HTML Viewer

Intellicus Enterprise Reporting and BI Platform

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Dated: - September 2010.

Acknowledgements

Intellicus acknowledges using of third-party libraries to extend support to the functionalities that they provide.

For details, visit: http://www.intellicus.com/acknowledgements.htm .

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HTML Viewer

Reports are displayed in HTML Viewer when you select **View > HTML** option on **Report Delivery Options** page.

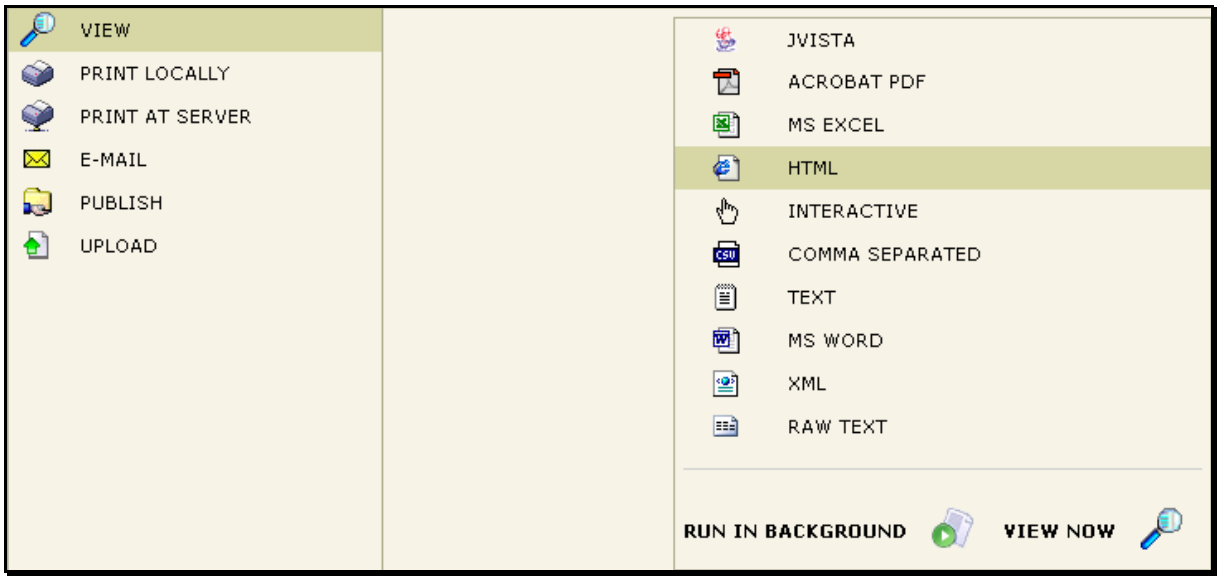

Figure 1: View > HTML on Report Delivery Options page

In addition to viewing a report, you can carryout following activities on HTML Viewer:

- Navigate
- Refresh the report
- Collaborate
- Email
- Print
- Publish
- Export
- Upload
- View Alerts

You can initiate any of these activities by clicking respective toolbutton from the toolbar.

HTML Viewer page

Depending on the report being viewed and the steps taken as post-view operations, it may have multiple components on it:

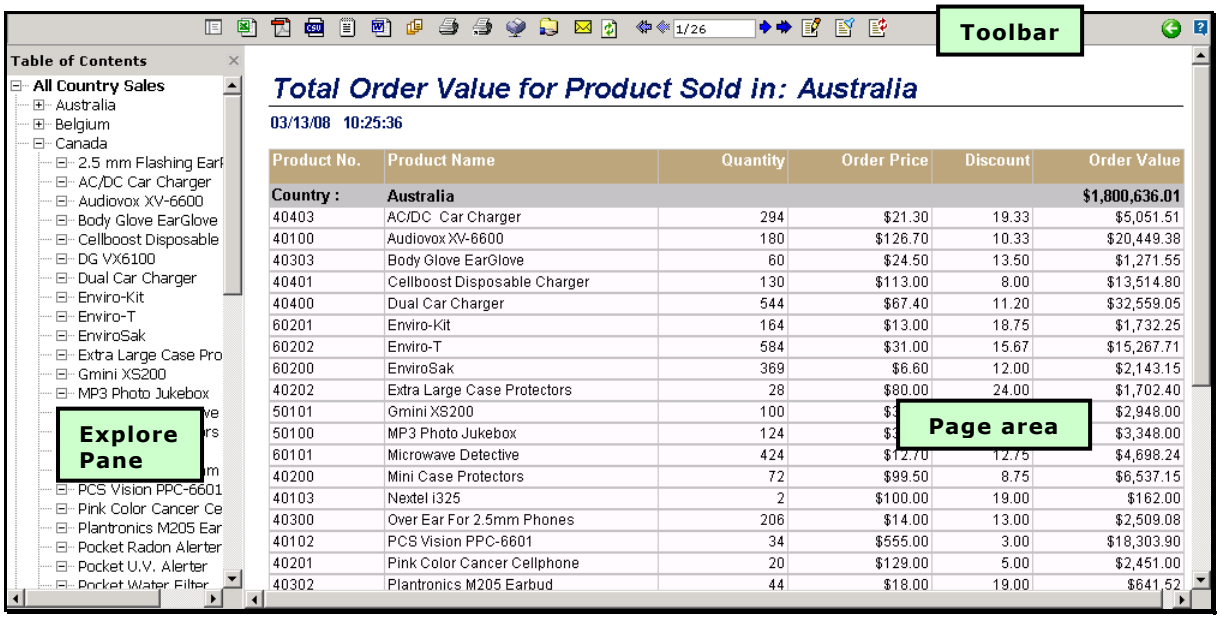

Figure 2: HTML Viewer

HTML Viewer has mainly three components. On the top, it has toolbar having buttons for all the operations that can be done on the Viewer.

The Explore pane appears on the left side of the window. This is the part of window where Table Of Contents pane as well as Alert pane appears. The right side of window is page area.

When a report is viewed in Viewer, the explore pane is off.

Loading long Reports

If the report has multiple pages, the first page appears as soon as it is generated. However, it may take some time for the remaining pages to become available. In this case, to indicate that the report is being generated, the text box in toolbar will display currently available pages followed by a + sign. Also, a stop button appears next (on right side) to the navigation buttons.

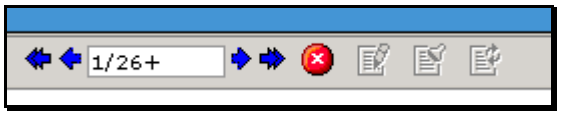

Figure 3: HTML Viewer: A long report is being generated

Once the last page of the report is available, then the + sign disappears.

Canceling report generation

Click button available on the Viewer toolbar to stop the report generation.

When report generation is cancelled using button, any of the operations related to print or export would not be available. This is because the complete report was not generated.

Toolbar

You can initiate any of the post-view operations by clicking respective button available on the toolbar.

Figure 4: The HTML Viewer Toolbar

Navigate

Use scroll-bar to bring any part of the page on screen. This is similar to viewing a web-page on browser.

Click navigation buttons to bring respective page on-screen:

- : To bring the first page on screen. This will not be available when the 1st page is being viewed.
- : To bring previous page on screen.
- : To bring the next page on screen.
- : To bring the last page on screen. If a long report is being generated, this button takes to the last page available. This will not be available when the last page is being viewed.
- : To return to the previous page.

Going directly to a specific page number

The two numbers in the text box between the arrow buttons indicate the present page on screen and total number of pages that the report has. To reach a specific page, you can type in the page number in the text box, followed by pressing the Enter key.

Figure 5: HTML Viewer: Specifying the page number to jump to

If the requested page is available in Viewer, then it navigates to that page. If the report does not have that page, the viewer will ignore the action.

Drilldown and hyperlink navigation

When you click hyperlink on a report, Report Navigation Panel may open up. Use this panel when you need to drill down to multiple reports and return to parent report or re-open drilled-down reports.

