Using Power Viewer

Intellicus Enterprise Reporting and BI Platform

intellicus

Enterprise Reporting and
Business Insights Platform

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

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Using PowerViewer

When an Adhoc Report is viewed in PowerViewer, you can do much more than just viewing and saving the report.

While viewing a report you may want to try out sorting or grouping or repositioning columns or viewing a chart in different ways. All these can be done on HTML Power Viewer itself without going back to the Adhoc Report Wizard.

The objective of this document is to make you aware of the tasks you can do while viewing a report in HTML Power Viewer and also how to complete those tasks.

Working with Columns

On HTML Power Viewer, you can do the following with columns:

- Hide or show a column

- Change column position

- Resize column width

To hide a column

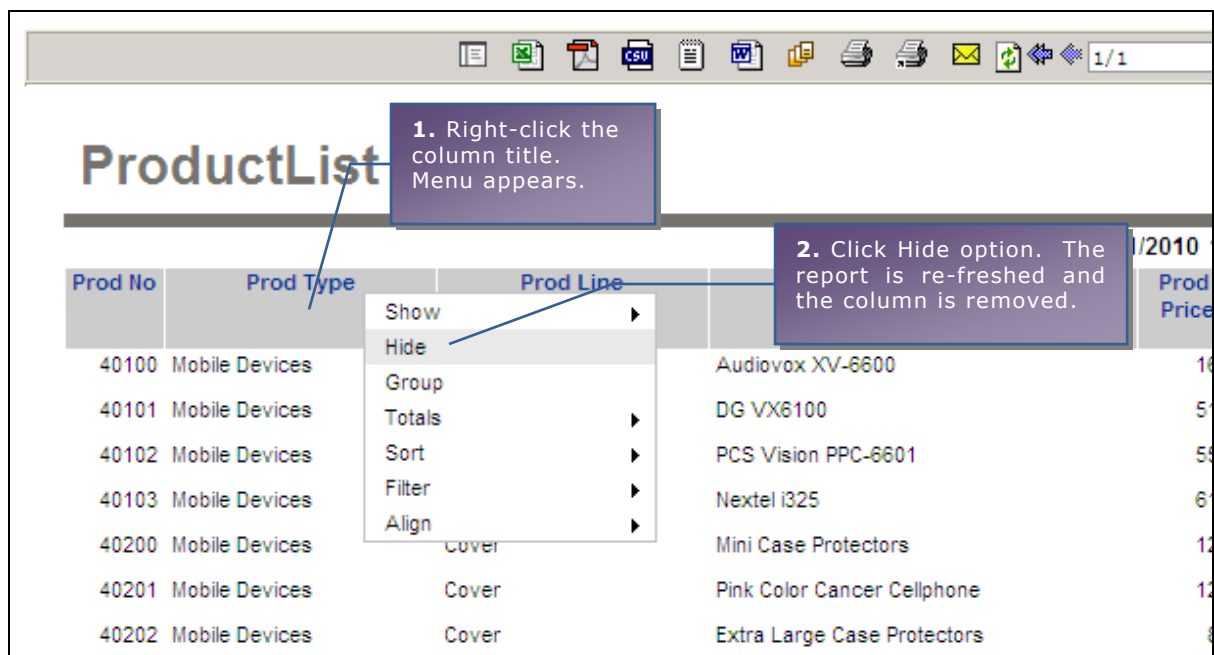You can hide a column that is appearing on the report.

Figure 1: Hiding a column

1. Right-click the mouse on the column title that you want to hide. A context-menu appears.
2. Click its option **Hide**.

The report will be refreshed which will not have the column that was hidden.

To show a column

If there are one or more fields that are not selected to be part of the report, you can show them on the report as a report column. To do so,
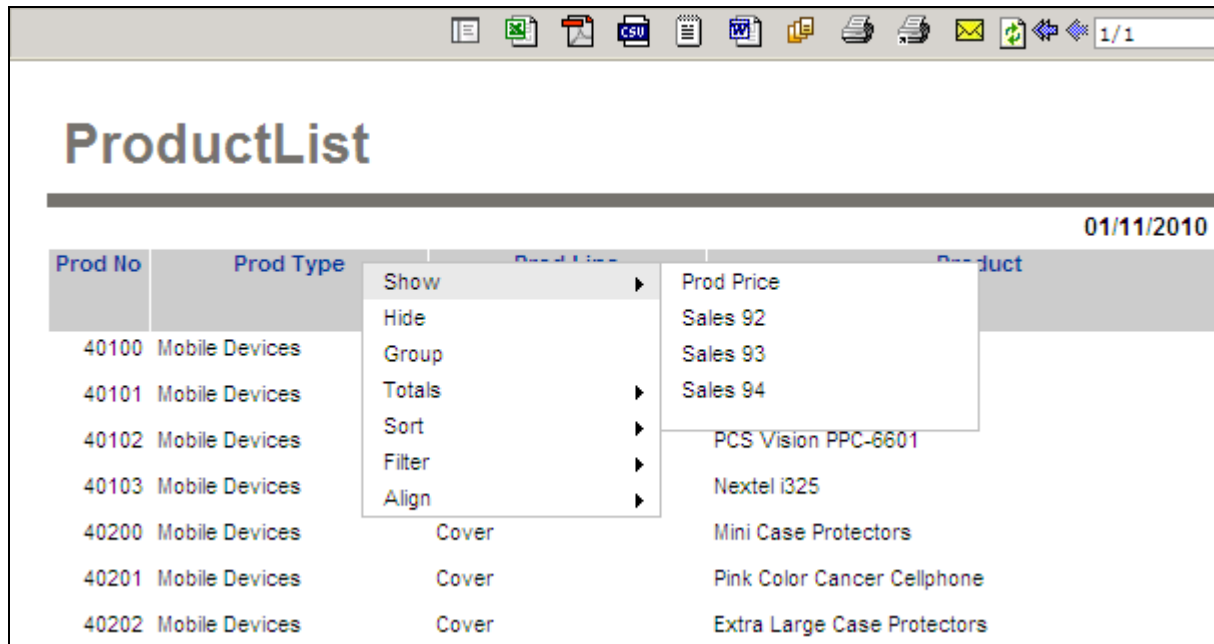

Figure 2: Getting a column on report

1. Point the mouse anywhere on the report and right-click. A context-menu appears. The number of options appearing on the context-menu will depend on where on the Viewer the mouse was placed while right-clicking.
2. Point the mouse on **Show** option. A sub-menu opens up having a list of fields that are not present on report.
3. Click the field that you want to place on report.

The report will be refreshed and selected field will appear as the right-most column.

> **Note:** If you have clicked on a column header to get the context-menu and selected a field for adding in the report, the field will appear on the left of the column on which the mouse was clicked.

To change column position on report

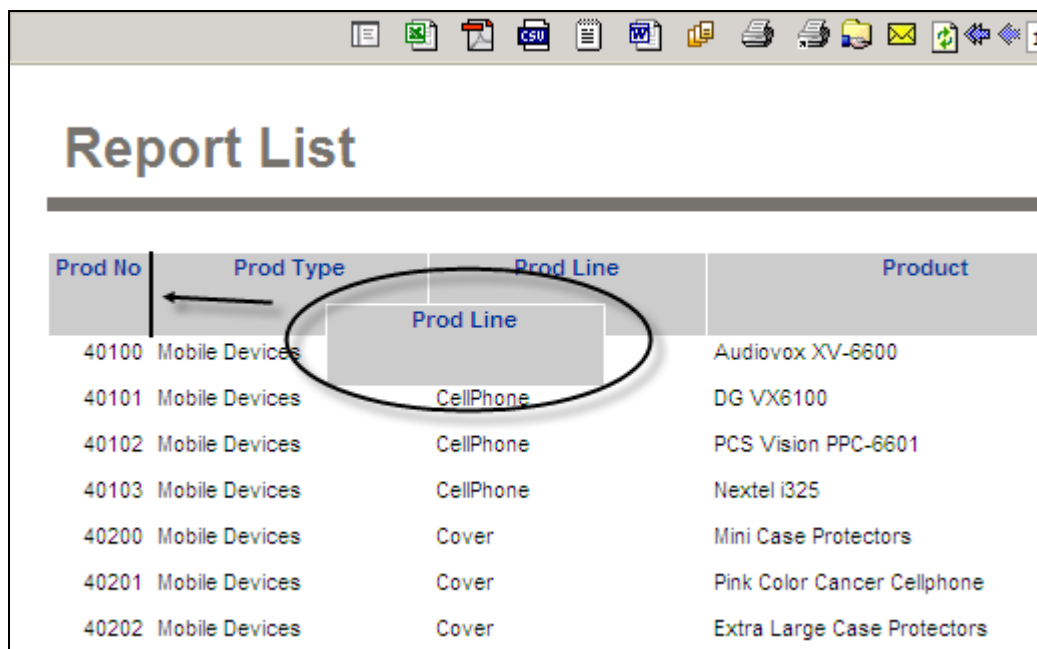HTML PowerViewer gives facility to reposition a column already placed on the report.

Figure 3: Changing position of a column

1. Click the mouse (on the title of the column that needs to be repositioned.) Markers appear on left and right edge of the column.
2. Drag the column header towards right or left side. A black line appears where the column will be placed.
3. After reaching at right place, leave the mouse key.

The report will be refreshed with the field placed at the new location.

To resize a column

HTML Power Viewer gives facility to resize a column already placed on the report. You can do the following to achieve this:
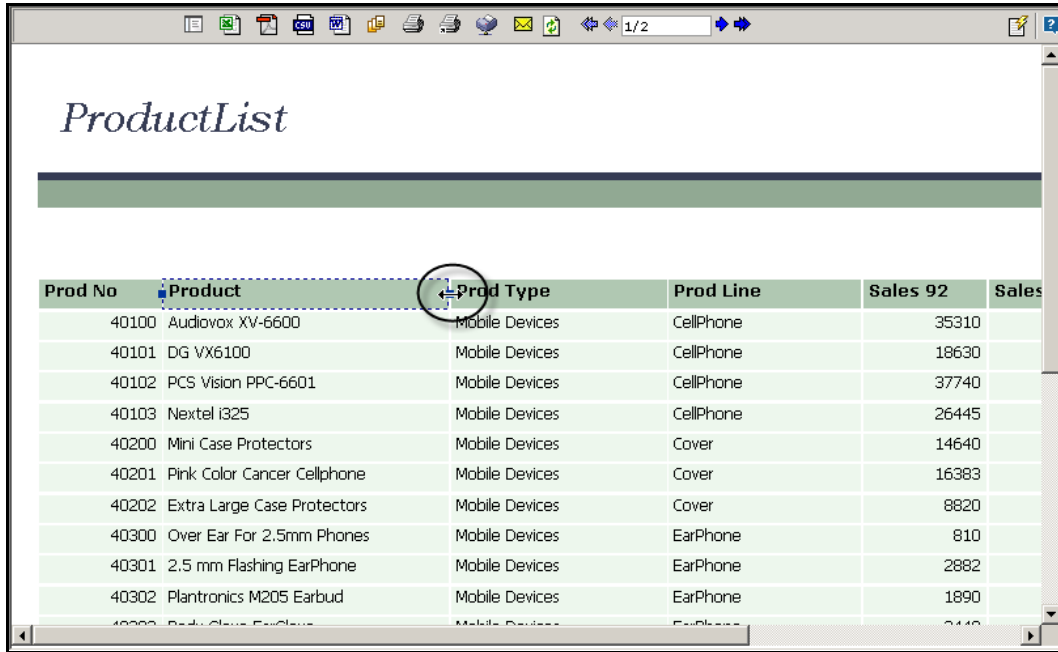

Figure 4: Resizing a column

1. Click anywhere on the header of the column which you want to resize. Markers appear on left and right edge of the column.
2. Click the marker and drag the mouse pointer towards left or right side. The mouse pointer changes to a double-headed arrow.
3. After required resizing, leave the mouse key.

