Viewing reports in JVista

Intellicus Enterprise Reporting and BI Platform

©Intellicus Technologies
info@intellicus.com
www.intellicus.com

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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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Intellicus Viewer (JVista)

When you are viewing a report in Intellicus Viewer, you can do a lot of other activities like printing, exporting and saving the report.

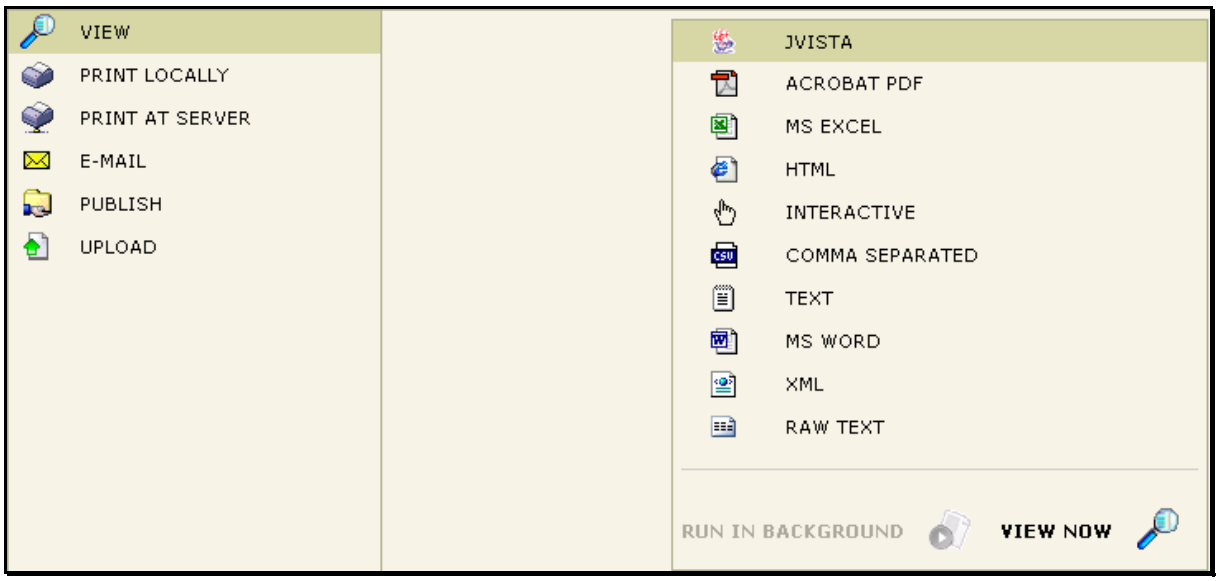

Figure 1: Viewing a report in JVista

On **Report Delivery Options** page, upon selecting **View** option in **Jvista**, you view the report in **Intellicus Viewer**.

When you try viewing secured reports, you will be prompted for user name and password.

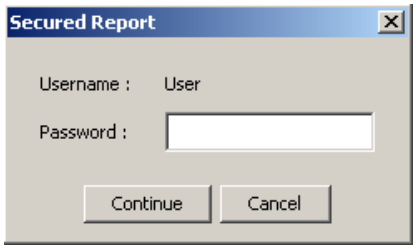

Figure 2: Viewing a secured report

The dialog box will display the user name using which you have logged into Intellicus. While running a report in JVista if you are prompted for a password, specify the password you used to log into Intellicus and click **Continue**.

Pre-requisites

JAVA Plug-in

In order to view reports in Intellicus Viewer (JVista), the system where this Viewer is used needs to have Java Plug-in installed. Java Plug-ins is generally auto-installed when the browser is installed.

Note: Intellicus is compatible with JRE 1.4.x. If you do not have Java Plug-in (JRE 1.4.x) installed on your computer system, you may download it manually from following link:

http://java.sun.com/products/archive/

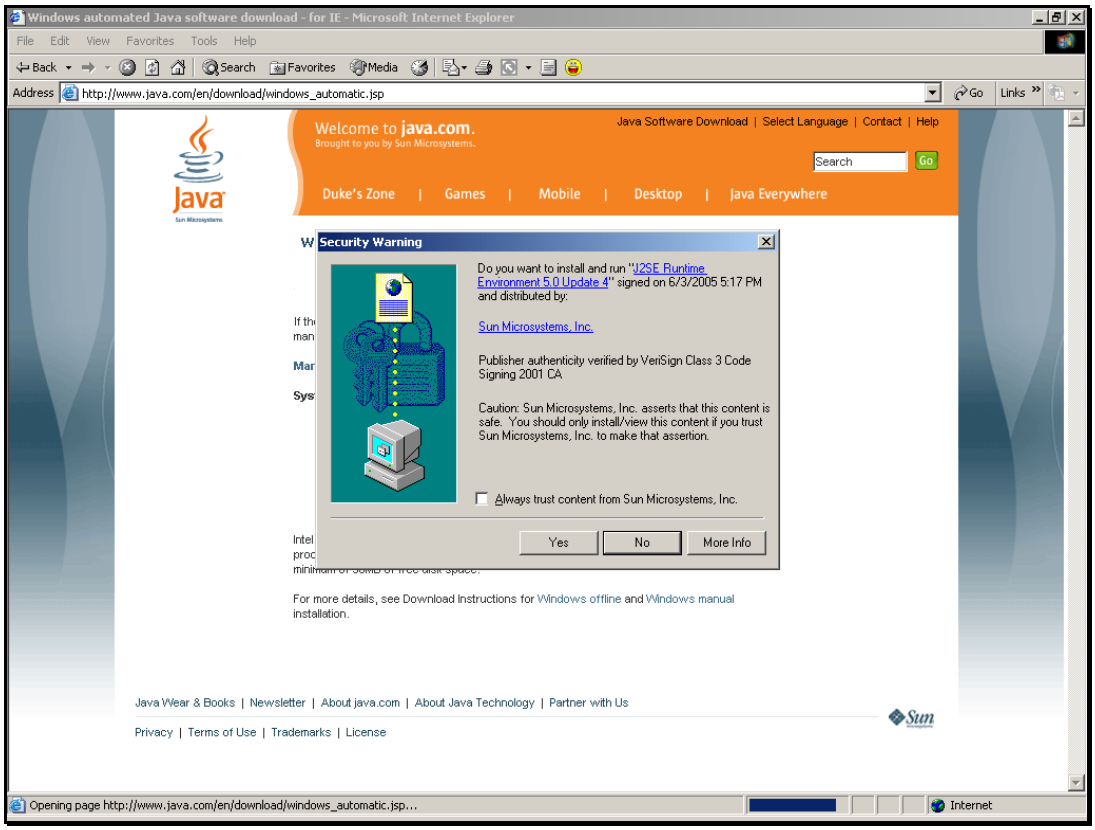

Figure 3: Java's plug-in related download site

Trust the Applet

Once the plug-in is installed onto the system, next time when you try viewing a report in Viewer, a Security warning will appear.

When security warning appears, make sure the applet is signed by **Intellicus**. The message in the dialog box should read:

Do you want to trust the signed applet distributed by "intellicus"?

Figure 4: The security warning

Buttons on the dialog box

Yes: You will be able to do all the operations in the Viewer only for current session. You will be prompted this dialog every time Viewer is opened.

No: You will NOT be able to carry out some of the operations in Viewer such as report export. You will be prompted this dialog every time Viewer is opened.

Note: Clicking NO will result in higher memory consumption by browser if the report is having a lot of data.

Always: You will be able to carry out all the operations in Viewer on this system always.

Note: To be able to carry out all the operations available in the Viewer every time you use it, we suggest clicking the Always button on the security warning dialog box.

Important: When you run Jvista on latest version of Internet Explorer, a tool-tip with message ""Click to activate and use this control" will appear. If this happens, you need to click anywhere on Jvista viewer before initiating any post-view operations.

Viewing Reports

Using Intellicus Viewer you can view reports as well as carry out various operations on the opened report.

