Actuate e.Reporting Suite 5

LRX for Netscape Navigator

Release 5

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Introduction

About Actuate e.Reporting Suite 5

Actuate is the leading provider of information delivery solutions for e.Business. e.Business customers use Actuate® e.Reporting Suite 5 to develop and deploy high resolution structured content to hundreds of thousands of users. Actuate takes web reporting to the next level by providing options for needs as varied as seamless personalized web pages and traditional online and printed reports.

Actuate's customer list includes commercial banks, securities, financial services, insurance, high tech, telecom, .com, internet, global 2000, and federal government. OEMs, system integrators, and others building e.Business sites for information delivery face challenges. Actuate e.Reporting Suite 5 offers the following solutions.

Challenge	Actuate solution
Delivering high resolution information	DHTML provides a fast, no-download option
Viewing structured content	Supporting standard browsers means there is no need to support installations of plug-ins for hundreds of thousands of users
Compromising information display because of lack of integrated tools	Provides template-based design and display
Exploding use of web-based content delivery	Ability to support a million hits per day per CPU
Delivering personalized secure information	Open security directory integration and page security

Challenge	Actuate solution
Reusing existing integrated content	Open server provides access to content from other applications
Maintaining data integrity on hard copy	PDF provides high-resolution printed copy
Transferring information into other applications	XML output provides access to data across applications

Actuate tools and reports do the following:

- Solve complex data access problems.
- Solve formatting problems that go beyond the scope of other tools.
- Scale to support hundreds of thousands of users.

The following summary describes the products in Actuate e.Reporting Suite 5.

Product name	Use
Actuate e.Report Designer Professional	An object-oriented application used by professional developers of structured content to design, build, and distribute report object designs for delivery on the Web. The Actuate Basic Language and Actuate Foundation Class Library support extensive customization capabilities.
Actuate SDK (Software Development Kit) included as part of Actuate e.Report Designer Professional	Actuate ActiveX Controls embed Actuate reporting functionality into custom applications. Actuate Requester API accesses attributes and values of report parameters, changes the values of report parameters, controls how and when a report is generated, displays and prints reports, and configures report print setup. Access the Requester API using Actuate Basic, Visual Basic, C, or C++. Actuate search extension API supports developing search extensions to transfer data to any third-party productivity or analysis tool.

Product name	Use
	Actuate report server API implements common Report Encyclopedia tasks, integrates report server features into existing corporate applications, automates routine or time-consuming tasks, and implements new feature groupings for custom business processes. Access the report server API using C++.
	Actuate Report Server Security Extension supports the use of third-party security tools.
	Actuate archive driver supports the use of third-party archiving software and hardware.
Actuate e.Report Designer	An application that complements e.Report Designer Professional and is used by business users to design and distribute a variety of reports. These reports require no programming. This application supports both modifying complex reports and using sophisticated components from libraries.
Actuate e.Report Designer Java™ Edition	A report development application used by Java developers to design and distribute a variety of reports. 100% Java compliant, the e.Report Designer Java Edition includes both AWT and Swing APIs.
Actuate e.Spreadsheet Designer	An application that supports designing, creating, and distributing custom spreadsheets over the web. Users can dynamically generate richly formatted Excel and spreadsheet-based reports from Actuate e.Reporting Server. These spreadsheets can be part of an application, an applet, or a Java Bean.

Product name	Use
Actuate e.Reporting Server	A server application that generates Live Report Documents, manages them in the Report Encyclopedia®, and makes them available to users. This application includes open server functionality that supports the use of third-party report generators with the Actuate e.Reporting Server. This product includes Actuate Administrator Desktop, an application for system and network administrators to manage and control one or more Actuate report servers. This product also includes Actuate ReportCast™ that transforms the Report Encyclopedia into a dynamic, secure web site. ReportCast provides the foundation for Channels and seamless integration with other web sites.
Actuate e.Reporting Server Progress Edition	A server application designed to work exclusively with Progress databases that generates Live Report Documents, manages them in the Report Encyclopedia®, and makes them available to users. This application includes open server functionality that supports the use of third-party report generators with the Actuate e.Reporting Server. This product includes Actuate Administrator Desktop, an application for system and network administrators to manage and control one or more Actuate report servers. This product also includes Actuate ReportCast that transforms the Report Encyclopedia into a dynamic, secure web site. ReportCast provides the foundation for Channels and seamless integration with other web sites.
Actuate Advanced e.Reporting Server	An application that adds page security to the basic e.Reporting Server. Page security supports personalized viewing of parts of reports for various users.

Product name	Use
Actuate Advanced e.Reporting Server Progress Edition	An application designed to work exclusively with Progress databases that adds page security to the basic e.Reporting Server. Page security supports personalized viewing of parts of reports for various users.
Actuate e.Analysis	An application used to transform data from an Actuate e.report into interactive information. Users can view and analyze data to determine relationships and trends. Actuate e.Analysis is an optional product that installs with ReportCast and the e.Reporting Server and extends its functionality.
Actuate e.Spreadsheet Option	An open server application that generates Excel spreadsheets from e.Spreadsheet Designer files. With this product customers manage spreadsheet reports and analytics within the Actuate e.Reporting Server, and save Actuate reports as richly formatted Excel spreadsheets.
Actuate End User Desktop	An application used by end users to request, generate, view, and print report documents. The ReportQuery™ capabilities enable seamless transfer of data from an Actuate report to any productivity tool or analysis tool.
Actuate Viewer	Application for end users to find, view, and print report documents. The ReportQuery capabilities are also part of the Actuate Viewer.
Actuate Live Report Extension (LRX)	Application for end users that works with both Microsoft Internet Explorer and Netscape Navigator to support report viewing and printing on the Web.

Actuate Viewer and Actuate Live Report Extension (LRX) are included with all products except Actuate e.Report Designer Java Edition and Actuate e.Spreadsheet Designer.

About Actuate LRX

If you install the Actuate LRX (live report extension) with your Web browser, you can view Actuate reports (ROI) from your browser. You can view reports that are stored on your local file system, or you can log into a Actuate Report Encyclopedia using your Web browser and view reports that are stored in the Encyclopedia.

From either your local file system or a Report Encyclopedia, you have the same report viewing, navigation, and searching capabilities that are available with the Actuate Viewer. For information about Actuate viewing and searching capabilities see Chapter 2, "Viewing a report," and Chapter 3, "Searching for and exporting report data."

About *Actuate LRX guide*

Actuate LRX guide describes the tasks you can perform with reports that have been designed, compiled, and generated. For more information about the Actuate LRX, see "About Actuate LRX," earlier in this chapter.

Actuate LRX guide includes the following chapters:

- *Introduction.* This chapter provides an overview of this guide, Actuate e.Reporting Suite 5, and the typographical conventions used.
- *Chapter 1. Using e.reports on the Web.* This chapter discusses how to access Actuate reports over the Web using your web browser.
- *Chapter 2. Viewing a report.* This chapter discusses opening, viewing, and moving around in a report. It also describes how Actuate reports use links to other Windows applications.
- *Chapter 3. Searching for and exporting report data.* This chapter describes how to search for specific data in a report and provides examples of how to use complex search criteria. It also describes how to export report data to other documents.
- *Chapter 4. Printing and distributing a report.* This chapter discusses printing and distributing reports.

Online documentation

The information in the printed manuals is also available as online books in Adobe Acrobat PDF format and in the online help system for the Actuate

products. For products without a Windows interface, such as the various versions of Actuate e.Reporting Server, Actuate e.Report Designer Java Edition, Actuate ReportCast, and Actuate e.Analysis, we provide HTML help files. In addition Actuate e.Spreadsheet Designer provides Java online help files. The HTML and Java help files install automatically with the product. These files can be viewed with standard browsers.

Using online manuals

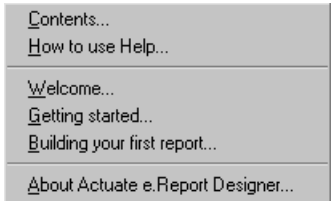
The online manuals do not install automatically with the product. On the product CD, you find those files in the Manuals directory. Open the introductory PDF file to get an overview of the manuals. Copy to your local drive this file and the files for each book you want to be able to use online. The items in the table of contents and the page numbers in the index both contain links to the appropriate topics in the text. In the index, you access the link by positioning your cursor over the page number, not the topic.

Online help

Actuate products provide both context-sensitive online help about the product and report-specific online help about the report you are viewing. Actuate e.Reporting Suite makes it possible for developers to create customized report-specific online help.

Using context-sensitive online help

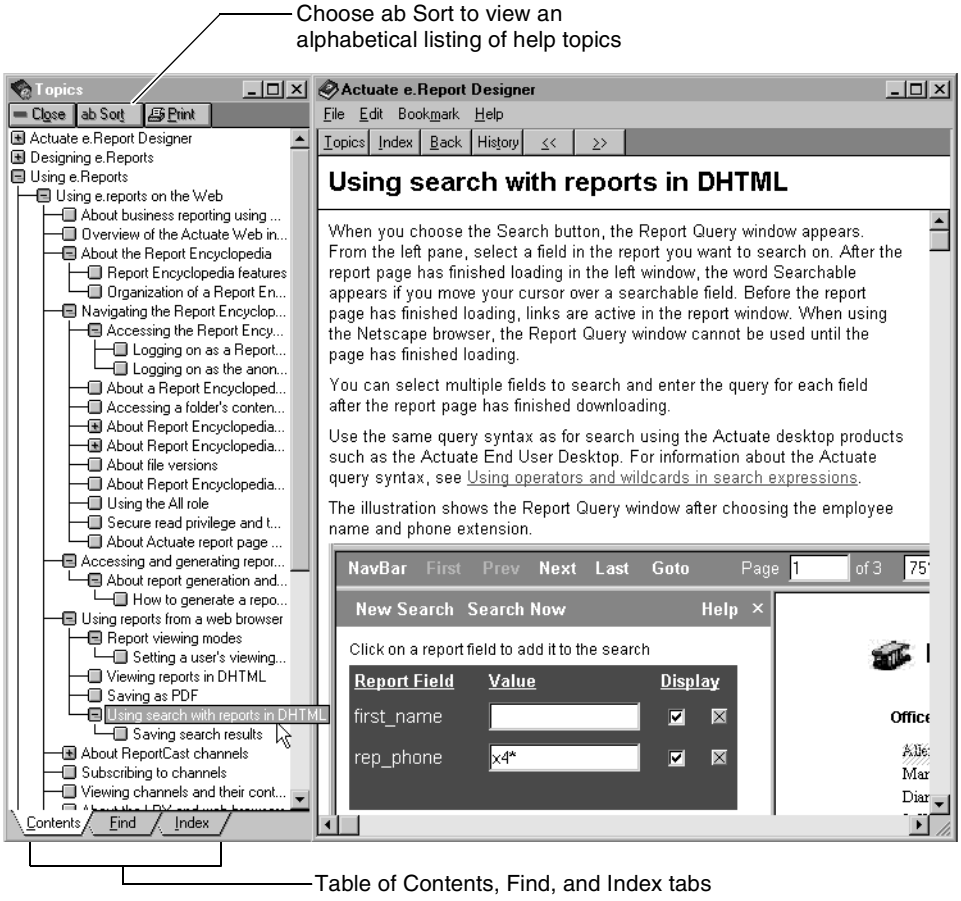
Sections from the printed manuals have been linked directly to the software interface to make relevant information available while you work. Dialogs that need additional explanation about how to use them have a help button. To access online help for other elements, use the Help menu on the menu bar.



An alternative method is to use the F1 key.

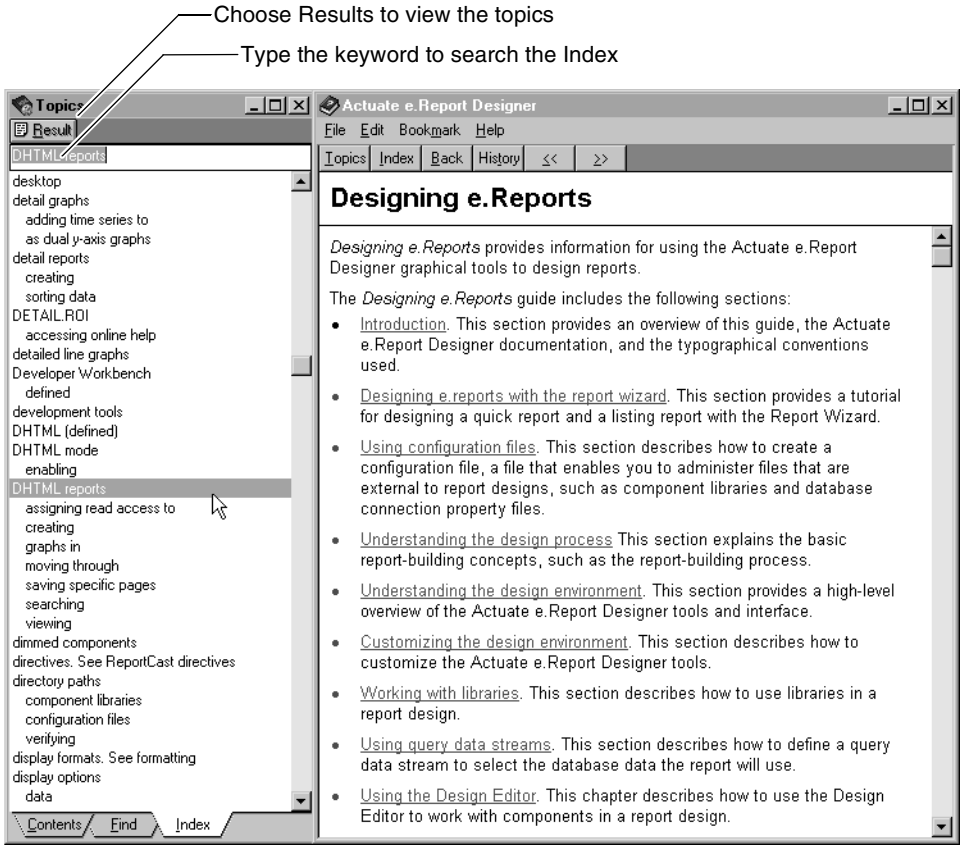
Using the Actuate online help system

Use two panes to access and view information in the e.Reporting Suite help system. The left pane displays the table of contents or the index of the online help system. The pane on the right displays the contents of the online help topics.

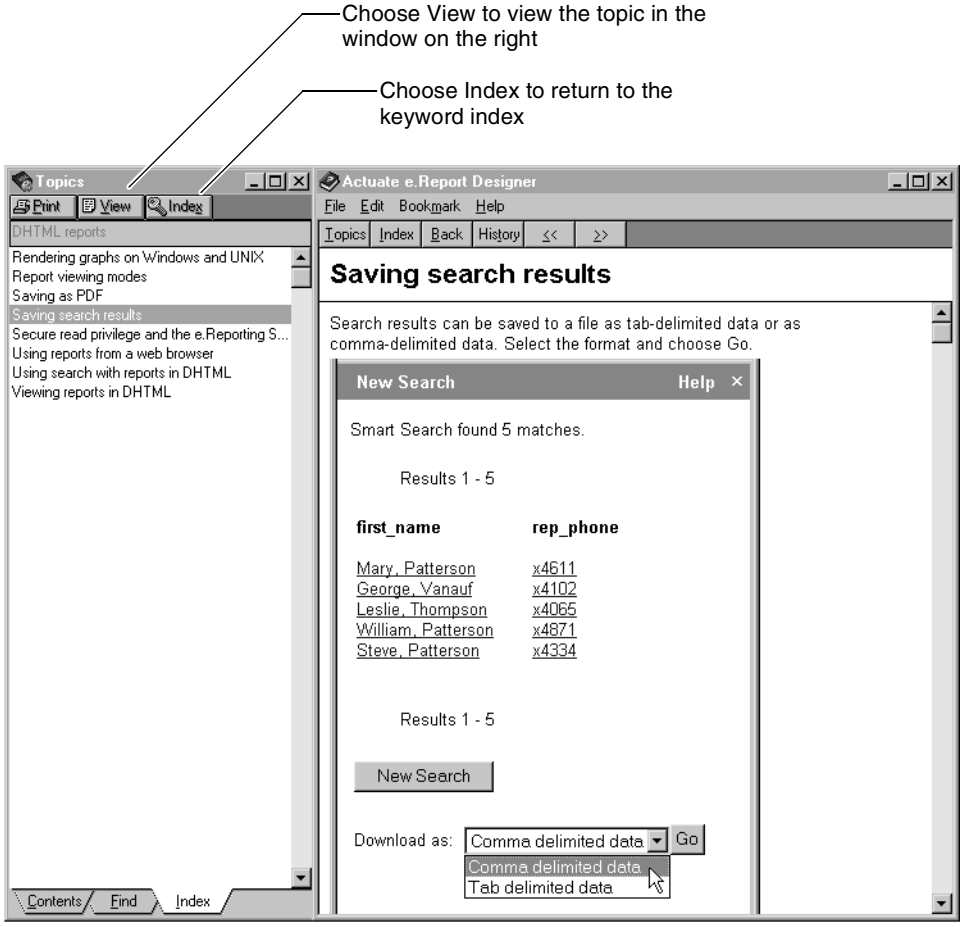


The tabs at the bottom of the left pane access different views. Use these tabs to switch views among the Table of Contents, Find, and Index. The buttons at the top of the window change according to the tab you select at the bottom.

The following illustration shows an example of the Index and the result of an Index search.

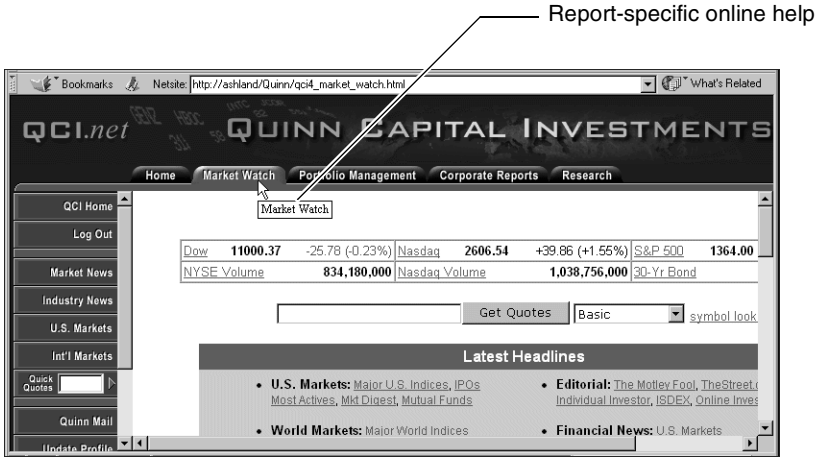


The following illustration shows the result of the search as it appears in the left pane. To view the topic in the right pane, double-click the topic from the list. The topic displays in the window on the right.



Using report-specific online help

During the design phase, report developers have the option to include report-specific online help. For example, the report developer can add comments to give further detail about specific report objects or to explain how calculations were created.



For detailed information about report-specific online help see “Using online help in a sample report” in Chapter 2, “Viewing a report.”

Typographical conventions

The following table describes the typographical conventions used in this guide.

Item	Convention	Example
Code examples	Sans serif	Dim As String
File names	Initial letter capitalized. Except e. Report Designer Java Edition, where file names are case sensitive	Detail.roi
Key combination	A + sign between the keys means to press both keys at the same time	Ctrl+Shift
Menu items	Capitalized. No bold.	File
Submenu items	Separated from main menu item with small arrow	File➛New

Item	Convention	Example
User input or user response	Sans serif	M*16*
User input in XML and Java code	Italics	chkjava.exe *cab_name*.cab

Syntax conventions

The following table describes the symbols used to present the syntax.

Symbol	Description	Example
[ ]	Optional item	[Alias<alias name>]
	Array subscript	blob[ ]
< >	Argument you must supply	<expression to format>
	Delimiter in XML	<tr>
{ }	Groups two or more mutually exclusive options or arguments, when used with a pipe	{While | Until}
	Defines array contents	{0, 1, 2, 3}

	Delimiter of code block	public ACJDesigner( )
		{
		}

|	Separates mutually exclusive options or arguments in a group	Exit {Do | For | Function | Sub}
	Java OR operator	int var |4

Chapter

1

Using e.reports on the Web

This chapter contains the following topics:

- About business reporting using Actuate
- Overview of the Actuate web interface
- About the Report Encyclopedia
- Navigating the Report Encyclopedia on the Web
- Accessing reports on the Web
- Using reports from a web browser
- About ReportCast channels
- Subscribing to channels
- Viewing channels and their contents
- About the LRX and web browsers
- What to do in the event of a system failure

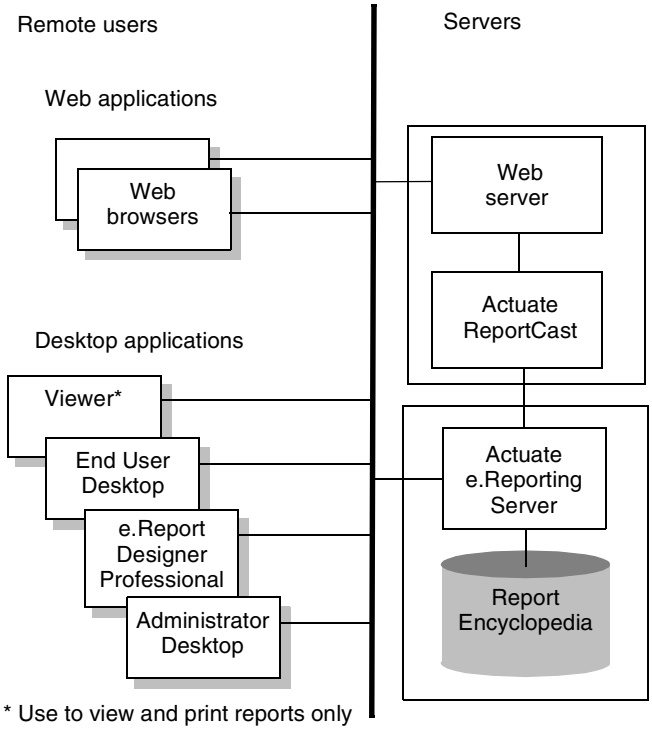
About business reporting using Actuate

In a diverse and global business environment, corporations need a way to design, publish, and distribute reports on a regular basis. The creation, storage, and viewing of report information is moving to distributed, networked environments such as the internet, intranets, and extranets.

Using Actuate e.reports provides an efficient, scalable, highly searchable, and easily updated alternative to static web pages or traditional, paper-based reporting.

You can store, view, print, and generate Actuate e.reports either remotely from a server or locally on your computer.

