



# Customizing HTML Viewer

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Intellicus Enterprise Reporting and BI Platform



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## **Acknowledgements**

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

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## Customizing HTML Viewer

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As an administrator user can customize HTML Toolbar Viewer according to organizational needs.

### Using HTML Viewer configuration page

You as a super administrator can customize (configure) HTML Viewer 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:

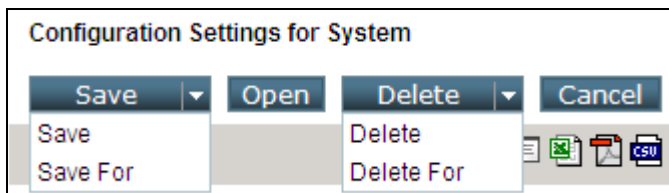


Figure 1: Buttons on Configuration pages

- **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...

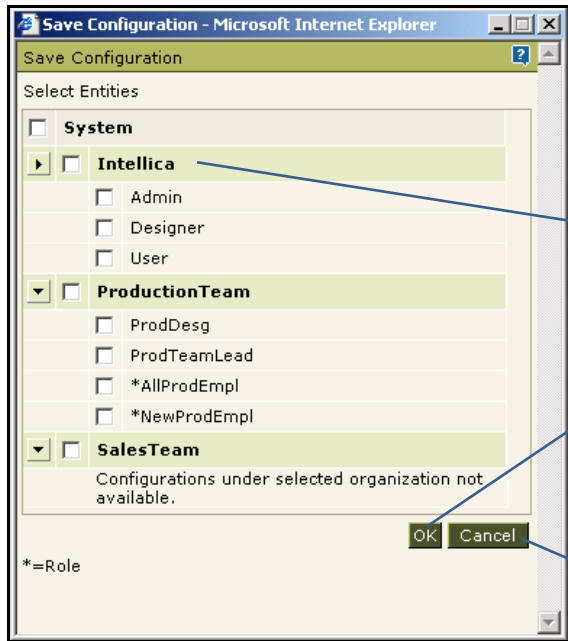
2. After selecting the entity, click **OK**.  
The dialog box will close and configuration for the selected entity will appear in Configuration page.

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...

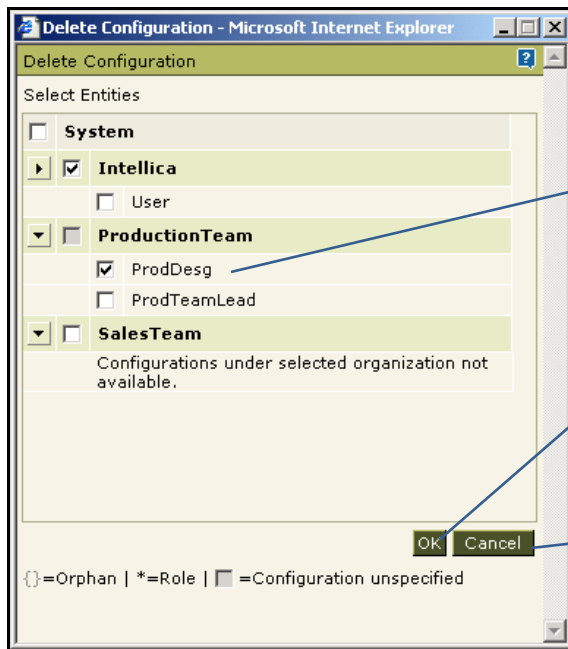
2. After selecting the entities, click **OK**.

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

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## Configuring the viewer

When a report is viewed in HTML output format, it is displayed in HTML PowerViewer. By customizing toolbar and PowerViewer feature of HTML Viewer, user can customize functionalities available on the viewer and behaviour of the viewer to suite your requirements.



**Note:** For any toolbar functionality, if no option is selected then default (all options) will be assumed selected.

To customize HTML PowerViewer, click Navigation > Administration > Configure > Viewer 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 Viewer tab.

In other cases,

<http://<IP of the server>/Intellicus/pattern/conf> and then click Viewer 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).

When configuration changes are complete, click **Save** (or **Save For**) button to save the configuration.

The HTML Viewer toolbar page has two areas:

- **Show:** To configure the toolbar group (and the buttons within the group) that should appear on viewer.
- **Adhoc Power Viewer:** To configure features related to Adhoc Power Viewer.

