

# Configuring Ad hoc Reporting

Intellicus Enterprise Reporting and BI Platform



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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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## Configuring Ad hoc Reporting

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Adhoc reporting feature brings report design functionalities from designers to the users. Users can not only view report output, but also study and analyze the output by carrying out a number of analysis activities like sorting, grouping and filtering the output without returning to the designer screen.

To satisfy a variety of design, execution and post-view operation needs, Adhoc reporting feature is made highly configurable.

You need to use Intellicus super-administrator login to be able to configure Adhoc reporting feature.

Following Adhoc reporting features are configurable:

- Ad hoc Wizard
- Ad hoc templates
- HTML viewer
- iHTML viewer

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## Configuring features on Adhoc Wizard

As an administrator you can customize Adhoc Wizard (Adhoc Wizard) according to the organizational needs.

### Using the configuration page

You as a super administrator can customize (configure) Adhoc Wizard for:

- **Default:** Applied when no configuration is set or System configuration is lost / deleted.
- **System:** Applied to all the users/roles of all the organization for whom custom configuration is not setup.
- **Organization:** Applied to all the users/roles of an organization for whom custom configuration is not setup.
- **Users/Roles:** Applied to the user/role for which it is created.

When you open the page, **System** configuration is displayed. A configuration can be:

- Opened, so that it can be edited.
- Saved for (and so applied to) one or multiple organizations and users.
- Deleted for one or multiple organizations and users.

### Buttons on Configuration page

Configuration page has following buttons on it:



Figure 1: Buttons on Configuration pages

- **Save:** To save configuration changes for System, selected organization or user (the one that is open)
- **Save For:** To open **Save Configuration** dialog, select the entities and save the changes in all selected entities.



**Note:** Click the down arrow on **Save** button to get **Save For** option.

- **Open:** To open **Open Configuration** dialog and select an entity to open its configuration information.
- **Delete:** To delete the open configuration information (default or selected entity).
- **Delete For:** To open **Delete Configuration** dialog and select the entities to delete.



**Note:** Click the down arrow on **Delete** button to get **Delete For** option.

- **Cancel:** To cancel the configuration changes and return to opened / last saved status.

## Open Configuration dialog

This dialog is used to select a configuration (System, of an organization or a user) and open it for edit on Configuration page.

1. Click the option button to select an entity...

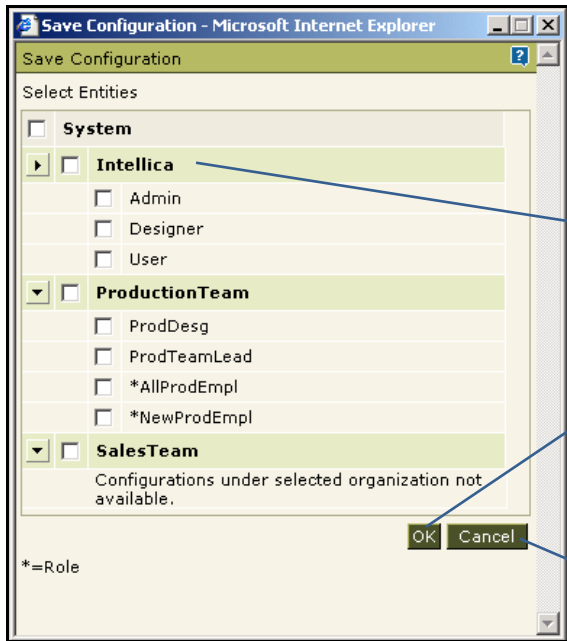
2. After selecting the entity, click **OK**.  
The dialog box will close and configuration for the selected entity will appear in Configuration page.

Click **Cancel** to return to Configuration page without opening configuration for the selected entity.

Figure 2: Open Configuration dialog

## Save Configuration dialog

This dialog is used to save configuration information (set on Configuration page) for one or more entities: organizations as well as users.



1. Select (check) the checkboxes of entities you wish to save configuration for...

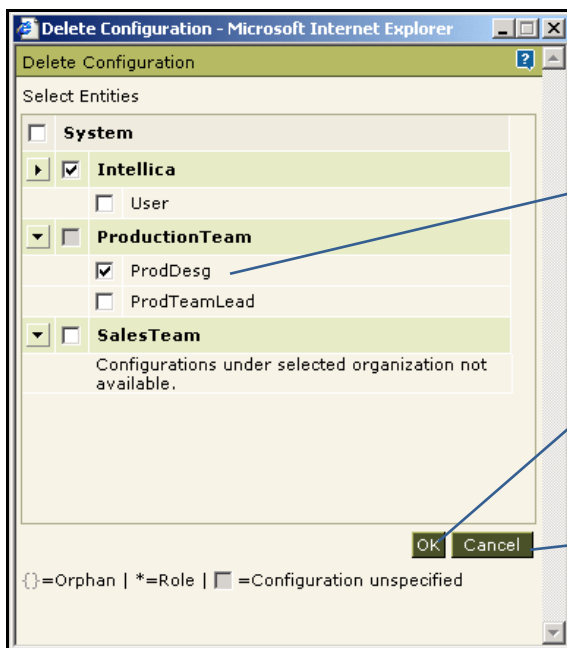
2. After selecting the entities, click **OK**.

The dialog box will close and configuration for the selected entities will be saved.

Click **Cancel** to return to Configuration page without saving the changes.

Figure 3: Save Configuration dialog

## Delete Configuration dialog



1. Select (check) the checkboxes of entities you wish to Delete configuration of...

2. After selecting the entities, click **OK**.

The dialog box will close and configuration for the selected entities will be deleted.

Click **Cancel** to return to Configuration page without deleting any configuration.

Figure 4: Delete Configuration dialog

## Customizing Adhoc Wizard

To customize Adhoc Wizard, click Navigation > Administration > Configure > Adhoc Wizard tab.



**Note:** If Intellicus is running under security disabled, specify following URL in the browser's address bar to get this page.

If you are using the computer used as web server,

http://localhost/intellicus/pattern/conf and then click Adhoc Wizard tab.

In other cases,

http://<IP of the server>/Intellicus/pattern/conf and then click Adhoc Wizard tab.

When you open the page, by default it opens configuration for "System". Before going ahead, make sure you have opened the right configuration (for "System", organization or the user/role).

Click Save (or Save For) button to save the configuration.

Figure 5: Configuration page for Adhoc Wizard



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## Properties for entire report

### Report Output Format Selection

If selected (checked), users will be able to select output format of the report.