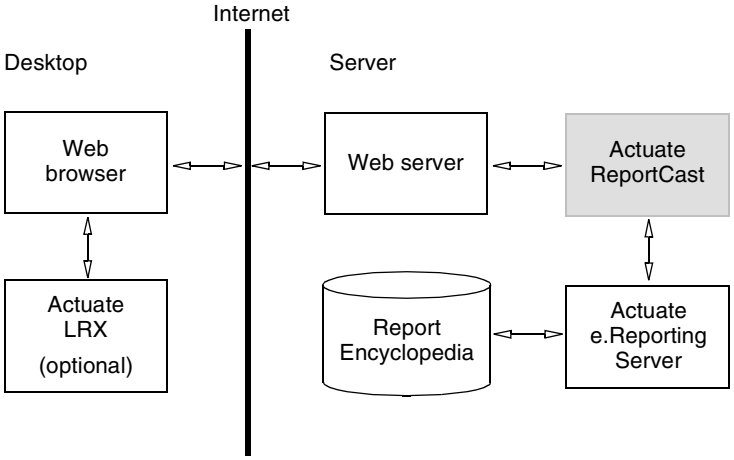
- To perform these tasks remotely using a server, your computer must be able to access a server running the Actuate e.Reporting Server. Using a web browser, access to the Report Encyclopedia is through a web server and Actuate ReportCast. Using an Actuate desktop application, access to the Report Encyclopedia does not require ReportCast.
- To perform these tasks locally, or on a stand-alone machine, you can use Actuate e.Report Designer Professional, e.Report Designer, End User Desktop, Administrator Desktop, or a web browser with the Actuate LRX installed.



This chapter describes the use of a web browser that connects to the Report Encyclopedia through a web server using Actuate ReportCast.

Overview of the Actuate web interface

Using Actuate ReportCast and a web server, you can access an Actuate Report Encyclopedia over the Web using a web browser. The following illustration shows where Actuate ReportCast fits into the Actuate Internet architecture.



Users can view reports in either DHTML format using a web browser that supports JavaScript and Dynamic HTML (DHTML), or in the native ROI format using the Actuate LRX (Live Report Extension). For more information, see "Report viewing modes," later in this chapter.

In addition to letting users navigate through an Encyclopedia and view reports, Actuate supports ReportCast channels. Channels use internet push technology to give users access to reports. Actuate supplies the following types of ReportCast channel web pages:

- **List of Channels.** A page that lists the channels to which the user is subscribed. This list is sorted alphabetically. (A web site designer can elect to put pages other than the list of channels on this list.)
- **Channel Contents Page.** A page that displays the contents of a channel. The contents are completed report requests. The completed requests are listed in descending chronological order.
- **Subscription Page.** A page that supports selection of lists of channels to which a user can subscribe. The user selects or deselects check boxes to subscribe to or unsubscribe from a channel.
- **Channel Administration Page.** A page that lets an administrator create, delete, and modify channels that appear in the user's channel Subscription Page.

As administrator, you can customize the look of the Report Encyclopedia pages by changing the ReportCast templates. For more information about customizing Report Encyclopedia web pages, see *Building an e.Reporting Web Site* distributed with Actuate ReportCast.

About the Report Encyclopedia

The Report Encyclopedia is a shared repository that contains all the items the e.Reporting Server manages. Users in an e.business or enterprise environment distribute and share report files by storing them in the Report Encyclopedia and displaying them on the Web.

Report Encyclopedia features

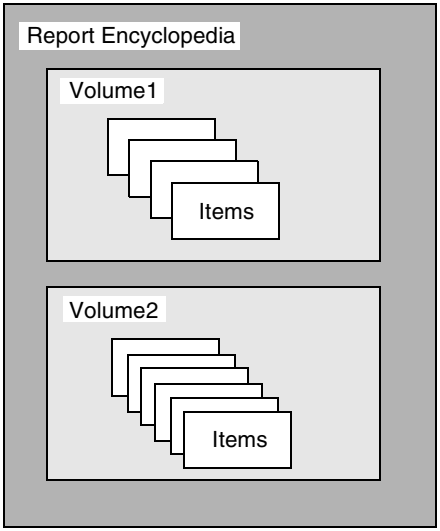
Key features the e.Reporting Server provides are the following.

Feature	Supports ...
Familiar file management system	Creating and working with hierarchical folders to organize report files.
Multilevel security	Limited report generation and viewing to authorized users. You can assign different privileges on a file or user basis. Secure read privilege on an Actuate report lets users read, but not download, the report.
Autoversioning	Grouping related report files to maintain different versions of reports that run on a regular schedule.
Flexible scheduling	Generating new reports at specified times. You can set a report to run once or on a regular basis. Supports automatic resubmission of failed requests.
Automatic notification and distribution	Placing completed reports in specified folders and sending notices to users.
Automatic archiving	Deleting and automatically archiving Report Encyclopedia files based on a date, the age of the file, or the number of versions of a file.
Access using web browsers	Viewing Report Encyclopedia contents over the World Wide Web. Viewing Actuate reports in DHTML format.
Report page security	Using report documents with security rules that determine which pages a user can view.

Feature	Supports ...
Open server report generation	Running or printing third-party report requests. From within the Report Encyclopedia, run or print a third-party report just like an Actuate report.
Report Server Security Extension (RSSE)	Supplying the ability to extend report page security.

Organization of a Report Encyclopedia

The Report Encyclopedia consists of volumes. A volume is a collection of Encyclopedia items managed by a report server. Administrators create volumes to group parts of a large Encyclopedia into convenient and manageable clusters. Within each volume are items such as folders, report files, and printers. The following illustration shows an example of the organization of a Report Encyclopedia.



Navigating the Report Encyclopedia on the Web

This chapter assumes that you are familiar with the Web and using web browsers. The illustrations in this chapter use the standard web pages provided by Actuate. Your report server administrator may customize the look of the web pages for your site, so your pages may appear differently from those in the illustrations.

Check with your Actuate report server administrator to find out if you can access reports on the Web.

To navigate through the Report Encyclopedia using your web browser, choose hyperlinks contained on the Encyclopedia's web pages, or enter URLs in the Address or Location window of your web browser.

Navigating through the Report Encyclopedia with a web browser is similar to navigating through the Report Encyclopedia using an Actuate Navigator window. From the main Report Encyclopedia web page, choose a folder's link. The folder contents page displays in the browser. You can continue to choose subfolder links to display their contents, choose a report executable to generate a report, or choose a report's ROI, ROV, or ROW to view a report.

Accessing the Report Encyclopedia on the Web

To access your Report Encyclopedia, bring up your web browser and enter a URL that points to a web server. For example, to access reports using a web server called Caligari from a report server on a machine called Mustique, type:

```
http://caligari/acweb/mustique
```

Depending upon your setup, a login dialog box may appear. If it does, enter the user name and password you typically use to access your Report Encyclopedia.

The following is the format of the URL to use a web server to connect to an Actuate Report Encyclopedia:

```
http://<web server>/acweb/<report server>
```

- <web server> is the name of the web server that runs the Web interface to the Report Encyclopedia. This name is unique to your company. You can get the name of the web server from your system administrator or webmaster.
- acweb is a keyword that indicates that you want to access the Report Encyclopedia
- <report server> is the name of the report server with the Encyclopedia you want to access. You can get the name of the report server from your system administrator or webmaster.

Logging on as a Report Encyclopedia user

When you first access the Report Encyclopedia using a web browser, the login dialog box appears. When you enter a valid user name and password, the initial report server view appears in your browser.

If your report server administrator set up an anonymous user, a login dialog box does not appear. For more information about the Report Encyclopedia anonymous user, see "Logging on as the anonymous user" in the following section.

Logging on as the anonymous user

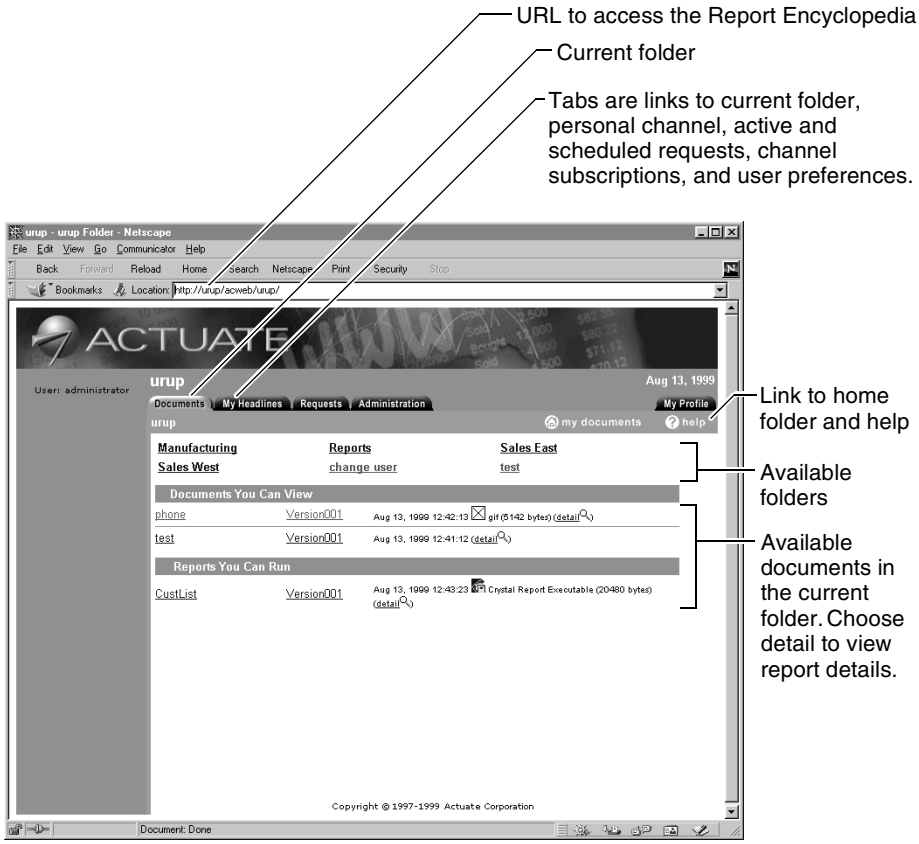
The anonymous user allows users to access a Report Encyclopedia without having to log on. The anonymous user only exists for some security configurations. For information about specific security configurations, contact your system administrator.

When the anonymous user attempts to view an object for which the user has only visible privilege, the login dialog appears. The user can then log on as another user with a privilege to view the object. The user must enter a valid user name and password to view the selected object. The user is reconnected to the Report Encyclopedia with the new authentication information and privileges.

For more information about the visible privilege, see "About Report Encyclopedia folder and file privileges," later in this chapter.

About a Report Encyclopedia web page

When you log on to a Report Encyclopedia over the Web, the initial Report Encyclopedia page is similar to the following.



From this main page, you can:

- View the contents of the Report Encyclopedia
- Access your personal channel that contains your Completed reports folder
- Access the available Report Encyclopedia folders
- Get detailed information about folders

The left pane contains links to the Report Encyclopedia's system folders and the user's Personal folder:

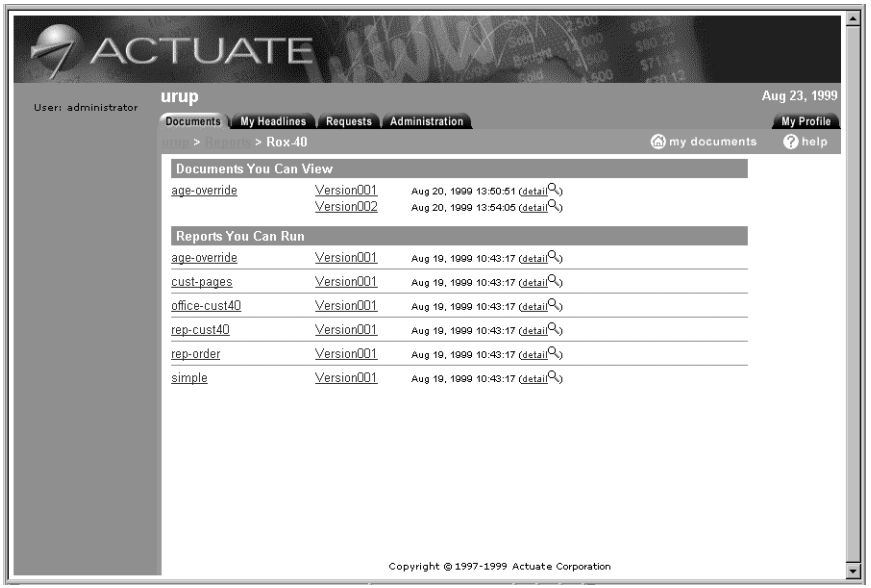
- The Report Encyclopedia administrator creates the Personal folder to hold the user's reports and other files.
- The home folder for the current Report Encyclopedia. In this case, the home folder is named mustique.
- The Active Requests and Scheduled Requests folders contain information about current and scheduled requests.

- The Channels folder provides access to completed requests in the Personal Channel, the channel subscription pages, and channel administration pages for Administrators.

The right pane lists the Report Encyclopedia objects available for viewing. Choose the Detail link to access details such as the privileges needed to access them. Choose a folder to view the folder's contents.

Accessing a folder's contents page

When you choose a Report Encyclopedia folder's link to display its contents, you see a folder's contents page similar to the following.



The folder web page lists the folder's contents, including any subfolders, as well as links to your personal folder and to the Active and Scheduled requests web pages.

For information about the types of Actuate files, see "About Report Encyclopedia files" later in this chapter.

About Report Encyclopedia folders

As a user, the following are the types of folders you can access:

- Encyclopedia home folder that all users can access
- Item folders that contain report files and other item folders
- Printers folder that lists the network printers you can use
- Requests folder that contains information about report requests you submit

Item folders

There are two types of item folders you can access:

- Folders owned by other users for which you have been granted read privilege.
- Your personal folder, if the administrator created one. The purpose of the personal folder is to provide each user with a private location that other users cannot access. A user owns his or her personal folder and controls if and how other users can access its contents.

Requests folder

The Requests folder is a system folder that you access to find the status of report generation requests. The Requests folder contains three subfolders:

- The Scheduled folder shows requests you scheduled to run at a later date and time.
- The Active folder shows requests you scheduled that are currently in the process queue.
- The Personal channel folder shows processed requests. These requests are requests you submitted, or requests for reports that other users asked to be sent to you.

About Report Encyclopedia files

As you browse the contents of folders in the Report Encyclopedia, you are likely to see a variety of file types, each with a specific function. Understanding the different types of files and their functions helps you better manage and use files in the Report Encyclopedia.

Report document (ROI) files

Report documents are the finished reports you view and print. Use e.Report Designer Professional, End User Desktop, or Administrator Desktop to create report document files. You can view Actuate reports with a web browser either

as DHTML or with the Actuate LRX (Live Report Extension) in the native ROI format. You can also view Report documents in the desktop environment using Actuate desktop products.

HTML report document (ROW) files

HTML report documents are created in the Report Encyclopedia when you run report executables that generate HTML reports. Use e.Report Designer Professional, End User Desktop, or Administrator Desktop to create HTML report files. An HTML report document is used only in the Report Encyclopedia. An HTML report document contains HTML files and other related files such as graphics files. When you view an HTML report document, the report server displays the HTML files and graphics in your web browser. You do not need the Actuate LRX to view an HTML report in your web browser.

Executable (ROX) files

Executables are files you run to generate report documents with current data. Use e.Report Designer Professional or e.Report Designer to create report executables. For information about running report executables, see "Accessing reports on the Web" later in this chapter.

Parameter value (ROV) files

Parameter value files store parameter values specified for a specific report executable. Use the Requester in e.Report Designer Professional, End User Desktop, or Administrator Desktop to create parameter value files. The values in a parameter value file typically filter the data that appears in a report document. You run a parameter value file to generate a report with a specified set of criteria. For information about generating reports, see "Accessing reports on the Web," later in this chapter.

Search definition (ROS) files

Save and use searches stored in search definition (ROS) files on an Actuate report document. A search definition file contains search criteria, data to display, extract options, and report document structure information. For more information about search definition files, see "Using search definition files" in Chapter 3, "Searching for and exporting report data."

Design (ROD) files

Design files contain components that specify the format and content of a finished report. Use e.Report Designer Professional to create report designs. Report developers can store design files in the Report Encyclopedia as backups or for sharing with other developers. You can open and edit a design

file only on a desktop machine. You do not need access to design files to run, view, or print reports.

Basic Source (BAS) files

Source files contain Actuate Basic code associated with a specific report design. Use e.Report Designer Professional to create source files. Report developers can store source files in the Report Encyclopedia as backups or for sharing with other developers. You can open and edit a source file only on the desktop environment. You do not need access to source files to run, view, or print reports.

Library (ROL) files

Library files contain reusable report components. Use e.Report Designer Professional to create library files. Library files are typically included with different report design files. Report developers can store library files in the Report Encyclopedia as backups or for sharing with other developers. You can open and edit a library file on the desktop with the Actuate e.Report Designer Professional. You do not need access to library files to run, view, or print reports.

Report Object Design (JOD) file Java Edition

Java design files contain report designs for e.Report Designer Java Edition. Report templates or report design files use the .jod extension to distinguish template files from other files. When you create a report, e.Report Designer Java Edition stores it in a report file that has a .jod extension.

e.Spreadsheet Template (VTS) files

Actuate e.Spreadsheet template .vts files contain spreadsheets or workbooks that can be used as report designs. VTS files are created with the e.Spreadsheet Designer. The VTS file format is a compressed file format optimized for portability and network transmission. The Report Encyclopedia assigns the VTX file type to .vts files. In the Report Encyclopedia run an e.Spreadsheet .vts file to create a Microsoft Excel .xls file. The Actuate e.Spreadsheet Option must be installed to run a .vts file.

e.Spreadsheet Template Package (VTF) files

Actuate e.Spreadsheet template package .vtf files are zip files that contain a single spreadsheet file, either .vts or .xls, and other files such as properties files, XSL files, and graphics files, used in an e.Spreadsheet report template. In the Report Encyclopedia, run an e.Spreadsheet .vtf file to create a Microsoft Excel .xls file. The Actuate e.Spreadsheet Option must be installed to run a .vtf file.

Open server file types

Actuate e.Reporting Server defines the following set of open server file types. Administrators can add additional open server file types.For more information about the Actuate open server, see

- HTML files (.htm and .html files)
- Crystal report files (Windows NT only):
  - RPX, defined as Crystal executable .rpt file
  - RPW, defined as Crystal web report .rpw file
  - RPT, defined as Crystal report .rpt file
- SQRIBE report files (Windows NT only):
  - SPF, defined as SQRIBE report .spf file
  - SQR, defined as an uncompiled SQRIBE report .sqr file
  - SQT, defined as SQRIBE report .sqt file
- PostScript PDF (.pdf)
- Text files (.txt files)

About Actuate open server reports

Using the standard e.Reporting Server users can view reports and other types of files from the Report Encyclopedia. If you have the Advanced e.Reporting Server, Actuate extends the Actuate open server functionality to handle report executables and report documents from third-party vendors. Actuate calls these third-party reports open server reports. For example, users can generate and print non-Actuate reports, which are stored in the Report Encyclopedia.

To run or print open server reports, report server administrators configure the Report Encyclopedia in a manner similar to Actuate report files such as report executables files ROX, report output files, ROI or HTML files, and report parameter files ROV.

About file versions

The Report Encyclopedia provides an autoversioning feature used to maintain different versions of a report. You can, for example, generate multiple reports from a report executable or parameter value file, and save each report as a different version. This capability is useful if you generate reports regularly and want to retain previous copies of the report. You set the versioning feature when you run a report executable. For information about running report executables, see “Accessing reports on the Web,” later in this chapter.

About Report Encyclopedia folder and file privileges

Privileges indicate the operations users can perform on folders and files. For example, the read privilege for a file means users can view or print a file, but cannot change the file. Unless users have read or visible privilege on a folder or file, they do not see the folder or file in the Report Encyclopedia.

The following table lists the privileges for folders and files. Each row describes a single privilege and summarizes what that privilege means for different item types. Report Encyclopedia privileges are not additive. For example, if a user has write privilege on an item, that user does not automatically have read privilege on the item. The user must also have read privilege on the item or it is not visible.

The visible privilege lets you access as different users when you view the Report Encyclopedia from a web browser. For example, if you try to view a report document, or view its properties, and you only have the visible privilege for the document, the report server displays the Login dialog and lets you change your login to a user with different privileges.

Privilege	Item type	Meaning
Visible	Folders	Users can see a folder and its contents. Read or visible privilege is required for users to see a folder and its contents.
	All other types	Users can see the object and properties but they cannot view or print the object's contents. If the object is a report, users cannot run a report. If a user accesses the Report Encyclopedia with a web browser, any attempt at viewing contents brings up a web page.

Privilege	Item type	Meaning
Secure read	Report document	Users can create requests to print from the report server. Users that also have read or secure read privilege on the associated report executable can: ■ only view and print the report document in DHTML format from a web browser ■ generate XML or PDF output from a report Users cannot copy the object from the Report Encyclopedia. With the Advanced e.Reporting Server, Actuate page security is enabled. With the standard e.Reporting Server, Actuate page security is disabled and reports using page security are not readable.
	Report executable, report parameter values	Users that also have read or secure read privilege on the report document can: ■ only view the associated report document in DHTML format using a web browser ■ generate XML or PDF output from the report Users cannot copy the object from the Report Encyclopedia.
	All other types	Users cannot copy the object from the Report Encyclopedia. Users can examine the item's properties. If the item is a folder, users can see what it contains.

Privilege	Item type	Meaning
Read	Folder	Users can see a folder and its contents. Read or visible privilege is required for users to see a folder and its contents.
	Report document	Users can view and print the report document if they also have read or privilege on the associated report executable.
	Report parameter values	Users can schedule a request for the associated report executable if they also have read and execute privilege on the report executable. See execute privilege on report executables for requirements when running reports.
	Report executable	Users can run the report executable if they also have execute privilege. See execute privilege on report executables for requirements when running reports. If a user has only read privilege on a report executable, the user cannot see it.
	All other types	Users can examine the item's properties and view or print the item's contents.
Write	Folder	Users can create new items in the folder, copy or move items into it, or rename it. Users must also have read privilege on the folder or it is not visible. Users can move the folder to a different containing folder if they have read and write privileges on the destination folder. Users cannot rename or move folders from a web browser.
	All other types	Users can rename the item. Users must also have read privilege on the item or it is not visible. Users can move the item to a different folder if they have read and write privileges on the destination folder. Users cannot rename or move items from a web browser.