Report will be refreshed and refreshed report will have new size of the column.

Note: If column-size of a column was changed, the context-menu on that column title will have an option Reset Width. Click this option to reset the width of that column to original size.
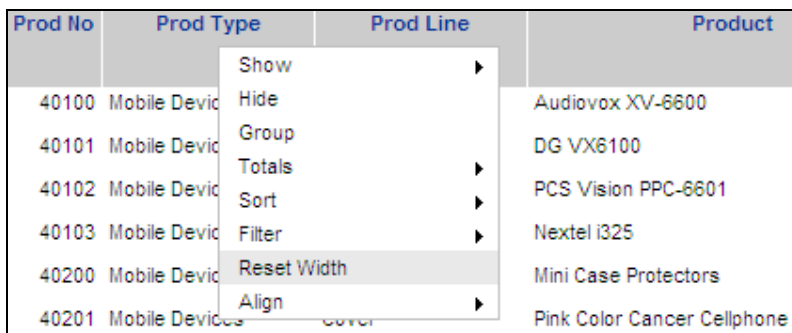

Figure 5: Resetting the width of column

To change alignment

Alignment of value in a column is set in the query (data source) that is used in the adhoc report. However, it is possible to change its alignment.
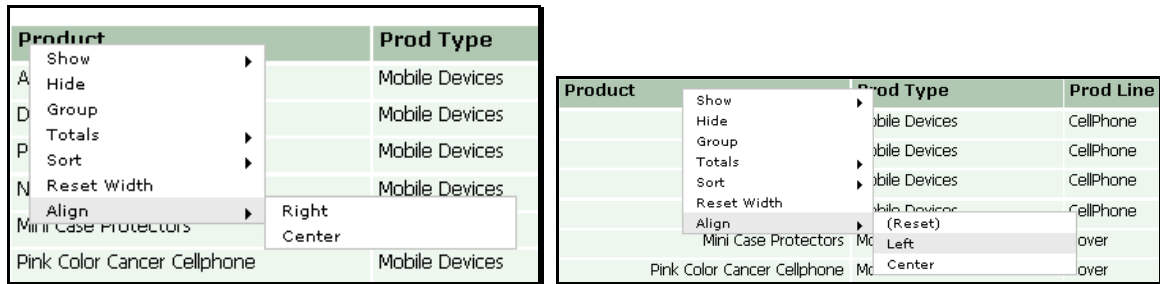

Figure 6: Reset option appearing in the menu

To change alignment of a column,

1. Point and right-click the mouse on the column-header. A context-menu appears.
2. The context menu has options except the default alignment. Click the option (Left, Center or Right). Report is refreshed with that column having aligned.

If you right-click the column that is aligned, **Reset** option will also appears on the menu. Clicking **Reset** option will apply the default alignment (the alignment specified in data source) on the column.

Selecting a template

Template gives look and feel to the report data. You can select a template from the available templates.
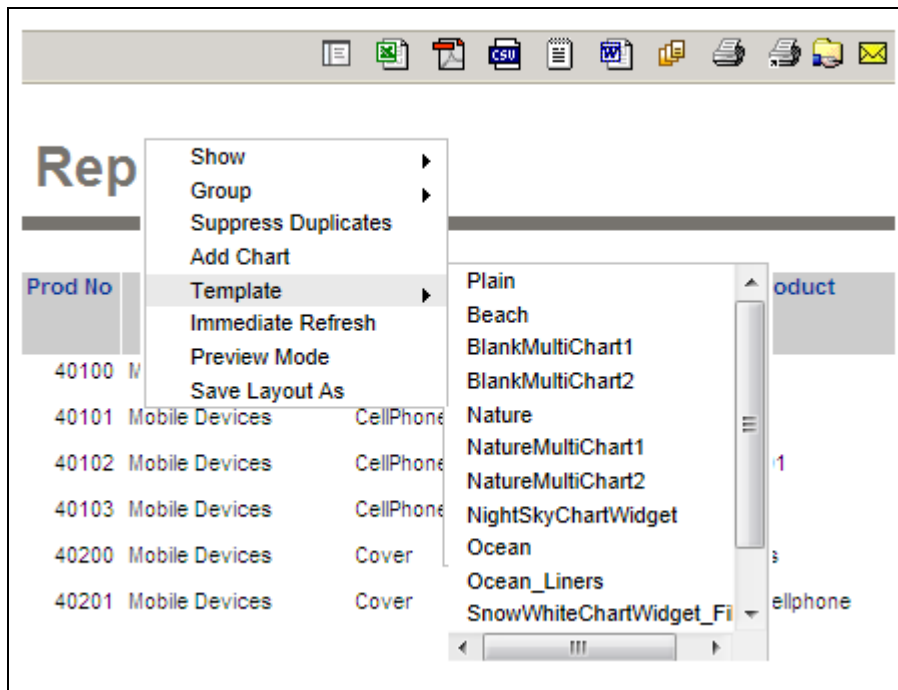

Figure 7: Selecting a template

To select a template,

1. Point the mouse anywhere on the report and right-click.
2. On the menu, point on **Template** option.
3. Click one of the options in sub-menu.

Report will be refreshed with new template applied.

Sorting

Multi-level sorting (a maximum of 3 levels) is available on HTML PowerViewer.

If the report is sorted by column A, and if it is also sorted by column B, then this will become the case of multi-level sorting. Here the report is first sorted by Column A and within it, sorted by column B.
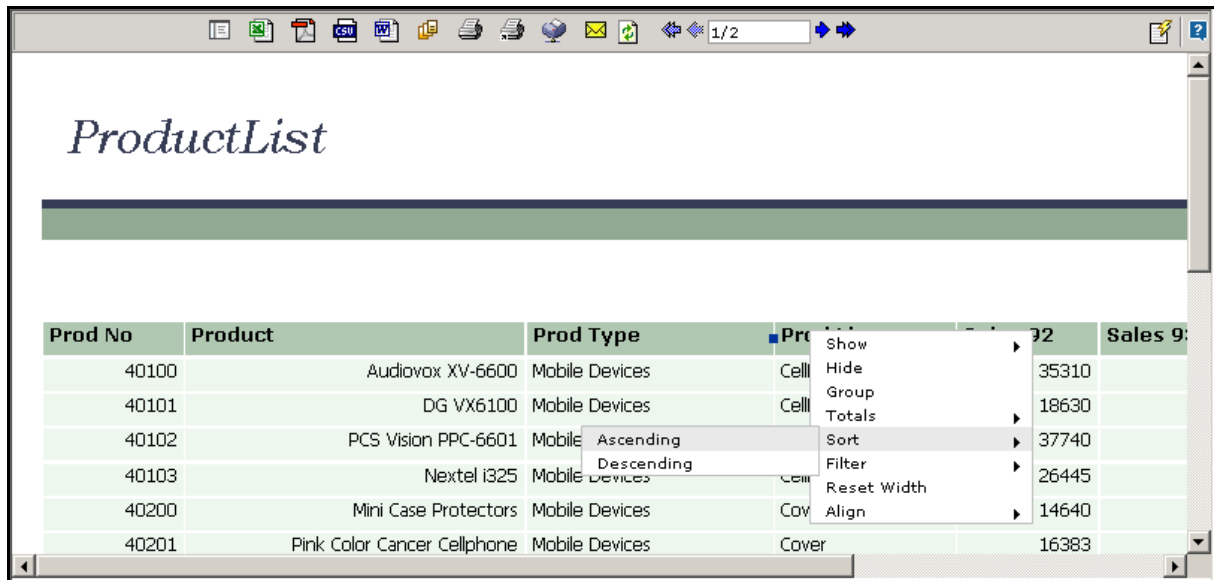
To sort the report

Figure 8: Sorting the report on ascending order of a column

1. Point and right-click the mouse on the header of the column by which you want to sort the report. A context-menu appears.
2. Point the mouse to **Sort** option. A sub menu appears.
3. Click the right option from the options available in the menu.

The report will be refreshed and will arrange the records in sorted order.
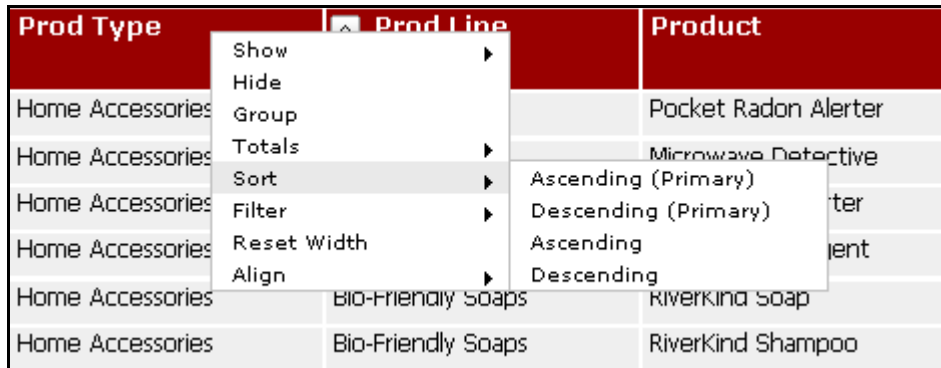
> **Note:** The options made available on sort sub menu will depend on the field's sorting status. For example, primary sorting (Ascending) is applied on the field, the submenu will have **Descending** option. If **Secondary** (descending) or lower level of sorting is applied on the field, the menu will have **Descending**, **Ascending** (Primary) and **Descending** (Primary) as options.

Upon sorting a button indicating sort type and level appears on header for first level sorting, second level sorting and third level sorting.

The action that takes places upon clicking the button will depend on what is setup. It will be any of the following:

- Reverse the sort order

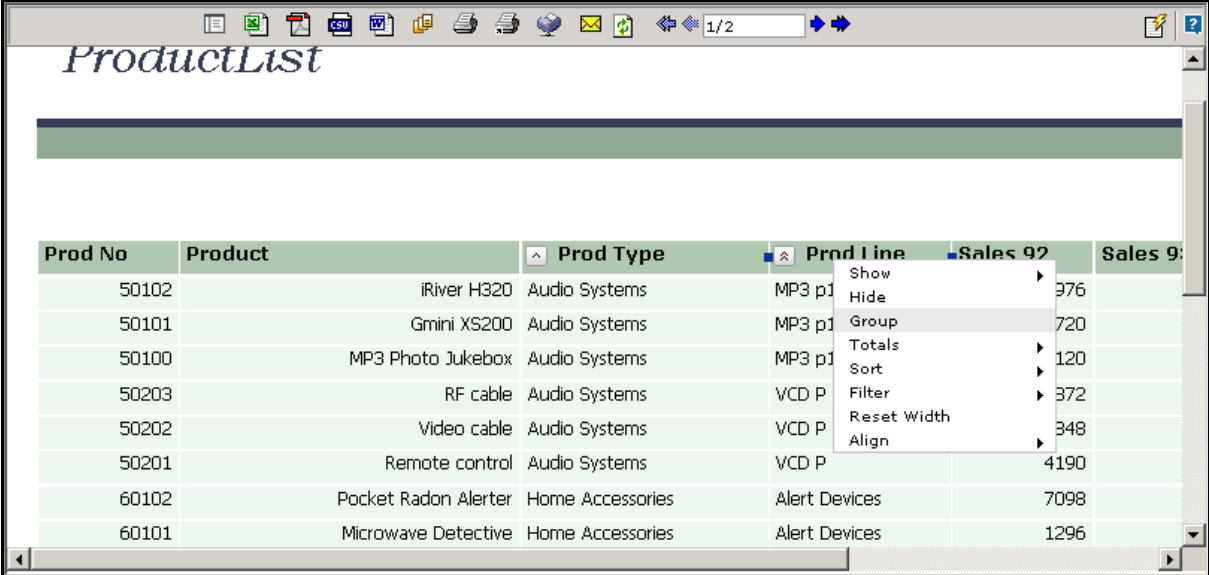- Make the field primary sort field

Figure 9: Sort related options appearing on a pre-sorted field

Grouping

HTML Power Viewer provides multi-level grouping. Once a group is created, groups created later will be placed below the created groups.