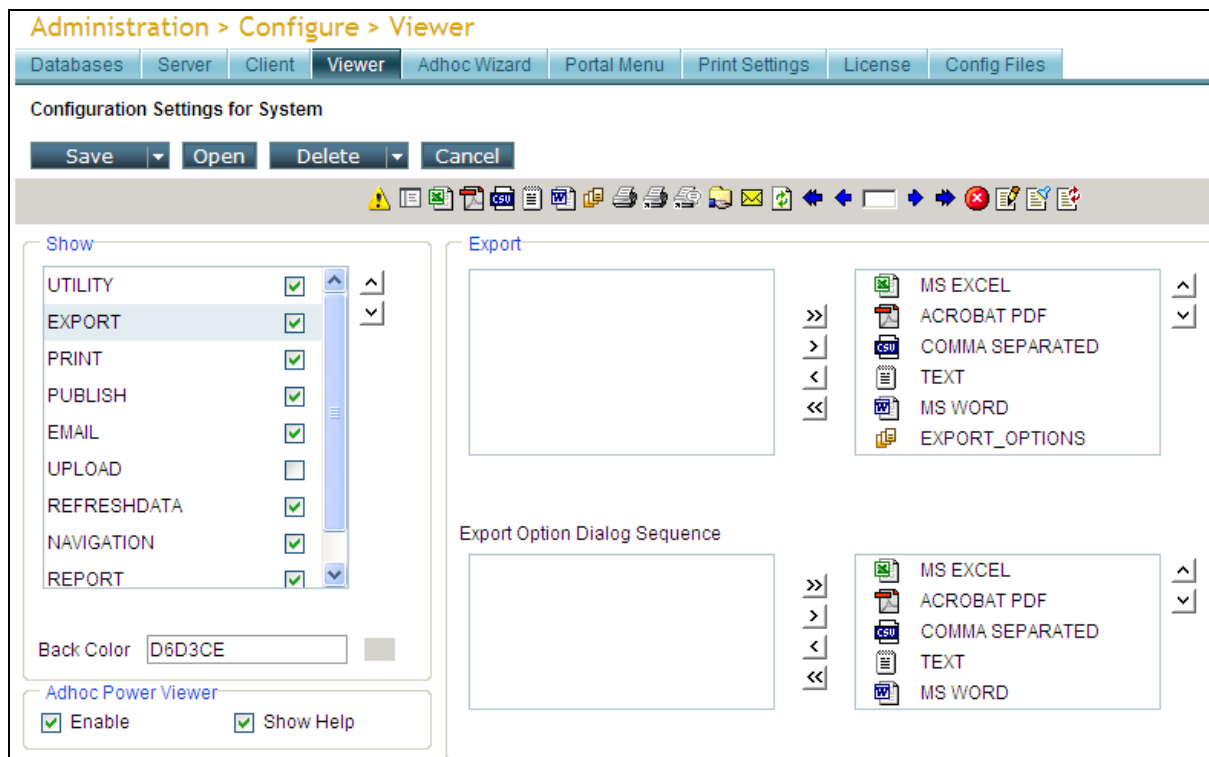




Figure 5: Configuring HTML Viewer toolbar

## Show

This area contains a box where you can select the tool-button group to include on HTML toolbar.

To make toolbutton groups appear on HTML Viewer,

1. In the box within **Show** area, select check box in front of respective group. The information on the right of **Show** area would change and have information related to the toolbutton group selected.
2. Specify details, select options as per need.
3. Click **Save** button to save the changes.

To select the sequence of toolbutton groups on toolbar and sequence of toolbuttons within the group, select respective option and use  and  buttons to shift it left or right on toolbar.



**Backcolor:** Choose the backcolor of the toolbar. Either specify RGB format code of the color or select a color from color picker. If color code provided is invalid, Intellicus will apply the default color (grey).

## UTILITY

Select this checkbox to include utilities related buttons on toolbar.

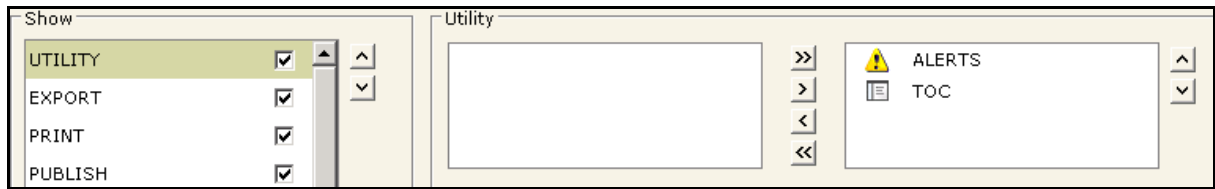


Figure 6: Getting TOC button on toolbar

- **TOC:** Select this check box to include TOC button on toolbar.
- **ALERTS:** To get alert indicator button on viewer toolbar. This button blinks when alerts set for the report being viewed are generated.