Privilege	Item type	Meaning
Delete	Folder	Users can delete the folder if they have write and delete privilege on all the items in the folder and the folder itself. Users must also have read or visible privilege on the folder or it is not visible. Users cannot delete folders from a web browser.
	All other types	Users can delete the item if they have write and delete privileges. Users must also have read or visible privilege on the item or it is not visible. Users cannot delete items from a web browser.
Execute	Report executable	Users can schedule a new request for the report executable. Users must also have read privilege on the report executable. In addition, users must have: ■ Read and write privileges on the folder where the generated report document is stored ■ Write privileges on an existing report document if the report is versioned or replaced by the new report document
	Report document	Users can schedule a request for the associated report executable if they also have read and execute privilege on the report executable. See execute privilege for report executable for other requirements when running a report.
Grant	All types	Users can grant any privilege on the item, including the grant privilege, to other users and roles. Users must also have read or visible privilege on the item or it is not visible. Users cannot grant permissions from a web browser. Users with grant privilege on an object see all roles and users in the Privilege tab of the object's Properties dialog box.

There is a special role called All role that contains all the Report Encyclopedia users. For information about the All role, see "Using the All role," in the following section.

Using the All role

The All role is a system-created role that includes all the Report Encyclopedia users. The following describes the All role:

- Users can use the All role to give all Report Encyclopedia users privileges to objects. This includes new users added after the privilege is granted on the object.
- You cannot delete the All role.
- All users are members of the All role. You cannot remove a user from the All role.

About Actuate report page security

Actuate report page security is available with the Advanced e.Reporting Server. With report page security, Actuate report developers create a report document with security rules that determine which pages a user can view. Using the Actuate standard e.Reporting Server, the page security features of a report are disabled. With the standard e.Reporting Server, users are notified that the Advanced e.Reporting Server is required to read a report that uses page security.

Using report page security, the report developer creates a report that defines a list of users and roles associated with the report's groups and sections. In the report design, the list is in the form of a static list or an expression that generates a list based on information in the report. This list is used to generate the Access Control List (ACL) for each report page. For information about creating reports using page security, see *Developing Advanced e.Reports* distributed with the Actuate e.Report Designer Professional.

When the report is in the Report Encyclopedia and is viewed, the view process retrieves information about the user from the Report Encyclopedia. This information is then compared against the ACL for each page in the report to determine which pages the user can view.

Secure read privilege and the e.Reporting Server

Secure read on an ROI for a user means that the user can only view or print the ROI in DHTML format or generate XML or PDF output from the report using a web browser and Actuate ReportCast. The ROI cannot be downloaded, bundled, or e-mailed or viewed in native format using the Actuate LRX or other Actuate applications such as the Viewer or End User Desktop. Viewing the report in the native format requires the downloading of the report to a cache on the user's machine.

Setting secure read privilege on a report executable ROX means that the report executable can only be used when viewing or printing an ROI as a DHTML

report from a web browser. The ROX cannot be downloaded by a desktop program or used in viewing reports using the Actuate LRX since the LRX downloads the ROX when viewing an ROI. Users can create requests to print from the report server.

If the Actuate report uses page security, setting a user's privilege to secure read on the report document enables the report's page security features. Page security is available only with the Advanced e.Reporting Server. For information about page security, see "About Actuate report page security," later in this chapter.

Setting secure read privilege on an object restricts users from copying the object from the report server. If a user has secure read privilege on an object in the Report Encyclopedia, the user cannot download that object from the Report Encyclopedia. Any of the user's applications that require a download to view the object cannot view it. For example, a user with secure read on HTML documents or text documents cannot view those documents using a web browser since a web browser downloads the files when viewing them.

Accessing reports on the Web

You can get to reports on the Web by navigating through the Report Encyclopedia folders using links from Report Encyclopedia web pages. For more information about Report Encyclopedia web pages, see "About a Report Encyclopedia web page," earlier in this chapter.

You can also get to links to report documents in your personal channel web page or from other ReportCast channel pages. For more information about ReportCast channels, see "About ReportCast channels," later in this chapter.

Once you see the link to a report document on a web page, choosing the link displays the document.

Generating reports on the Web

You can generate reports on the Web by choosing report executable links in a Report Encyclopedia folder. The rules regarding report generation and viewing from a Report Encyclopedia apply. You still need the appropriate privileges to generate and view a report. And the users viewing the report via a channel also need the appropriate privileges. For information about privileges, see "About Report Encyclopedia folder and file privileges."

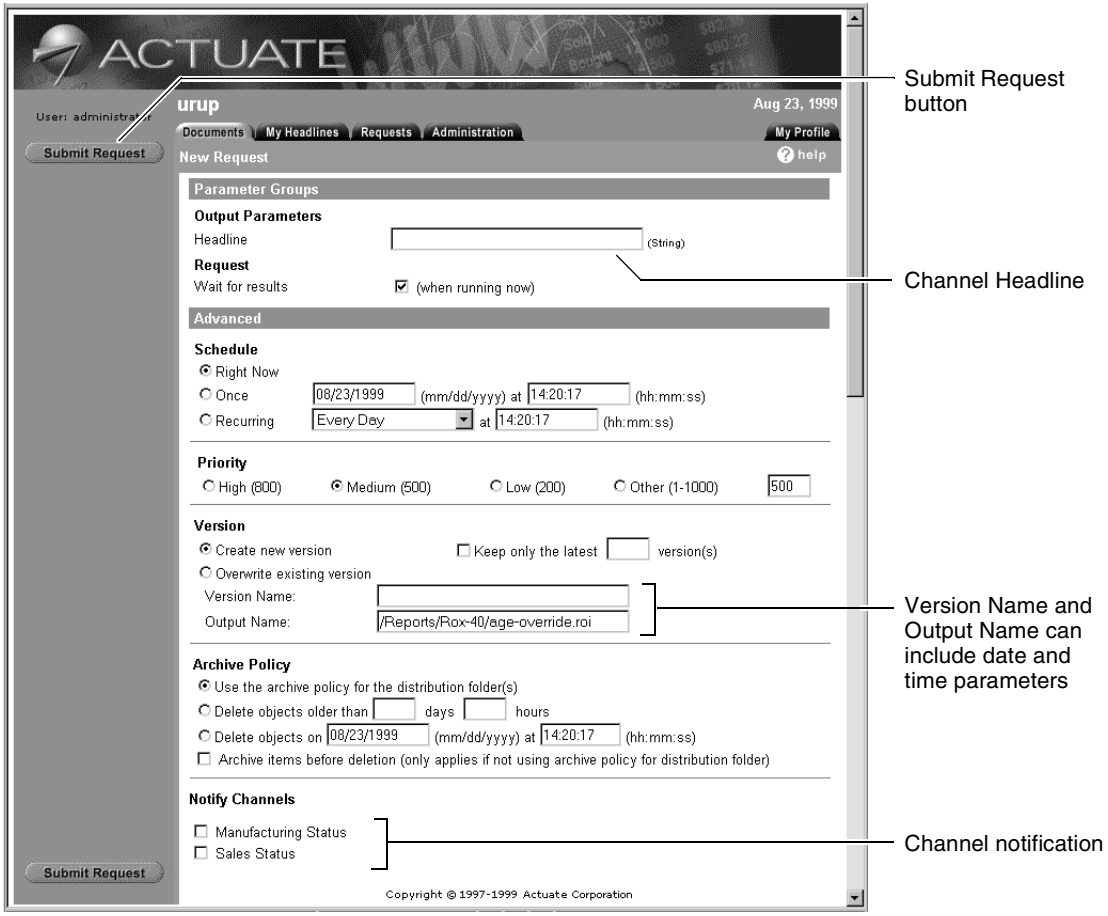
When you generate a report from the report server, a notification message appears in one or more ReportCast channels. The notification appears in your personal channel and in the personal channels of users who are selected to be

notified of a completed request. Users can view the report by selecting the notification item in the channel's page.

If you generate a report from a web browser, you can send a notification message to ReportCast channels to which you have access. A subscriber to the channel can view the report by selecting the item in the channel's page.

How to generate a report request from a web browser

1. From your web browser, log on to the Report Encyclopedia.
2. Go the folder containing the report executable (.rox) or report parameter value file (.rov).
3. Choose the report executable to display the New Request page.
4. Enter the report request information. For reports displayed in channels, you can specify a headline. At the bottom of the web page, the available channels appear. Select the channels you want to notify when the report completes. For each channel, you can exclude roles that have access to the report.
5. To include date and time parameters in Version Name and Output Name, see "Assigning parameters for the Output Name and Version Name" later in this chapter.



6 To submit the report request, choose Submit Request at the top or bottom of the page.

7 If you disable Wait for results and run the report immediately, a confirmation form displays in the browser similar to the following illustration. Choose Request Status to check on your request's status. To cancel the request, choose Cancel Request.

Assigning parameters for the Output Name and Version Name

You can use the report generation date as a parameter to give a unique Output Name and Version Name to an e.report. Use a date/time format to set the report generation date in the Version Name and Output Name fields. You can also assign parameters in the Output Name field to distribute different versions of a report instance in different folders of the Report Encyclopedia.

To format date/time, use one of the following methods:

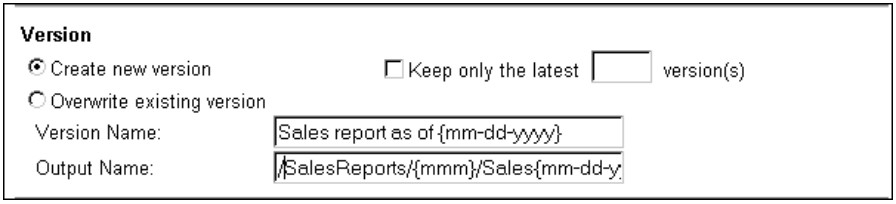
- Use the pre-defined format keywords.
- Create your own user-defined formats using standard characters or symbols that have special functional meanings when used in a format expression.

You can specify the Version and Output name expressions by setting the Output parameters while requesting report generation using e.Report Designer Professional, ReportCast, Administrator Desktop, or RSAPI.

The Factory server evaluates the Output Name and Version Name expressions before the report is generated. The expression is evaluated by parsing the expression for date/time components, using the same rules that apply when formatting date and time using the Format$ function in Actuate Basic.

If a Version or Output Name is specified in the Requester's Parameters tab and also in the Distribution tab, then the value entered in the Distribution tab is used. You can use the same format for building the Output and Version Name expressions in the Parameters tab and in the Distribution tab.

The following illustration shows an example of how you can define the Version and Output names before report generation in the ReportCast requester form. Braces ({}) enclose the date/time formats.



This example generates and places this version of the sales report in the Report Encyclopedia in a folder named for the month.

For more examples of syntax for the date/time format refer to “Building the date/time expression using pre-defined date/time formats,” “Building the date/time expression with user-defined date/time symbols,” and “Building the date/time expression using time symbols,” later in this chapter.

Building the date/time expression using pre-defined date/time formats

The following table shows the pre-defined date and time format keywords you can use and the effects of each on the resulting format pattern.

If the default date format using the forward slash as a separator is used in the date/time expression to create the Output Name, the server interprets the forward slash as a folder delimiter and creates the appropriate folder structures in the Report Encyclopedia.

Commas and colons in the date/time expression can create unexpected results. Actuate Corporation recommends using General Date, Long Date, Long Time, Medium Time, and Short Time for building only the date/time expression in the Version Name field. In the following table, the examples and results that have an .roi extension are Output Names. The examples and results without an .roi extension are Version Names.

Keyword	Description	Example	Result
General Date	Returns a date and time in the Short Date Long Time format as defined in the user's Control Panel/ Locale Map file	/SalesReports/ {General Date}	/Sales Reports/ 01/23/2001 8:53:03PM
Long Date	Returns a Long Date as defined in the user's Control Panel/Locale Map file	/SalesReports/ {Long Date}	/Sales Reports/ Tuesday, January 23, 2001
Medium Date	Returns a date with the month name abbreviated to 3 letters: dd-mm-yy	/SalesReports/ {Medium Date}.roi	/Sales Reports/ 23-Jan-01.roi
Short Date	Returns a Short Date as defined in the user's Control Panel/Locale Map File	/SalesReports/ {Short Date}.roi	/Sales Reports/ 01-23-2001.roi
Long Time	Returns a Long Time as defined in the User's Control Panel/Locale Map file	/SalesReports/ {Long Time}	/Sales Reports/ 8:45:00 PM
Medium Time	Returns hours and minutes in 12-hour format, including AM/PM designation (hh:nnAM/PM)	/SalesReports/ {Medium Time}	/Sales Reports/ 8:45 PM
Short Time	Returns hours and minutes in 24-hour format (hh:nn)	/SalesReports/ {Short Time}	/Sales Reports/ 20:45

Using escaped/unescaped literal characters in the date expression with pre-defined Actuate Basic format keywords will give you a syntax error. For example, using the Version Name parameter expression

```
Sales Report for MMM company as of {Date - Short Date}
```

gives you the following syntax error:

```
"Syntax Error: Character position 50."
```

Building the date/time expression with user-defined date/time symbols

You can use double quotation marks to add literal strings. Use back slashes to add literal characters. The only literal characters allowed are the date/time symbols, space character, and punctuation characters. The following table shows the symbols or characters you can use to create your own user-defined date formats and the effect of each symbol on the resulting format string.

The order of month, day, and year depends on the date format defined in the user's Control Panel. Note that the symbol for minute is n, not m, which is the symbol for month.

For information about the use of forward slashes, commas, and colons, see "Building the date/time expression using pre-defined date/time formats," earlier in this chapter.

In the following table, the examples and results that have an .roi extension are Output Names. The examples and results without an .roi extension are Version Names.

Symbol	Description	Example	Result
d	Returns day of the month without leading zero (1-31)	/SalesReports/Day{d}.roi	/SalesReports/Day23.roi
dd	Returns day of the month with leading zero (01-31)	/SalesReports/Day{dd}.roi	/SalesReports/Day23.roi
ddd	Returns three-letter abbreviation for day of the week	/SalesReports/{ddd}.roi	/SalesReports/Tue.roi
dddd	Returns full name of day of the week	/SalesReports/{dddd}	/SalesReports/Tuesday

Symbol	Description	Example	Result
dddd	Returns Short Date string as defined in the user's Control Panel/Locale Map file	/SalesReports/ {dddd}	/SalesReports/ 01/23/2001
dddddd	Returns Long Date string as defined in the user's Control Panel/Locale Map file	/SalesReports/ {dddddd}.roi	/SalesReports/ Tuesday, January 23,2001.roi
w	Returns day of the week as a number (Sunday = 1. Saturday = 7.)	/SalesReports/ Weekday {w}.roi	/SalesReports/ Weekday 3.roi
ww	Returns week of the year as a number (1-53)	/SalesReports/ Week {ww}.roi	/SalesReports/ Week 4.roi
m	Returns number of the month without the leading zero	/SalesReports/ Month {m}.roi	/SalesReports/ Month1.roi
mm	Returns number of the month of the year with the leading zero	/SalesReports/ Month {mm}.roi	/SalesReports/ Month 01.roi
mmm	Returns three letter abbreviation for month name	/SalesReports/ {mmm}.roi	/SalesReports/ Jan.roi
mmmm	Returns full name of the month	/SalesReports/ {mmmm}.roi	/SalesReports/ January.roi
q	Returns number of the quarter (1-4)	/SalesReports/ Quarter {q}.roi	/SalesReports/ Quarter 1.roi
y	Returns number of the day of the year (1-365)	/SalesReports/ Day {y}.roi	/SalesReports/ Day 23.roi
yy	Returns last two digits of the year (00-99)	/SalesReports/ Year {yy}.roi	/SalesReports/ Year 01.roi

Symbol	Description	Example	Result
yyy	Returns all four digits of the year (1000-9999)	/SalesReports/ Year {yyy}.roi	/SalesReports/ Year 2001.roi
c	Returns date variant as dddd	/SalesReports/ for {dddd}	/SalesReports/for 01/23/2001 or /SalesReports/for 01-23-2001

Using certain unescaped literal characters or strings in the date expression along with user-defined date/time formats gives you a syntax error. For example, using the Version Name parameter expression

```
Sales Report for MMM company as of {Date - mm/dd/yy}
```

gives you the following syntax error:

```
"Bad fomat specification in token - {Date - mm/dd/yy}."
```

Building the date/time expression using time symbols

The fractional part of a number that represents a date represents a time of day on that date.

Times returned are in 24-hour format unless you use one of the A.M./P.M. format symbols. Note that the symbol for minute is n, not m, which is the symbol for month.

For information about the use of forward slashes, commas, and colons, see “Building the date/time expression using pre-defined date/time formats,” earlier in this chapter.

In the following table, the examples and results that have an .roi extension are Output Names. The examples and results without an .roi extension are Version Names.

Symbol	Description	Example	Result
h	Returns hour of the day without the leading zero (0-23)	/SalesReports/Hour {h}.roi	/SalesReports/Hour 9.roi
hh	Returns hour of the day with the leading zero (00-23)	/SalesReports/Hour {hh}.roi	/SalesReports/Hour 09.roi
n	Returns minute without the leading zero (0-59)	/SalesReports/Minute {n}.roi	/SalesReports/Minute 5.roi
nn	Returns minute with the leading zero (00-59)	/SalesReports/Minute {nn}.roi	/SalesReport/Minute 05.roi
s	Returns second without the leading zero (0-59)	/SalesReports/Second {s}.roi	/SalesReports/Second 1.roi
ss	Returns second with the leading zero (00-59)	/SalesReports/Second {ss}.roi	/SalesReports/Second 01.roi
AM/PM	Returns designation AM/am for any hour before noon and PM/pm for any hour after. This is case-sensitive	/SalesReports/{hh:nn:ss am/pm}	/SalesReports/08:45:03 pm

Symbol	Description	Example	Result
A/P or a/p	Returns designation A/a for any hour before noon and P/p for any hour after noon. This is case-sensitive	/SalesReports/{h:n:s a/p}	/SalesReports/8:45:3 p
AMPM	Uses formats set by s1159 and s2359 as defined in the user's Control Panel. Default is AM/PM	/SalesReports/{h:n:s AMPM}	/SalesReports/8:45:3 PM
tttt	Uses format set by sTime as defined in the user's Control Panel/Locale Map file	/SalesReports/{tttt}	/SalesReports/8:45:00 PM

Using unescaped literal characters within the date expression that are not intended to be evaluated as date/time components might give you an unexpected value for the name. For example, using the Version Name parameter expression

```
{MMM&MMM Rep - mm/dd/yy}
```

gives you the following result:

```
Jan&Jan Rep - 01/23/2001
```

No error returned. But an unexpected result!

Using reports from a web browser

You can view Actuate report documents over the Web without the need to install any desktop software aside from a standard web browser that supports JavaScript and Dynamic HTML (DHTML).

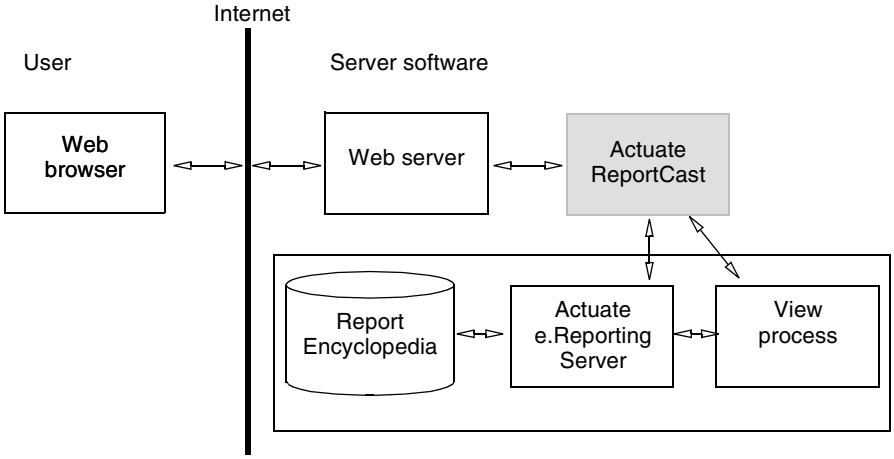
Actuate converts pages and other Actuate report document data to DHTML as needed. The report documents continue to be stored and managed in the Actuate Report Encyclopedia as report documents (ROI). For viewing Actuate

reports in DHTML format, there is no need to maintain separate HTML and ROI report files. If the report is stored in an Advanced e.Reporting Server, Actuate reports using page security features can be viewed in DHTML format. For more information about page security, see "About Actuate report page security," earlier in this chapter.

Using the report server View process, when you view a page of a report document over the Web, the View process converts the page and other required report data to DHTML and delivers the page to the Actuate ReportCast. ReportCast and the web server deliver this page to you as a DHTML page. The View process can also convert Actuate report document data to XML for use with other web applications and PDF for printing.

When converting a report to XML, the View process converts the entire report, not just a single page. Depending on the memory available on your system, your browser can have problems opening or viewing large reports converted to XML.

The following illustration shows the interaction of the components when using the View process to view Actuate reports in DHTML format.



You can still view reports in the native ROI format with the Actuate LRX for Netscape Navigator or Microsoft Internet Explorer and a web browser, or with the Actuate End User Desktop or Actuate Viewer applications.

Report viewing modes

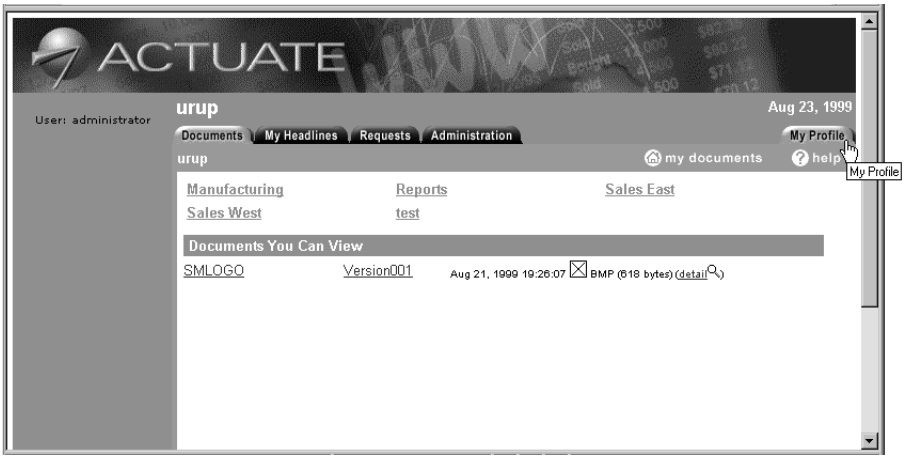
You can specify the viewing mode for viewing Actuate reports over the Web. Specify either DHTML or LRX mode. The mode can be set for the Report Encyclopedia and for individual users. The user's preference overrides the Encyclopedia setting:

- DHTML—Actuate reports are converted to DHTML for viewing. Users need a JavaScript and Dynamic HTML capable browser. The web browser must have the use of style sheets enabled. DHTML viewing supports Smart Search and e.Analysis. For more information about Smart Search, see "Using search with reports in DHTML,"later in this chapter. For more information about e.Analysis, see *Using e.Analysis*, distributed with the e.Analysis add-on product.
- LRX—Actuate reports are viewed in the native format. Users must install the Actuate LRX with their web browser. For information about the LRX, see "About the LRX and web browsers," later in this chapter.