The Viewer

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

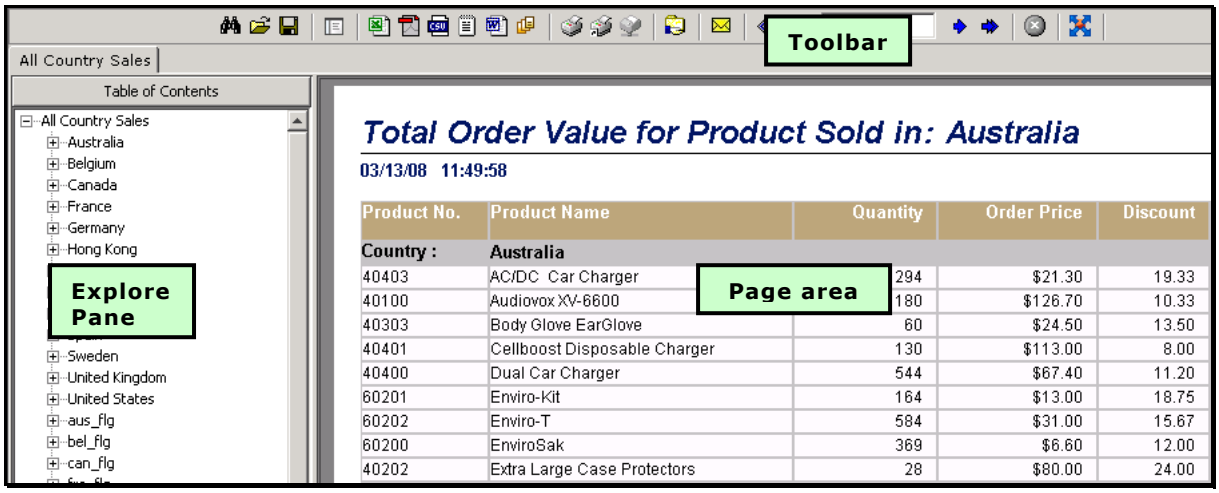

Figure 5: A report opened in Viewer

The Explore pane appears on the left side of the window. This is the part of window where **Table Of Contents** and **Search pane** appears. The right side of window is page area.

When a report is viewed in Viewer, the explore pane is off. It opens only when it is opened while viewing Table Of Contents or performing a search.

A one-pager report or a few-page report is displayed almost instantly.

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 progress message **Loading** appears on toolbar, next to the stop button. However, you will be able to carry out navigation tasks even when the entire report is not available.

Figure 6: A long report is being generated

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

Toolbar

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

Figure 7: The Viewer Toolbar

Note: In case at the time of running the report, browser window was not maximized and after report execution you choose to maximize the window, click button to maximize Viewer area within the browser.

Navigation

Intellicus Viewer offers multiple ways of navigation.

On the same page

If the entire page is not visible on screen, you can use the scrollbar or click and drag the mouse on the page area itself. This is similar to what we do to view a PDF file. When you do this, the mouse pointer changes to once you bring it on the report page. It changes to when you click and drag it upwards or downwards. However, this method is not useful to navigate to other pages.

Navigating to other pages

You can click arrow buttons to reach their respective pages. The explanation is provided in the table:

Button	Effect
	To bring next page on screen.
	To bring previous 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 bring the first page on screen. This will not be available when the 1st page is being viewed.

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.

Figure 8: Specifying the page number to jump to

To reach a specific page, you can type in the page number in the text box, followed by pressing the Enter key. 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.

Canceling report generation

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

Figure 9: The position of Stop button

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

Warning: For Java Plug-in 1.5 users.
When a report is being generated, we recommend not to click **Back** button or any other buttons of browser to navigate away. If it is absolutely essential to take such an action, first click Stop button of Viewer toolbar to cancel report generation and then take the required browser navigation action.

Using the 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.