The screenshot shows the 'Global' configuration window with the following settings:

- Report Output Format Selection
- Show Option to Hide Report Details
- Show Calendar as: **Inline**
- Show Option to Set Template
- Default Template: **Blank**
- Default Template for Dashboard: **(None)**
- Default Selected Output Format: **HTML**
- Auto-Resize Field Drop Down Width
- Default Width of Field Drop Down: **200**
- Multipage Prompt: **BASIC**
- Viewer Frame: **Integrated**
- Show Option to Set Report Title
- Layout Type: **Freeflow**
- Show Help: **COMMON**

Report Output Formats (Left Panel):

- HTML
- ACROBAT PDF
- MS EXCEL
- COMMA SEPARATED
- TEXT
- MS WORD
- iHTML

Default Expanded Designer Tabs (Right Panel):

- TOTAL
- SORT
- MATRIX
- CHART
- HIGHLIGHT
- SELECT
- FILTER
- GROUP

Figure 6: Global tab

### Show Option to Hide Report Details

If selected (checked), option to hide report details will appear. In this case only group headers and summaries will appear on the report. Each individual record will not appear.

### Show Calendar as

If **Inline** is selected (checked), date picker will open as part of portal window. If **Popup** is selected, date picker will open in a new popup window.

### Show Options to Set Template

If selected (checked), a dropdown box having options of templates will appear on Adhoc Wizard page. User can select the template to be used with the report.

### Default Template

Specify the default template to be used while generating reports using Adhoc Wizard.

### Default Template for Dashboard

Select the default template to be used when an adhoc report is designed from Dashboard Widget Designer page.

### Default Selected Output Format

This represents report output format that should appear as selected.

### Auto-Resize Field Drop Down Width

If selected (checked) width of the dropdown box appearing to select the field (in filter tab) gets re-sized based on the longest option in the dropdown box.

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### Default Width of Field Drop Down

The default width of the dropdown box that appears for field-selection (in filter tab). The width is specified in terms of characters.

### Multipage Prompt

The value selected here will decide the way Multipage options appear on Adhoc Wizard.

- **BASIC:** To get Multipage checkbox. If selected, report output will be split across width as well as length. If kept clear, report output will appear as a single page.
- **ADVANCED:** To get Pagination dropdown box. It has options Single Page, Multiple Page, Horizontal Breaks and Vertical Breaks to choose from.

### Viewer Frame

Value selected here will decide the way the adhoc report Viewer will open.

- **Integrated:** Adhoc report viewer will open within application window.
- **New Window:** Adhoc report viewer will open as a new window.

### Show Help

Select **None** for not having help icon on wizard. Select **Common** to have common help for entire Wizard. Select **Tabbed** to have help icons for individual tabs.

### Show Option to Set Report Title

Check this checkbox to display Report Title text box on Adhoc Report Wizard. It is used to specify report title for the report being designed. By default, Query name is displayed as report title on the report. If Report Title text box is displayed, users can specify title of the report which will be displayed on the report.

### Layout Type

Adhoc report wizard can be configured to open in any of the two layouts:

- To get collapsible sections which when clicked, opens one below other, select *Freeflow*. This arrangement lets you view all the tabs at a time.
- To get adhoc wizard having dialog box like tabbed arrangement where you click a tab to activate it, select *Tabbed*.

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## Report Output Formats

These are the report formats that can be made available to user. These options will appear on Adhoc Wizard. User can select any output format (one).

## Report Output Formats

The report formats that can be made available to user. These options will appear on Adhoc Wizard. User can select any one report output format at the time of designing a report.

## Default Expanded Designer Tabs

The tabs that should appear as expanded when Adhoc Wizard is opened.

## Data Source

| While Editing Adhoc Reports                                     |                                   |   |   |
|---|-----------------------------------|---|---|
| <input checked="" type="checkbox"/> Show Display-Fields Section | Display Data Source Drop Down Box | TRUE  |   |
| Display-Fields Selection From                                   | DUAL LIST                         | <input type="checkbox"/> Display-Fields Sequencing Option | <input checked="" type="checkbox"/> Show Custom Width Option    |
| Fetch Query Object As   | LAZY                              | <input checked="" type="checkbox"/> Show Grouped Fields   | <input checked="" type="checkbox"/> Display Custom Align Option |
| Allowed Query Editor Operations                                 | FULL                              | <input type="checkbox"/> Retain Design On Query Change    | <input checked="" type="checkbox"/> Show Render As Option       |

Figure 7: Data Source tab

## While editing Adhoc reports

### Show Display-Fields Section

Effective when an adhoc report is opened for edit from Reports List page. If selected (checked), display-fields section will be displayed on Adhoc Wizard.

### Display Data Source Dropdown Box

Effective when an adhoc report is opened for edit from Reports List page.

- **FALSE:** Data source dropdown box will not be displayed, so user can't know the data source name as well as cannot select a data source.
- **Show Source:** Data source name will be displayed. Data source dropdown box will not be displayed, so user cannot select a data source.
- **TRUE:** Data source drop down box will be displayed on Adhoc Wizard. User can select a data source from the dropdown box.

### Show Display-Fields Section

If selected (checked), display-fields section will be displayed on Adhoc Wizard.

---

## Other configurations under data source

### Display Custom Align Option

If selected (checked), option for alignment of fields will appear on PowerViewer. This will be available on right-clicking a field.

### Display-Fields Selection From

Select the way display-fields selection should be done.

- **Dual List** is an arrangement of **Available List** and **Selected List**. Fields are selected and shifted to either list.
- **Checkbox** arrangement lists all the fields with a check box. Select (check) or clear (uncheck) a checkbox to get the field on report or remove it from the report respectively.

### Display-Fields Sequencing Option

If selected, mechanism will be made available on Adhoc Wizard's **Data Source** tab to set the sequencing of the fields for arrangement on report. Topmost is placed the left most.

### Show Custom Width Option

This check box will become enabled if **Dual List** option is selected in Display-fields selection from. If selected, an entry box will be made available on Adhoc Wizard to set the width of that column (width) on the report.

### Fetch Query Object As

Set when query object should be fetched - at the time of opening Adhoc Wizard or only when the respective query object is selected. If it is set to **PREFETCH**, fields detail is fetched at the time of opening Adhoc Wizard. If it is set to **LAZY**, fields detail is fetched only when respective query object is selected from the dropdown box.

### Show Grouped Fields

If selected, fields will appear by groups set in query object. This will happen only if selected QO has fields assigned to groups. All the fields in a group can be selected by clicking group name.