You can group the report using any of the two methods: Group based on a field that is placed on the report or by a field that is not placed on the report.

Grouping by a field that is placed on the report

Figure 10: Grouping a report

1. Point and right-click the mouse on the header of the column by which you want to group the report. A context-menu appears.
2. Click the option **Group**.

The page will be refreshed. On refreshed page, the column by which the report was grouped will not appear and report will be grouped.

If the field is of Character or Number type, for each value a new group will be formed.

> **Note:** If you click on any of the column value (and not header), Group option will open in a sub menu having all the fields available. Click the field to group report by that field.

Grouping by a Date field

When you right-click on column title of a date field, you get a sub menu having options: **Minute**, **Hour**, **Day**, **Week**, **Month**, **Quarter** and **Year**. Click an option to group the report grouped appropriately.

Figure 11: Grouping by Date Field

- **Minute**: Groups all the records for each minute.

- **Hour**: Groups all the records for each hour.

- **Day:** Groups all the records for each day.

- **Week:** Groups all the records with date falling within a week (a week is considered from Sunday to Saturday).

- **Month:** Groups all the records by months.

- **Quarter:** Groups all the records by quarter (a quarter is Jan to March, April to June, July to September and October to December.)

- **Year:** Groups all the records by year.

Grouping by a field that is not placed on the report

Use the following method to group the report by a field that is not already placed on the report. However, you can also use this method to group the report by a field that is present on the report. To do so,
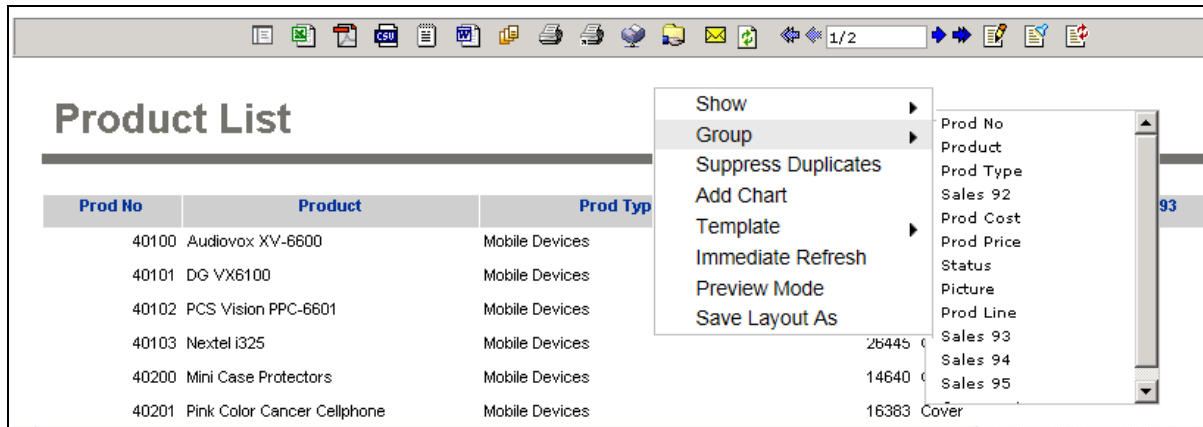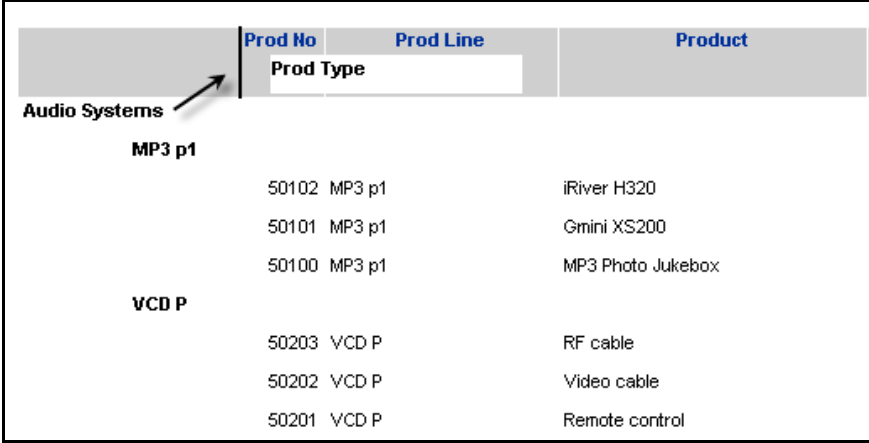

Figure 12: Grouping by a field that is not placed on the report

1. Point the mouse on blank part of the report and right-click. A context-menu appears.
2. On the menu, Point to option **Group**. A sub-menu will open up having all the fields as sub menu options.
3. Click the field by which you want to group the report.

The report will get refreshed and a new group will appear on the report below the group setup earlier.
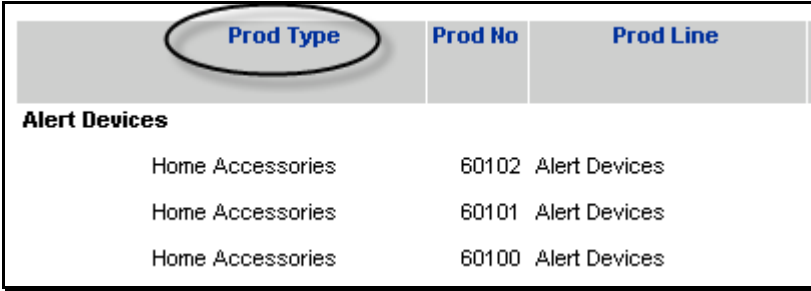
Shifting a group field to detail section

To shift a group field as one of the columns of the report,

Figure 13: Shifting a group field to column header

Figure 14: Report refreshed after shifting the field

1. Click the group field and drag it in the field title row. A place-holder marker appears indicating where the field will be dropped.
2. Dropping the field at that place will process the change and refresh the report.

Note: Depending on the configuration, it may not process the change immediately, but add the action on action board. If the group already exists as one of the column fields, it will not be dropped.

Change group order (re-arrangement of groups)

When a report is having multiple groups, you may wish to change the grouping order. To change grouping order,

Figure 15: Changing group order (Re-arrangement of groups)
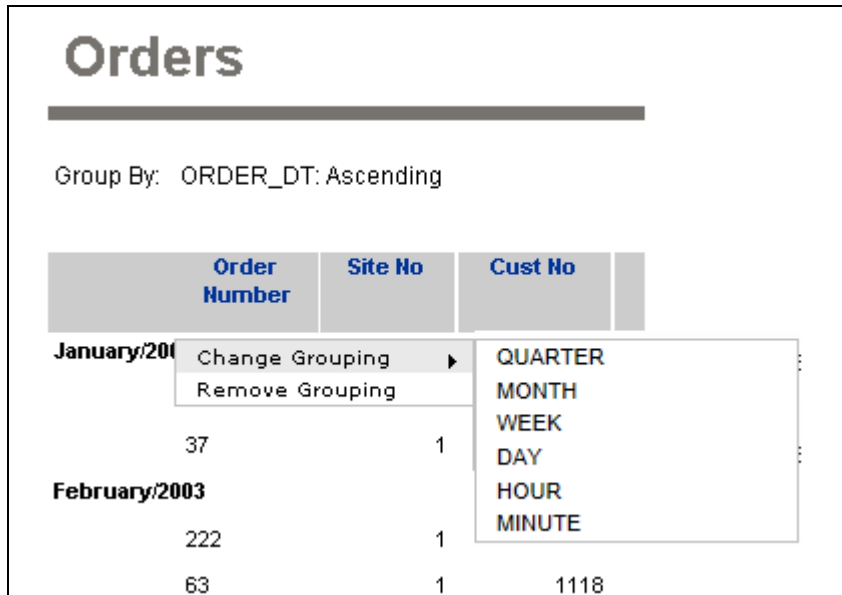
1. Click on a group field and drag it up in the order or down in the order. A place-holder marker will appear indicating where the group field will be dropped.
2. Dropping the field at that place will process the change and refresh the report.

Note: Depending on the configuration, it may not process the change immediately, but add the action on action board. A field can't be dropped below or just above the field representing innermost group.

To change grouping (date fields)

When you right-click a group formed by a date type group, you get two options in the menu that lead to any of the following actions:

Figure 16: Grouped by a Date field

- Change grouping to any of the other type

- Remove grouping

Point to **Change Grouping** followed by clicking any of the options available, group will be changed.

To remove grouping

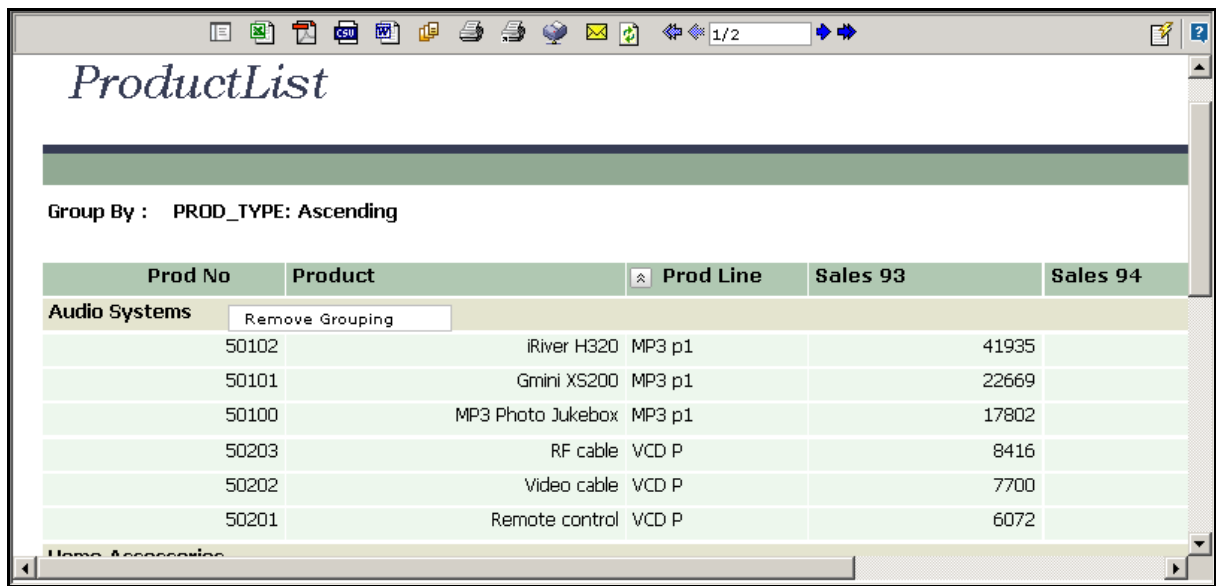Here are the steps to remove grouping:

Figure 17: Removing the grouping

1. Point and right-click the title of the group that you want to remove. One-option menu appears having **Remove Grouping** as its option.
2. Click **Remove Grouping** option.