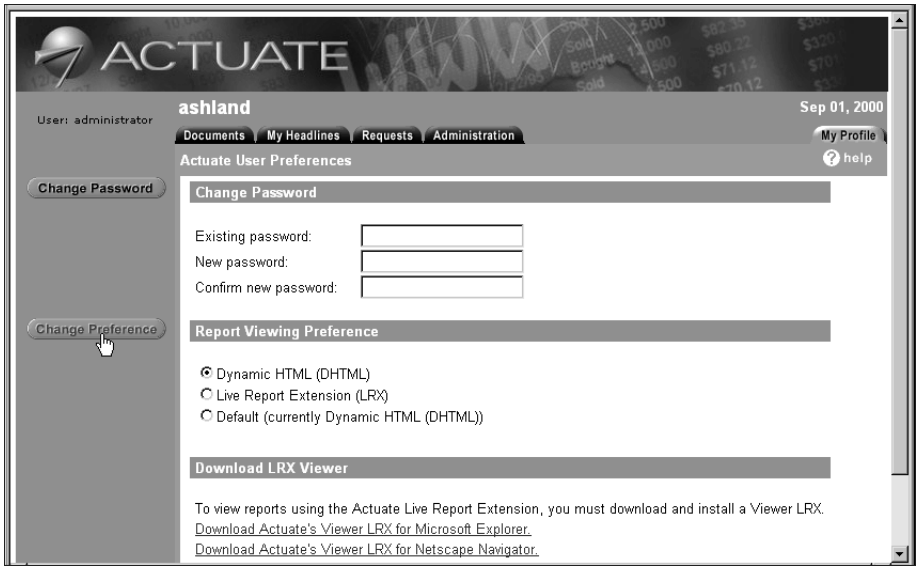
How to set a user's viewing mode

You can specify web viewing mode for Actuate reports for individual users. Select Default, DHTML, or LRX. The Default setting uses the Report Encyclopedia setting. If the setting differs between the user and the Encyclopedia, the user's viewing mode is used.

1. To set the viewing options from a web browser, log on to a Report Encyclopedia.
2. Choose the My Profile link, as shown in the following illustration.



The User Preferences page appears.



3 To change your report viewing settings in the Report Encyclopedia, select a viewing option. Choose Change Preferences.

How to change your user's password

1 In the User preferences page, to change your Report Encyclopedia password, type a new password.

2 Choose Change Password.

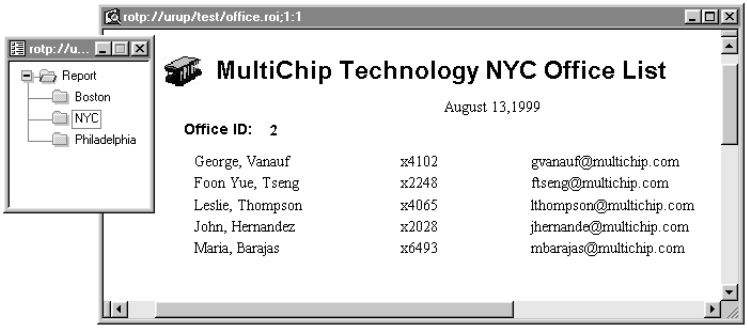
Some security implementations do not support changing your Report Encyclopedia password.

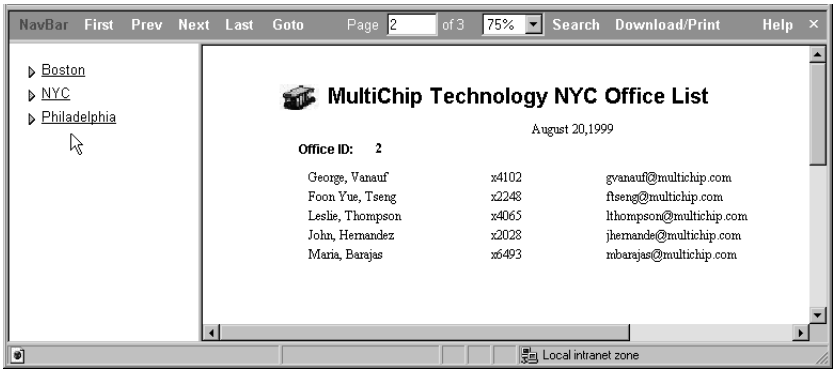
Viewing reports in DHTML

Using the Actuate view process, you can view Actuate reports in Dynamic HTML (DHTML) format. Using the view process, Actuate reports can use the page security built into the report. Actuate page security restricts access to sections of the report based on the security specified in the report and the user's login account.

Actuate reports in DHTML format are viewed in a web browser with formatting similar to a report viewed in an Actuate program such as the Actuate End User Desktop or the Actuate LRX.

The following illustrations show an Actuate report displayed in the End User Desktop and the same report displayed as DHTML in a web browser.





A report in DHTML format can appear different from the report displayed in an Actuate program application. This difference can be caused by the web browser's configuration, the machine's configuration, or the fonts on the machine. Contact your report server administrator if there are problems in this area.

If your cursor hovers over a control that has balloon help available, you see online help information provided by the developer. Balloon help does not appear when the Smart Search window is open.

When viewing a DHTML report, use the toolbar to navigate through the report, search the report, and save data from the report.

The controls perform the following functions:

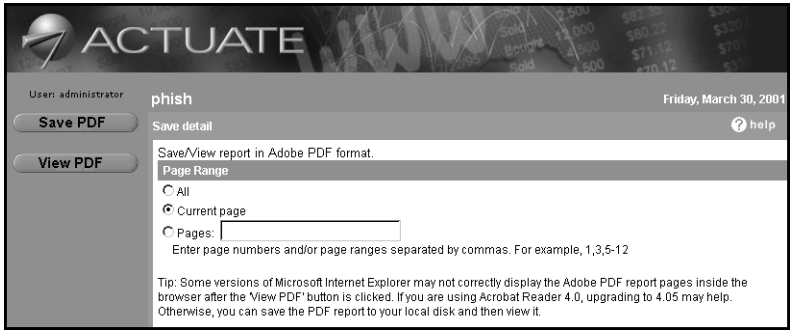
- NavBar hides and shows the report's table of contents. Using the table of contents, you can go to a specific section of the report.
- Go to the next or previous page, or the first or last page.
- Enter a page number and press the Goto button to go directly to a page.

- Change the report page. Select a percentage size from the list. The setting remains until you change the percentage.
- Search for data in the report.
- Save all or part of the report as a PDF file.
- Help.
- The x button returns you to your previous page. This is similar to the browser's Back button.

Viewing and saving as PDF

Use viewing and saving as PDF to view the report and save all or part of your report in Adobe PDF format. Choosing View supports viewing and printing the report with the Adobe Acrobat Reader. Choosing Save supports saving the file on your local machine. You can then use this file with the Adobe Acrobat Reader to view or print the report.

When saving as PDF, you see the page shown in the following illustration. Select an option. For Pages, type the pages to save. You can enter a series of pages separated by commas, for example 1,3,7, or a range of pages separated by a hyphen, for example, 5-10. Pages generate in ascending order.



Depending on the memory available on your system, the Adobe Acrobat reader can have problems opening or viewing large PDF files. When saving a large number of pages to PDF, your web browser can display a time out message before saving is complete. You can save the pages using multiple save operations.

When viewing, saving, or printing the PDF file, the PDF can appear different from the displayed report. The differences fall into the following categories:

- Intentional differences are part of the report design implementation. Report designers can include or exclude some elements of the report from the PDF. For example, the report's table of contents, Scripting Controls, and images do not necessarily appear in the PDF.

- Unintentional differences are those differences over which the report designer does not have full control, for example:
  - Report designers can link or embed objects such as images or spreadsheets in reports. If a link to an object fails to produce the object in the PDF, an X appears in place of the object. For more information about linked and embedded objects, see "Linked and embedded objects in the report," in Chapter 4, "Printing and distributing a report."
  - Browser settings can affect wordwrap characteristics of the display.
  - If a report uses a font other than Courier, Times Roman, or Helvetica, the font must be installed on the machine where the report executable ROX generates and on the machine where the report is saved and viewed. If the font is not installed, Actuate substitutes Helvetica.

    If an Actuate report contains a font other than Courier, Times Roman, or Helvetica and the font is not installed on the machine where the report is viewed in PDF format, the Acrobat reader substitutes fonts.

Contact your report server administrator if you experience problems that match the unintentional differences included in the preceding list.

Using search with reports in DHTML

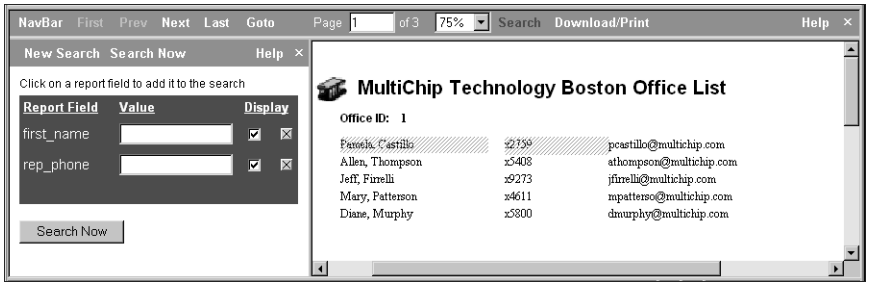
When you choose the Search button, the Smart Search window appears. After a report page finishes loading in the right window, the word Searchable appears if you move your cursor over a searchable field. Before the report page finishes loading, links are active in the report window.

From the right pane, select a report field you want to search on. You can select multiple fields to search on. When using the Netscape browser, you cannot use the Smart Search window until the page finishes loading. Enter the query for each field after the report page finishes downloading.

While viewing a DHTML report document on the web, when you add multiple objects to the search criteria and choose Search Now, the search analysis maps the path to each chosen object in the report structure. If the paths differ at some level, the analysis compares the path differences to determine whether those differences show one-to-one or one-to-many relationships among the objects.

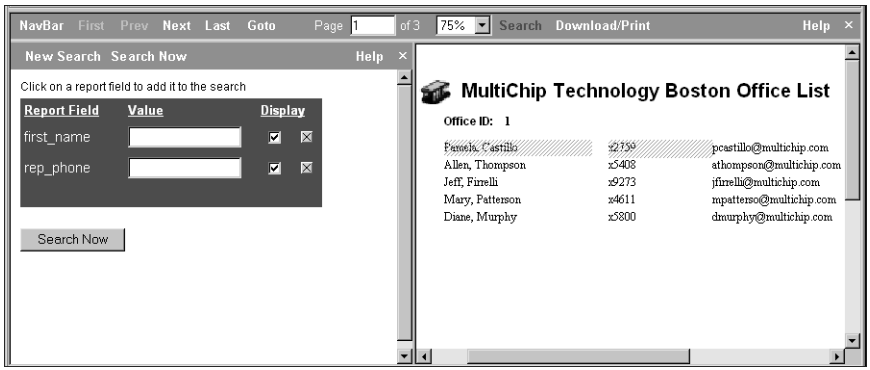
Use the same query syntax as for search, using the Actuate desktop products such as the Actuate End User Desktop. For information about the Actuate query syntax, see "Using operators and wildcards in search expressions" in Chapter 3, "Searching for and exporting report data."

The following illustration shows the Smart Search window after choosing the employee name and phone extension.



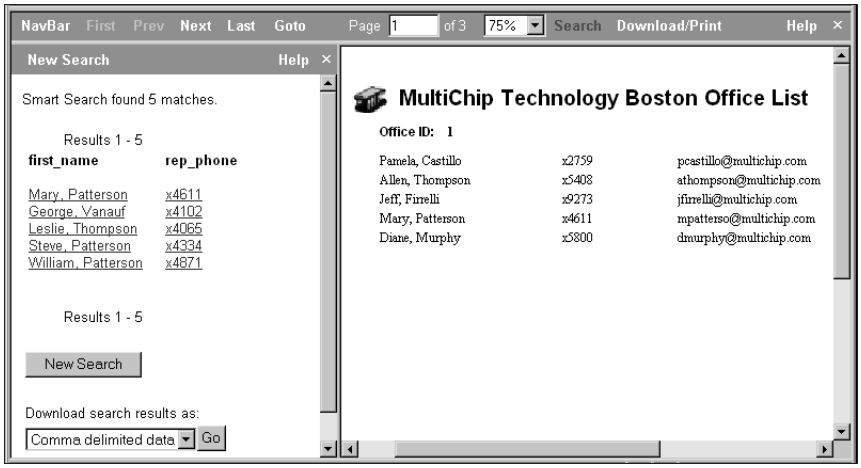
In the Smart Search window, you can do the following:

- To remove a field from the search, choose the X button.
- To remove the search fields from the query window, choose New Search.
- To display the field in the results field, choose the Display option. If you enable the Display option, the data from the field appears in the Search Results page.



To start the search, choose Search Now.

The following illustration shows a completed search with five items found.



The items found are linked to the report page. When you select an item listed in the Smart Search Results page, the report in the right window changes to the report page with the matching item. You can select only one object at a time from Smart Search Results to jump to the page containing it in the report.

Searching large reports can cause a timeout message to appear before the search finishes. Contact the report server administrator if this occurs.

Saving search results

In Download search results as, you can choose to save search results to a file as comma-delimited data or as tab-delimited data, as shown in the following illustration. Choose Go to save or display the data. The browser prompts for information about how to handle the file. Select open the file, or save file, and specify a file name.

If you choose to download and display the data, the data appears in one of the following forms:

- Comma-delimited data appears in a Microsoft Excel spreadsheet if you have Excel installed. For Netscape browser, to display the spreadsheet, navigate to a link to open Excel.

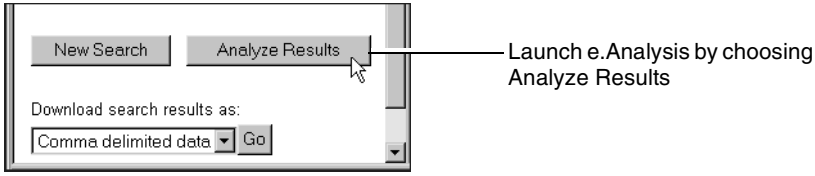
  Excel has a limit to how much information you can import. See the Microsoft Excel documentation for limitations.

- Tab-delimited data appears in a text editor, for example, Notepad.

Analyzing search results

The e.Analysis application is an add-on product that works with DHTML reports on the Web. You use e.Analysis to analyze report fields selected in a Smart Search. For more information, see *Using e.Analysis*, distributed with the e.Analysis product.

If Actuate e.Analysis is available, the Analyze Results button appears on the Smart Search page, as shown in the following illustration.



About ReportCast channels

Actuate ReportCast channels requires the Actuate Web Agent and a web server. ReportCast channels is a service which allows users to subscribe to particular web channels of interest, and view Actuate reports that are available on those channels. ReportCast channels use push technology (also called webcasting, push/distribution, and publish/subscribe) to send reports to particular web channels, where interested users can access and view them.

When new reports become available, the appropriate channel receives a notification. From a Report Encyclopedia, subscribed users can check the channel's web page to get a list of available reports. When users choose a report link, the report appears in the web browser window. The following are ReportCast channel features:

- Channels are supported only on the Web. They are administered only over the Web.
- Channels are secure. They use the same security scheme as Actuate Encyclopedia folders and items.
- Channels have unique names.
- Every user has a default personal channel. This channel is the user's report server Completed folder.
- Channels receive notifications when reports generated for the channel are complete.
- Reports in channels can display headlines that describe the reports. This headline appears when listing the contents of a channel.
- Channel items expire after a given time period and are automatically removed from the channel.

As a user, you can:

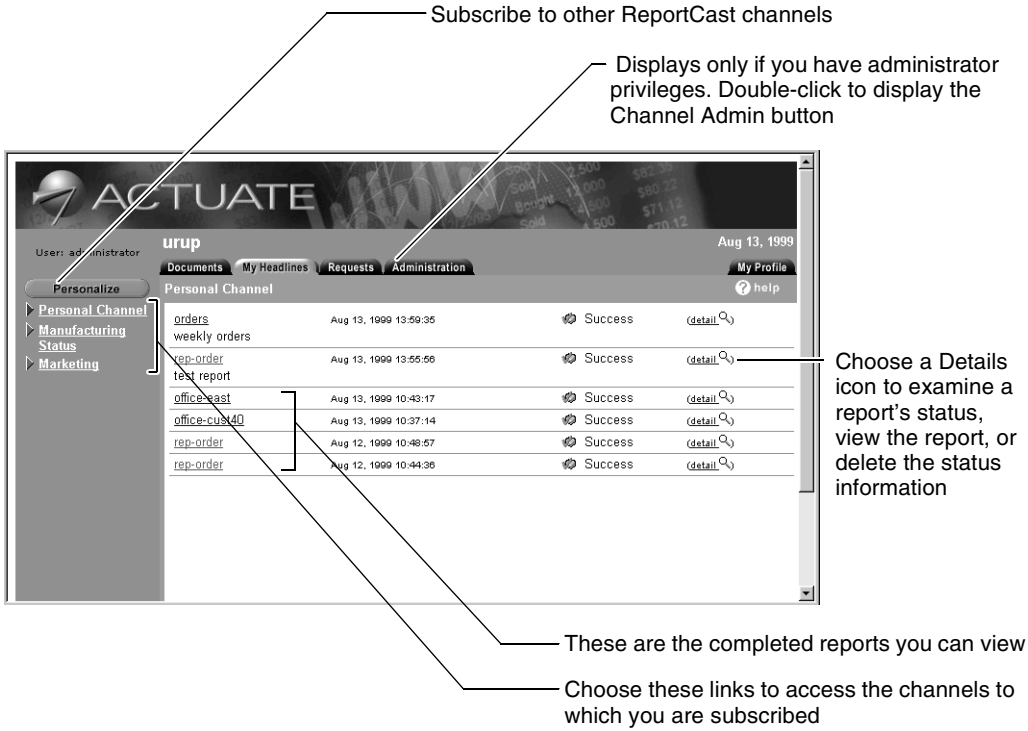
- Retrieve the list of available channels
- Subscribe to a channel
- Drop a channel subscription
- View the list of reports in a channel
- View the reports in a channel

As an administrator using a web browser, you can also:

- Create a channel
- Delete a channel
- Change a channel's properties
- Update a channel's contents

About your Personal Channel

From a web browser, the user's Completed request folder is the personal channel. After a successful report generation, the report notification appears in the user's personal channel. When you choose the Channels link on the main Report Encyclopedia web page, a page such as the following displays in the browser.



From your Personal Channel, you can:

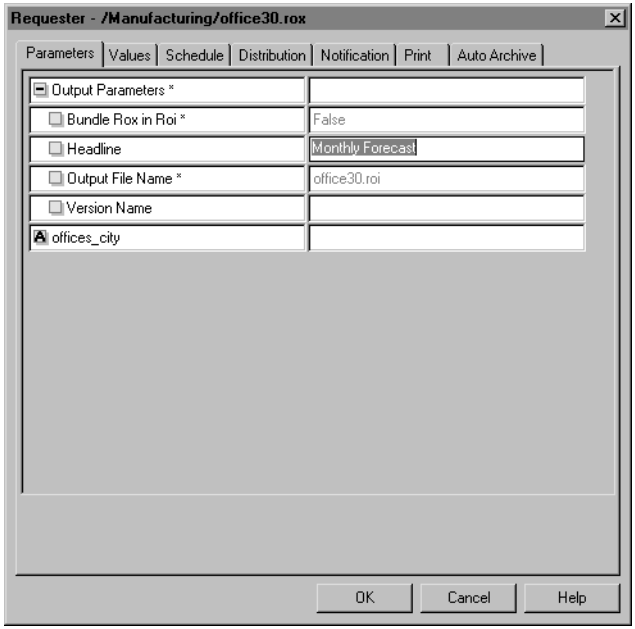
- Choose the Subscribe button to subscribe to or unsubscribe from ReportCast channels.
- Choose the Channel Admin button to administer ReportCast channels. This option is available to administrators only.
- Choose the channel icons to access particular channels to which you are subscribed.
- View completed reports.
- Choose the Details icon to view a report's status, view the report, or delete status information for the report.

About ReportCast channel headlines

When you generate a report for a ReportCast channel, you can specify a headline that generates as part of the channel notification. The headline appears as the second line of a channel notification on a web page.

Users who generate a report from a web browser can enter a headline in the Requester web page. In the Requester dialog, the Headline parameter is one of the Output Parameters. In the New Request page, the Headline parameter appears as a field in the web page form. For information about creating report requests on the web, see “Generating reports on the Web” earlier in this chapter.

Users who generate reports from an Actuate desktop product like the End User Desktop can enter a headline in the Requester dialog. The following illustration shows the Headline parameter in a Requester dialog.

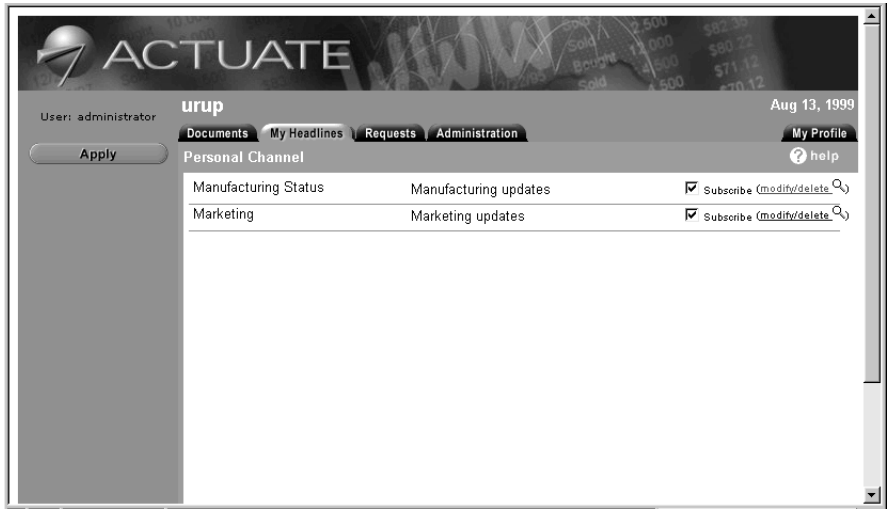


Report developers can also access the headline parameter. By default, the report server copies the value of the headline parameter into the completed request headline. Developers can change the headline by changing the global variable that corresponds to the parameter. Changing the headline for a completed request does not change the original parameter. That is, if the report is run from an ROV file, then changing the headline for the completed request does not change the original parameter value in the ROV file.