In the selection box on top, choose the buttons that needs to be included on viewer toolbar (as part of utilities related toolbuttons).

## EXPORT

Select this check box to include export related toolbuttons on the toolbar.

In the selection box on top, choose the buttons to include on the toolbar (as part of export related toolbuttons).

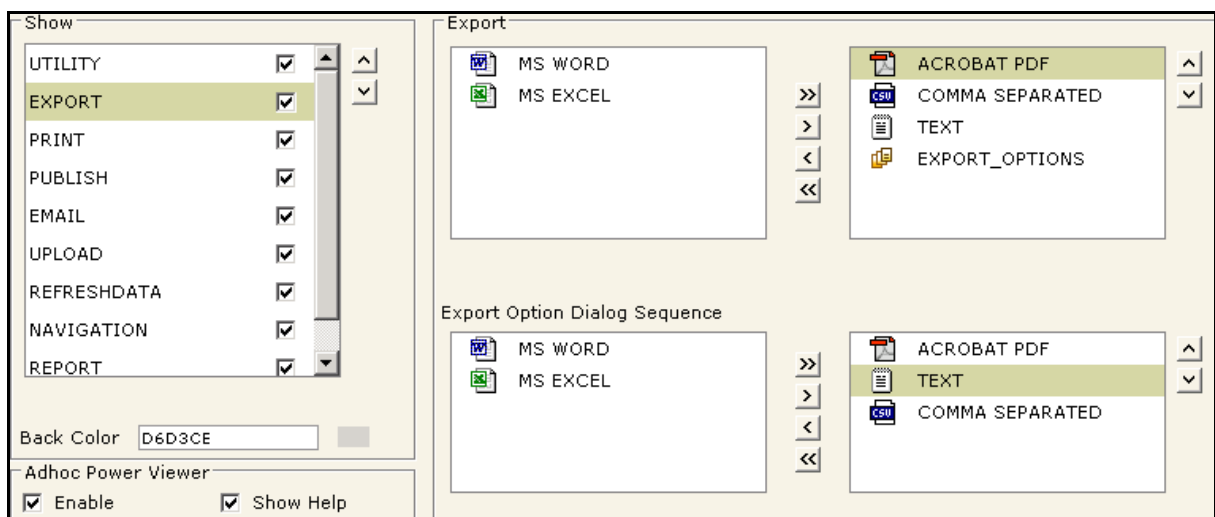


Figure 7: Configuring Export related buttons on toolbar

In **Export Options Dialog Sequence**, select the export options that should appear in export dialog box. Setting the sequence will decide the sequence of options' appearance in the dropdown box.



**Note: Export Options Dialog Sequence** will be effective only when EXPORT\_OPTIONS is selected in the selection box on the top.

## PRINT

Select this check box to include printing related toolbuttons on the toolbar.

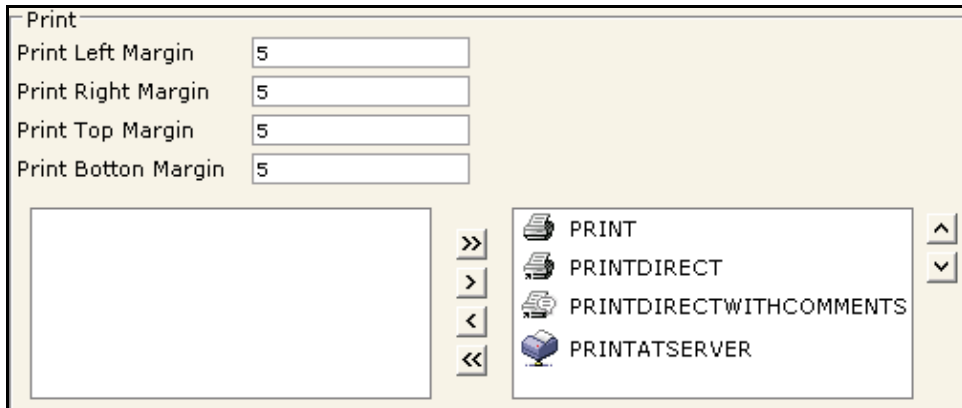


Figure 8: Print Settings and Print related toolbuttons

For **Print Left Margin**, **Print Right Margin**, **Print Top Margin** and **Print Bottom Margin** specify margin (space to be kept blank) on left, right, top and bottom of the page respectively. This is specified in terms of pixels.