The report will be refreshed and grouping will be removed.

Filtering

While viewing a report in HTML Power Viewer, you can filter the report. Filtering of records is available on date field and character field as well.

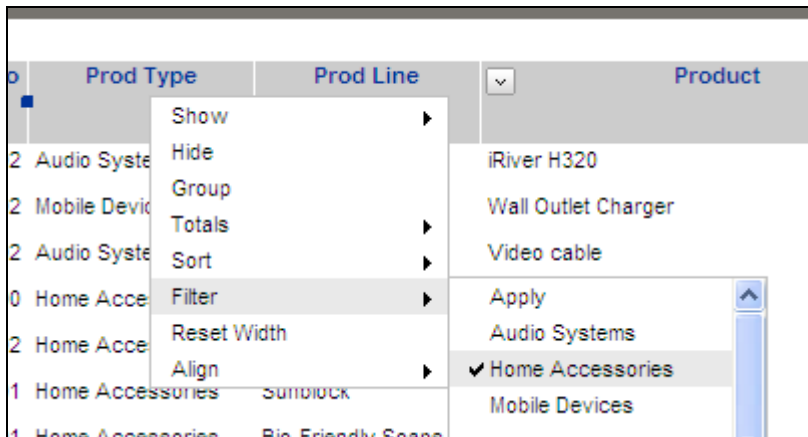## To filter by a character field

Figure 18: Viewing the desired data by applying filter

1. Right-click the field title for which you want to add a filter. A Context-menu appears.
2. Point to **Filter** option. A sub-menu opens up. From this sub-menu, click the values by which you want to filter the report.   A check will appear before the value option.
3. Click the **Apply** link to apply the filter and get the filtered report.

Report will be refreshed having filtered records.

> **Note:** Filtering is not available for numeric fields. For character fields you will get the filter option only if list of lookup values is provided by the administrator.
>
> **Filtering behavior**
>
> When you apply a filter on a field from HTML Power Viewer, the filter will be additionally added on the filter set on Adhoc Report Wizard. You may also observe that when you apply a filter on a field from Powerviewer, previously added filter is removed and newly apply filter is applied. This behavior depends on configuration of HTML Power Viewer.

(Show all) option

On **Filter** sub-menu, if **(Show all)** option is also available, it is because a filter has been already applied on the field. Click **(Show all)** to remove all the filters.
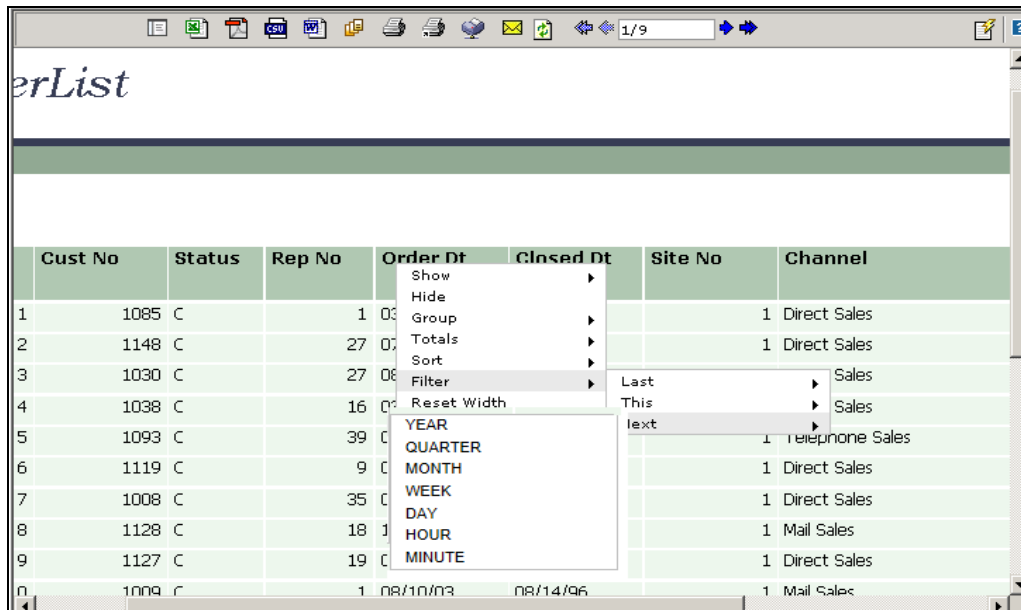
To filter by a date field

Figure 19: Setting Filter by Date

To Filter by Date, you need to:

1. Right-click title of the date field by which you want to filter the report. A context-menu appears.
2. On this menu, when you point option **Filter**, a sub menu opens with options **Last**, **This** and **Next**. Each of the options will open in a submenu having options **Year**, **Quarter**, **Month, Week, Day, Hour and Minute** options.

For example, if you choose **Filter** > **Last** > **Year**, you will get all the records of last year. If you click **Filter > Next > Quarter**, you will get all the records that have a date falling in Next quarter. The detail given below gives more information on these:

- **Day:** All the records with date falling on the selected day.

- **Hour:** All the records falling under selected hour.

- **Minute:** All the records falling under selected minute.

- **Week:** All the records with date falling within selected week (among Last, This and Next). A week is considered from Sunday to Saturday.

- **Month:** All the records having a date falling within selected month among Last, This and Next.

- **Quarter:** All the records having a date falling within the selected quarter amongst the Last, This and Next options. (A quarter is a period from Jan to March, April to June, July to September or October to December.)

- **Year:** All the records having a date falling within selected year among Last, This and Next.

Suppressing duplicate rows

Report may have rows that are completely same (having completely duplicate row). If you want to have only one row and suppress other rows,
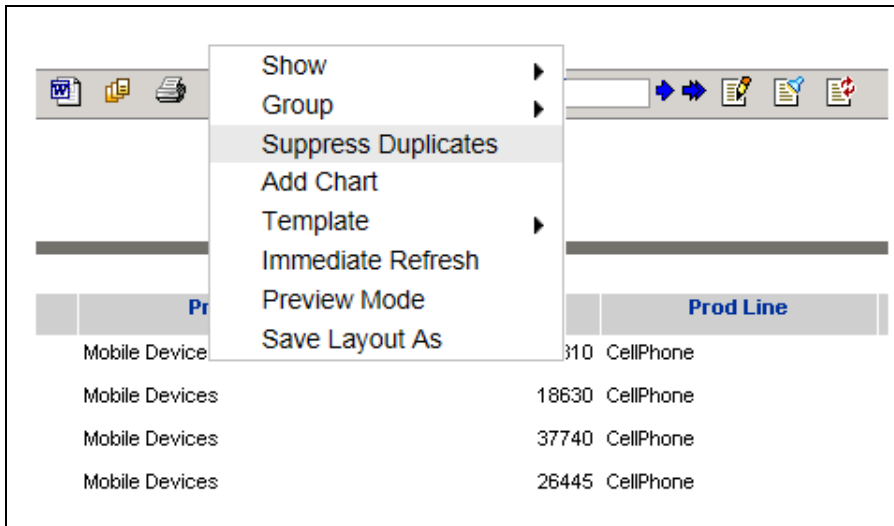

Figure 20: Suppress Duplicates

1. Right-click on blank area of the report.
2. Click **Suppress Duplicates** option in the menu.

> **Note:** This menu option will appear only if **Show Suppress Duplicates** Checkbox is checked on Navigation > Administration > Configure > Ahdoc Wizard page.

The report is refreshed with duplicate rows suppressed.
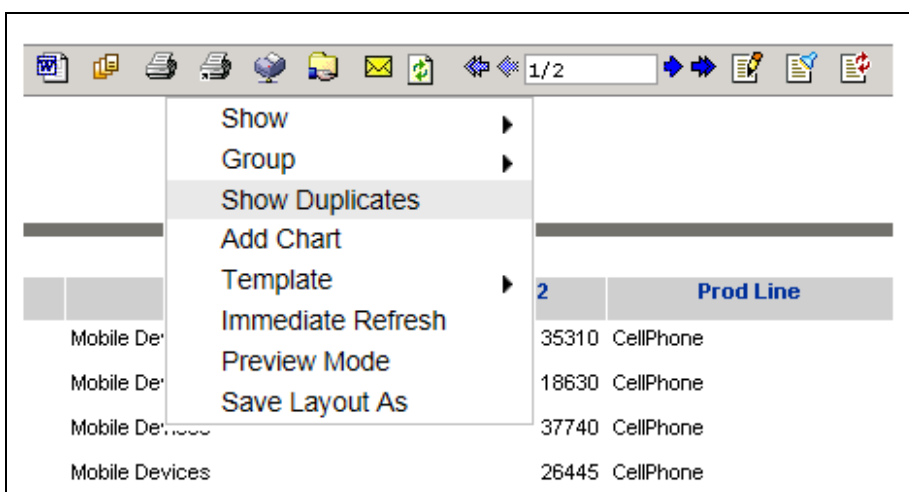
To get all the rows,

Figure 21: Show Duplicates

1. Right-click on blank area of the report.
2. Click **Show Duplicates** option in the menu.

Lazy fetched lookup values on Power viewer

Power viewer available at Report and Matrix controls can now fetch the field values in Lazy mode.

This enables very light weight and fast rendering of reports and you will have an access to the fresh set of values on-demand without an impact on performance.