Subscribing to channels

You can subscribe to channels and drop channel subscriptions using your web browser. After connecting to a report server, you can go to a page that lists all channels to which you have access. Each channel name appears next to a check

box. The box is checked if you are subscribed to the channel. You can change the check marks to subscribe to or unsubscribe from a channel.

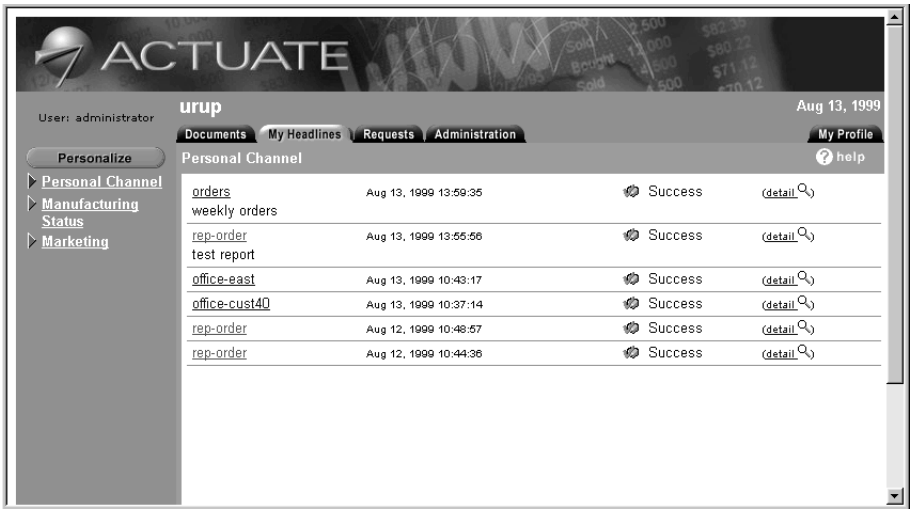


Viewing channels and their contents

You can view a list of channels from your web browser. Actuate supplies a default web page that lists all the your subscribed channels. From this page, you can subscribe to channels and view the channel's contents. For more information about subscribing to channels, see "Subscribing to channels," earlier in this chapter.

As the Actuate default, when you view the contents of a channel, the contents appear as a list containing the report headline and optionally the report name, the creation date, and so on. Choosing the link for a channel item displays the report itself. The page that lists the channel contents can also list all the subscribed channels in the menu bar on the left.

The contents of a channel remain in the channel even after you have viewed them. The web browser uses a different color to display visited reports, so you can easily track which reports have been read.

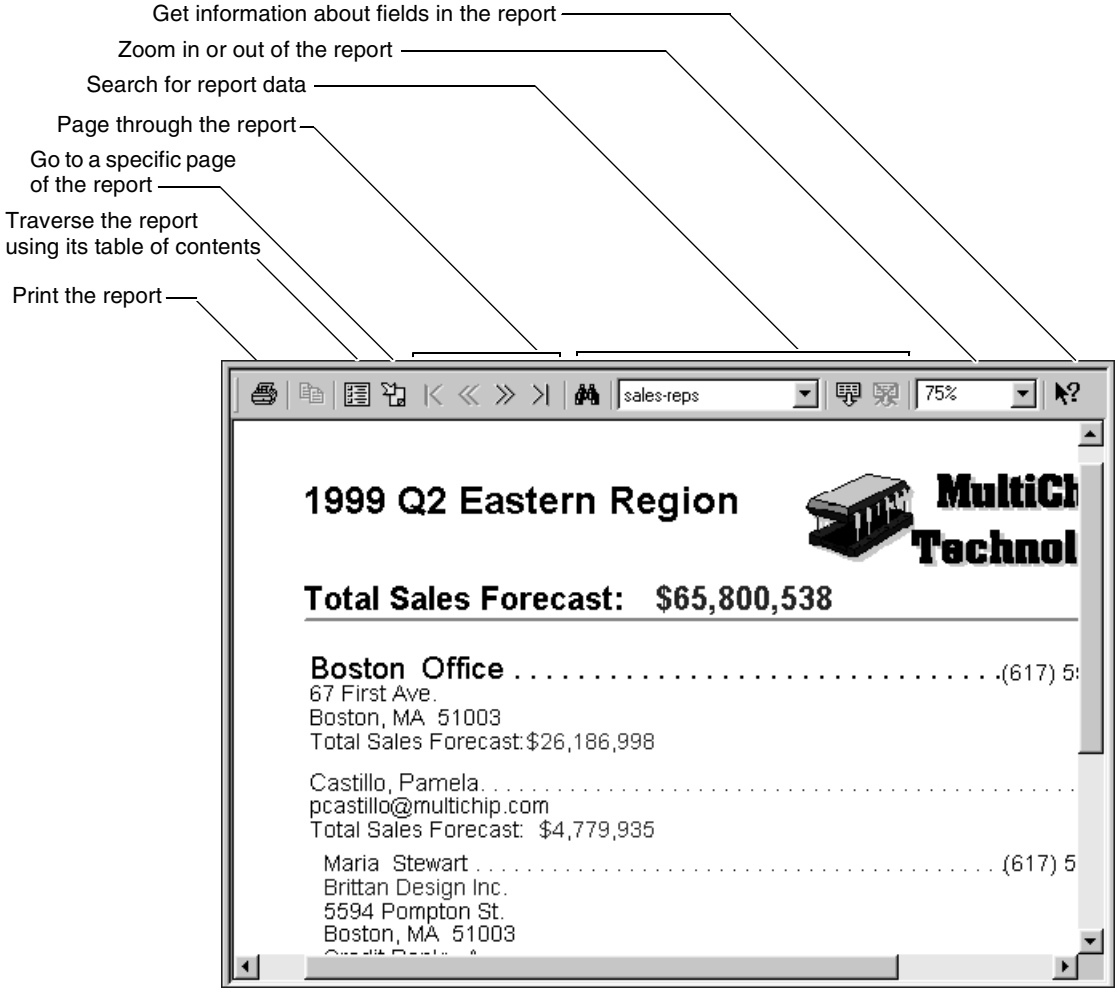


About the LRX and web browsers

If you install the Actuate LRX (Live Report Extension) with your web browser, you can view Actuate reports (ROI) from your browser. You can view reports that are stored on your local file system, or if your system is configured to do so, you can log on to an Actuate Report Encyclopedia using your web browser and view reports that are stored in the Encyclopedia.

From either your local file system or a Report Encyclopedia, you have the same report viewing, navigation, and searching capabilities that are available with the Actuate Viewer. For information about Actuate viewing and searching capabilities, see Chapter 2, “Viewing a report,” and Chapter 3, “Searching for and exporting report data.”

The following illustration shows a sample report when viewed from a web browser with the Actuate LRX installed.


Get information about fields in the report
Zoom in or out of the report
Search for report data
Page through the report
Go to a specific page of the report
Traverse the report using its table of contents
Print the report
sales-reps
75%
1999 Q2 Eastern Region
Total Sales Forecast: $65,800,538
Boston Office . . . . . (617) 5
67 First Ave.
Boston, MA 51003
Total Sales Forecast:$26,186,998
Castillo, Pamela. . . . . .
pcastillo@multichip.com
Total Sales Forecast: $4,779,935
Maria Stewart . . . . . (617) 5
Brittan Design Inc.
5594 Pompton St.
Boston, MA 51003

Using a web browser with the Actuate LRX installed to open and view a report stored locally is similar to opening a report with the Viewer. For more information see "Opening and viewing a report" in Chapter 2, "Viewing a report." To view a report that is stored in a Report Encyclopedia, see "Navigating the Report Encyclopedia on the Web."

If you view an Actuate report stored locally, not from the Report Encyclopedia, you may need some additional files. If the report is not a bundled report, you need the report executable, ROX file. Depending on the LRX version and the report version, you may need an Actuate library. Actuate libraries have the name AFCxxxx.rox where xxxx is a number and letter combination. The AFC libraries are placed in the AFC directory of the LRX installation. For the default installation, the AFC directory is C:\Actuate5\Lrx\Afc. See your report server administrator or the sender of the report if you need additional files.

What to do in the event of a system failure

If the Report Encyclopedia becomes unavailable—because of a machine or network connection failure—the information in the Report Encyclopedia is automatically restored to its last consistent state when the report server is restarted. Operations in progress at the time of the crash are backed out of the Report Encyclopedia.

For example, if you were in the process of copying a file to the Report Encyclopedia, that file might not have been copied. Or, if you had just submitted a request to run a report, that request might not exist in the Scheduled folder. When the Report Encyclopedia is available again, you should check the items you were working on prior to the crash to see if you need to perform a task again.

If reports were being generated when the report server failed, the report server restarts the generation process automatically. You do not need to take any crash recovery steps.

If you encounter any other problems after taking the crash recovery steps, contact the report server administrator.

Chapter

2

Viewing a report

This chapter contains the following topics:

- Opening and viewing a report
- Moving around in a report
- Using links to other Windows applications
- Zooming
- Using online help in a sample report
- Using context menus while you view a report

Opening and viewing a report

Actuate LRX enables you to view Actuate reports that were not designed as HTML reports. HTML reports open in a web browser. Opening and viewing a report that is stored in a file system (on a stand alone machine or a network file server) or in the Report Encyclopedia involves a somewhat different sequence of tasks.

To open a report from a Report Encyclopedia, enter the URL for the Report Encyclopedia. For information about using a web browser to access the Report Encyclopedia, see "Accessing the Report Encyclopedia on the Web," in Chapter 1, "Using e.reports on the Web."

To open a report on your desktop in the Actuate LRX, open your web browser and follow these steps:

1. Choose File➛Open file.

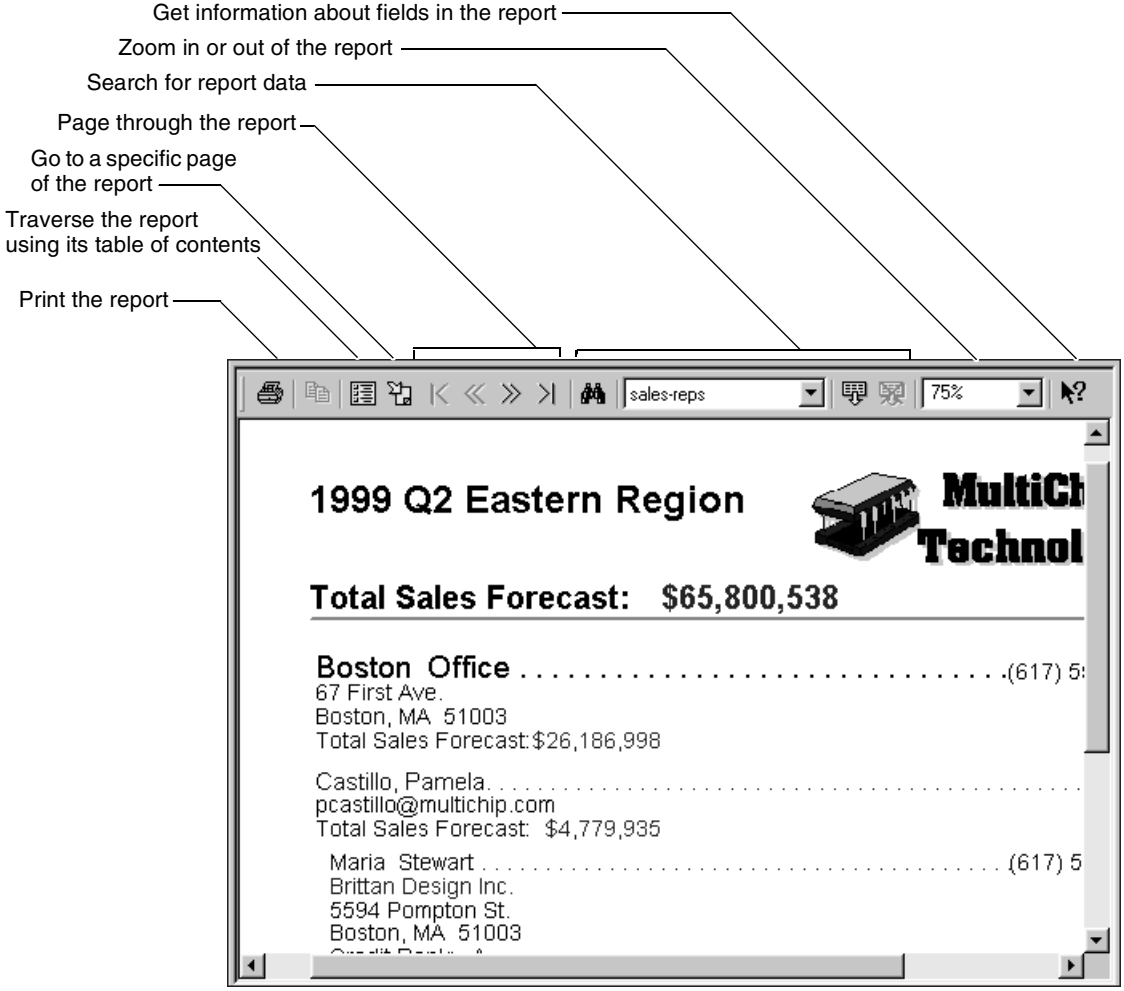
   Open appears.

2. To navigate to a report, do one of the following:
   - In Netscape Navigator, choose Choose File.
   - In Microsoft Internet Explorer, choose Browse.
3. In the Files of type box, choose All Files (*.*).
4. Find an .roi for an Actuate report, such as Detail.roi.
5. Make sure there is a matching .rox for this report, such as Detail.rox.
6. Double-click the .roi.

The report appears. The report has the same functionality as it would in any Actuate product used in the enterprise environment. Different browsers offer different viewing interfaces, but the functionality of the report is independent of the browser.

The following illustration shows a report viewed with Netscape Navigator or Microsoft Internet Explorer.

]



HTML Reports in the Report Encyclopedia

An HTML report document file (ROW) is stored in the Report Encyclopedia and created with the report server, e.Report Designer Professional, End User Desktop, or Administrator Desktop from a report executable (ROX). You can view an HTML report using a web browser without using the Actuate LRX (Live Report Extension).

To view an HTML report, open it the same way you would a report document (ROI).

Viewing open server reports

View an open server report as you would any other report in the Report Encyclopedia. If the report requires special software to view the report, that software must be installed on the local machine. For example, if a Crystal or SQR report is in the Report Encyclopedia and you want to view it in the native format, you must install the appropriate viewing software on your machine. The Report Encyclopedia does not support demand paging when viewing open server reports. The entire report transfers to the local machine for viewing.

If you have the Advanced e.Reporting Server, the Actuate open server report functionality extends the Actuate Reporting System to create and print report documents from third-party vendors called open server reports.

Moving around in a report

There are a number of ways to move around in an Actuate report. You can:

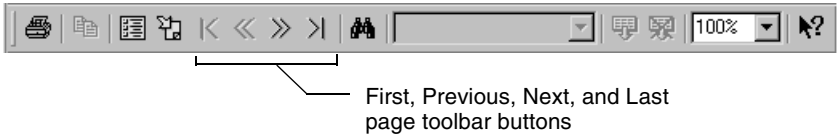
- Page through the report sequentially, or go to the first or last page using the paging commands.
- Go to a specific page by specifying a page number.
- Use hyperlinks, if provided by the report developer, to go from one part of the report to another part in the same or different report.
- Use the report's table of contents to traverse the content hierarchy.
- Use the search feature to find and go to specified report data.

This section describes all the techniques for moving around in a report except the search feature. For more information about searching for report data, see Chapter 3, "Searching for and exporting report data."

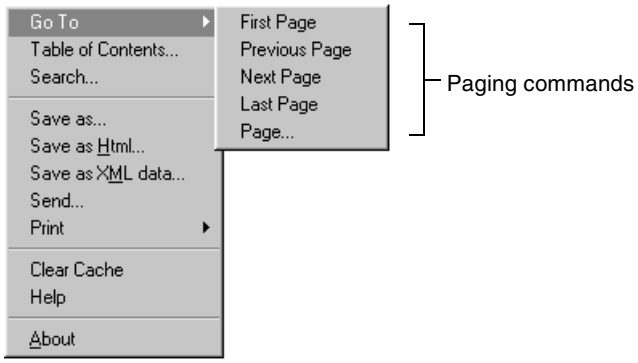
Using the paging commands

The View menu includes various paging commands, first page, previous page, next page, and last page. Actuate reports store data in a highly compressed form. It is possible to move very quickly through large Actuate reports. Paging sequentially through the report is an option, but it is more convenient and faster to choose specific paging commands. Use either toolbar buttons or menu items to access the paging commands.

Paging buttons in a sample toolbar



Paging commands in context menu

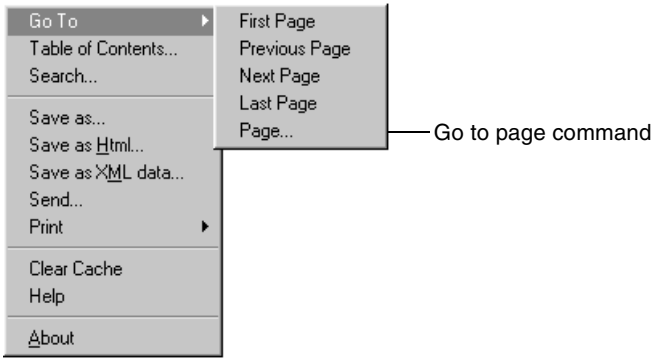


Using Go To

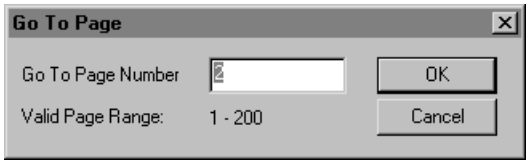
If you are familiar with the page layout of the report, or you are working from a printout to find particular report pages, use the report's context menu Go To➛Page or the Go To Page button to access a specific page by number.

Go To Page button in a sample toolbar

Go to page command in context menu



Go to Page brings up a dialog box where you type the number of the page to display.



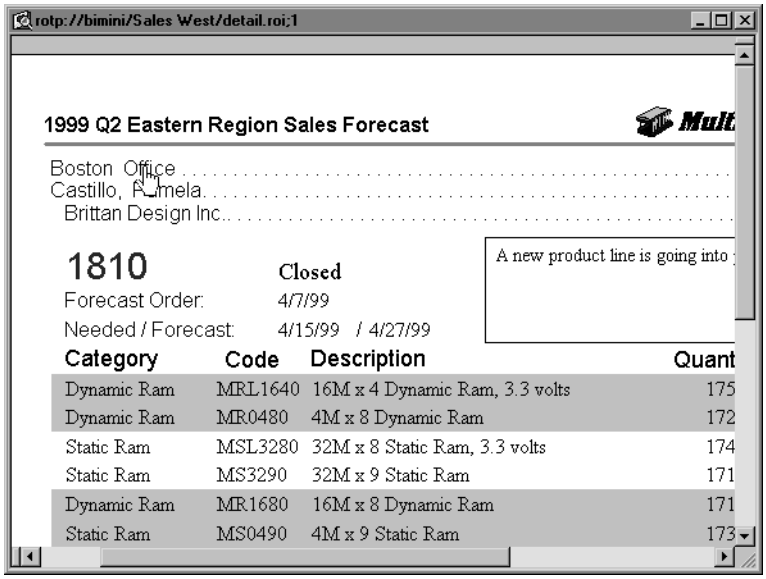
Using hyperlinks

During the design process, the report developer has the option to provide hyperlinks in any Actuate report. Hyperlinks make it easy to move from information in one part of a report to related information in another part of a report. Not all reports include hyperlinks.

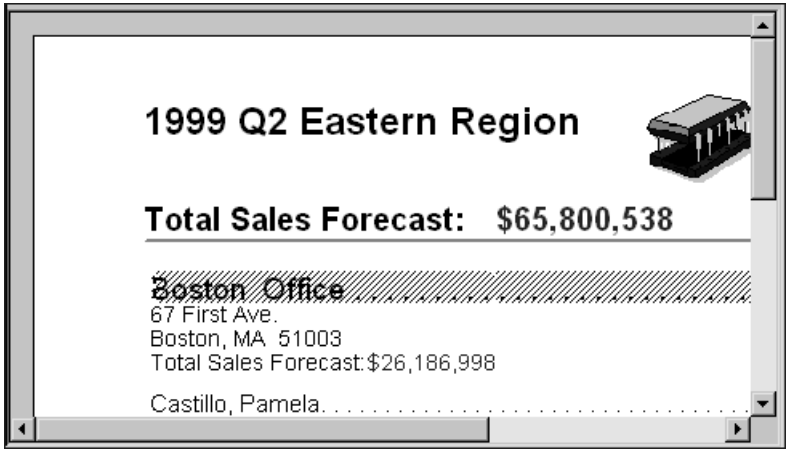
When you choose a hyperlink in a report document that links to another report document, the linked document uses the zoom setting of the document containing the hyperlink. For information on using the Zoom feature, see "Zooming" later in this chapter.

How to use a hyperlink

1. Pass the mouse over a hyperlinked field. The cursor changes to a small hand to show that the field contains a hyperlink. In the following illustration, the hyperlink for "Boston Office" is active. Look on page 2 of Detail.roi to find this example. Choosing the hyperlink takes you directly to the main entry for the Boston Office.

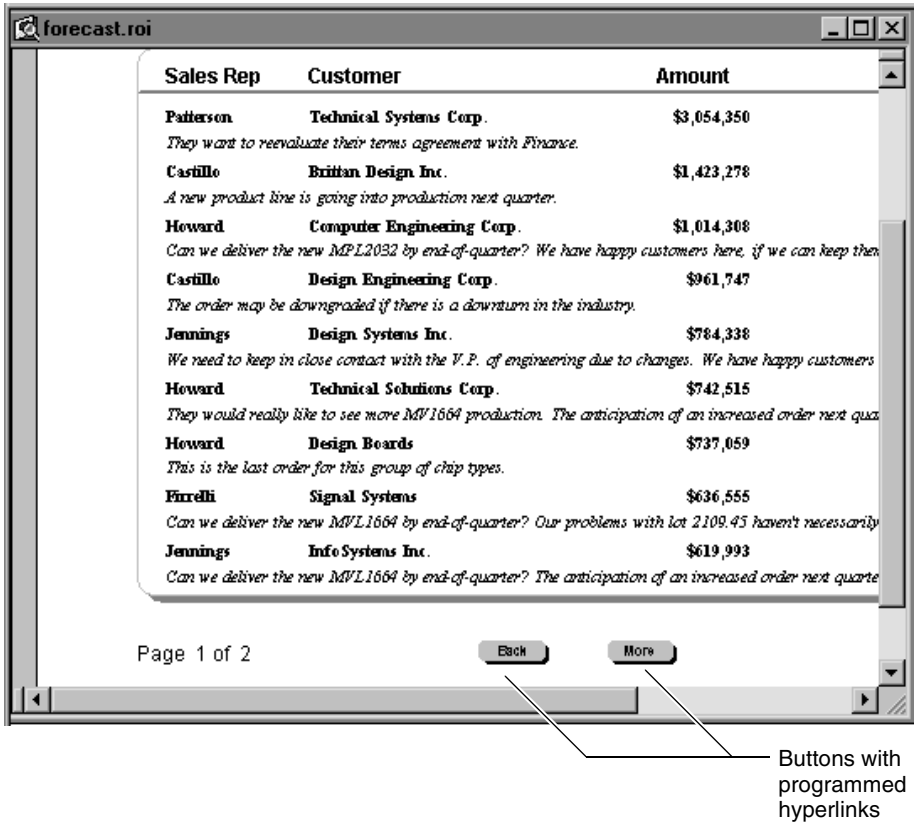


2 Choose the hyperlinked field to go directly to the related field. The following illustration shows the field to which the hyperlink connects.