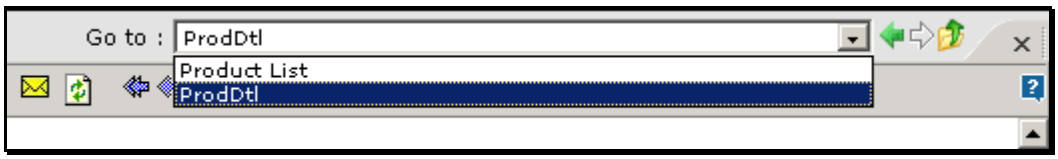

Figure 6: Report Navigation Panel

Report Navigation Panel opens up when you click a hyperlink on a report.

Note: Report Navigation Panel will not open when hyperlinked report opens in a new window.

- **Go to:** To open any of the previously opened (parent or child) report. Select the report from **Go to** drop-down box.
- : To navigate to the report, which was opened before opening this report.
- : To navigate to the report, which was opened after opening this report.
- : To open the parent of this report.
- : To close this report. If you are removing a report that is parent, all of its children will also be removed from navigation panel.

Table of Contents

When the information on the report is grouped, (for example, by countries, or products, or departments, etc) you can use Table of Contents (TOC) to navigate by groups.

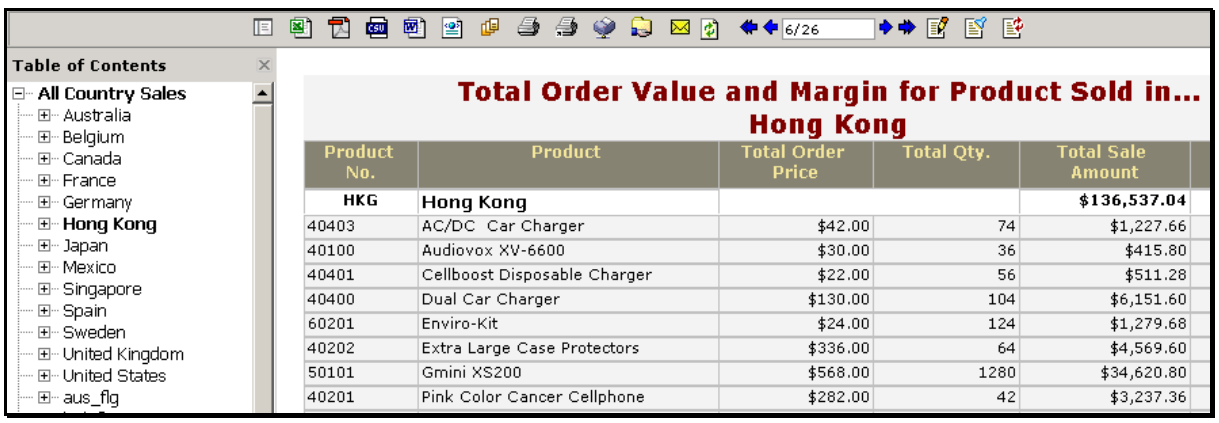

Figure 7: HTML Viewer: The TOC pane

To switch on the TOC pane, click the button. This button works as a toggle.

To navigate to a specific group,

1. If TOC is not on, click button to get the TOC pane.
2. The groups and sub-groups are shown in a tree.
3. Click any of the entry on tree to navigate to that group – Viewer navigates to respective page and highlights the item.
4. Click the plus icon to open a branch and so on.

Refresh the report

Click to refresh the same report with latest data.

Collaborate

Use , and to achieve collaboration on report being viewed on HTML Viewer. For detailed information on collaboration, refer to chapter **Report Collaboration**.

Email

A report can be mailed as a link or as attachment.