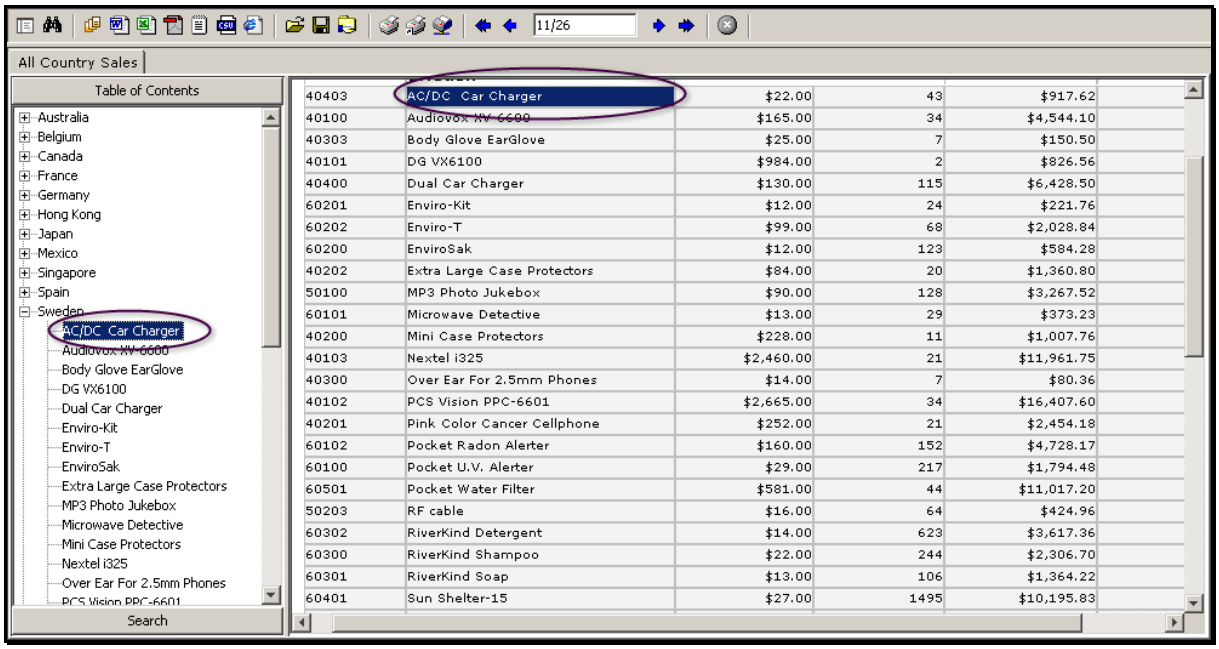

Figure 10: The Table of Contents pane

To switch on the TOC pane, click the button from Viewer toolbar. 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.

Performing a Search

Make use of the Search feature of the Viewer to find one or more occurrences of a value in the report. This method of searching saves time and practically zeroes the chances of missing an occurrence of the value being searched.

To switch on the Search pane, click the button that is available on the toolbar. This button works as toggle.

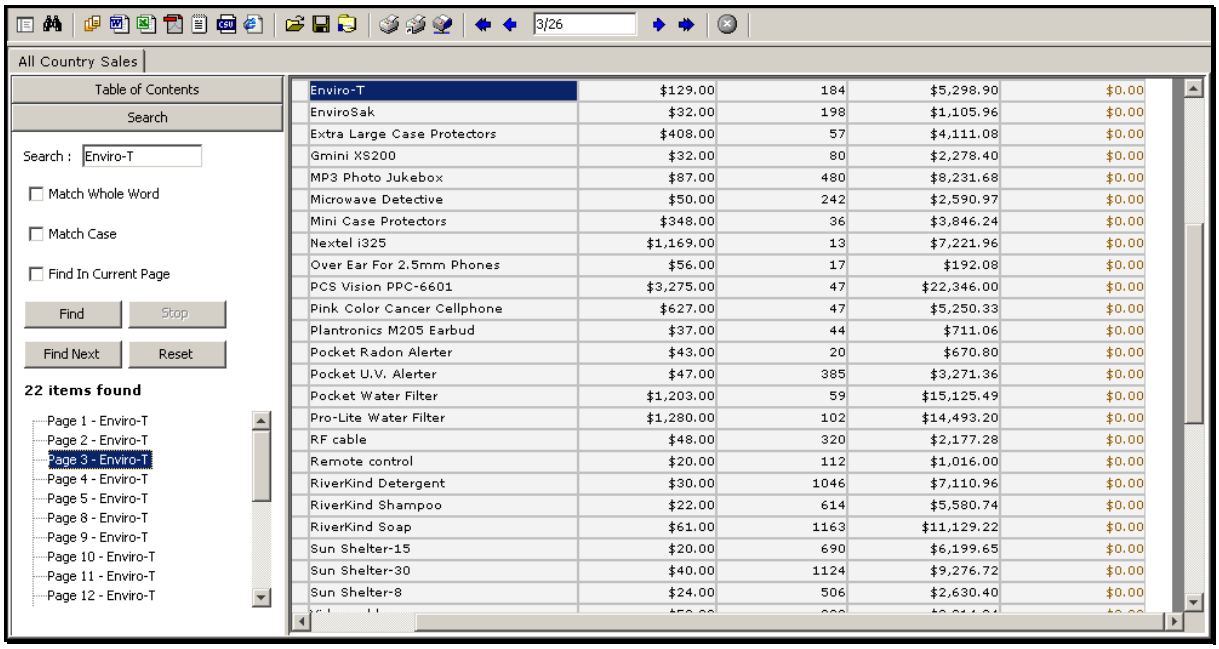

Figure 11: Searching for an item

To search an item, you need to

1. If the Search pane is not on, click button to switch on the search pane.
2. Specify preferences as per the details given following this series of steps.
3. Click the **Find** button.