### Allowed Query Editor Operations

If set to *FULL*, **Query Editor** link will appear next to drop down box listing data sources on Adhoc Wizard. Clicking this link user can open **Report Objects** page in new window and work with report objects. If set to *NONE*, this link will remain invisible on the Adhoc Wizard.

### Retain Design On Query Change

A Query object is selected and when either or all (filters, sorting, grouping or totals etc) operations are applied. Now, you select another query object. The query object can have same fields or different fields. For all the fields that are same in the already selected query object and the query object which is recently

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selected, any operation (filters, sorting, grouping or totals etc) performed on query object will not be lost. Check the checkbox to retain the design on query change.

**Show Render as Option**

With Number field whether Render as option shall be given to user for choosing options like Data bar

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## Filters Section

Select this checkbox (on tab header) to make this tab visible on Adhoc Wizard.



The screenshot shows a configuration window titled "Show Filters". It contains several options: "Initial Number of Filters" with a text input field containing the number "3"; "Show Max Rows Option" (checked); "Show Run-Time Prompt Checkbox" (unchecked); "Show Option to Set Advanced Filters" (checked); "Show User Parameters" (unchecked); and "Show Suppress Duplicates Checkbox" (checked).

Figure 8: Show Filters tab

### Initial Number of Filters

Specify the number of filters that should be displayed when Adhoc Wizard is opened.

### Show Max Rows Option

If selected (checked), Adhoc Wizard will show option using which user can select the maximum number of rows he / she wants to have on the report.

### Show Run-Time Prompt Checkbox

If selected (checked), run-time prompt check boxes are visible. User will be prompted at run time for the value. When user select this check box, make sure user has selected **Show user parameters** checkbox too.

### Show Option to Set Advanced Filters

Ad hoc filter section shows relating multiple conditions using AND OR operator, if this checked.

### Show User Parameters

If selected (checked), User Parameters drop down box are visible on Adhoc Wizard. When the filter depends on this parameter, Intellicus will try to run the report with default value set for the parameter. If **prompt** checkbox is available, Intellicus will prompt to present the dialog box to provide run time parameter.

### Show Suppress Duplicates Checkbox

If selected (checked), **Suppress Duplicates** checkbox is visible on Adhoc Wizard. This way, user can choose to get all the records satisfying filter criteria or only one record out of the records satisfying filter criteria.

---

## Filter Operators Section

Select this checkbox (on tab header) to make this tab visible on Adhoc Wizard.

### Operators for Character data type

Select the operators to be made available to the user while applying filters for a character type field.

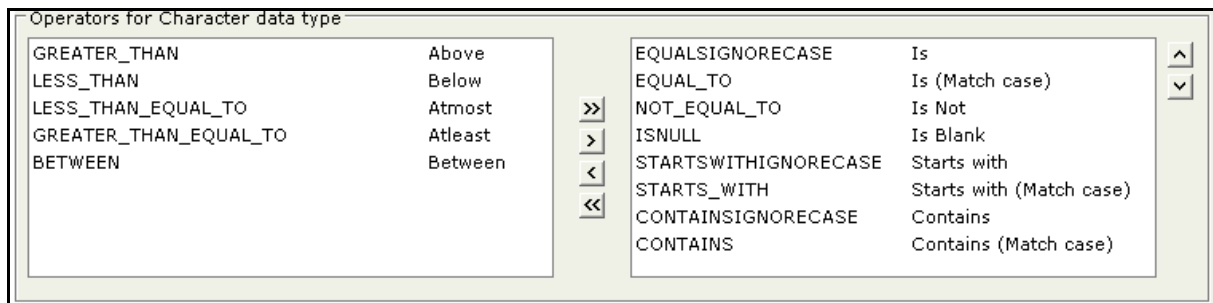


Figure 9: Operators for Character data type

After shifting the required operators to the selected list (list on the right), double-click the entry on the right to open it for edit. Now you can specify the text that user should get for this operator at design time.

### Operators for Number data type

Select the operators to be made available to the user while applying filters for a number type field.

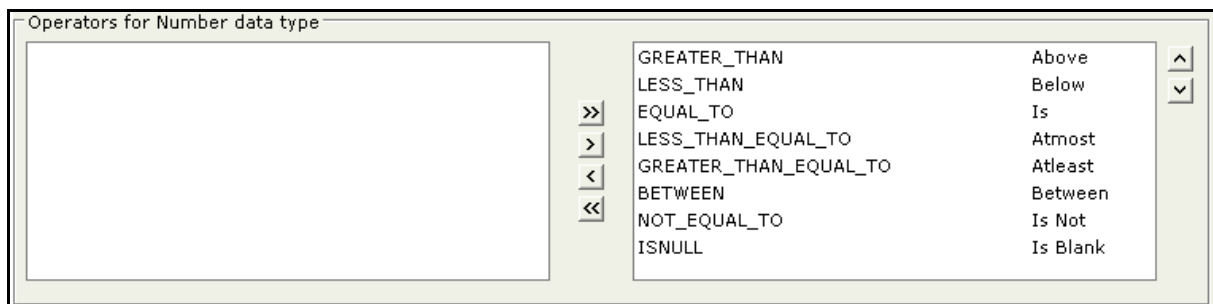


Figure 10: Figure 4: Filter Operators for number data type

After shifting the required operators to the selected list (list on the right), double-click the entry on the right to open it for edit. Now you can specify the text that user should get for this operator at design time.

### Operators for Date data type

Select the operators to be made available to the user while applying filters for a date type field.

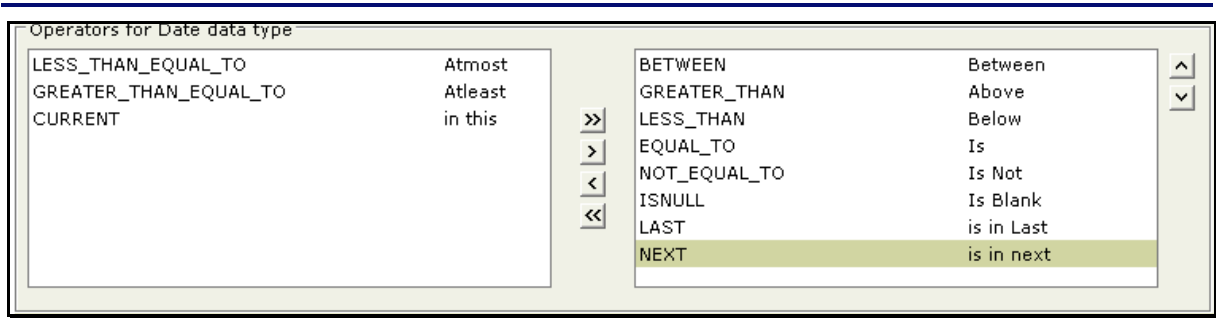




Figure 11: Filter Operators for date data type

After shifting the required operators to the selected list (list on the right), double-click the entry on the right to open it for edit. Now you can specify the text that user should get for this operator at design time.