You can choose to apply filter on field with large distinct values:

You can choose multiple values to apply the filters:

You also have an option to deselect or fetch more values to apply filter.
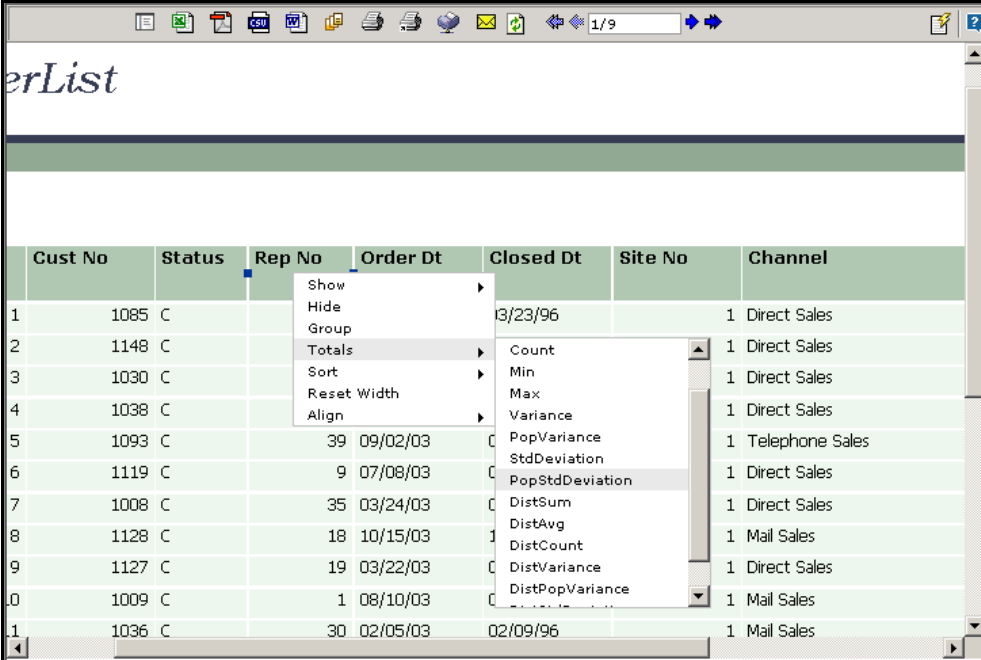
Companyname: Acer Mobiles,Akai Mobiles,Alcatel,Apple,BlackBerry,HTC,Intex Mobiles,Karbonn Mobiles

Companyname	Modelname	Series	City	Invoice Date	Manufacture Date	Price
Apple	Show ▶	iPad	Tamuning	01/16/2012	03/06/2012	31798
Apple	Hide	iPad	Rancho Cordova	04/26/2013	03/04/2011	34129
Apple	Group	iPad	Pascagoula	03/06/2011	05/28/2010	2062
Apple	Totals ▶	iPad	Covina	07/24/2010	12/12/2013	14801
Apple	Sort ▶		Galveston	06/20/2010	05/03/2012	22141
Apple	Filter ▶		Oro Valley	03/16/2011	04/18/2013	33552
Apple	Reset Width		Ontario	11/25/2013	03/04/2012	31802
Apple	Align ▶		Poughkeepsie	12/14/2011	05/08/2009	26783
Apple	iPad 2 Wi-Fi		Boulder Junction	07/27/2011	09/04/2012	40000
Apple	iPad 2 Wi-Fi + 3G		Durango	11/20/2009	09/29/2011	12963
Apple	iPad Wi-Fi		Santa Monica	11/02/2012	05/15/2013	12802
Apple	iPad Wi-Fi + 3G		New Britain	04/12/2012	06/25/2013	470
Apple	iPhone	iPhone	Phenix City	10/22/2010	02/04/2013	15769
Apple	iPhone 3G	iPhone	Houston	12/24/2012	08/06/2010	7201
Apple	iPhone 3GS	iPhone	Baltimore	03/12/2012	06/07/2009	35696
Apple	iPhone 4	iPhone	West Hollywood	11/06/2010	03/06/2010	36367
Apple	iPhone 4 CDMA	iPhone	Ontario	02/20/2010	12/25/2012	25239
Apple	iPhone 4S					
Apple	iPhone 5					
BlackBerry	BlackBerry Bold 9900	BlackBerry Bold series	Las Cruces	06/07/2013	06/25/2013	24056
BlackBerry	BlackBerry Bold 9930	BlackBerry Bold series	Bend	08/30/2011	09/24/2009	18769
BlackBerry	BlackBerry Bold 9790	BlackBerry Bold series	New Haven	10/02/2013	10/15/2011	13946
BlackBerry	BlackBerry Bold 9780	BlackBerry Bold series	Layton	04/15/2010	10/20/2012	15726
BlackBerry	BlackBerry Bold 9788	BlackBerry Bold series	North Pole	11/04/2010	03/02/2009	12202
BlackBerry	BlackBerry Bold 9000	BlackBerry Bold series	Brookfield	05/22/2013	05/05/2011	4314
BlackBerry	BlackBerry Bold 9700	BlackBerry Bold series	Oswego	05/28/2012	07/11/2012	32437
BlackBerry	BlackBerry Bold 9650	BlackBerry Bold series	Pascagoula	02/17/2011	05/25/2011	15631

Filter submenu:
- ⟳ Fetch More Values
- Apply
- (Show All)
- ✔ Acer Mobiles
- ✔ Akai Mobiles
- ✔ Alcatel
- ✔ Apple
- ✔ BlackBerry
- ✔ HTC
- ✔ Intex Mobiles
- ✔ Karbonn Mobiles

Getting Totals

HTML Power Viewer provides the functionality of getting totals and summaries on the fly when you are viewing reports. This feature is particularly useful when the report is grouped.

To get summaries

Figure 22: Getting summaries

1. Right-click the column title on which you want the summary. A context-menu appears.
2. To get summary, point to **Totals** and in the sub-menu click the option representing the summary option that you want to use.

The report will be refreshed. The refreshed report will have summary calculated based on the function you selected.

The **Totals** sub menu will have option **(None)** if on that field summary is already applied. Click **(None)** to remove summary.

> **Note:** If the report has groups, the summary totals will appear after each group. If the report does not have a group, the summary total will appear as report summary.

To Hide or show Details

It is possible to hide or show details for a report when a report has at least one total and at least one group. This feature is particularly useful when the report has totals on it. Hide details if you want to have a look at totals only.
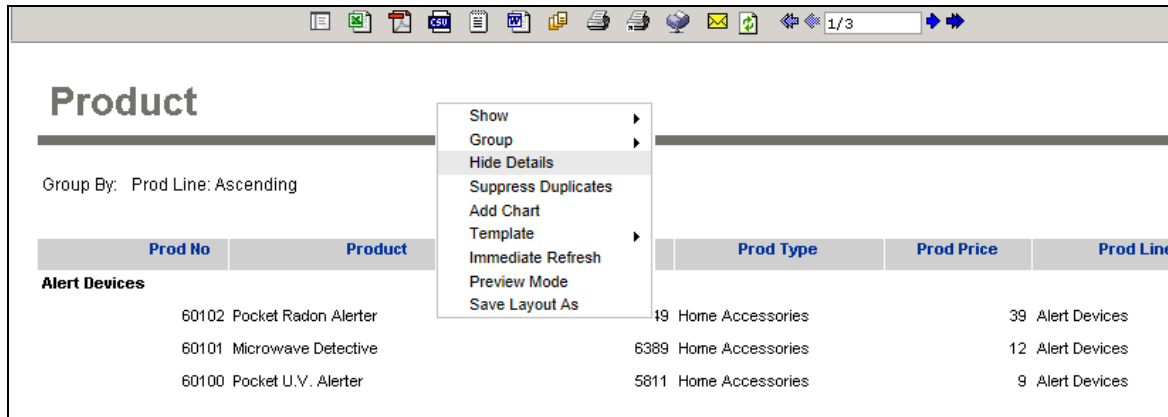
Figure 23: Hiding or Showing details

To Hide Details

When the report has details,

1. Right-Click on blank area of the report. A context-menu appears.
2. Click the **Hide Details** option.

The report will be refreshed. The refreshed report will hide detail rows showing only summary.

To show details

1. Right-click on blank area of the report. A context-menu appears.
2. Click the **Show Details** option.

The report will be refreshed. The refreshed report will show detail rows.

Matrix

Intellicus provides an option to keep the matrix in collapsible form when report executes.

The property to keep matrix collapsed is exposed in the template that the designers can set.

On the viewer, you can click on desired group header values to expand required section of the matrix.

Upon export or printing, full matrix is expanded.

Following activities can be done on PowerViewer on a matrix.

- Place a field on matrix (column, row or summary field)
- Remove a field from matrix
- Re-position a field already placed on matrix

Showing a field on matrix

A field is picked up from field list and placed as row header, column header or a summary cell.

Available Fields dialog contains fields received from data source.
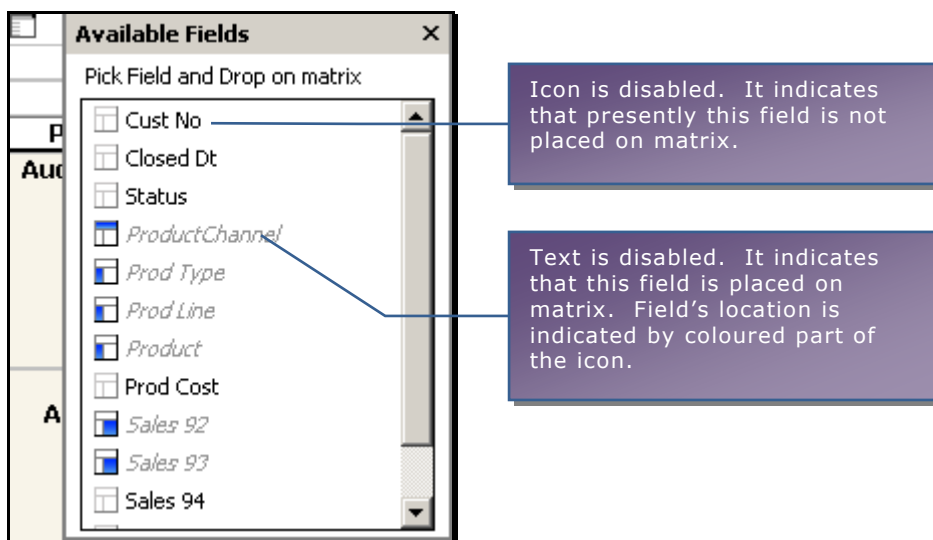
Figure 24: Available Fields dialog box

To show a field,

1. Open **Available Fields** list by clicking ⬜ button available on top-left corner of the matrix.
2. Click the field to pick up.

3. Now point the mouse pointer to the location on matrix where the field is to be placed (row header, column header or summary cell header).
4. After picking up the field, when you hover mouse pointer over a column header, row header or summery cell header, a placeholder will appear indicating where the field will be placed. To place the field, click on the placeholder.

Figure 25: Placing a field on matrix

Getting totals on matrix

1. Hover the mouse pointer on respective column header, row header or summary header.
2. Click ⚙ button appearing on the header.
3. Click **Show Totals** option from the menu.
4. The report will be refreshed. The refreshed report will have totals.

Hiding a field from matrix

1. Hover the mouse pointer on respective column header, row header or summary header.
2. Click ⚙ button appearing on the header.
3. Click **Hide Totals** option from the menu.
4. The report will be refreshed and the field will not appear on matrix.

Note: You cannot hide a column header if the matrix has only one column header. It is true for row header and summary cell.

Repositioning a field

1. Click the mouse pointer on respective column header, row header or summary header.
2. Drag and drop to the location (row header, column header or summary cell header) where the field is to be placed.
3. After picking up the field, when you hover mouse pointer over a column header, row header or summery cell header, an image will appear indicating where the field will be placed. To place the field, click on the placeholder.

Image	Meaning
K	On the left of this field.
>I	On the right of this field.
⊼	Above this field.
⊻	Below this field.
⊘	Field cannot be placed at this location.

Note: You can pick up a field from column header if it has two or more fields. It is true for row header and summary cell.

Swap two fields

Figure 26: Swapping two fields

Fields can be swapped when there is only one field on the location from where the field is being picked up and the location where the field is being dropped. The steps are same as Repositioning a field.

Cancel the drop action

If you have picked up a field and you don't wish to drop it anywhere, drop the field at the location from where it was picked up.

Charting

When you run an adhoc report, you select a template. To draw chart, a template may use RChart provider or AmChart provider.

Chart Operations (RChart provider)

When adhoc report template uses RChart, HTML Power Viewer provides following features on chart:

- Hide or show a chart

- Add a field on value axis or group axis on a chart

- Grouping

- Remove a field from the chart

- Change the chart type

Showing a chart

On Power Viewer, you can have chart even if you have not setup chart on Adhoc Report Wizard.