Viewer will perform a search in the report, prepare a list of found items with page numbers and will navigate to first occurrence. You can navigate to other found items by clicking on respective list entries.

- **Search:** Specify the item that is to be searched.
- **Match whole word:** Select this checkbox if you want to consider only whole words for search operation.
- **Match Case:** Select this check box if you want to have only those occurrences in which case is also matching with search item.
- **Find in Current Page:** Select this check box if you want to find the item on the page that is presently on screen.

Buttons

- **Find:** To start the search.
- **Stop:** To stop the search.
- **Find Next:** To bring on screen the next occurrence of the search item.
- **Reset:** To reset the search related preferences.

When the **Search** pane is on, click the **Search** button to switch off the pane.

Printing report

To cater different kind of printing requirements, Intellicus 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.

If the report is of custom page size (and default printer is not DMP) an alert appears offering option to select a different page size.

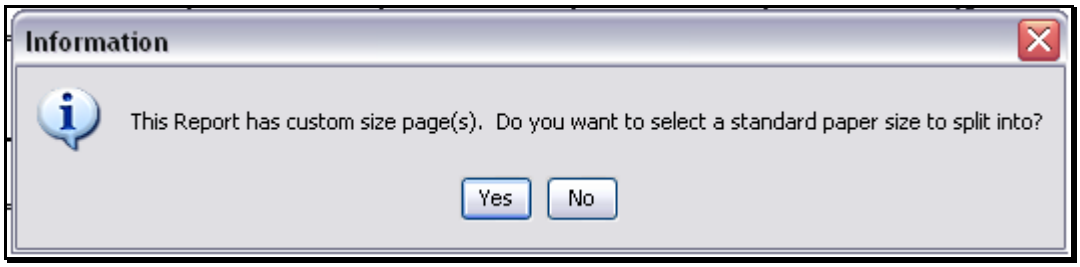

Figure 12: Dialog to select page of one of the standard sizes

On this alert, if you click No, you will be presented with Print dialog box. On clicking **Yes**, **Page Setup** dialog box will appear. Clicking **No** will bring Print dialog box on screen.

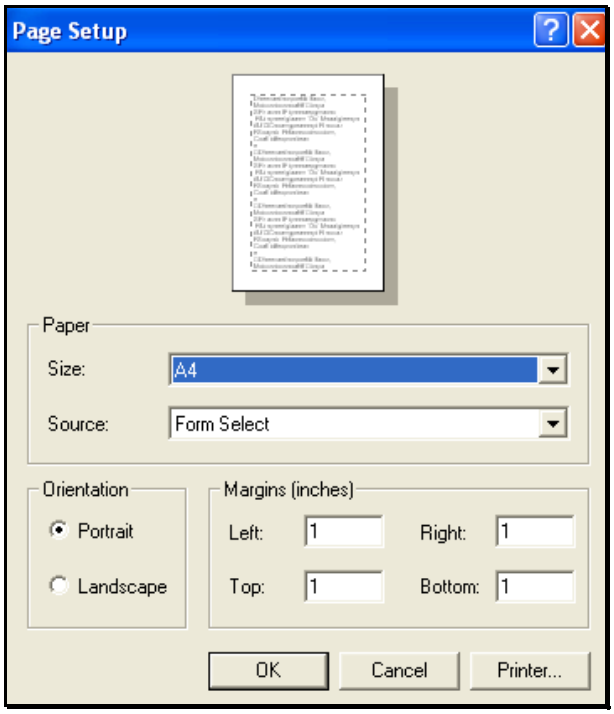

Figure 13: Page Setup dialog box

Set page related preferences on this dialog box. Clicking **OK** after making the changes will bring **Print** dialog box on screen. Clicking Cancel will truncate the changes and bring **Print** dialog box on screen. The table shows what will happen in case the report page size is smaller or larger than the actual page size.

Report Page size	**Effect**
Smaller	No effect. The right and bottom part of the page will remain blank.
Larger	Information on the report will split into multiple pages.

