories and a single cutoff is not a time series.

Portfolio analytics can Freeze portfolio report for the exact currently authorized project scope. A completed bundle contains the portfolio manifest and complete project report parts. Incompatible financial policies stay in separate groups; a failed project part does not masquerade as a complete portfolio report. Download links remain subject to current access and the stated expiry.

Inputs and terminology

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Term	Meaning
Draft preview	A current authorized query that has not issued an artifact.
Issued report	A retained snapshot, template version, source manifest and generated artifact.
Scheduled delivery	A separately configured recurring request; a saved schedule does not establish a working external delivery provider.

Procedure

1. Preview the report

Open Reports, choose a template or Governed default, set scope/measures/date parameters, title and format. Add optional User commentary distinct from calculated figures. Select Preview report.

2. Save and generate

If authorized, Save template version. Choose Generate report and inspect queued/running/completed/failed/cancelled generation state. Use Run generation when the current deployment requires explicit processing.

3. Inspect private output

Use View downloads for an issued job. Check snapshot identity, source metadata, expiry and every output part. CSV and PDF use the same pinned contributor set; large CSV output may be partitioned with a manifest.

4. Correct through restatement

Under Restate an issued snapshot, select the predecessor reference and explain the reason. Issue a new version; do not replace the old artifact invisibly.

5. Configure and verify scheduling

In Scheduled delivery, select the exact template, timezone, recurrence, time, eligible recipient identities and format. Review generation/delivery history and Check delivery readiness. Queue run now is explicit; external delivery remains unavailable until configured.

Verify the result

A completed report has an inspectable private manifest and retained source snapshot. Failed generation and failed/unconfigured delivery remain distinct recoverable states.

What happens next

Template sharing does not grant source access. Jobs and recipients are reauthorized before generation/access/delivery.

Already downloaded copies cannot be recalled; use access-controlled delivery appropriate to the project policy.

Troubleshooting

A report job failed or remains queued

Inspect generation status, source access, template compatibility and whether a processing runner is configured. Retry the same job where supported or run explicitly; do not claim an artifact exists before completion.

The schedule does not send

Check schedulerConfigured/deliveryConfigured indicators and intended recipient access. Have the accountable operator configure the actual runner/provider route; a saved schedule alone is not a sent message.