To email a report,

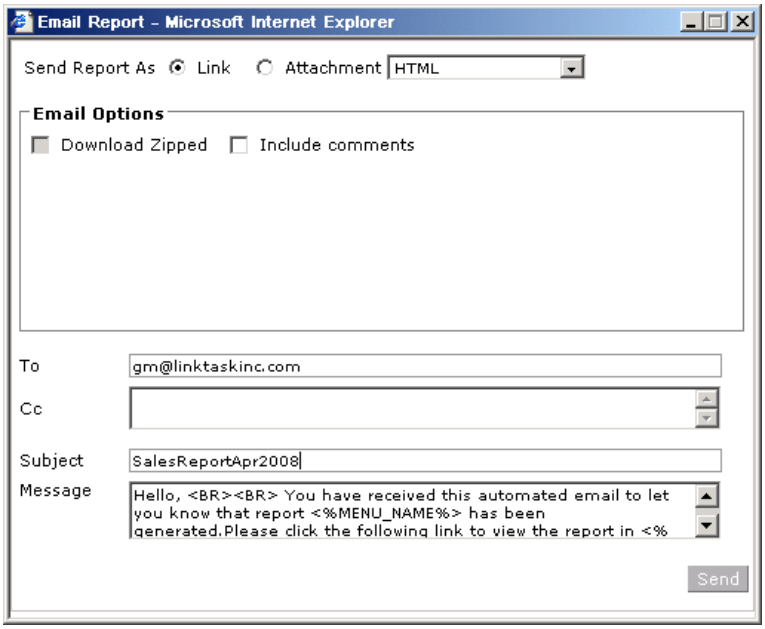

Figure 77: Mailing a report

1. Click button from the HTML Viewer toolbar.
2. In **Send Report As**, select *Link* to send link of the report. Select *Attachment* to send report as email attachment.

3. Specify **Email Options**.
4. Specify Ids for **To** and if required, for **CC**.
5. Specify **Subject**.
6. In **Message**, you may prefer to continue with pre-set message or specify a new message.
7. Click **Send** to send the report.

Include Comments: This will appear when a report already published is being e-mailed as a post-view operation from HTML Viewer. A report once viewed may have comments attached to it. Select this checkbox to include comments (if at all there are any) as tail pages with the report.

Upload

A report can be uploaded to an FTP server or a shard location.