Other hyperlink techniques exist in some reports. For example, each section on a summary page in a report can be linked by a More button to a detailed section of the report. In the more detailed report, the developer can insert More and Back buttons to facilitate navigating through the pages of that part of the report. The following illustration shows a page of Forecast.roi with More and Back buttons.

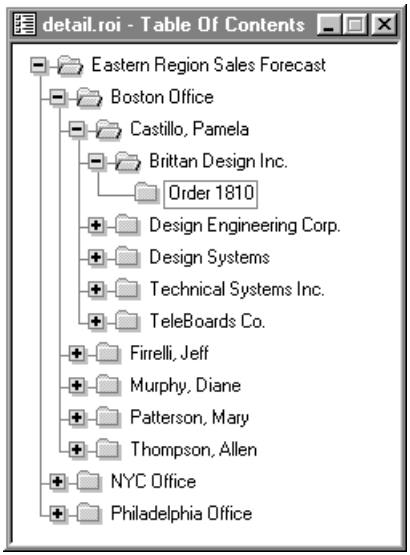
To see several examples of hyperlinks, open the Forecast.roi and work with the hyperlinks provided on pages 1 and 2 of that example report.



Some of the hyperlinks in Forecast.roi go to the sample report Detail.roi. If you select a hyperlink that goes to Detail.roi and it is not available, you see messages saying Detail.roi cannot be opened.

Using the table of contents

Reports typically contain a generated table of contents. You can view the table of contents with sections collapsed or expanded depending upon what level of detail you want to see. The following illustration shows the table of contents, partially expanded, for the sample report, Detail.roi.



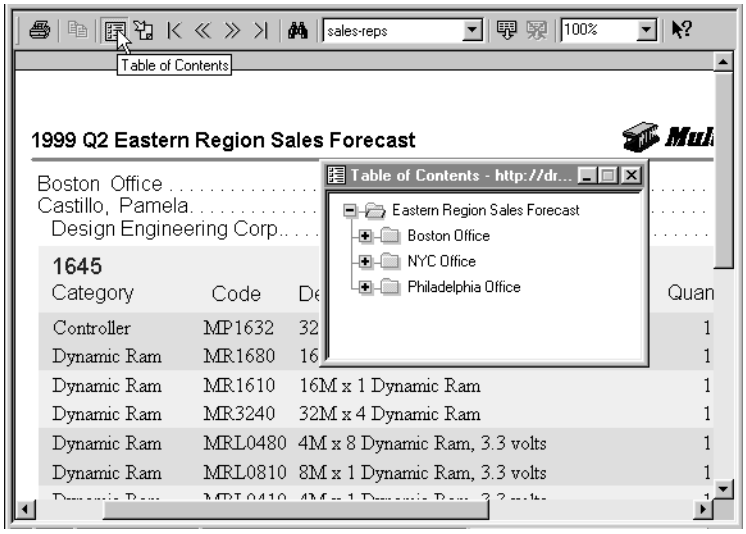
As the table of contents for Detail.roi shows, the Eastern Region Sales Forecast includes three offices. Each office includes a group of sales representatives and each of those representatives has a group of customers. Each customer, in turn, has one or more orders.

In some cases, the report design includes a table of contents with additional items to highlight particularly important sections.

How to access the report's table of contents

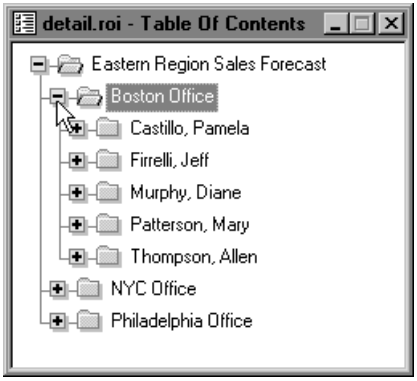
From the report's context menu, choose Table of Contents, or press the TOC icon.

The table of contents for the report appears. The following illustration shows the table of contents for the sample report, Detail.roi.



How to use the report's table of contents

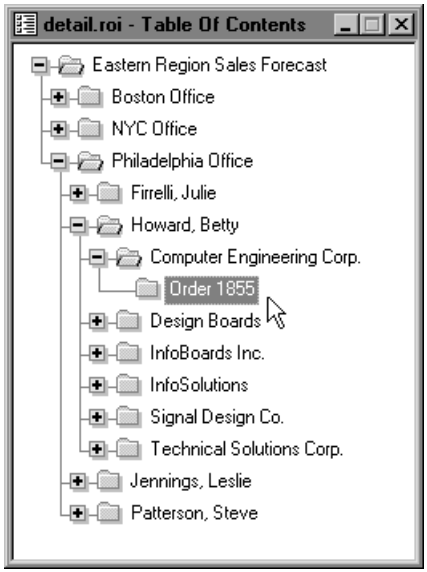
1 To expand the table of contents to show more levels of information, choose +. The following illustration shows the Boston Office folder expanded to display sales representatives in that office.



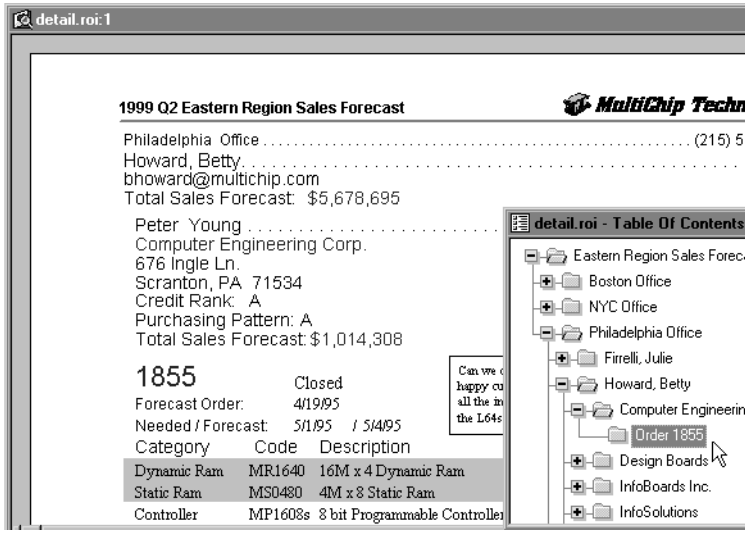
2 To collapse the table of contents to show fewer levels of information, choose -.

How to go to an item displayed in the table of contents

Double-click the item in the table of contents.



The report displays the chosen item.



Using links to other Windows applications

Actuate reports can display and manipulate data from Windows applications that support Object Linking and Embedding (OLE). For example, report

developers can use OLE to link a Word document, an Excel graph, a spreadsheet, or a Paintbrush picture to an Actuate report. What the developer is able to provide depends to some degree on the particular OLE object and the applications installed on your computer. For example, if a report contains a link to an Excel graph, the graph appears only if Excel is installed on your computer. Otherwise, a grey box appears in place of the graph.

About linked and embedded objects

During the report design phase, the report developer has the option to link or to embed objects such as Excel spreadsheets or Paintbrush pictures to the report design. If the data is in the form of a linked OLE object, the data remains in a file maintained by the application that created it. In that case, the Actuate report contains a reference to that file. If the object is embedded, the data itself is in the Actuate report.

Linked objects can be used by several applications, but the data such as a spreadsheet is kept in one place. Embedded objects are not shared, requiring more effort to maintain updated data.

Editing linked and embedded objects

Depending upon the application used to create the original object, it is possible to manipulate the linked object in the report. For example, if the linked object is an Excel bar graph, printing or viewing the data in a variety of ways, such as a pie chart or a ribbon graph, is an option.

Any change in the view is for that session only. The change is not stored or saved in the original document. Nor are you able to save this variation in the Actuate report. A linked OLE object is external to the report you are viewing.

About OLE automation

Report developers use OLE automation to make it possible for you to run another application from within an Actuate report. Typically, accessing the other application is transparent for the end user. For example, the developer can provide a button on a report that accesses Microsoft Excel and transfers data to the report.

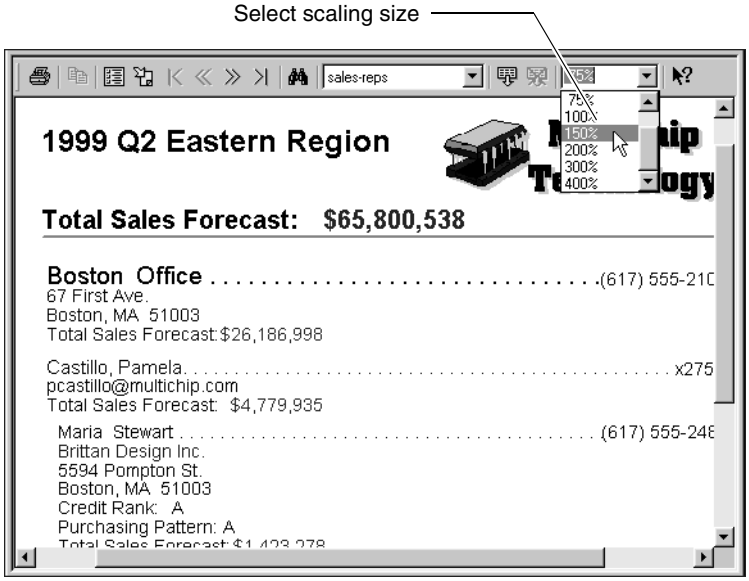
Zooming

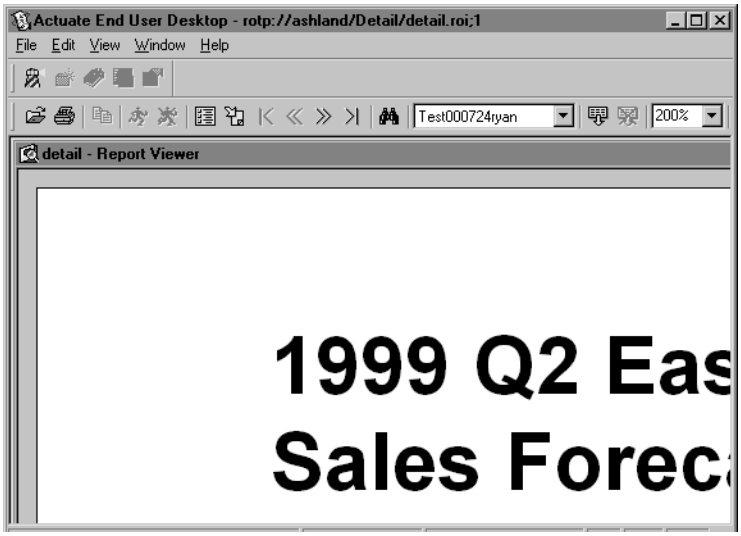
Zooming in and out of a report makes it easier to view specific sections. The scaling range is from 25% to 400%. The following illustrations show a report at 50% and at 200%. The example shown is in the End User Desktop. If you are

working in another product in the Actuate Reporting System, your menus and toolbars are somewhat different. However, the same capabilities exist.

Actuate uses the last zoom setting you set as the default magnification when opening report documents. When you open an Actuate report document ROI by double-clicking its icon, dragging-and-dropping, or choosing File➛Open, Actuate uses the default zoom. When you change the zoom scale of a report document, you change the default zoom setting.

When you choose a hyperlink in a report document that links to another report document, the linked document uses the zoom setting of the document containing the hyperlink.





Using online help in a sample report

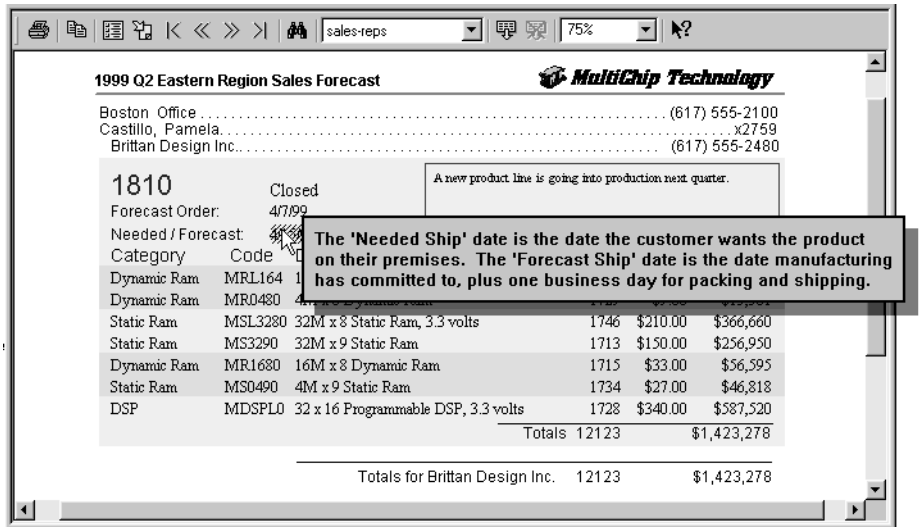
During the design phase, report developers have the option to include report specific online help. For example, the report developer can add comments to give further detail about specific report objects or to explain how specific calculations were created.

This section provides instructions for accessing online help specific to a report. The sample report, Detail.roi, is used to demonstrate the procedure.

How to access report online help

1. Select the object in the report for which you want online information. In this example, select one of the dates, 4/15/95 or 4/27/95, on page 2 of Detail.roi.
2. Press the right mouse button to access the context menu, which displays options provided by the report developer.

Select Help on that menu. The help item explains what the Needed/ Forecast heading on that column means.



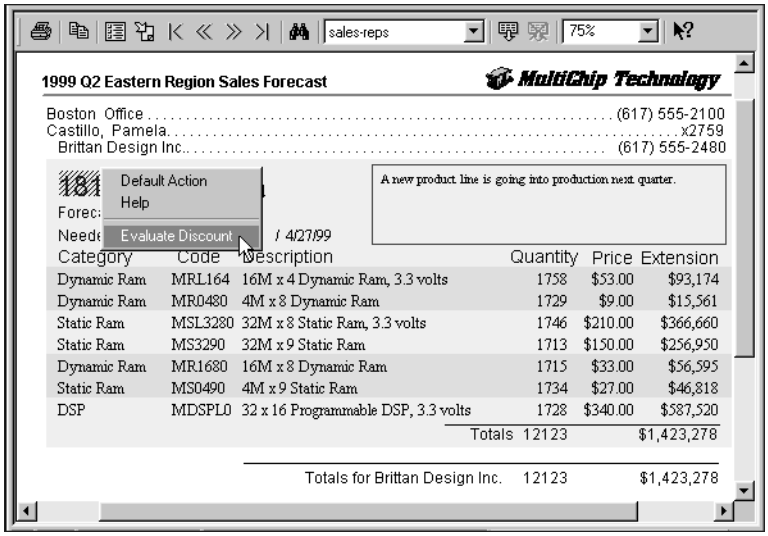
Another way to access the online help is to select the help icon. Then use the help icon to choose the object to see if the report developer provided help on that item. Balloon help does not appear when the search frame is open.

If your cursor hovers over a control that has balloon help available, you see online help information provided by the developer.

Using context menus while you view a report

Context menus are an option the developer can choose to provide. If the developer provided context menus, first select the object, then press the right mouse button to access the context menus. By default, Actuate reports provide the context menus “Default action” and “Help.” If, however, the report developer does not write code for these context menu items, they do not do anything.

The report developer can add other context menu items. For example, the following illustration shows a context menu that appears when you hold down the right mouse button over the number, 1855, in the sample report, Detail.roi. Here the developer chose to provide the option “Evaluate Discount.”



It is important to remember that context menu actions are an option provided by the developer. Although you see them in the examples shown here, they are not available in every report.

Chapter

3

Searching for and exporting report data

This chapter contains the following topics:

- About Actuate report searches
- Using basic searching techniques
- Executing a single-object search
- Executing a multi-object search
- Using operators and wildcards in search expressions
- Specifying data to display in the Results page
- About report structure in multiple object searches
- Using search definition files
- Exporting report data

About Actuate report searches

Using the Actuate report search feature you can:

- Perform complex searches on the data in an Actuate report document.
- Save the search criteria and search settings as a search definition.
- Export all or part of the data from an Actuate report to a file.
- Transfer report data to other applications.

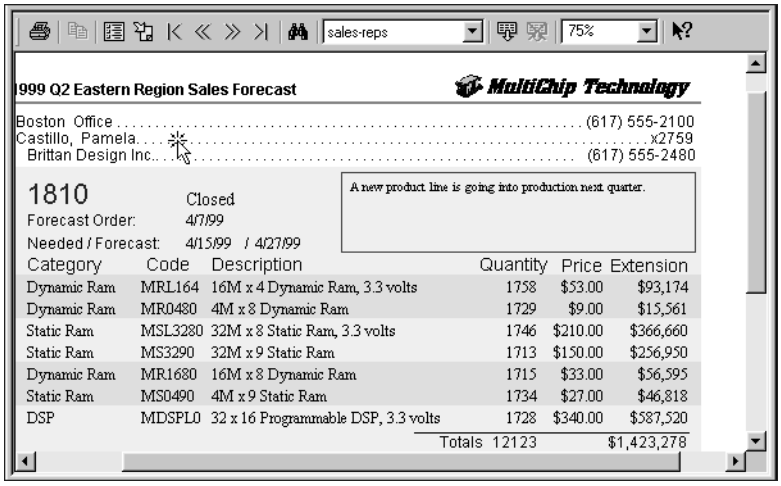
Using basic searching techniques

You begin a search by selecting a searchable object in a report. Then, you add the selected object to the Search dialog box and specify the value to find.

How to find searchable objects

As you move the cursor around the report, you notice the cursor shape changes to an arrow with an active symbol at the tip. The change in cursor shape indicates that an object is searchable.

The following illustration shows a searchable object in the sample report, Detail.roi.



Use a single mouse-click to highlight or select a searchable object. The search cursor lets you select only one object at a time. For information about searching multiple objects, see “How to select multiple objects to search,” later in this chapter.

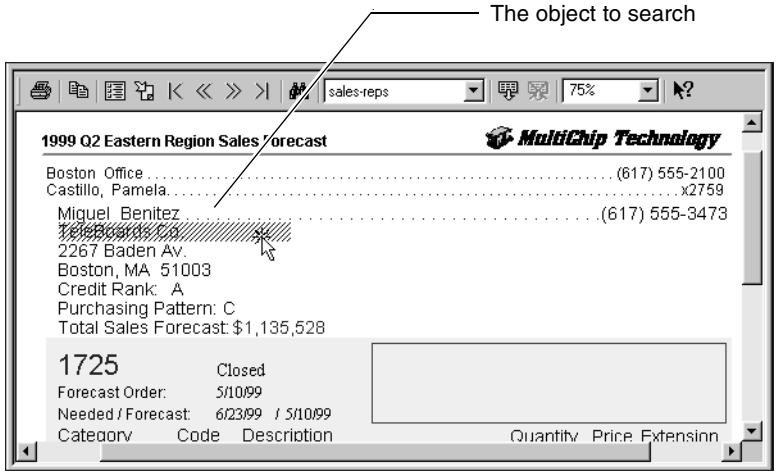
Executing a single-object search

This section walks through the process of executing a single-object search. In the following example, the objective is to find all companies whose names start with the word Advanced in the sample report, Detail.roi.

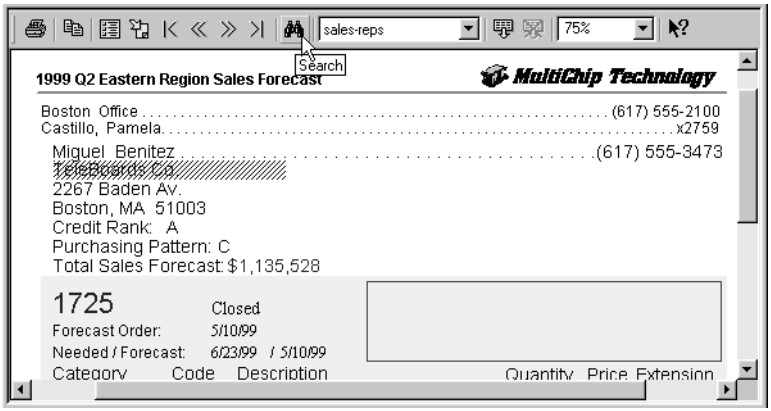
How to execute a simple search

1 Select a searchable object from the report. In this example, select a company name such as “TeleBoards Co.”

You can select any company name because the purpose of this step is to specify the object—CompanyName—to search, not the object’s value. You specify the value to search in a later step.

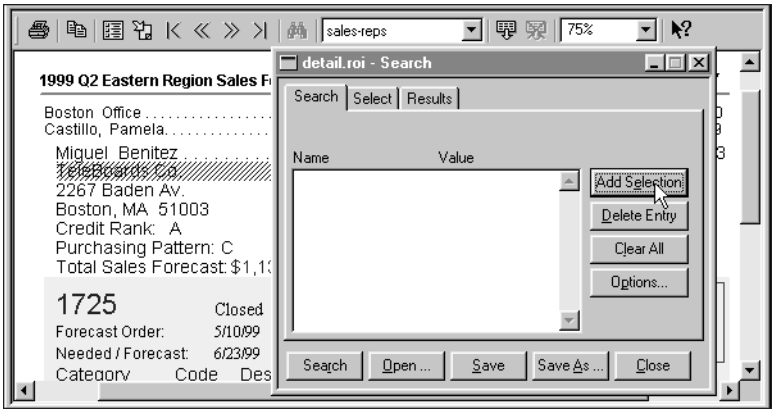


2 Choose the Search toolbar button.



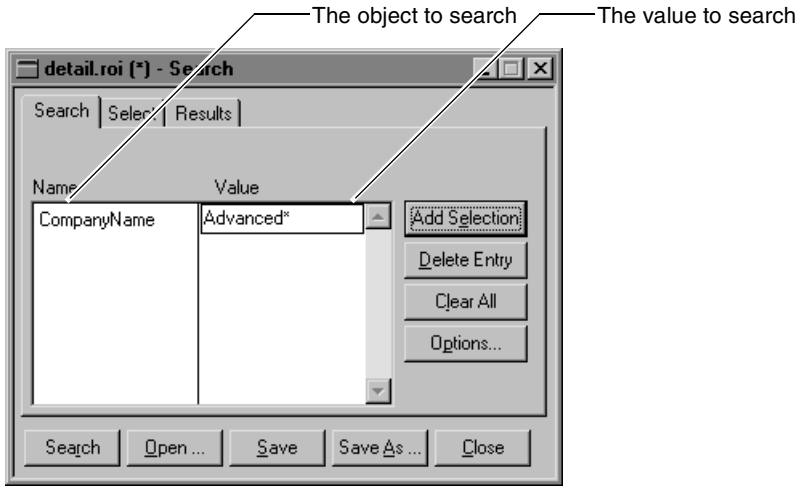
The Search dialog box appears.