To get chart on Power Viewer,
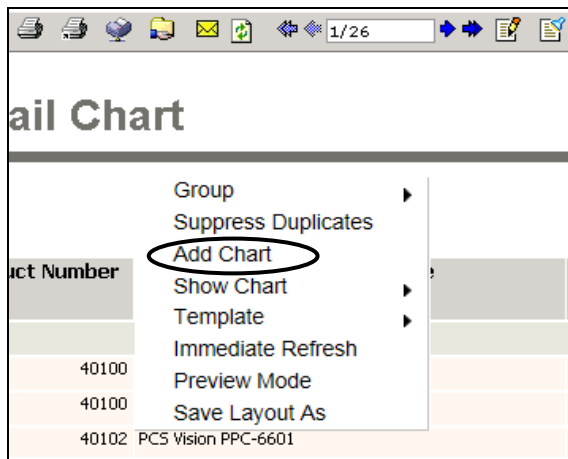
Figure 27: Show Chart option

1. Right-click on blank area of the report. A context-menu appears.
2. Click option **Add Chart**.

Report will be refreshed with chart on it.

> **Note:** Intellicus takes the first character field and selects as X Axis, takes first numeric fields and selects as Y axis and plots the chart.

If the chart was originally plotted but then hidden, in that case, **Show Chart** will just re-plot original chart.

Hiding a Chart

To hide a chart when you are on Power Viewer,
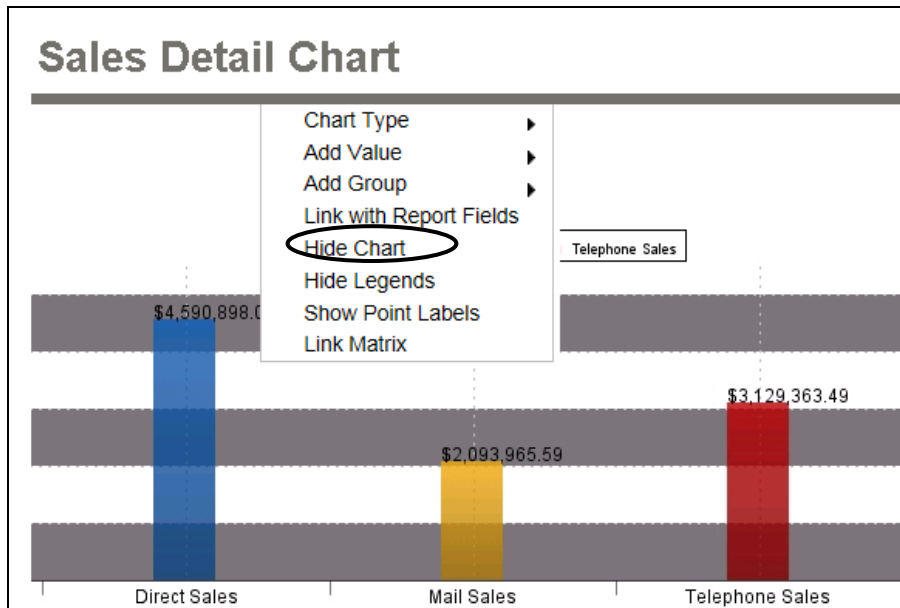
Figure 28: Hide a chart from Power Viewer

1. Right-click on the chart you wish to hide. A context-menu appears.
2. Click option **Hide Chart**.

If chart is "Linked with report fields"

If you have checked **Link with report fields** checkbox on Chart tab of Adhoc Report Wizard, chart will be auto-plotted based on fields selected in Select Display Fields.

When chart is linked then you cannot add any field in chart's X-Field or Series. Before linking, if any fields are part of chart then they need to be removed.

To unlink the chart from report fields, right-click on the chart and uncheck **Unlink chart from Report fields** option.
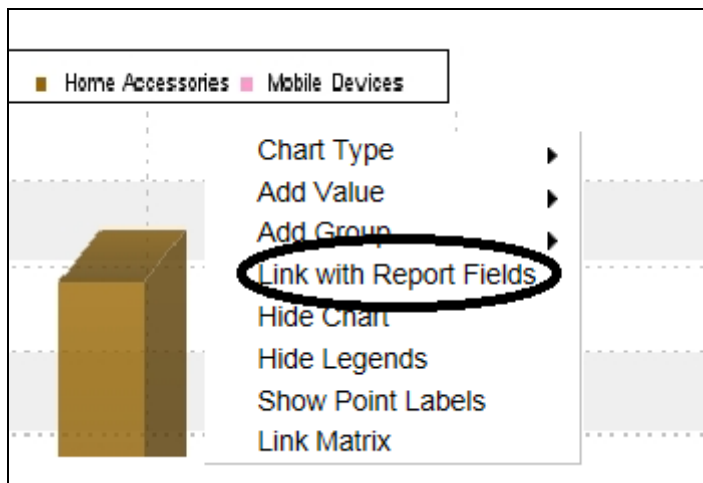
Figure 29: Option to unlink chart from tabular data of report

The chart will remain, but now, you can change it by making your own selections from Chart tab.

Adding a field on chart

Click and drag the title of the field that you want to place on chart.
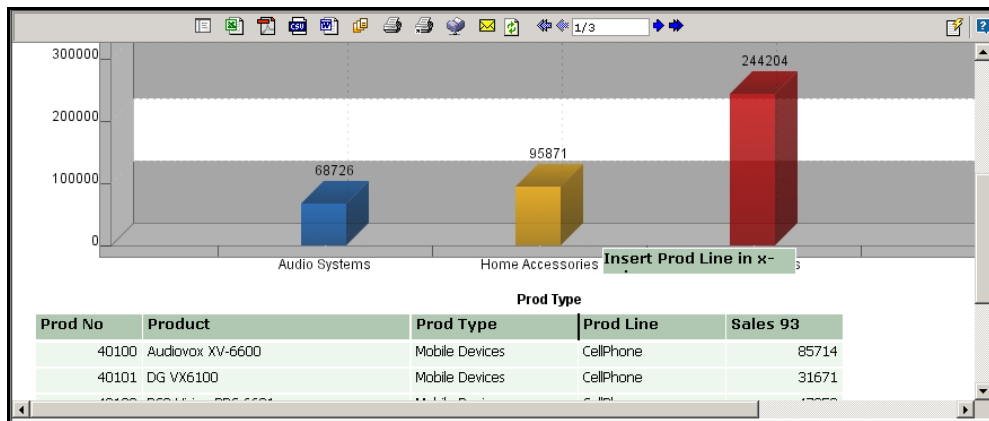
Figure 30: Adding a field on chart

The report will be refreshed having previously added series and newly added series.

Note: Numeric fields are placed on Y axis. Non-numeric fields are placed on X axis.

Tip: If your report has only chart and no fields to drag on, right click below chart to get a context-menu. On context-menu, point to Show and then click the field that you want to bring on chart. This field will appear on report which can then be placed on chart.

Grouping on Chart

When a chart has date as one of the series, you can group the chart by day, week, month, quarter or year. If a chart is already grouped by any of these, that option will not appear on the menu.
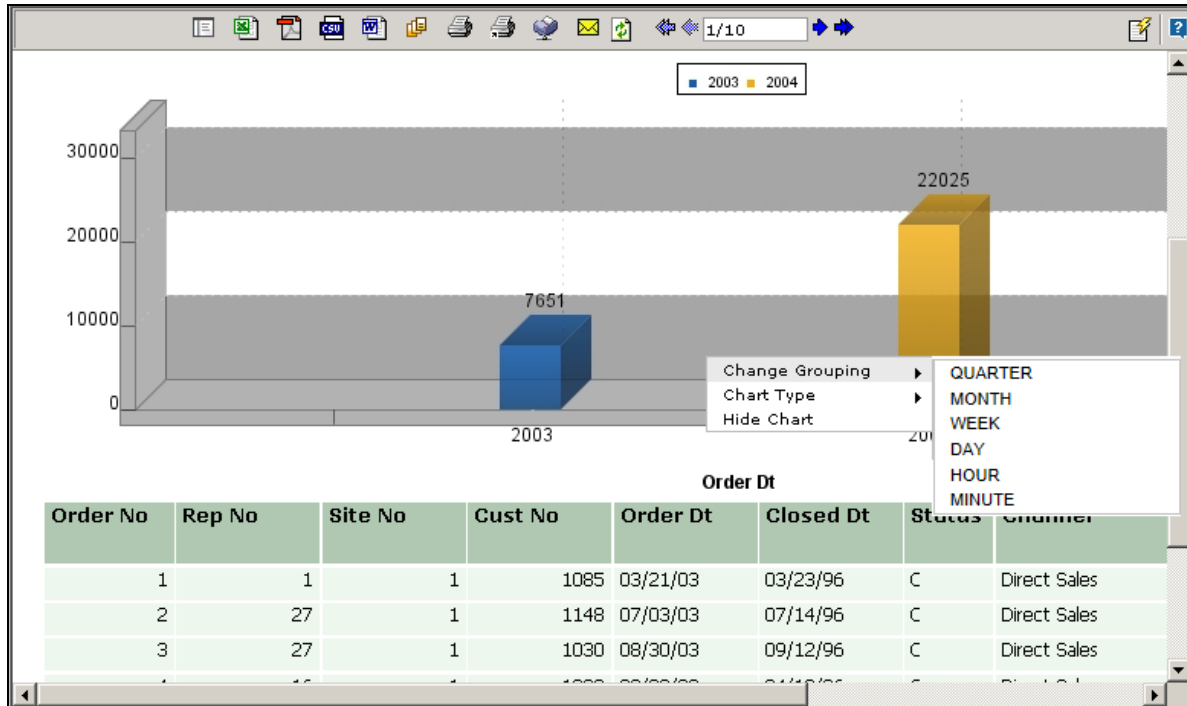
Figure 31: Grouping on Chart

1. Right click a chart having date as one of the series. A context menu opens.
2. Point option **Change Grouping**. It opens a sub-menu with respective options. Click the grouping method you want.

The report will be refreshed. In refreshed report, the chart will be re-plotted based on selected grouping preferences.

Note: The chart is grouped by existing field when a non-numeric field is added on the chart. Newly added field appears inside in the group.