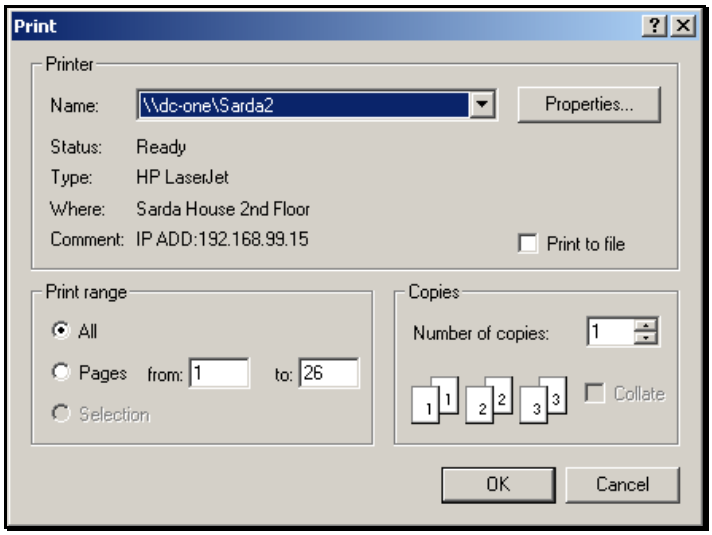

Figure 14: Print Dialog box

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**.

After printing has started, status message **Report printing in progress** will be displayed in the Viewer toolbar. You can click button of Viewer toolbar to cancel the report printing.

Figure 15: Printing related status messages

If you cancel printing, Viewer toolbar displays the status message **Printing cancelled by user**. When a report printing is cancelled, as many pages as they are spooled, shall be printed, including the last page partially spooled.

Warning: For Java Plug-in 1.5 users.
When spooling / printing has already started, and if you click **Back** button of the browser, then in next report runs, Viewer shall behave abnormally by not generating report.

In such case, you shall have to close all browsers or even shall need to re-login into windows.

To avoid such a situation, cancel the printing using the stop button on Viewer tool bar before navigating away during printing in progress.

Print Report Direct

You can print a report directly to their 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

You may select this option to print report using the printers installed on the machine running Intellicus Server. Upon clicking button on the Viewer toolbar, **Print At Server** dialog will be opened.

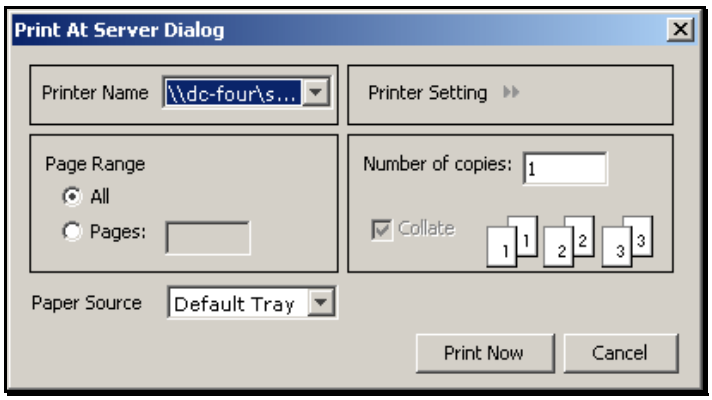

Figure 16: Print At Server dialog

Details of Print At Server dialog

- **Printer Name:** Select a printer from the listed options.
- **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.

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

Saving report locally

Intellicus Viewer provides feature to save reports locally. A saved report can be opened any time for viewing and printing purposes. However, you can't export or publish a report that is opened from a locally saved file.