3 To use the selection as criteria for your search, choose Add Selection, as shown in the following illustration.



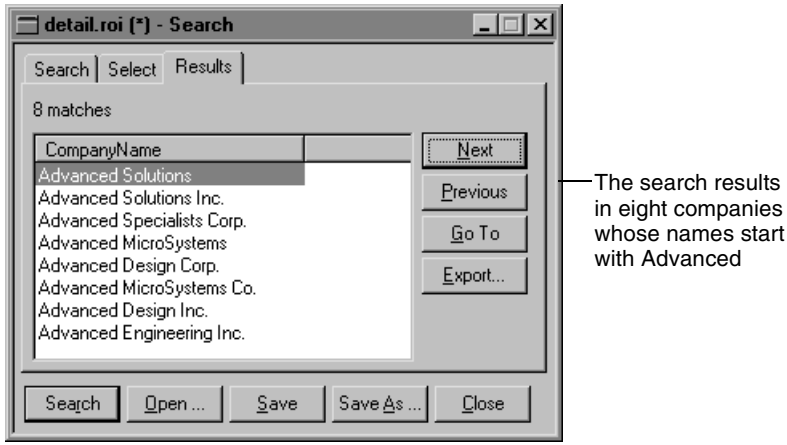
4 In the Value column, specify the value to search. In this example, type Advanced*.

The asterisk (*) is a wildcard that specifies you want to find all values that contain “Advanced” in the first part of the string, and any number of characters after that.



5 Choose Search to start the search process.

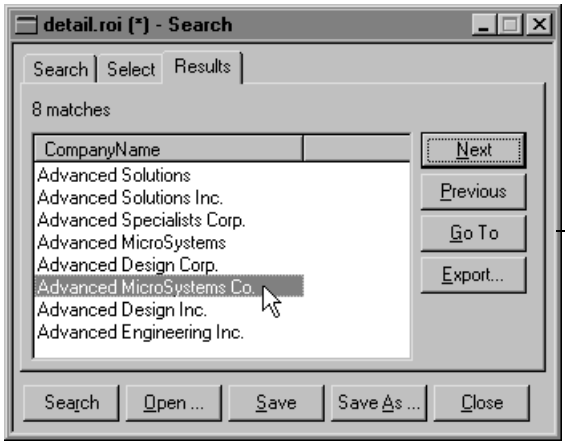
Matches to the search target appear in the Results page in order of their occurrence in the report.



How to use the Results page to go to a specific match in the report

The Results page displays the matches found in the report. You can go to the page containing any of those matches directly from the Results page. The following example shows the matches retrieved from a search for all company names that begin with “Advanced”, and how to use the results to go to specific matches in the report.

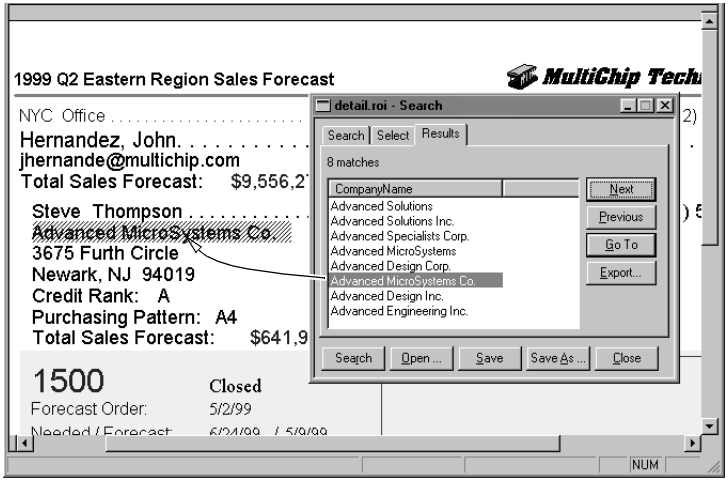
1 Select the match you wish to see.



To go to a match in the report, select the company name, then choose Go To

2 Choose Go To or double-click the selection.

The report becomes active and displays the matching value. If you selected Advanced MicroSystems Co. as shown in the previous illustration, the page containing the company name, Advanced MicroSystems Co., appears. The company name is highlighted.



3 To go to another match in the report, use the Next, Previous, or Go To button in the Results page.

Executing a multi-object search

You can select multiple objects from a report to add to the search criteria to execute a more specific search. For example, instead of just searching for company names that start with "Advanced", you can search for company names that start with "Advanced" and that are located in Boston.

The number of conditions on which you can search is limited only by the number of objects in the report. Each condition you add to the search criteria adds an And logical operation. For example, if you specify three objects and values for the search, the search expression in effect is condition1 And condition2 And condition3. There is a match only if all conditions are true.

For more information see "About report structure in multiple object searches," later in this chapter and "Using the table of contents," in Chapter 2, "Viewing a report."

The following sections explain the basic techniques for a multi-object search, and provide two examples of executing multi-object searches.

How to select multiple objects to search

There are two ways to select multiple objects from a report:

- Hold down the Shift key and use the mouse to select each object you wish to include in the group of objects.
- Use the left mouse button and drag a rubberband to select the area containing the group of multiple objects.

Using either method, when you release the mouse button, all the selected objects are included in your search.

How to add objects to a search

Actuate provides the capability to add objects to your search after you begin searching:

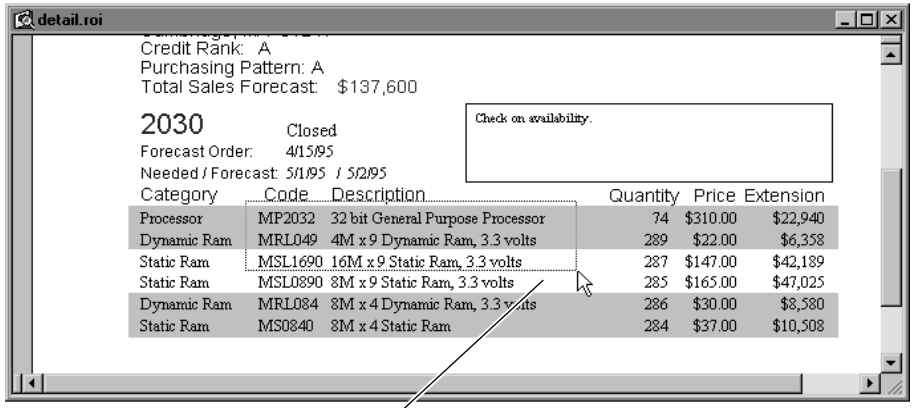
1. Leave the Search dialog box open.
2. Return to the report behind it to select other objects.
3. Choose Add Selection after selecting each object.

How to search for specified values on two objects

In this example, a search finds orders of item code MP1632 that exceed 500 units. Detail.roi is the report used in the example:

1 Select searchable objects from the report. In this example, rubberband several objects that include both the item code and the quantity objects.

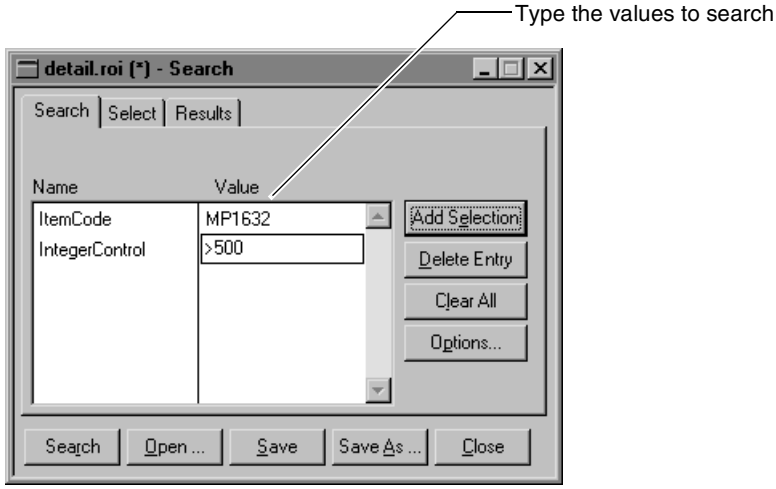
The rubberband draws a boundary around the search objects. For the selection to be successful, the entire object must be within the rubberband area. To deselect a previously selected object, double-click somewhere in the white space around the report.



You can use the rubberband to select multiple objects for the search

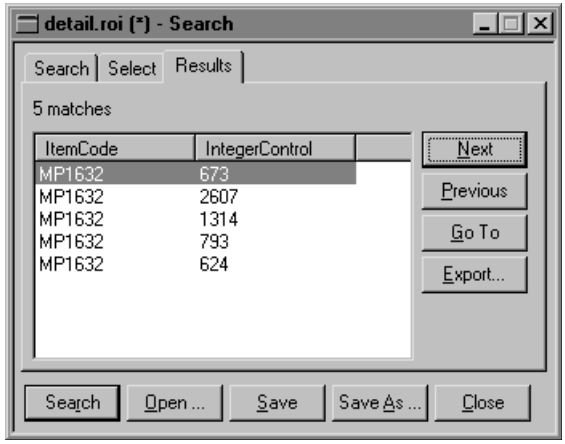
2 To narrow the search criteria, delete the objects you want to exclude from the search. In this example, delete ItemDescription and Price.

3 Specify the values to search. In this example, type the values as shown in the following illustration to retrieve orders for item code MP1632 in which the quantity exceeds 500.



4 Choose Search to begin the search process.

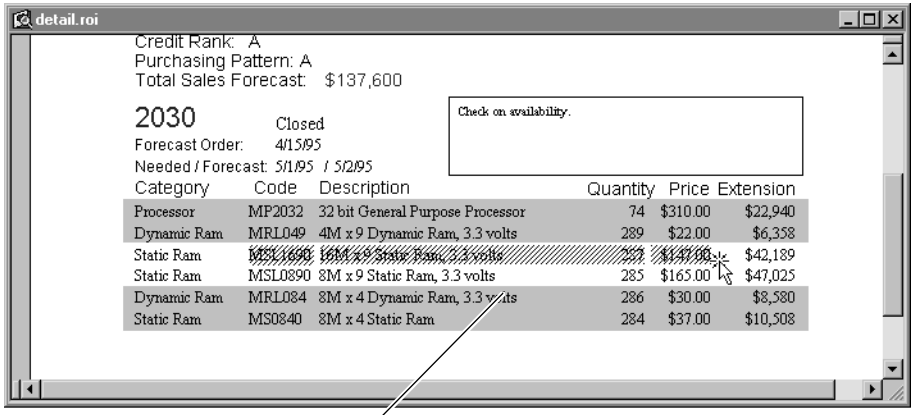
The search results appear in the Results page.



How to add and delete objects from a multi-object search

This example shows how to add and delete objects from the search, as well as how to modify the values to search. Detail.roi is the report used in the example:

1 Select searchable objects from the report. In this example, select the following objects under the following column headings, Code, Description, Quantity, and Price.

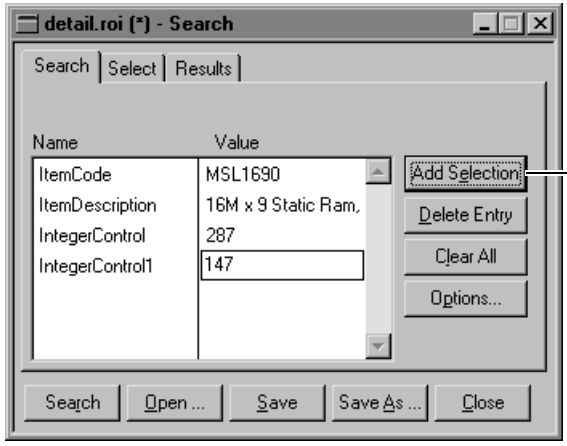


You can use Shift+click to select multiple objects for the search

2 Choose the Search toolbar button or Search from the report's context menu to activate the Search dialog.

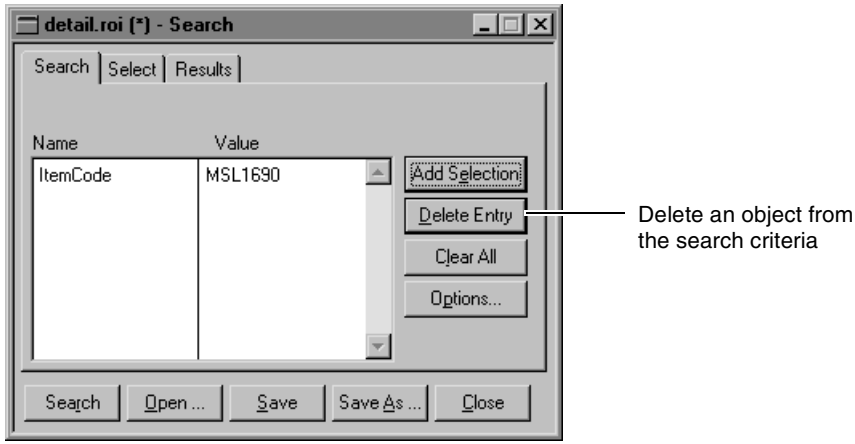
3 Choose Add Selection.

As the following illustration shows, the item code, description, quantity, and price objects (indicated as Integer Controls) are added to the search. The names that appear in the Name column are not the same as the descriptive column headings that appear in the report. They are the names of the objects as assigned by the report developer at design time.

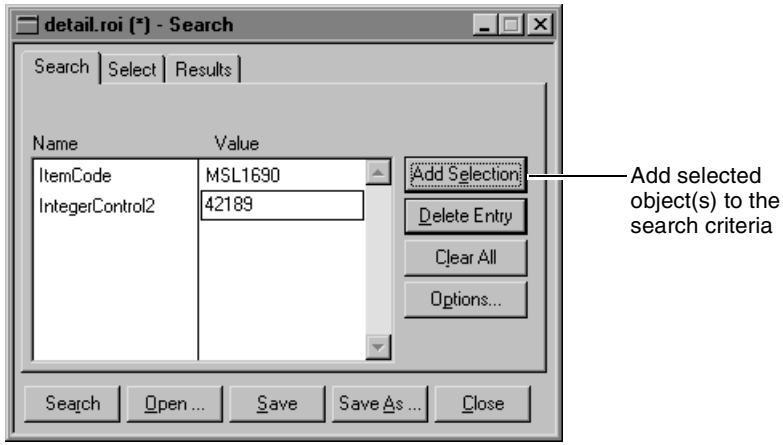


Choose Add Selection to add the objects you selected in the report to the search criteria

4 To delete an object, select it and choose Delete Entry. In this example, delete ItemDescription, IntegerControl, and IntegerControl1.

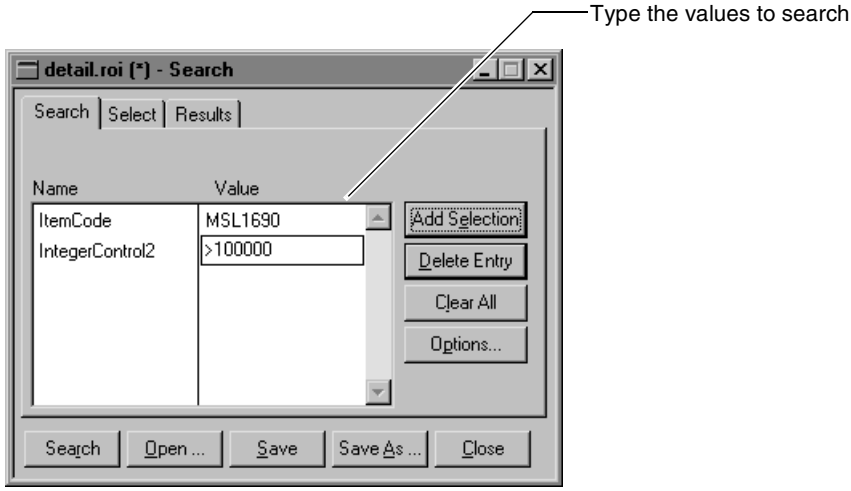


5 To add another object, leave the Search dialog box open and select a new object from the report behind it. In this example, add the Extension Price object to the search.



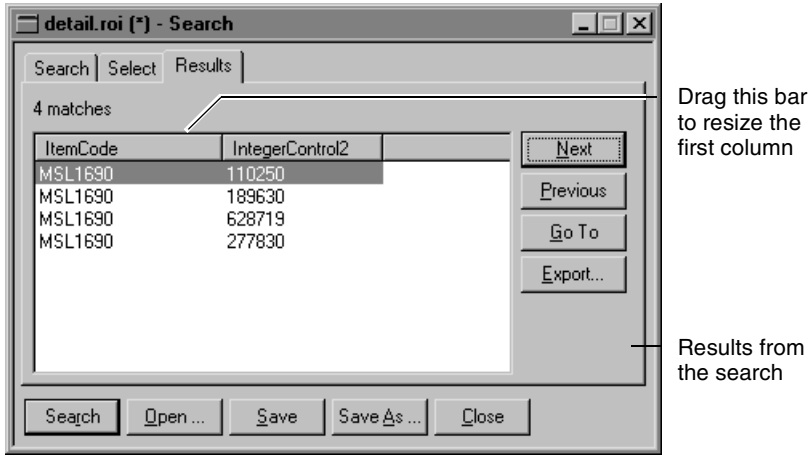
6 After selecting the objects on which to search, you can specify the values to search. For this example, change the IntegerControl2 (which represents the extension price) value in the Value column to > 100000.

The search now looks for orders of item code MSL1690 which have an extension price greater than $100,000.



7 Choose Search to execute the search.

The search results appear in the Results page. Results for multi-object searches are formatted in columns, as the following illustration shows. You can resize the width of the columns.

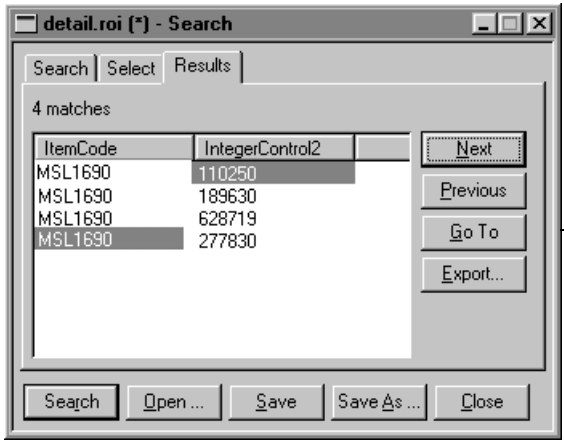


How to use the Results page in a multi-object search

The Results page displays the matches found in the report. You can go to the page containing any of those matches directly from the Results page. The following example shows the matches retrieved from a search for orders of item code MSL1690 which have an extension price greater than $100,000.

1 Select the match you wish to see.

In a multi-object search, you can hyperlink to only one object at a time and not a whole row. Hold down the Shift key to select more than one object.



To go to a match in the report, select the company name, then choose Go To

2 Choose Go To or double-click the selection.

The report becomes active and displays the matching value. If you selected extension price 110250, as shown in the previous illustration, the page containing that extension price appears. The extension price 110250 is highlighted.

3 To go to another match in the report, use the Next, Previous, or Go To button in the Results page.

Using operators and wildcards in search expressions

Use operators and wildcards in search expressions in the Value column of the Search page to narrow or widen your search.

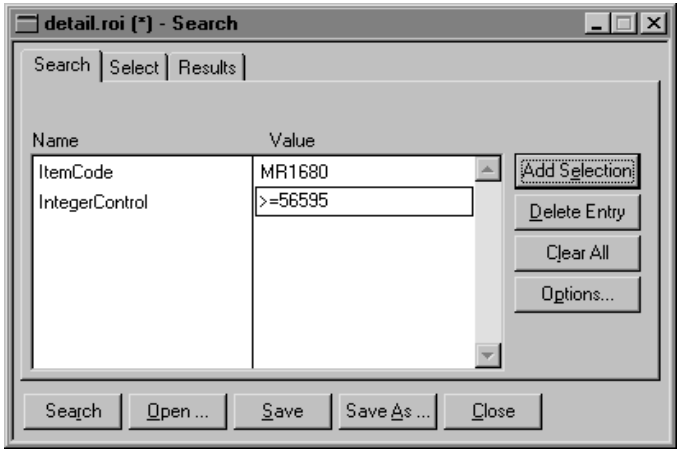
To search an integer control, an operator compares numbers. To search a text control, an operator compares letters. For instance, the expression “> Moore” as the value for the SalesRep object would find all the names that fall after “Moore” in the alphabet.

Using operators and symbols in a search expression

Actuate accepts the following operators and symbols.

Symbol	Meaning
=	Equals or is the same as
>	Greater than or alphabetically after
<	Less than or alphabetically before
>=	Greater than or equal to
<=	Less than or equal to
-	Range (hyphen separates upper and lower limits of the range)
,	Or (comma separates two values)
!	Not

The following example shows a search in the sample detail sales report for all orders for item code MR1680 that are greater than or equal to $56,595.



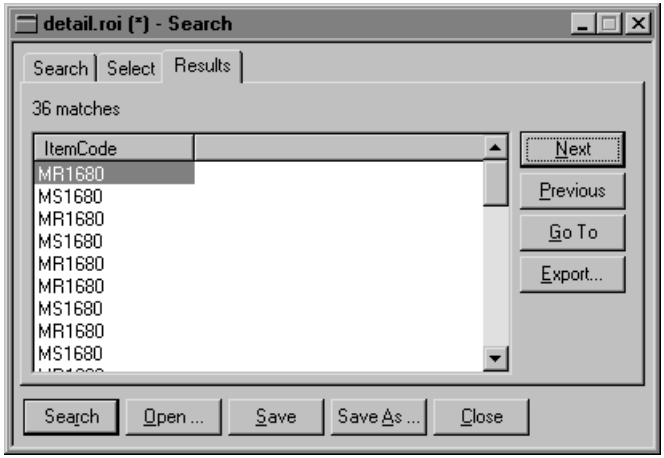
Using wildcards in a search expression

Use wildcard characters to do pattern matching on text objects. Actuate accepts the following wildcards.