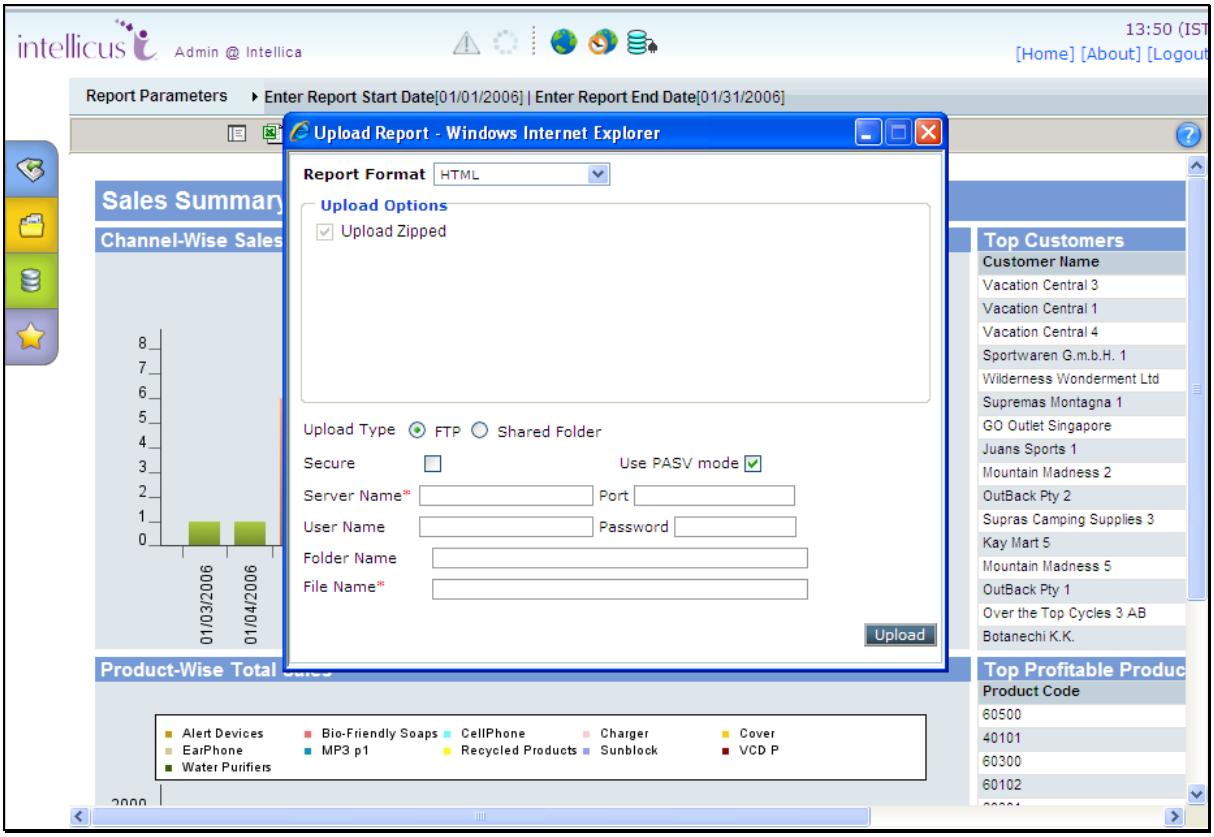

Figure 8: Uploading a report as post-view operation

1. Click option to get Upload Report dialog.
2. Provide information as per following details on the dialog.
3. Click **Upload Report** button.

Details on Upload dialog

- **Report Format:** Select report format in which report output will be generated for upload.
- **Upload Options:** Specify Upload Options.
- **Upload Type:** Select *FTP* to upload to an FTP server. Select *Shared Folder* to upload it to a shared folder on the network.
- **Secure** (only for FTP): check this checkbox to upload report on a secure FTP server. When you do this, Use PAS mode checkbox will be unchecked and disabled.
- **Use PASV mode:** (only for FTP): Check this checkbox to upload in passive mode.
- **Server Name** (only for FTP): The server where the report should be uploaded.
- **Port** (only for FTP): The port at which should be used during upload.
- **User Name** (only for FTP): Specify the user name by which application to login into server.
- **Password** (only for FTP): Specify the password to be used at the time of login.
- **Folder Name:** In case of FTP upload, specify the folder where the report should be placed. Specify backslash / if you want to place the report at root. In case of Shared Folder upload, specify the network path in UNC format(\\computername\folder) where the report should be placed.
- **File name:** Specify name by which the report will be stored on server.

Print

To cater different kind of printing requirements, HTML Viewer offers three options to choose from:

- : Print Report
- : Print Report Direct
- : Print Report At Server

You may use the option that best addresses your report printing need at that point of time.

Print Report

You may access this option when you want to print report using any of the printers installed on your system. When you click button on the toolbar, **Print** dialog box appears.

You need to specify the required information on the dialog box and click **OK** to go ahead with printing. To abandon printing at this point of time, click **Cancel** button of the **Print** dialog box.

Warning: No Modal !
When Print dialog box in Viewer is active, if the you click anywhere outside the dialog box, the dialog will go behind the active application. You will be NOT be able to do anything on Viewer. This may be mis-interpreted as the Viewer has hung and has stopped responding.

In such case, use ALT+Tab to look for Print dialog and close it by clicking **OK** or **Cancel**.

Print Report Direct

You can print a report directly to your machine's default printer. In this case, no printer dialog is prompted. When you click button from the Viewer toolbar, the default print settings on your computer system will be considered for printing.

Important: The printing related warning above remains valid in this case too.

Print Report at Server

Select this option to print report using one of the printers installed on the machine running Intellicus Server. Upon clicking button, **Print At Server** dialog will be opened.