Changing chart type and removing a chart series

You can do this through a context menu. Click anywhere on the chart to get the context menu. The menu has an option Chart type. Point mouse on Chart Type will open up the chart-types.
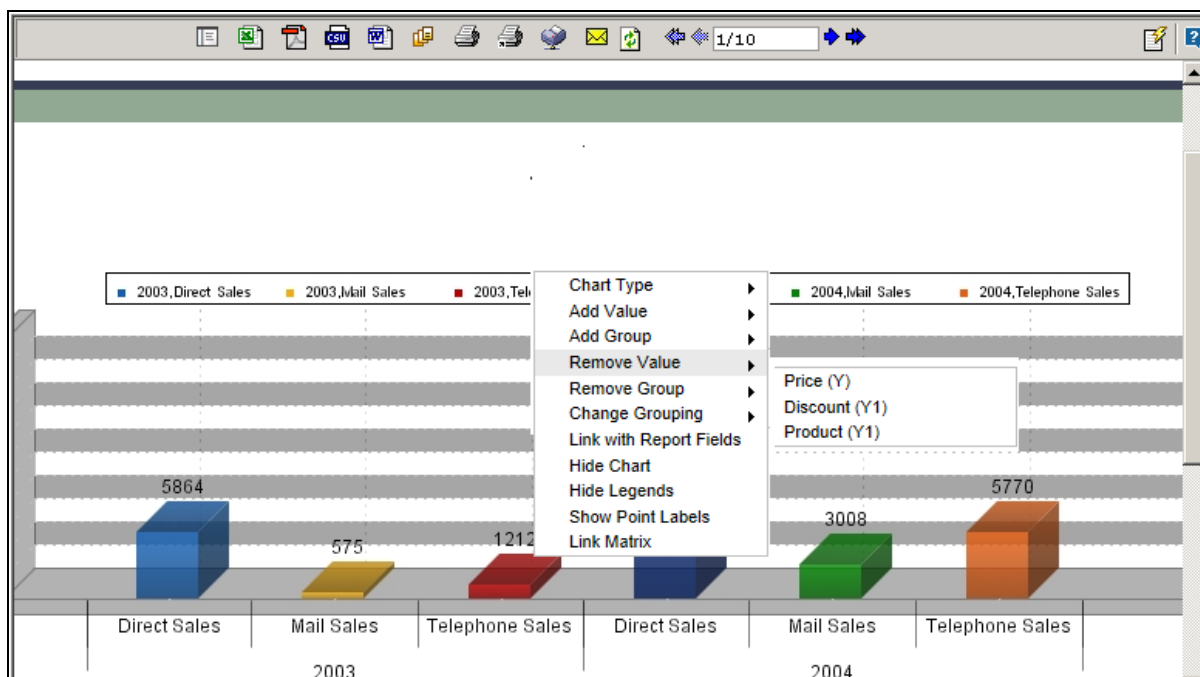
Figure 32: Options available on HTML Power Viewer for charts

If the chart has two or more series, another option **Remove Value** will also appear.

To change a chart type

1. On context-menu, point to **Chart Type** option. A list of available chart type appears.
2. Click the chart type that you want to have on report.

The report will be refreshed. The refreshed report will have newly selected chart type.

To remove a Y series

1. On context-menu, point to the **Remove Value** option. A sub-menu having all the series presently available will appear.
2. Click the series that you want to remove from the chart.

The report will be refreshed. The refreshed report will not have the series that you removed.

To remove an X-Axis value

1. On context-menu, point to **Remove Group** option. A sub-menu having all the fields presently available on x-axis will appear.
2. Click the field that you want to remove from the chart.

The report will be refreshed. The refreshed report will not have the series that you removed.

> **Note:** This will work only when you have two values placed on X axis.

Chart operations (AmChart provider)

The toolbuttons to initiate chart operations are on Chart toolbar. When the report is displayed, chart toolbar will open for 2 seconds. To open the chart toolbar again, hover the mouse pointer on chart title.
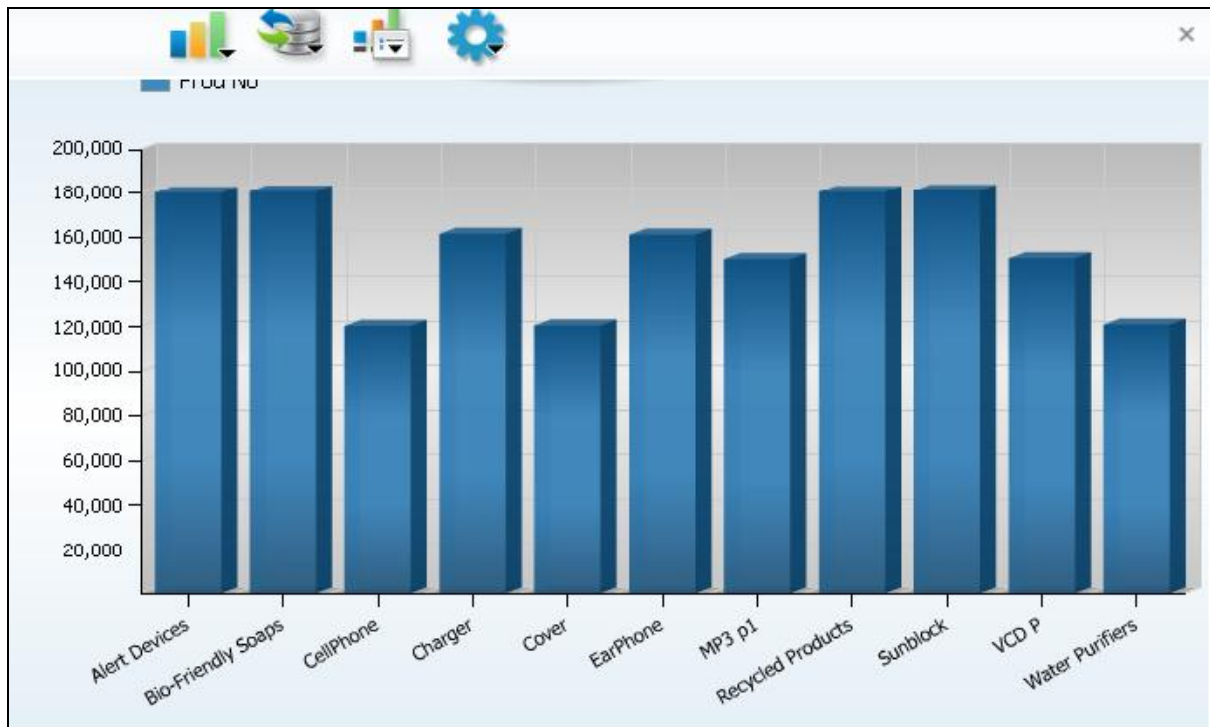

Figure 33: Chart toolbar in AmChart

To "Link" chart with report fields or matrix

If you have selected **Link With Report Fields** on Chart tab of Adhoc Report Wizard, chart will be auto-plotted based on fields selected in Select Display Fields.

When chart is linked then you cannot add any field in chart's X-Field or Series. Before linking, if any fields are part of chart then they need to be removed.

To unlink the chart from report fields, open AmChart's toolbar and click button.

The chart will remain, but now, you can change it by making your own selections from Chart tab.

To link the chart again, click button from the chart toolbar.

Similarly, you can select **Link Matrix** on the Chart tab of Adhoc Report wizard to auto-plot chart based on fields selected from Available Fields.

To change chart type

When the report is run, the chart is plotted in the chart type selected on **Adhoc Report Wizard**, which can be changed on viewer.

After opening the Chart toolbar, click **Change Chart Type** button to open chart types toolbar.
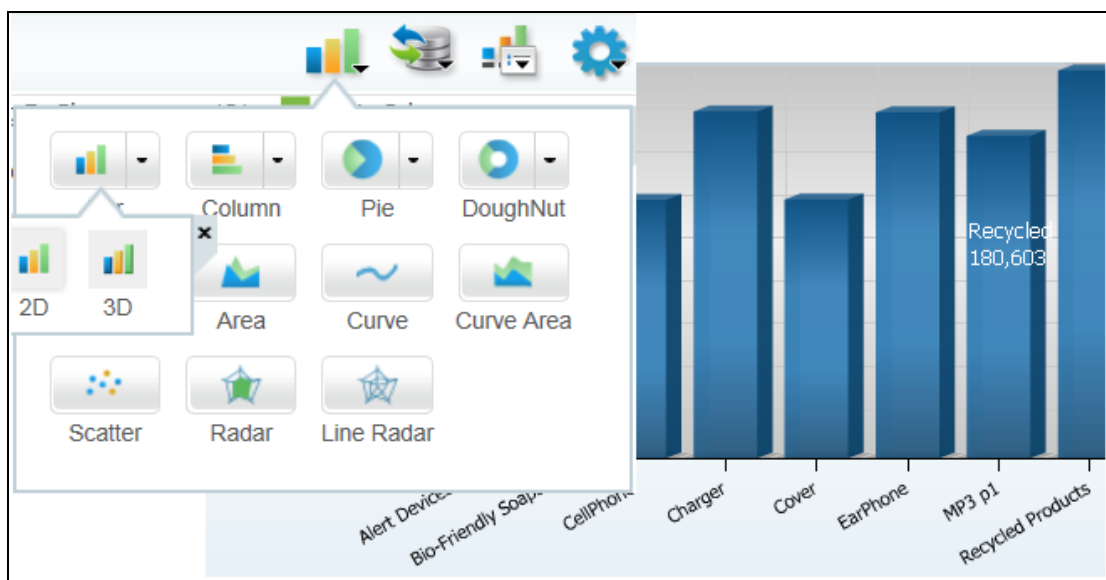

Figure 34: Chart Types toolbar

On **Chart Types** toolbar, click the button representing the type of chart you want to open, or click inverted triangle button to open chart sub-types available for in the selected chart type and click one of the sub-types from it.

If Pie is selected and the chart has more than one series, pie chart will plot the 1st series.
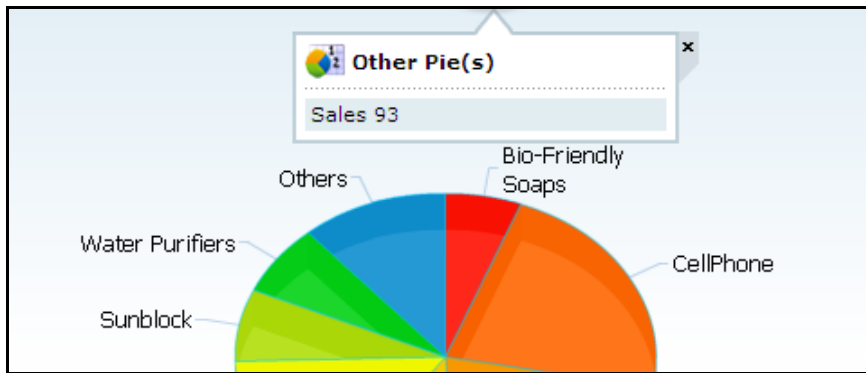

Figure 35: Selecting Other pies when the chart has multiple series

To view other series, click ![button] button on the chart tool bar. It will open **Other Series** dialog. Click the series, which you want to plot on the chart.

Chart will be re-drawn using the selected chart sub-type.

To change fields

When the report is run, the chart is plotted based on **Group** axis and **Value** axis fields selected on **Adhoc Report Wizard**.

To change the fields plotted on **Group** axis and **Value** axis, without returning to Adhoc Report Wizard, click ![button] button on **Chart** toolbar. **Change Data** dialog will open, from where you can change chart fields.
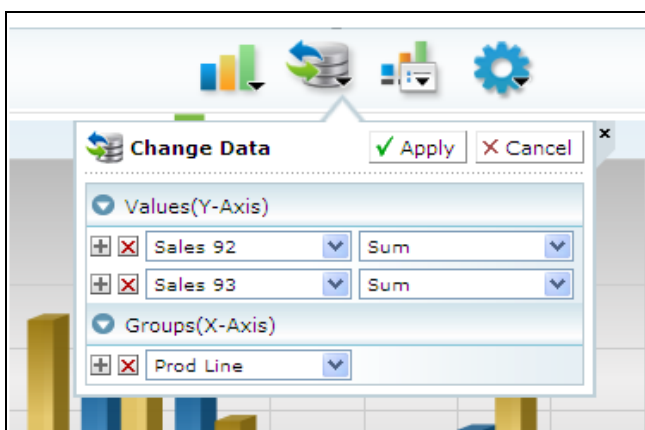

Figure 36: Change Data dialog

Click ⊞ to add a field on the axis. Click ⊠ to remove a field from the axis. To replace a field, choose the desired field from the dropdown of the field you want to replace.

> **Note:** This button will be disabled when the chart is **linked with report fields**.

After making the desired changes, click **Apply** button to get the effect of changes on chart.