In the selection box, choose the buttons that user wants to include on the toolbar (as part of print related toolbuttons).

## PUBLISH

Select this check box to include publishing related toolbuttons on the toolbar.

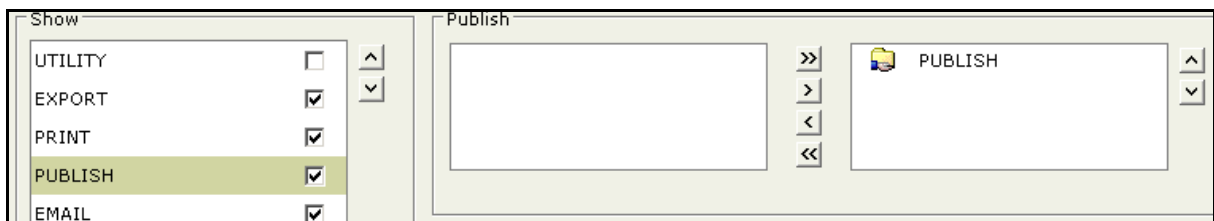


Figure 9: Getting button for Publish on toolbar

Also, from the selection box, choose the toolbutton to be included on the toolbar.

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## EMAIL

Select this check box to include email related toolbuttons on the toolbar.

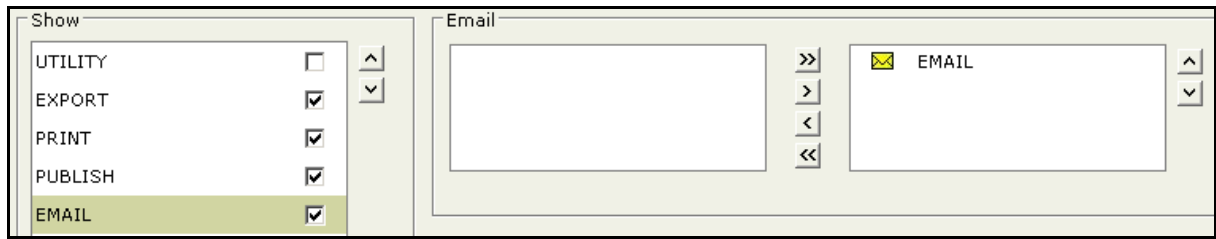


Figure 10: Getting button for email on toolbar

Also, from the selection box, choose the toolbutton to be included on the toolbar.

## UPLOAD

Select this check box to include upload related toolbuttons on the toolbar.

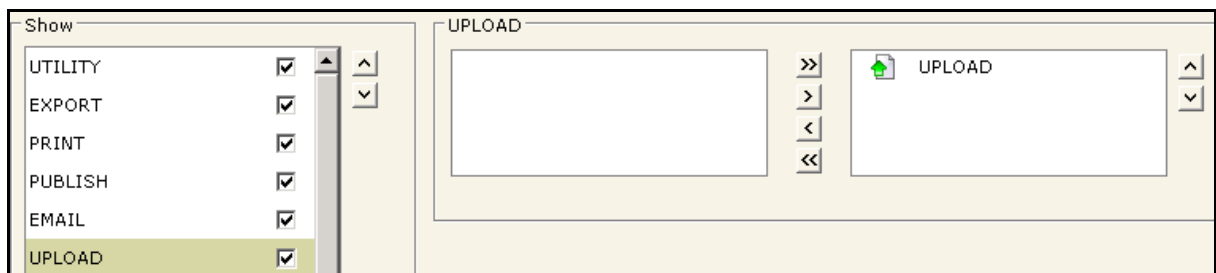


Figure 11: Getting button for Upload on toolbar

Also, from the selection box, choose the toolbutton to be included on the toolbar.

## REFRESHDATA

Select this check box to include button for refreshing report with latest data to appear on the toolbar.