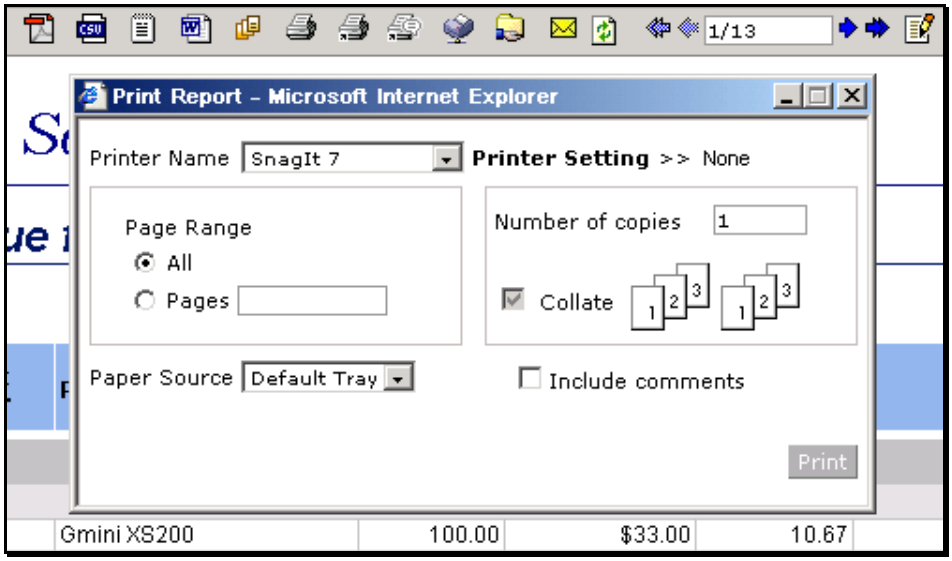

Figure 9: HTML Viewer: Print At Server dialog

Details of Print At Server dialog

- **Printer Name:** Select a printer from the listed options. Select one of the pre-set printer setting by clicking **Printer Setting** and choosing the right option from the dropdown that opens up.
- **Page Range:** If you select *All*, it will select all the pages of the report. Pages option is not operational at present.
- **Number of Copies:** Specify the number of copies that you want to print.
- **Paper Source:** Specify the tray preferences.
- **Include comments:** Effective if report being printed on server is already published from HTML Viewer as post-view operation. Select this checkbox to print approval comments along with report as tail pages.

Click **Print** button to start printing. Clicking **Cancel** button will not initiate printing process and close the dialog box.

Publish

A report being viewed in Intellicus Viewer can be published as a private report (a report that only the user who published will be able to view) or a public report (everyone can view the report).

Note: A published report will be available to users only if **Approval Process** is set as *Direct* (at the time of deploying the report). If it has to undergo an approval process, then the report will be available only after approval.

To publish a report,

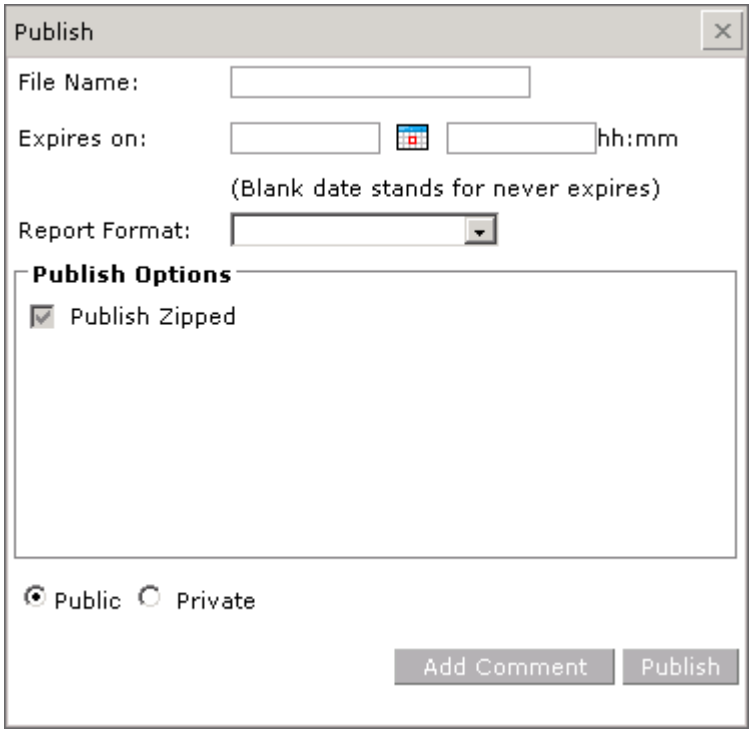

Figure 76: Publishing a report

1. Click button from the Viewer toolbar.
2. In **File Name**, specify the file name.
3. Use **Expires on** if you want the report to be published only for a specific period. Click button to get the **Select Date** dialog and specify date.
4. Select **Report Format** and provide **Publish Options** for the selected format.
5. Select the appropriate option between **Public** and **Private**. A public report is made available to all the users. Private report is made available only to you.
6. Click **Publish** to go ahead with publishing the report.

To select a date, select month and year from the drop down and click the date from the calendar.

Note: Click **Add Comment** button to add comments. If this report has to undergo approval process, you can work with approval at the time of publish itself.