For all of the above, user can also set their sequencing using  and  buttons on the right of respective **Selected List**.

### Grouping Section

Select this checkbox (on tab header) to make this tab visible on Adhoc Wizard.

#### Initial Number of Groups

Specify the Initial number of groups a user can specify on Adhoc Wizard.

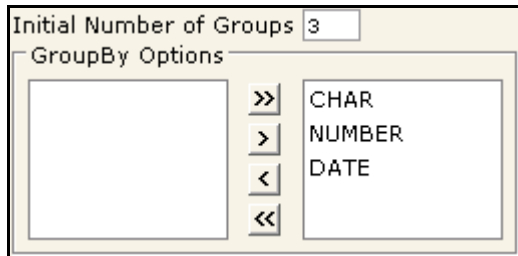


Figure 12: Show Groups tab

#### GroupBy options

Intellicus can group the data by date, number and character. Select the options you want your users to use.

### Totals Section

Select this checkbox (on tab header) to make this tab visible on Adhoc Wizard.

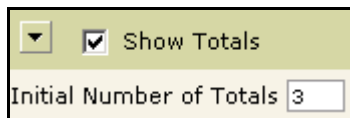


Figure 13: Show Totals tab

#### Initial Number of Totals

Specify the number of totals (summary values) that should be displayed when Adhoc Wizard is opened.



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## Sort Section

Select this checkbox (on tab header) to make this tab visible on Adhoc Wizard.

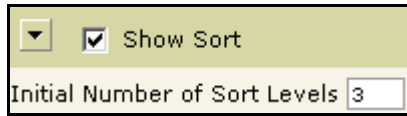


Figure 14: Show Sort tab

### Initial Number of Sort Levels

Specify the number of sort levels that should be displayed when Adhoc Wizard is opened.

## Charts Section

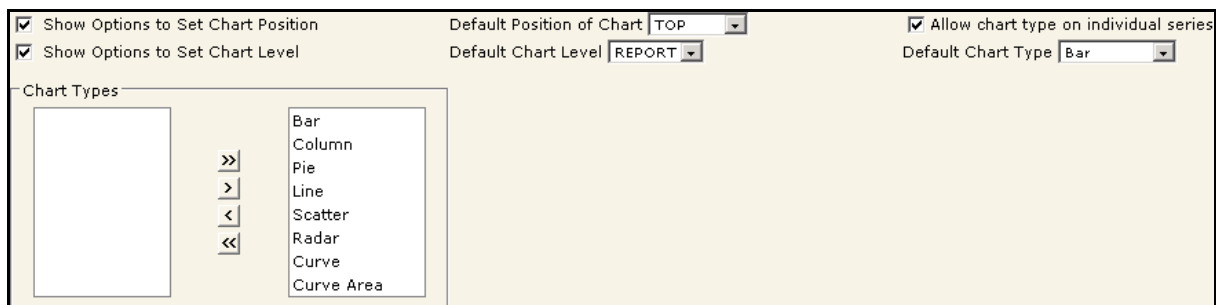


Figure 15: Options on Chart tab

Select this checkbox (on tab header) to make this tab visible on Adhoc Wizard.

### Show Options to Set Chart Position

If selected (checked), Adhoc Wizard will show option to set the position of chart on report.

### Default Position of Chart

From the dropdown box, select the default position of the chart.

### Allow chart type on individual series

If selected (checked), Adhoc Wizard will show a button using which a user can select chart type for each of the series.

### Show Options to Set Chart Level

If selected (checked), Adhoc Wizard will show option to set the position of chart on report.

### Default Chart Level

From the dropdown box, select the default chart level for plotting the chart.

---

## Default Chart Type

From the dropdown box, select the default chart type for the chart.

## Show Options to Set Top(N)

Top(N) allows users to decide a pre-set number of data points to be plotted on chart. These can be decided by "highest N values" or "Lowest N values". Check this checkbox to display this option on Adhoc Wizard.

## Chart Types

Select chart types that should be made available to the users of Adhoc Wizard.

## Matrix Section

Select this checkbox (on tab header) to make this tab visible on Adhoc Wizard.



Figure 16: Options on Show Matrix tab

## Show Totals Option on Rows and Columns

Select this checkbox if you want your user to get option to place row totals and column totals on Adhoc Wizard.

## Viewer tab

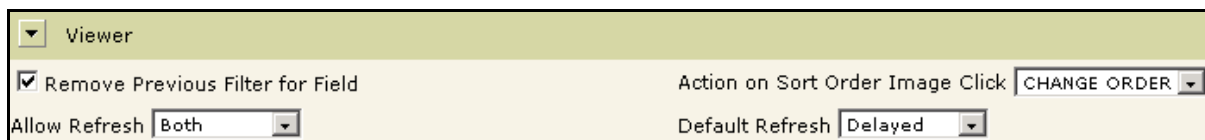


Figure 17: Viewer tab

## Remove Previous Filter for Field

Set if the filter setup should be continued on a field if another filter is applied. If unchecked, only one filter (set latest) will be applied on a field.

If checked, at a time all the filters setup on a field will be applied.

## Action on Sort Order Image Click

Select the action that should be taken when user clicks Sort Order image on viewer. Select *Change Order* to reverse sort order of the field. Select *Make Primary* to set the field as primary sort field.

## Allow Refresh

Set how the actions taken on PowerViewer should be applied. Select *Immediate* to apply the change immediately after it is done. Select *Delayed* to apply changes once after making many changes. Select *Both* to have flexibility to choose any of Immediate and Delayed.

## Default Refresh

If *Both* is selected for **Allow Refresh**, select the default method of refresh.

## Summary Functions

### Summary functions for character data type

Select the summary functions to be made available to the user to be used with a character type field.