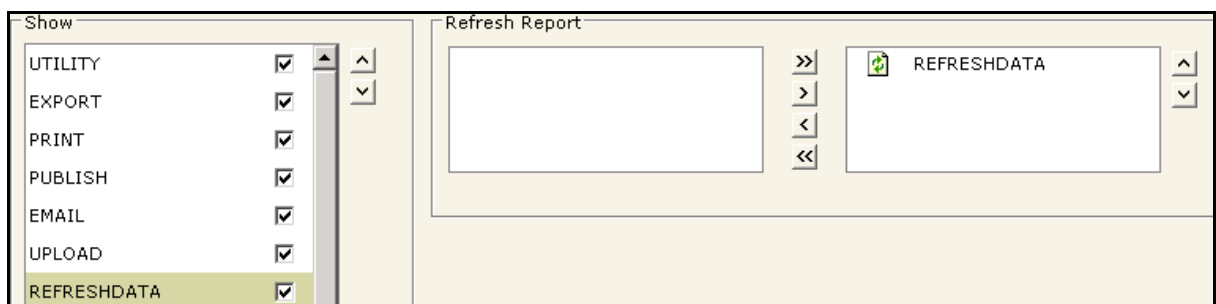


Figure 12: Getting Refresh data toolbutton

Also, from the selection box, choose the toolbutton to be included on the toolbar.

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## NAVIGATION

Select this check box to include navigation related toolbuttons on the toolbar.

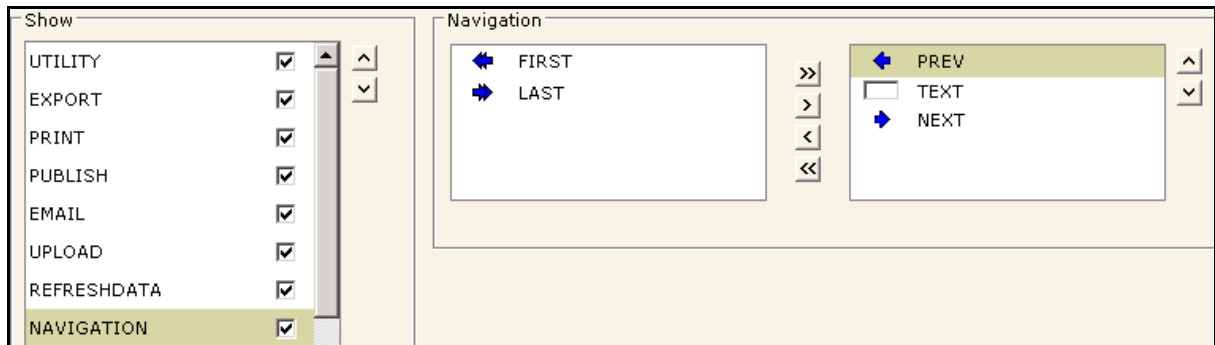


Figure 13: Configuring Navigation related toolbuttons

In the selection box, choose the buttons to include on the toolbar (as part of navigation toolbuttons).

## REPORT

Select this checkbox to include Stop button on toolbar. Users can stop report execution by clicking this button.



Figure 14: Getting Report button on toolbar

Also, from the selection box, choose the toolbutton to be included on the toolbar.

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## COMMENTS

Show comments in new reports: When selected, Intellicus displays buttons in never-published reports. If a comment is added in the report, the report will be automatically published as Public and for infinite duration.

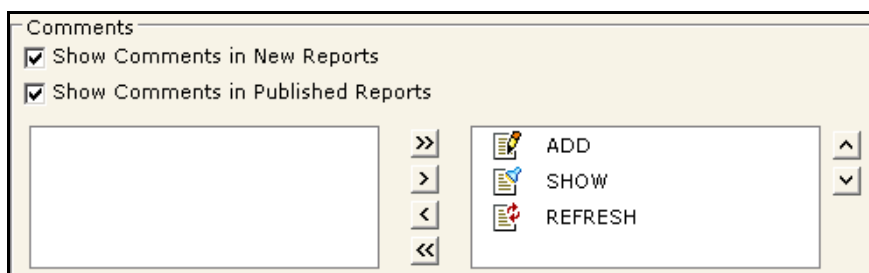


Figure 15: Configuring Comments group on toolbar

Show comments in published reports: When selected, it displays buttons while viewing a published report.

In the selection box, choose the buttons to include on the toolbar (as part of Comments related toolbuttons). You can also set the sequence of the buttons.

## Adhoc Power Viewer

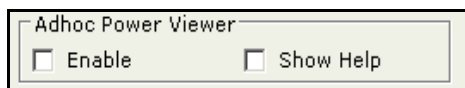


Figure 16: PowerViewer features

### 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.