To save a report,

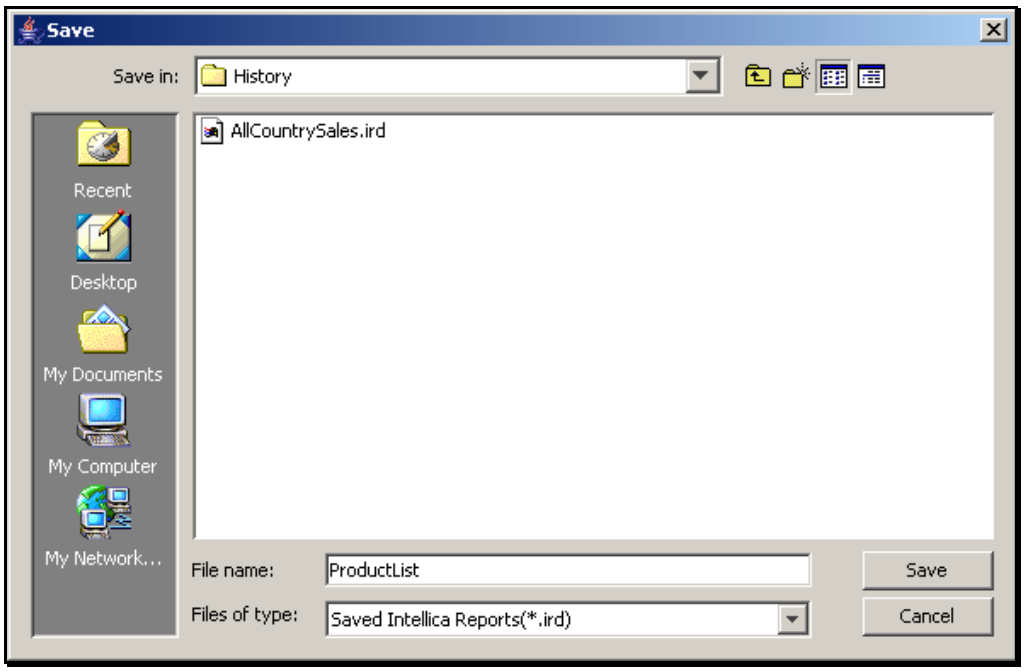

Figure 17: Save dialog box

1. Click button from the Viewer toolbar.
2. Select the location in **Save In** and specify the report name in **File name** entry box.
3. Click **Save** to save the report.

A saved report can be opened using button (from viewer toolbar) when the viewer is open.

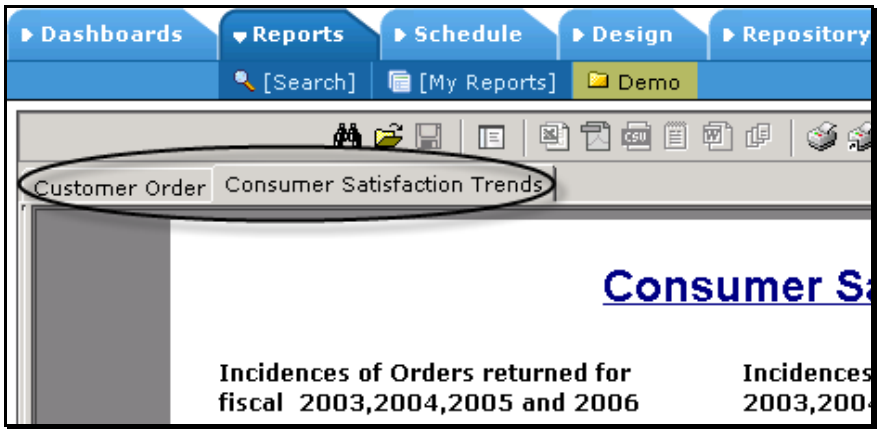

Figure 18: Tabbed view when multiple reports are open in JVista

When viewer has multiple reports, they are displayed in tabbed view. Click a tab to bring that report forward.

Exporting report

Using Intellicus Viewer, you get the following options to export reports to popular formats, like: HTML, PDF and MS Excel.

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

Format	Button	Notes
CSV		To export the report as CSV file.
MS Word		To export the report as MS Word file.
PDF		To export the report as PDF file.
MS Excel		To export the report as MS Excel file.
Text		To export the report as text file.
HTML		To export the report as HTML file.
XML		To export the report as XML file.

Based on the export format selected, Viewer may pop up a dialog box. In this dialog box, you need to enter more information that may be needed to export a report in the selected format.

You may also click (Export) button from Viewer toolbar to select an export format and click **Continue** to go ahead with the export operation.

When a report is being exported **Report exporting in progress** message will appear in the toolbar.

Figure 19: Report export related status message

Exporting as MS Excel

A report being exported in MS Excel needs some more information:

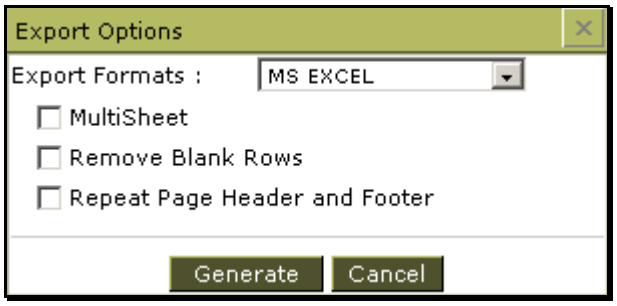

Figure 20: Exporting in MS Excel

- **Multisheet:** Select this checkbox if you want a multi-page report to appear on separate sheets.
- **Remove blank rows:** Select this check box if you want Viewer to remove any blank rows found in the report.
- **Repeat page headers and footers:** This option will be available only when **Multisheet** option is clear. Select this check box if you want headers and footers appear on exported report.