**Note:** If no option is selected then default (all options) will be assumed selected.

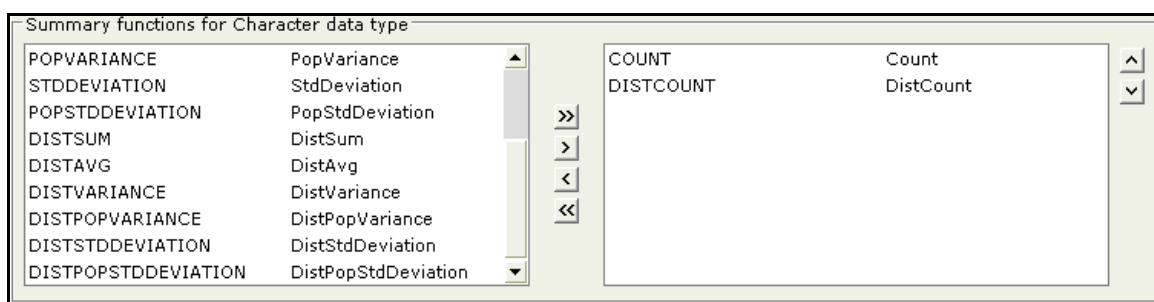




Figure 18: Summary functions for Character data type

After shifting the required functions to the selected list (list on the right), double-click the entry on the right to open it for edit. Now you can specify the text that user should get for this operator at design time.

For all of the above, user can also set their sequencing using  and  buttons on the right of respective **Selected List**.

### Summary functions for Number data type

Select the summary functions to be made available to the user to be used with a Number type field.

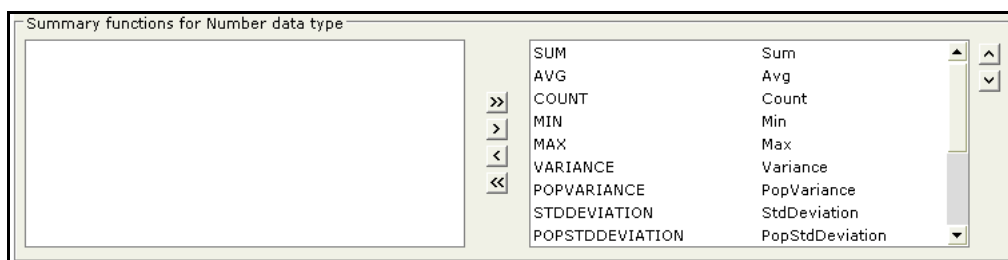




Figure 19: Summary functions for Number data type

After shifting the required functions to the selected list (list on the right), double-click the entry on the right to open it for edit. Now you can specify the text that user should get for this operator at design time.

For all of the above, user can also set their sequencing using  and  buttons on the right of respective **Selected List**.

## Summary functions for Date data type

Select the summary functions to be made available to the user to be used with a date type field.

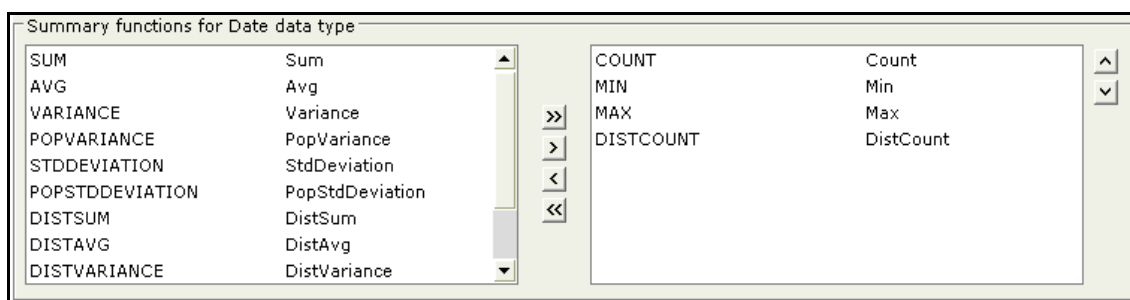




Figure 20: Summary functions for Date data type

After shifting the required functions to the selected list (list on the right), double-click the entry on the right to open it for edit. Now you can specify the text that user should get for this operator at design time.

For all of the above, user can also set their sequencing using  and  buttons on the right of respective **Selected List**.

## Highlight Section



Figure 21: Show highlight tab

Select this checkbox (on tab header) to make this tab visible on Adhoc Wizard.

### Initial Number of Highlights

Specify the number of highlight setup rows that should be displayed when Adhoc Wizard is opened.

### Show Option to Set Advanced Conditions

Specifies whether relating multiple conditions using AND OR operators will given to end user.

---

## Configuring Viewer for Adhoc reports



Figure 22: PowerViewer features

### **Enable**

Select this checkbox to enable the power viewer functionalities on Viewer.

### **Show Help**

Select this checkbox to make the help icon visible on Viewer.

---

## Configuring Adhoc Report Templates

Intellicus needs multiple type of files to generate output of an adhoc report:

- **Style file (.sty):** Takes care of look and feel, arrangement, orientation, etc.
- **Layout file (.irl):** Takes care of factors like paper size and static controls.

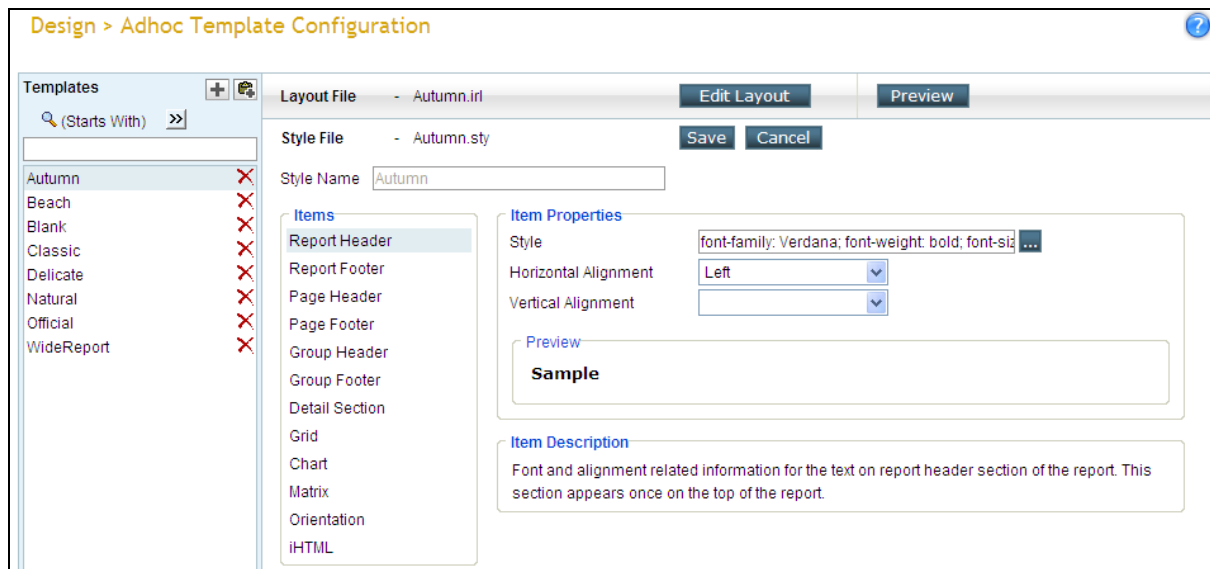


Figure 23: Adhoc Template Configuration page

STY file needs to attach following templates:

- **Chart template:** Information about look and feel of charts. There are separate templates for amchart and rchart.
- **iHTML template:** Information to provide look and feel to a report in iHTML report type.
- **Grid template:** Folder having collection of files needed to draw a grid (when an adhoc report is being viewed on HTML or iHTML).

The above three type of templates needs to be attached to an STY file from **Adhoc Template Configuration** page.

---

## Working with Adhoc Template Configuration page

### To filter the list of templates

List of templates can be filtered by:

- Starting character (Starts with)
- Characters that appear anywhere in the template name (Contains)

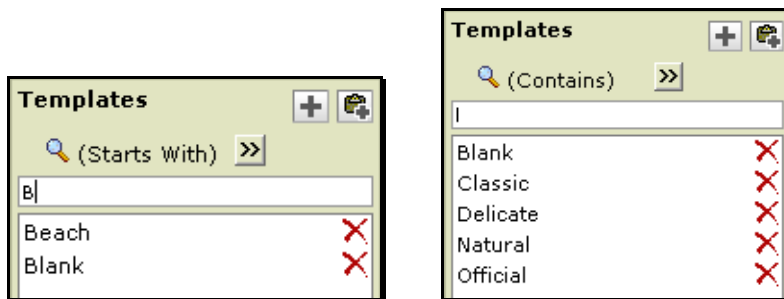


Figure 24: Getting filtered list of Template files

Steps:

1. Check the option on the right of .
2. To get the right option there, click and select **Start** with or **Contains**.
3. Specify character(s) in the textbox.

The list will be filtered (not case sensitive) as per the criteria.

### To create a copy of an existing template

1. Select the template to copy from.
2. Click the button.

A template will be created having same contents as in the one that was copied. This new template's name will be the same as copied one, but with prefix "Copy of". You can rename the template and modify style file as well as layout file.

### To create a new template

Major steps involved in creating a new template are,

1. Click button.
2. Specify **Style Name** and click **Save** button. Respective layout file and style file will be created.
3. Set the styles by selecting **Items** and selecting **Item Properties**. Click **Save** button to save the changes in style.
4. Create a layout. To create a layout, click **Edit Layout** button and open **Report Designer**.

---

## To modify a style file of template

1. From template list, select the template. Its properties are listed on the right side of the page.
2. For the item that needs changes, select the item and make required changes in Item Properties.
3. Click **Save** button to save the changes.

## To modify layout file of a template

To modify a layout file, open it in Report Designer. (It opens in a new window).

1. From template list, select the template.
2. Click **Edit Layout** button to open **Report Designer**.
3. Click **Save** button on **Report Designer** to save the changes.
4. To preview template changes / effect of the template
5. Click **Preview** button to open **Adhoc Wizard**. Here you can open an existing report or you can design a new report to preview it.

## Details of Style

**Select File:** Select the template file from this drop-down box.

## Report Header / footer, Page header / footer, group footer

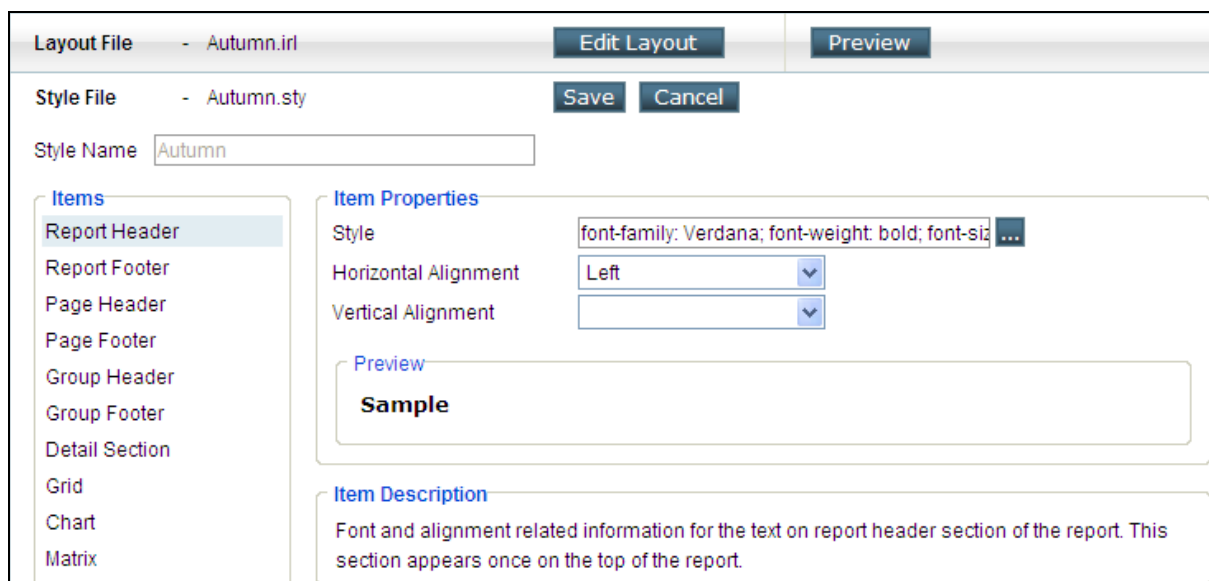


Figure 25: Setting styles for adhoc report output

- **Style:** To set Font, font style, size, font color and back color, Underline and Strikethrough.
- **Horizontal Alignment:** Select one among Right, Left or Center.



- 
- **Vertical Alignment:** Select one among Middle, Top, Baseline and Bottom.

## Group Header



**Item Properties**

Style: font-family: Tahoma; font-weight: bold; font-size: ...