Export

Note: Some export options are not available in Smart Developer and Smart Viewer.

Using Intellicus Viewer, you get the following options to export reports to:

- MS Excel
- PDF
- CSV
- MS Word
- TEXT

To export a report, click the respective export button from Viewer toolbar. The following table shows the button to be used:

- : To export the report as MS Excel file.
- : To export the report as PDF file.
- : To export the report as CSV file.
- : To export the report as MS Word file.
- : To export the report as Text file.

When you click an export button, viewer will pop up **Export Options** dialog. Options appearing in the dialog will depend on export type. Select the options and click **Generate** to start export. Click **Cancel** to abandon export process.

You may also click button from Viewer toolbar to select an export format on **Export Options** dialog box and click **Continue** to go ahead with the export operation.

View Alerts

A report might have alerts set in it. These are conditions set by report designers. When you run a report having alert set, Intellicus goes on checking that alert-condition and creates an alert message every time the condition is satisfied. When a report has alert messages, a blinking ⚠ icon appears on HTML Viewer's toolbar.

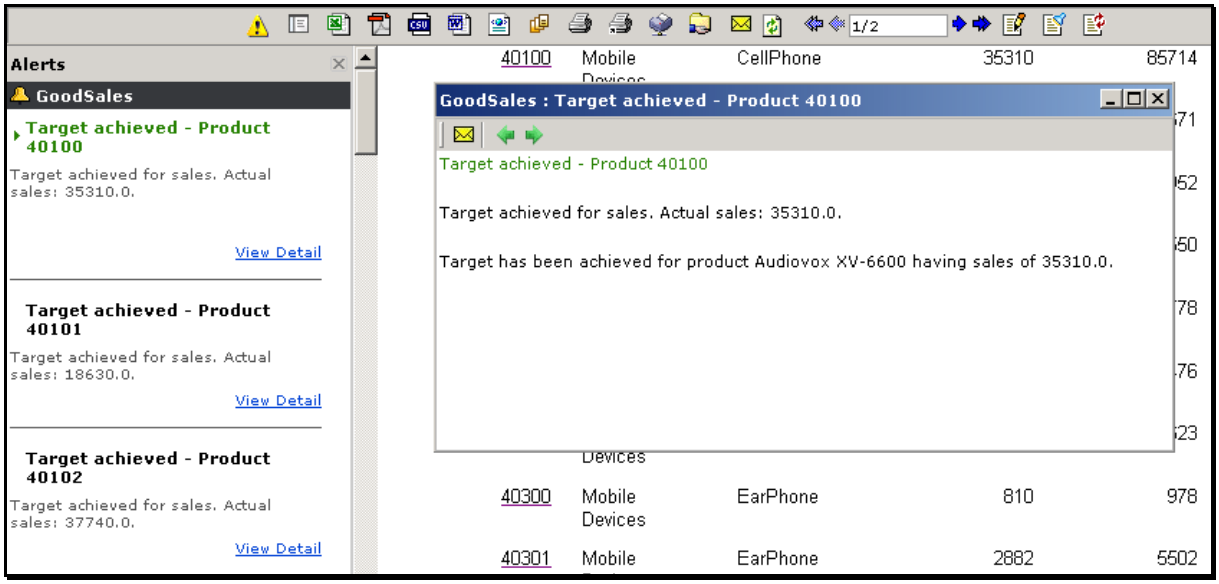

Figure 10: Alert pane in HTML Viewer

Getting Alerts Pane

Alerts are listed in Alerts pane. It appears on the left of HTML Viewer. Click ⚠ icon appearing on the HTML Viewer toolbar to open **Alerts** pane.

Alert pane displays Alert title and short message. Click **View Detail** link of respective Alert to open the alert in a new window.

Alert Window

Alert window displays selected (clicked) alert in detail.

Use following buttons to carry out respective tasks on Alert window:

- ✉ : Opens window to mail the alert to recipients.
- ◀ : Brings previous alert on the window. Also on the HTML Viewer, brings row with that alert on top.
- ▶ : Brings next alert on the window. Also on the HTML Viewer, brings row with that alert on top.

The window has functionality of minimize, maximize, restore and close.