Note: When Multisheet is not selected, multi-page report will appear on one sheet. You may not need repeating report headers and footers on the sheet.

Click **Continue** button to go ahead with exporting. You may click **Cancel** button at any point of time to abandon the export process.

Exporting as CSV

A report being exported in CSV needs a character to be used as separator between values. Generally a comma is used for the same. However, Viewer can take the character that you specify.

Figure 21: Specifying Column separator

In **Column separator**, specify the character you want to use as separator for the CSV file. Click **Generate** button to go ahead with exporting. You may click **Cancel** button to abandon the export process.

Publishing report on Server

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).

To publish a report,

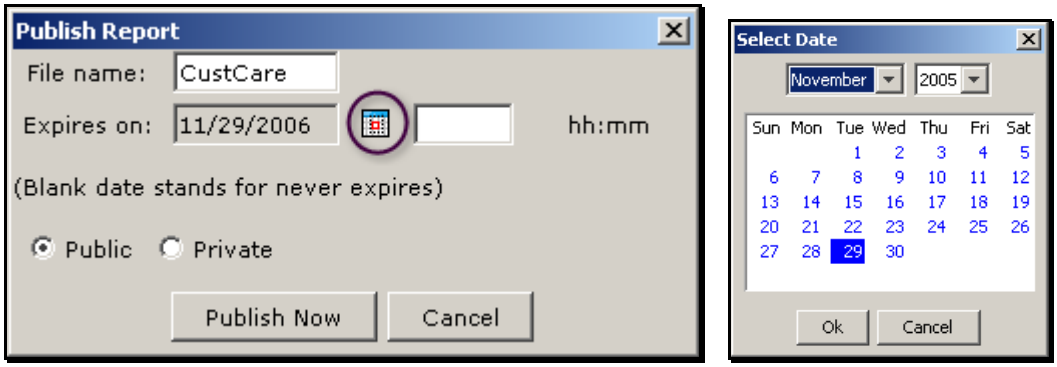

Figure 22: Publishing a report

1. Click (Publish) button from the Viewer toolbar.
2. In **File name**, specify the file name.
3. If you want the report to be published only for a specific period, click **Calendar** button to get the **Select Date** dialog and specify date.
4. Select the appropriate option between **Public** and **Private**.
5. Click **Publish Now** to go ahead with publishing the report.

You may click **Cancel** button to abandon the publishing operation.

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

Email report

A report being viewed in Intellicus Viewer can be mailed as a link or as attachment.

To email a report,

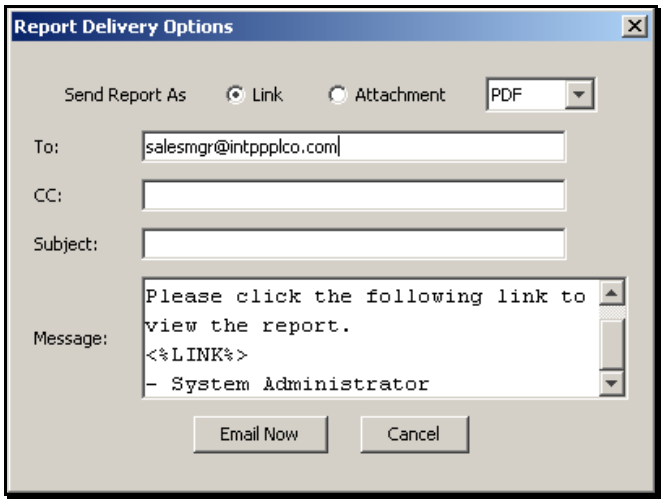

Figure 23: Mailing a report

1. Click button from the Viewer toolbar.
2. In **Save Report As**, select **Link** to send link of the report. Select Attachment to send report as email attachment.
3. Specify Ids for **To** and **CC**.
4. Specify **Subject**.
5. In **Message**, you may prefer to continue with pre-set message or specify a new message.
6. Click **Email Now** to send the report.