Group Indent Width:  Auto  Fixed 1000

Include Groups in CSV: False

Horizontal Alignment: Left

Vertical Alignment:

Preview: Sample

Figure 26: Setting styles for Group Header section

- **Style:** To set Font, font style, size, font color and back color, Underline and Strikethrough.
- **Group Indent Width:** Indent to be kept for each level of group. Set Fix to have a pre-set fix indent. Set Auto to let application decide the indent.
- **Include Groups In CSV:** Value of this property will decide if group header and group footer will appear when viewed in CSV (if a report has one or more groups). Set True to have group header and group footer. Set False for not having group header and footer.
- **Horizontal Alignment:** Select one among Right, Left or Center.
- **Vertical Alignment:** Select one among Middle, Top and Bottom.

---

## Detail Section

**Item Properties**

Style: font-family: Tahoma;font-weight: normal; font-...

Horizontal Alignment: Left

Vertical Alignment:

Alternate Backcolor (BGR Format): EFEFEF

Border Color (BGR Format): ffffff

**Preview**

Sample

**Item Description**

Font and alignment related information for the text on detail section. This section is rendered once for every record and generally has database fields and calculated fields.

Figure 27: Style options for detail section

- **Style:** To set Font, font style, size, font color and back color, Underline and Strikethrough.
- **Horizontal Alignment:** Select one amongst Right, Left or Center.
- **Vertical Alignment:** Select one amongst Middle, Top, Baseline and Bottom.
- **Alternate Backcolor (BGR format):** Set the alternative color to get background of detail section in alternating colors. This may increase readability.
- **Border Color (BGR Format):** Set the Border color to get border.

---

## Grid

| Item Properties     |                 |
|---------------------|-----------------|
| Grid Provider       | Dhtmlx          |
| Grid Template       | Default         |
| Width               | 11000           |
| Height              | 6500            |
| Grid Local Cache    | True            |
| Data Tree Expansion | Fetch on Demand |

Figure 28: Grid Properties

- **Grid template:** Look and feel of a grid are defined in its template file. Select a template file to apply for grid, when user selects this adhoc template on Adhoc Wizard.
- **Width:** Specify width of the grid in twips.
- **Height:** Specify height of the grid in twips
- **Grid Local Cache:** On Grid, user can select a field to show / hide through a menu. Select True to get show / hide option for all fields of the QO. Select False to get show / hide option only for the Selected Fields.
- **Data Tree Expansion:** Applicable when data is grouped. Select Fetch on Demand, Prefetched, Expanded.

## Chart

| Item Properties     |        |
|---------------------|--------|
| Width               | 11000  |
| Height              | 6500   |
| Chart Output Viewer | Image  |
| Font Name           |        |
| Chart Provider      | Rchart |
| Chart Template      |        |

Figure 29: Options for chart component

- **Width:** Total width to be used to plot chart.
- **Height:** Total height to be used to plot chart.
- **Chart Output Viewer:** The way chart should be displayed. Select Image to plot chart as an image component. Select Flash to plot chart as flash component.
- **Font Name:** The font that should be used for text on the chart.

- **Chart Provider:** Chart on Adhoc report are provided by managed by RChart and AmChart. AmChart provides more chart types and chart actions than what RChart provides. Select the one you want to use to plot chart on adhoc report.
- **Chart Template:** Chart template defines look and feel of chart. Select the chart template that should be applied when this report template is selected. After selecting a template, click **Edit** button to edit the chart template file. **Configuration Files List** page will popup where you can open file and edit it.



**Note:** If the selected font is not available on the report server, Intellicus default font (Arial) will be used.

## Matrix



| Item Properties                  |  |
|----------------------------------|--|
| Theme                            | Original   |
| Alternate Backcolor (BGR Format) | <input type="text"/>  |
| Alternate Forecolor (BGR Format) | <input type="text"/>  |
| Font Name                        | <input type="text"/>   |
| Row Height                       | 270  |
| Column Header Height             | 270  |

Figure 30: Options for Matrix component

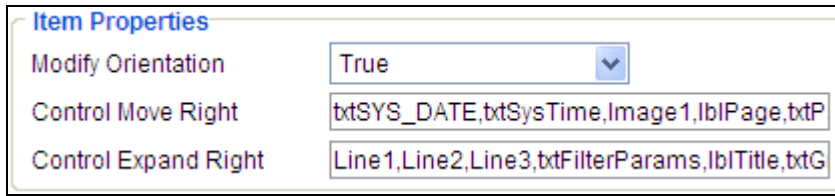
- **Theme:** Select a theme to be applied on matrix.
- **Alternate Backcolor (BGR Format):** Select the alternative color to get background of matrix in alternating colors.
- **Alternate Forecolor (BGR Format):** Select the color of text to be used when alternative background color is applied.
- **Font Name:** The font that should be used for text on the matrix.
- **Row Height:** Specify width of the matrix component in twips.
- **Column Header Height:** Specify width of the matrix component in twips.



**Note:** If the selected font is not available on the report server, Intellicus default font (Arial) will be used.

---

## Orientation



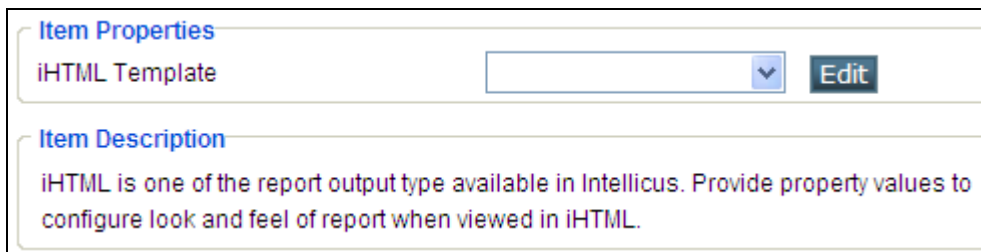
The screenshot shows a dialog box titled "Item Properties" with three rows of settings:

|                      |  |
|----------------------|--|
| Modify Orientation   | True   |
| Control Move Right   | txtSYS_DATE,txtSysTime,Image1,lbIPage,txtP     |
| Control Expand Right | Line1,Line2,Line3,txtFilterParams,lbTitle,txtG |

Figure 31: Orientation change options

- **Modify Orientation:** This will take care of situations when an adhoc report has more number of fields than it can handle in given page width. Select **true** to automatically change orientation from portrait to landscape.
- **Control Move Right:** Comma separated values appearing in the list are the static controls found in the sty file. If page orientation is changed, these controls will also be shifted towards right.
- **Control Expand Right:** Comma separated values appearing in the list are the static controls found in the sty file. If page orientation is changed, these controls will be expanded towards right side.