> **Note:** The data changes that have been applied here will be reflected on **Adhoc Report Wizard**'s chart tab also.

To specify Settings

You can provide options to show or hide Point labels and Legends, eliminating the need to go back to the Ad hoc Report wizard.
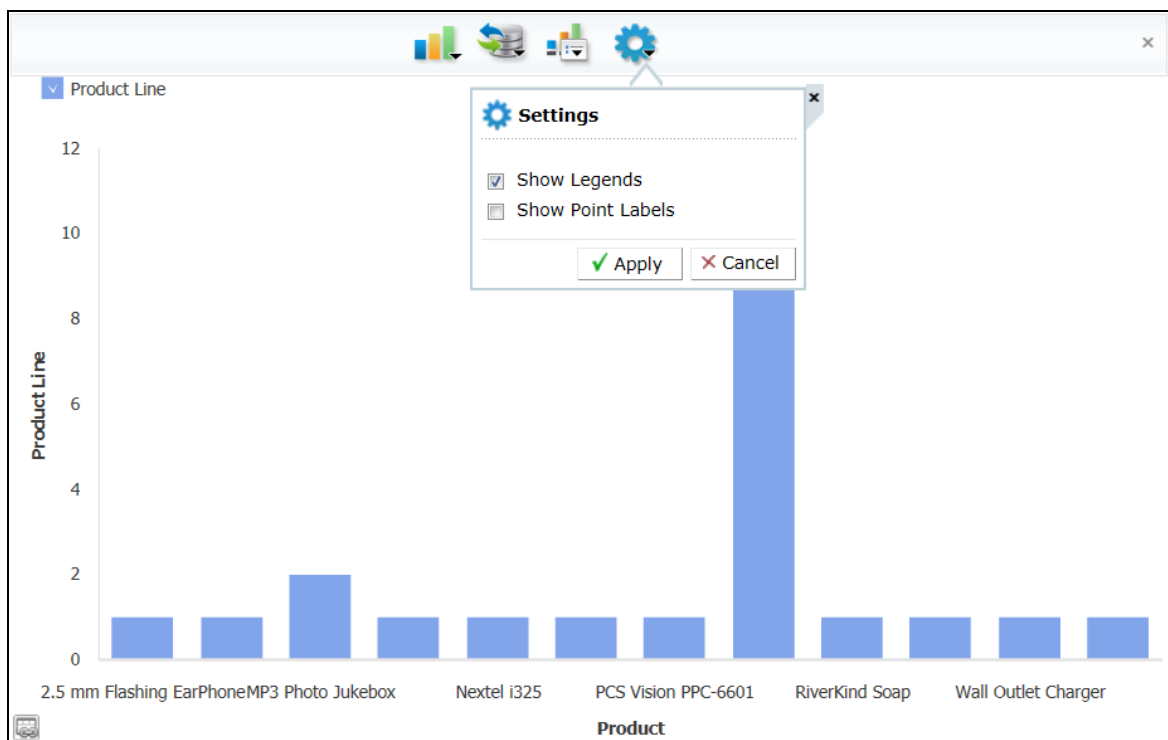

Figure 37: Specify Settings

Saving the layout

After the changes that you have made in report output, you can save the layout.
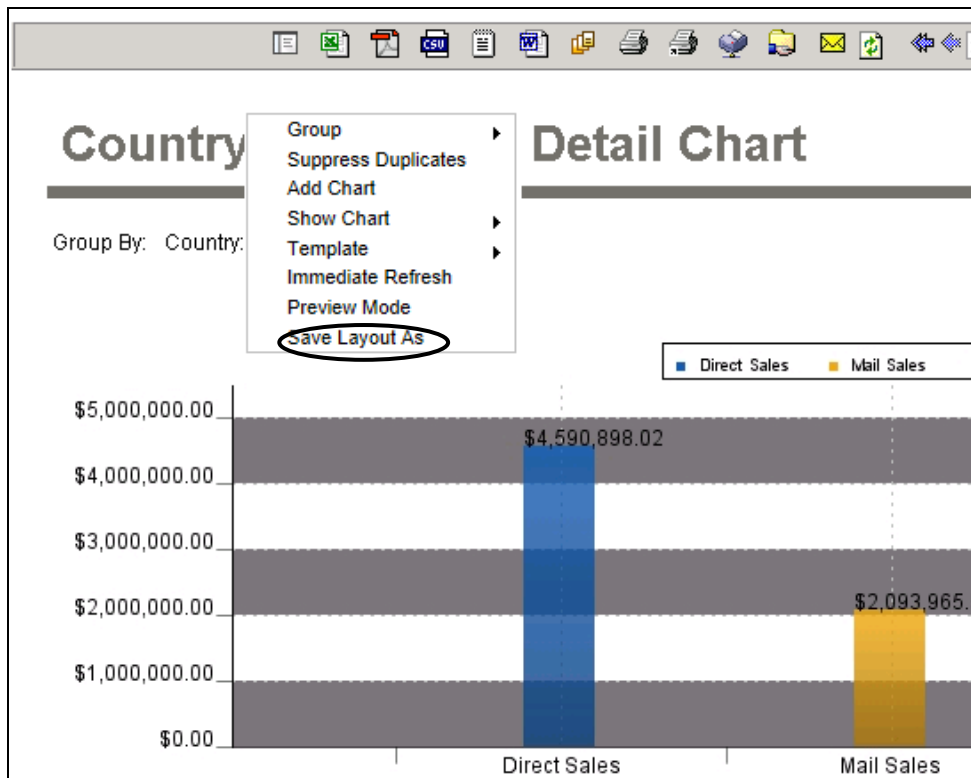

Figure 38: Saving the layout

1. Right-click anywhere on the report. A context-menu appears.
2. Click the option **Save Layout As**. A **Save Report Layout As** dialog box opens up.
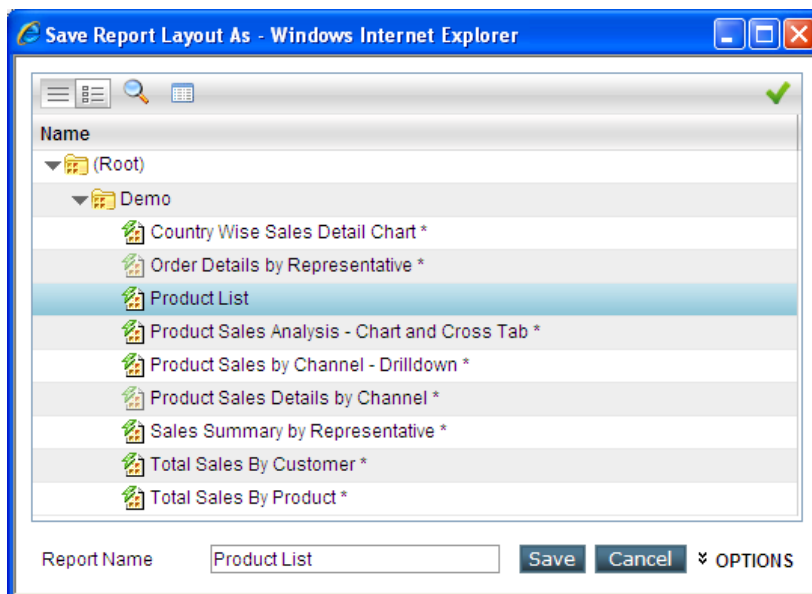

Figure 39: Save As Dialog box

To save the report, you need to do the following:

1. Select the **Category** in which the report is to be stored.
2. Specify **Report Name**. Select **Public** to make it available to all the users. Select **Private** to make it available to only yourself. Specify its **Description**.
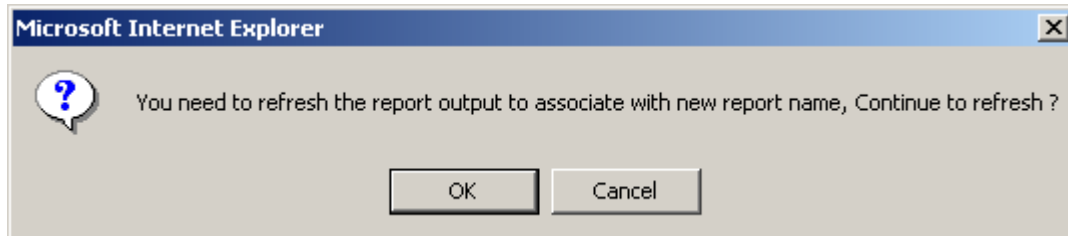3. Click **Save As** button to save the report. Dialog box given below appears.

Figure 40: Click OK to refresh the report

Click **OK** if you want to save, continue making changes and save the changes made. Click **Cancel**, if you want to save the output, but continue working on the report output without having need to save modified output under the same name.

Changing the Refresh method

Application provides two methods for refreshing the report output from PowerViewer:

- **Immediate:** To refresh report output after every change / action

- **Delayed:** To collect multiple changes / actions and apply them at one go
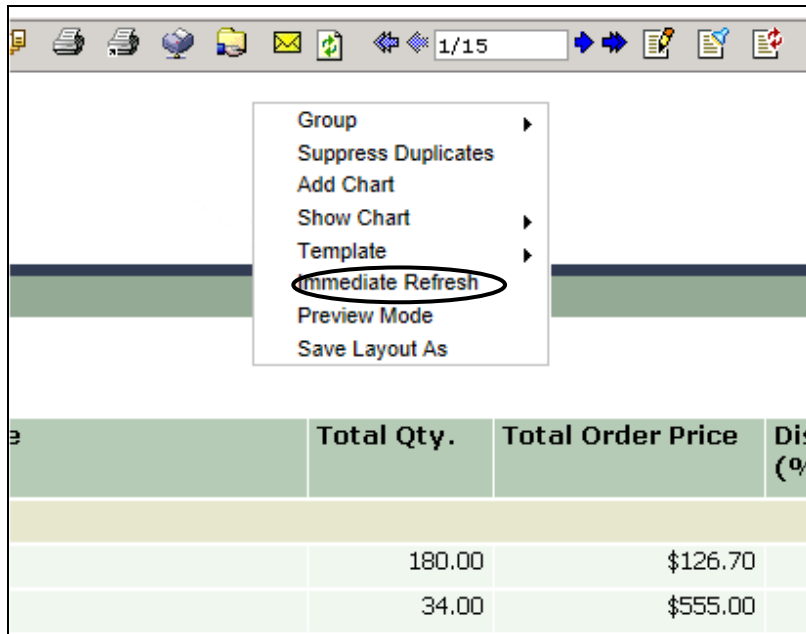
To change refresh method,

Figure 41: Changing refresh method

Right-click on an empty area of the report viewer. If changing of refresh method is allowed, the context-menu will have **Immediate Refresh** option. A tick in front of this option indicates "Immediate". In this case, change will be implemented immediately. To change it to "Delayed", remove the tick.

Preview Mode

This enables you to view first 200 records in the report output.

1. Right-click anywhere on the report.
2. Click the option **Preview Mode** to run the report in preview mode.

Working with Actionboard

Actionboard will appear when refresh method is **delayed** and you make any changes like changing column width or hiding a field.

Figure 42: Actionboard

- **To apply the changes:** Click **Apply** button.

- **To cancel all the changes:** Click **Clear All** button.

- **To cancel last change:** Click ⊠ button available on the right of respective entry in Actionboard.

> **Note:** Click ▼ on titlebar of the **Actionboard** to close it. When it is closed, click it again to open it.