## iHTML



The screenshot shows a dialog box titled "Item Properties" with two sections:

- Item Properties:** Contains a dropdown menu for "iHTML Template" and an "Edit" button.
- Item Description:** Contains the text: "iHTML is one of the report output type available in Intellicus. Provide property values to configure look and feel of report when viewed in iHTML."

Figure 32: Miscellaneous settings for adhoc template

- **iHTML Template:** Select the iHTML template to be used when the report is viewed in iHTML output type. iHTML template defines look and feel as well as positioning details of report components. To edit a template, select the template from the drop down and click Edit button. Config Files page will open where you can edit the template and save it.

---

## iHTML template

iHTML template is a collection of web resources having one mandatory html file (main.htm). This is the main page, which would be displayed in Intellicus Html Viewer.

**Important:** If this file is not found as a part of template then report output would be generated using Adhoc IRL template.

All web-resources, which are used on iHTML template should be placed in a folder at location:

```
<installation folder>Intellicus/ReportServer/templates/ihtml/.
```

Name of the folder would act as name of template. Names of all folders are listed on **Adhoc Style Configuration** page.

Register onload event of body tag in main.htm. Name of registered javascript function should be 'INTERA\_ONLOAD()'. This function would be called when report output is loaded in HTML viewer. This would trigger an event to start rendering of all client side controls like Chart, Data Grid etc. for e.g.

```
<body onload="INTERA_ONLOAD()">
```

All placeholders kept in main.htm for rendering of client side controls like chart, Data grid, system parameters, user parameters, etc should be given proper id's in below mentioned manner.

### Grid

Id of html element should be INTERA\_GRID0. For e.g.

```
<div id="INTERA_GRID0" style="..."> </div>
```

### Chart

Id of html element should be INTERA\_CHART0. For e.g.

```
<div id="INTERA_CHART0" style="..."> </div>
```

To display image for "loading" or some pre-processing information before chart renders, then leave one more place holder positioned above chart placeholder. Id of this html element should be "INTERA\_CHART0<!>MESSAGEDIV". For e.g.

```
<div id="INTERA_CHART0<!>MESSAGEDIV" style="..."> </div>
```

---

## System parameters or User parameters

Id of html element should be INTERA\_<name of parameter>.

**Important:** Name of parameter should be in uppercase.

So for e.g. if report title is to be displayed then Id of html element in which report title would be displayed should be 'INTERA\_SYS\_REPORT\_TITLE'. For e.g.

```
<div id="INTERA_SYS_REPORT_TITLE'" style="..."> </div>
```

To display "display parameter" of any parameter, HTML id should be INTERA\_<PARAMETERNAME>\_DISP.

When a template has a placeholder, but the report does not have corresponding data, that place would be left empty. For example, if the template has placeholder for chart, but the report does not have chart, its place holder will be left blank.

If report is expected to have Unicode data, set charset property value as utf-8.

```
<META HTTP-EQUIV="Content-Type" CONTENT="text/html; charset=UTF-8">
```

---

## Property File for Grid control (dhtmlxgrid.properties)

It is possible to control the functionalities to be made available on iHTML's grid control by setting property values in dhtmlxgrid.properties file.

This file is available at path:

```
<install path>Intellicus\ReportEngine\templates\grids\dhtmlx\<template folder>\dhtmlxgrid.properties
```

For example,

```
<install path>\Intellicus\ReportEngine\templates\grids\dhtmlx\default\dhtmlxgrid.properties
```

**Note:** Report Engine reads this property file and caches the property values. Changes made in this file will come into effect only after report-server restart.

### GLOBALS

#### STATUS\_BAR

Value of this property defines visibility of the status bar on grid. Set TRUE to display the status bar. Set FALSE to hide the status bar. Default: TRUE.

Example: STATUS\_BAR=TRUE

#### COLUMNS

##### SHOW\_HIDE\_COLUMNS

Value of this property defines if user will be given column show / hide functionality on grid. Set TRUE to enable column show / hide functionality. Set FALSE to disable this functionality. Default: TRUE.

Example: SHOW\_HIDE\_COLUMNS=TRUE

##### COLUMN\_RESIZE

Value of this property defines if user will be able to resize columns on grid. Set TRUE to enable column-resize functionality. Set FALSE to disable this functionality. Default: TRUE.

Example: COLUMN\_RESIZE=TRUE



---

## **COLUMN\_MOVE**

Value of this property defines if user will be able to reposition columns displayed on grid. Set TRUE to enable this functionality. Set FALSE if users should not be able to reposition columns. Default: TRUE.

Example: COLUMN\_MOVE=TRUE

## **SORTING**

### **SORT\_ON\_CLICK**

Value of this property defines if functionality of sorting columns will be enabled on grid. If this functionality is enabled, users can click a column-title to sort the list by that column. Set TRUE to enable this functionality. Set FALSE if users should not be able to sort the list. Default: TRUE.

Example: SORT\_ON\_CLICK=TRUE

## **FILTERING**

### **SEARCH**

Value of this property defines if user will be able to search the rows by filtering the rows in the grid. Set TRUE to enable this functionality. Set FALSE to disable this functionality. Default: TRUE.

SEARCH=TRUE

### **SEARCH\_TYPE**

When SEARCH is set to TRUE, value of this property will define how search results will be displayed on grid. Set FILTER to list the records that meet the criteria. Set NAVIGATE to highlight first record that meets the criteria. Default: FILTER.

Example: SEARCH\_TYPE=FILTER

### **FILTERING\_LEVEL**

Value of this property defines the level in grid (when it is grouped) at which filter criteria can be provided. Valid values are:

- CURRENT\_LEVEL: The level of the selected row in grid.
- TOP\_LEVEL: Row of the top-most level of the group.
- LAST\_LEVEL: Row of the lower-most level of the group.
- ALL\_LEVELS: Any row of the grid.

Default: CURRENT\_LEVEL

Example: FILTERING\_LEVEL=CURRENT\_LEVEL

---

## **PAGINATION**

Value of this property defines if pagination will be available on the grid or not. When pagination is true, data records on grid are displayed as pages. Set TRUE to enable pagination functionality. Set FALSE to disable this functionality. Default: TRUE.

Example: PAGINATION=FALSE

## **RECORDS\_PER\_PAGE**

When pagination is TRUE, Value of this property defines number of records per page. Default is 100. Set any positive integer value.

Example: RECORDS\_PER\_PAGE=100