Wildcard	Meaning
?	Find any one character
*	Find any number of characters
#	Find any one ASCII numeric character (0-9)

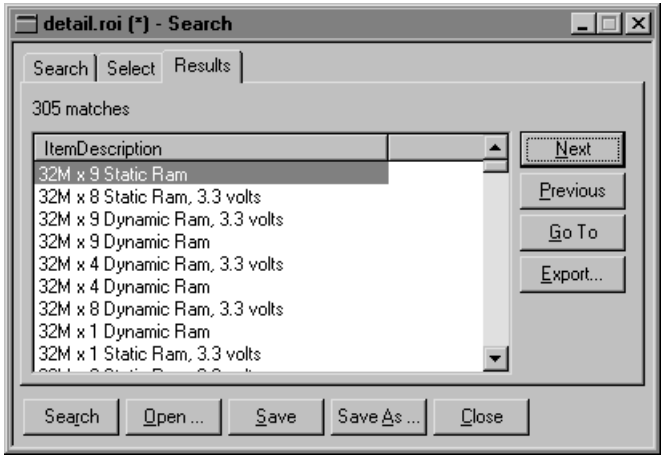
Using the ? wildcard in a search expression

The following illustration shows the results of a search in the samples sales detail using the ? wildcard. We search the report for the ItemCode “M?1680”. This search retrieves only those item codes that begin with “M”, end with “1680”, and are exactly six characters long.



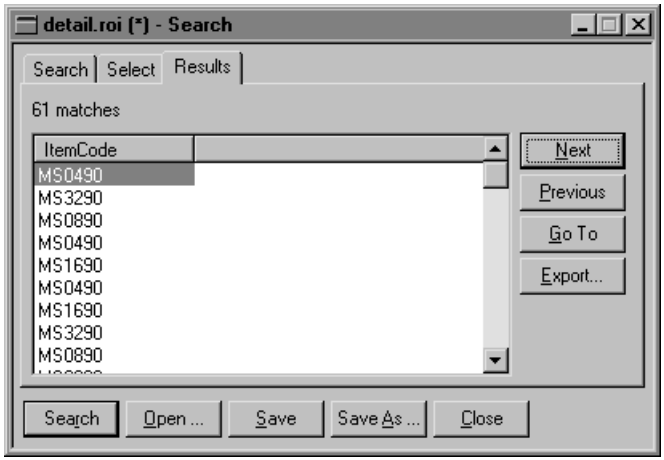
Using the * wildcard in a search expression

The following illustration shows the results of a search in the sample sales detail using the * wildcard. We search the report for the ItemDescription “32M*”. This search retrieves all items with descriptions of any length that begin with “32M”.



Using the # wildcard in a search expression

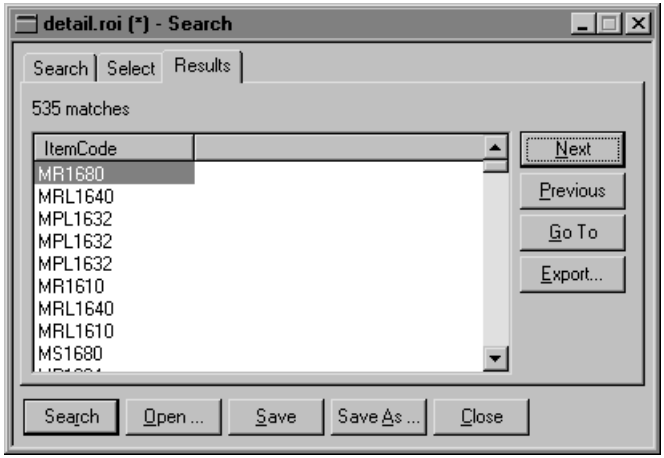
The following illustration shows the results of a search in the sample sales detail using the # wildcard. Use the pound sign to exclude characters other than the numeric characters zero through nine from your search. For example, “MS??90” or “MS*90” matches both “MSL390” and “MS1690”. “MS##90” limits the search to codes in the “MS” group. The following illustration shows the results of the search for the item code “MS##90”.



Using multiple wildcard characters in a search expression

Use a wildcard character multiple times in a single value to broaden a search. For example, the following illustration shows the results of a search in the

sample sales detail report for the item code “M*16*”. This search retrieves all item codes that begin with “M” and contain “16”.

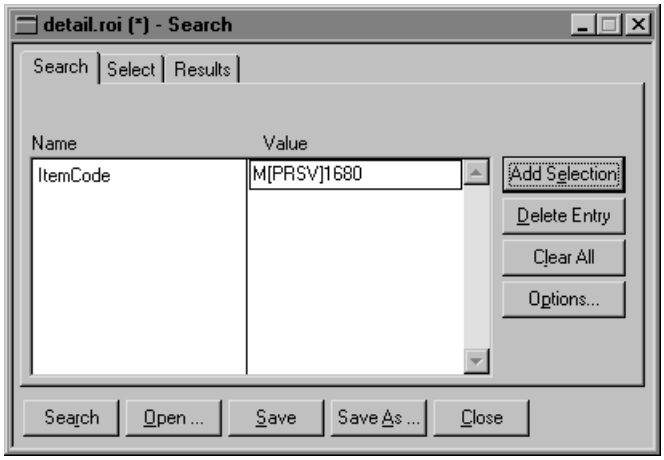


Using patterns in a search expression

Use patterns in a search expression to qualify a search. Patterns allow you to look for characters in a range or to select only certain characters for searching. Use the brackets ([ ]) to place a pattern inside a search term. The following table defines pattern meanings and provides examples of using patterns in a search.

Pattern	Meaning	Example
[character list]	Match any one character inside the brackets.	[M]16 In this example, match the M.
[a-z0-9]	Match any lowercase character and ASCII numeric character	a-c and 1-3
[a-z-]	Match any character or hyphen	*a-*
[^a-z0-9]	Match any character other than lowercase or ASCII numeric	^Z
[^]	Match one caret	^and

The following illustration shows a search in the sample sales detail report for item codes “MP1680”, “MR1680”, “MS1680”, or “MV1680”.



Searching for the characters ?,*,#, and [ ]

Because the characters ?, *, #, and [ ] have special meanings in search expressions, you must indicate when you want to search for the characters themselves. To search for a special character itself, you can do one of the following:

- Place the character inside brackets.
- Use the backslash (\) before any special character, and enclose both the backslash and the character in quotation marks.

The following table defines some special characters.

Special characters	Definition
[?] or "\?"	Match one question mark
[#] or "\#"	Match one pound sign
[*] or "*"	Match one asterisk
[[] or "\["	Match one open bracket
[]] or "\]"	Match one close bracket
["\["-"\]"]	Match any ASCII character code between “[“ and “]”

Using special characters in a text string

If a search text string contains one or more special characters, it must be enclosed in quotation marks (''). Special characters include:

- Comma (,)
- Hyphen (-)
- Exclamation point (!)
- Less than sign (<)
- Greater than sign (>)
- Equal sign (=)

For example, the string:

16M x 1 Dynamic Ram, 3.3 volts

must be enclosed in quotation marks as follows:

"16M x 1 Dynamic Ram, 3.3 volts"

If this string is not enclosed in quotation marks, the comma is interpreted as an OR in SQL, for example:

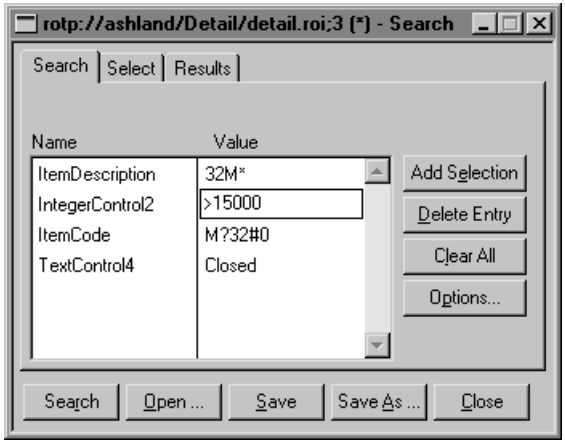
```
WHERE items.itemcode LIKE '16M x 1 Dynamic Ram%'
OR items.itemcode LIKE '3.3 volts%'
```

Using nonprinting ASCII characters in a search

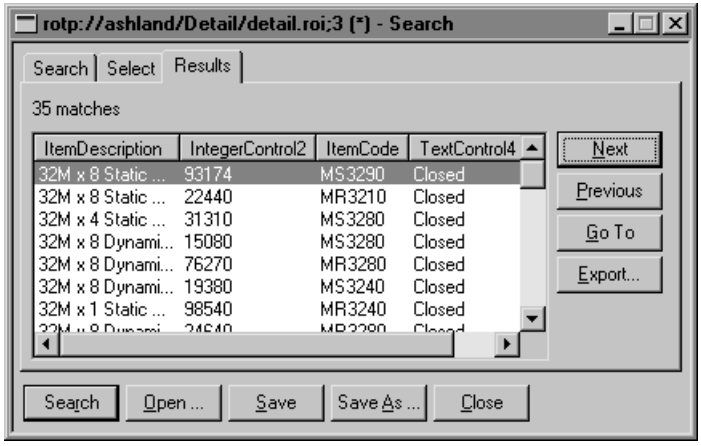
Tabs, line feeds, and carriage returns are examples of nonprinting ASCII characters. With the backslash as an escape character, use the following nonprinting ASCII codes in search expressions.

Special characters	Definition
\	Escape next character (one- or two-byte character)
\a	Match one alarm (0x07)
\b	Match one backspace (0x08)
\t	Match one tab (0x09)
\n	Match one new line (0x0a)
\f	Match one form feed (0x0c)
\r	Match one carriage return (0x0d)
\\	Match one backslash (\)
[\1-\377]	Match any one-byte character excluding NUL (0x00)
[\x100-xffff]	Match any two-byte character

The following illustration is a search of the sample sales detail report for closed orders in excess of $15,000 that are for items whose description contains “32M” and whose item code is in the “Mx” group and in the “32x0” range.



The following illustration shows the search results.

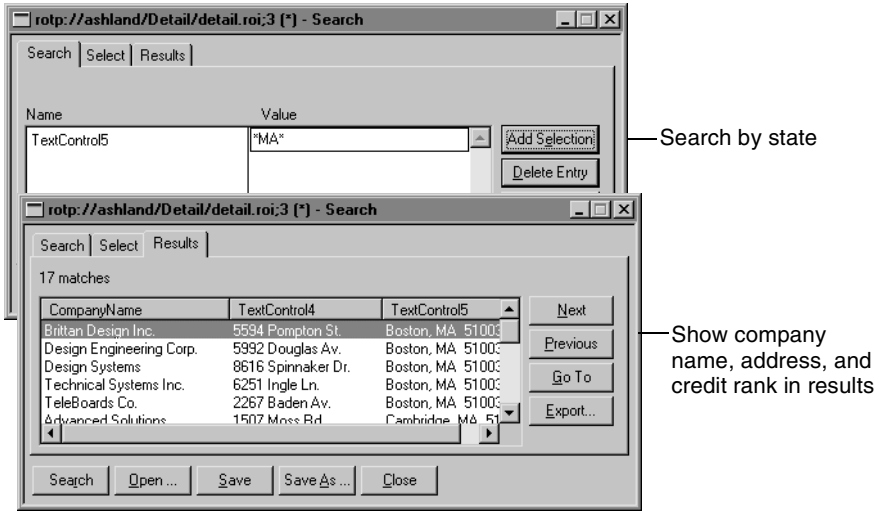


Specifying data to display in the Results page

Besides displaying the results of a search, the Results page can display data from other objects in a report. If, for example, you search for companies by state, the Results page displays, by default, only the company names that match the search criteria. You might, however, also want to display the full

company address and credit rank next to the company name, as shown in the following illustration.

Text fields displayed in the Results page have a limit of 255 characters. For example, each field under CompanyName can have 255 characters in length. If a text field in a report contains more than 255 characters, the first 255 characters are used. For more information about exporting all the characters from a text field, see “Exporting search results,” later in this chapter.



You can specify any number of object values to display in the Results page. This capability is useful for creating a quick view of particular data in a report.

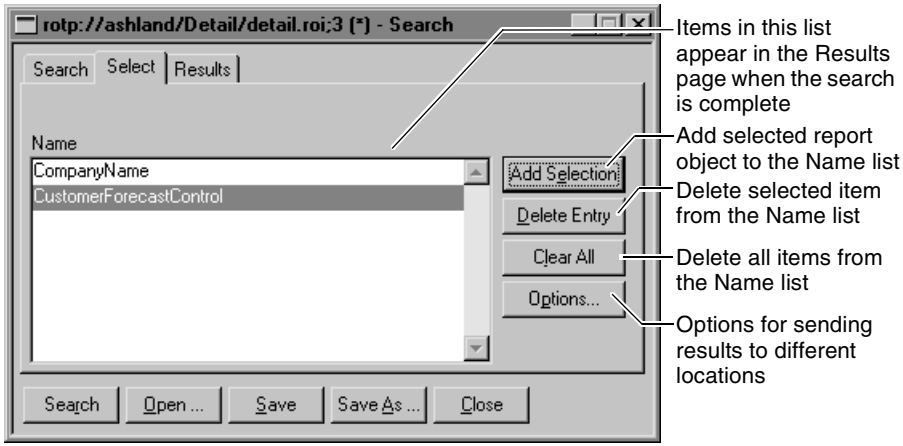
The data in the Results page usually appears as described in the preceding example and in the following procedure, however, in a search of a report designed using a hierarchy of data groups, unexpected results can appear. For more information about avoiding unexpected search results, see “About report structure in multiple object searches,” later in this chapter.

How to specify object data to display in the Results page

The instructions in this section assume you have already specified the search criteria. For more information about specifying search criteria, see “Executing a single-object search” and “Executing a multi-object search,” earlier in this chapter.

1 Choose the Select tab of the Search dialog box.

The Select page appears. By default, the name of the object or objects you selected as criteria for the search appears in the Name column. The values of these objects, in turn, appear in the Results page after you execute the search.



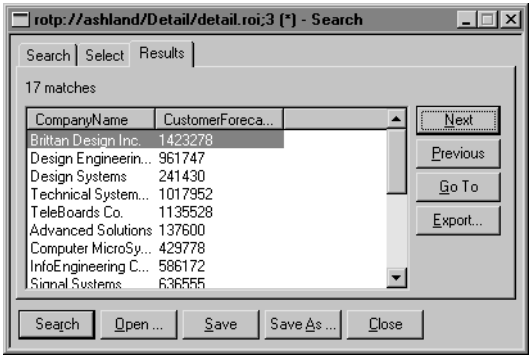
2 If you want the Results page to display only some of the objects, select each object to exclude. Then choose Delete Entry. To exclude all objects, choose Clear All.

3 To specify additional objects, select each object you want to add. Then choose Add Selection on the Select page.

The names of the objects you select appear in the Name list.

4 Choose Search to start the search process.

The search results appear in the Results page.



About report structure in multiple object searches

Understanding the search feature can help designers design reports to enable faster and more successful searches in report documents. A report designer

can make searching more effective in a particular report document by organizing report sections and creating an index.

When the user selects multiple objects for a search, the success of the search depends on whether or not distinct relationships exist among the selected searchable objects. The search feature is designed to work with controls that can be organized into a flat two-dimensional table, such as a spreadsheet. If the analysis of the controls that a user chooses for a search in the report document contains a hierarchy that cannot be organized into a flat two-dimensional table, an error message appears when the user chooses Search.

Using search definition files

Actuate ReportQuery extends the report search functionality. You can save and use searches stored in search definition (ROS) files on an Actuate report document.

Actuate saves the following information in a search definition file:

- Search criteria in the Search page
- Data to display in the Select page
- Options in the Search Export Options dialog box
- Report document structure information

You can use search definition files with different report document (ROI) files if they are generated from the same report executable (ROX). For example, if you have a report executable that you use to create weekly reports, you can create a search definition that searches for and extracts data from the report. You can use the same search definition file with any weekly report as long as the report executable did not change.

You can run a search definition from either the Search dialog box or from the toolbar. For more information about opening and running a search definition see “Opening and running a search definition,” later in this chapter.

For information about creating searches and specifying data to be returned from searches, see “Using basic searching techniques,” “Executing a single-object search,” “Executing a multi-object search,” “Using operators and wildcards in search expressions,” and “Specifying data to display in the Results page,” earlier in this chapter.

For information about the options available for exporting data, see “Exporting report data,”later in this chapter.

Saving a search definition

After you have set up a search, you can save the search criteria and options in a search definition (ROS) file. Choose Save in the Search dialog box to save the search definition. The search definition file is saved in the Actuate search definition directory. If you use the default installation directory, the search definitions are saved in C:\Actuate5\Srchdef.

The report document structure information is used when Actuate runs the search on a report document.

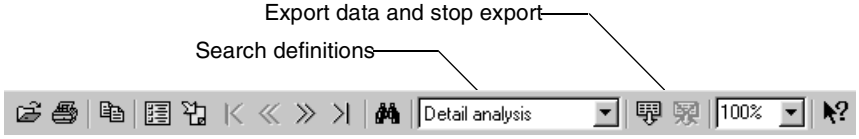
Opening and running a search definition

You can open and run a search definition from either the Search dialog box or from the toolbar. You can open and use a search definition file only from your local computer. The report document can be in the Report Encyclopedia or on a system that you have access to. The search definition file must be on your system or another system that you have access to outside the Report Encyclopedia. Actuate searches for the search definition files in the report document directory and the Actuate search definition directory. If you use the default installation directory, the search definition directory is C:\Actuate5\Srchdef.

If the search definition file cannot be used with the current report, Actuate displays a message when you try to use it.

From the Search dialog box, choose Open to open a search without running it. Choose Search to run the search.

From the toolbar, select a search definition from the list of search definitions and select the Export data button to open the search and run it.



In the toolbar, the list of search definitions lists the search definition files that are in the same directory as the report document and the search definition directory. If you select the Export data button after selecting a search from the list Actuate opens and runs the search.

If you have a search definition file that exports data to an application, using Export data from the toolbar runs the search, exports the data, and starts the application.

Exporting report data

There are two ways to export data from an Actuate report to another document:

- Use Actuate's search feature to select only report data that meet specified criteria. Send that data to an ASCII file, the Clipboard, or an application. Using this technique, you, in effect, create a new report from the original report.
- Select text or images in the report itself, copy the selection, and paste the selection in the destination document. This technique is similar to the standard copy-and-paste operation available in other Windows applications.

Only 32-bit Windows systems such as Windows 95/98 or Windows NT support exporting report data to an application.

Exporting search results

When you use Actuate's search feature to locate and display report object values that meet specified criteria, you can copy the search results to the Clipboard, or export them to an ASCII file or an application. You can choose to export the entire result set or only a portion of it.

If you export search results from the Results page, each text field exported is limited to the first 255 characters. If you export search results directly as part of the search, the entire text field is exported.

You can also use the exported file as the data source for another report. For information about using an ASCII file as a data source, see *Programming e.Reports* which is part of the Actuate e.Report Designer Professional documentation.

Using Actuate search extensions, a part of Actuate Transporter technology, you can export all or part of the results of a search to:

- Microsoft Excel spreadsheets
- Brio Technology BrioQuery documents
- CorVu Graphical Analysis Module using a CorVu TAB file
- Text files

For information about the Actuate search extensions, see "Using the search extension options dialog box," later in this chapter.

For information about installing and using custom search extensions, DLLs that Actuate uses to export data directly to other applications, see the

documentation for the custom search extension. If the search extension uses the default Actuate search extension directory, add the search extension to the Actuate search extension directory.

How to export all of the search results

The instructions in this section assume you already specified search criteria and selected the objects whose values you want to appear in the result set. For information about specifying search criteria, see "Using basic searching techniques," "Executing a multi-object search," and "Specifying data to display in the Results page," earlier in this chapter.

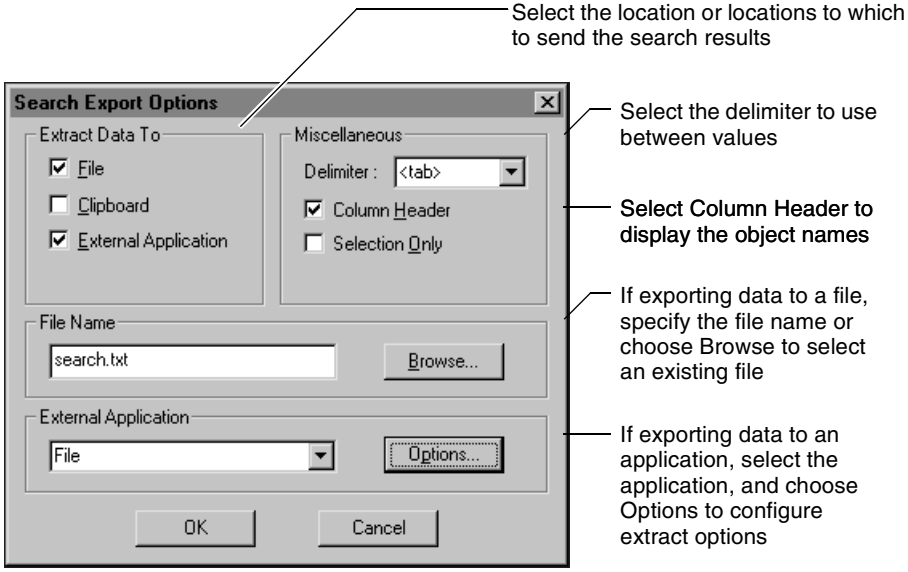
1 To export the search results to a file or Clipboard, do one of the following:

- In the Search page or Select page, choose Options.
- Choose Search. Then, in the Results page that appears, choose Export.

  If you export search results from the Results page, each text field exported is limited to the first 255 characters. If you export search results directly as part of the search from the Search or Select page, the entire text field is exported.

The Search Export Options dialog box appears. The options differ slightly, depending on whether you access the dialog box from the Search page, Select page, or the Results page.

The following illustration shows the Search Export Options dialog box accessed from the Select page.



2 Select the location or locations to which to send the search results. Portions of the dialog box are enabled or disabled, depending on the export locations you select:

- If the location is a file or the Clipboard, select the delimiter to use between values if the result set contains values from multiple objects. You can select a tab, comma, or space.

  Select Column Header to include the names of the objects as column headings when exporting data.
- If the location is a file, specify a file name or use the default file name.
- If the location is an external application, select the application from the list and choose Options to set the options. For information about the options, see "Using the search extension options dialog box," later in this chapter.

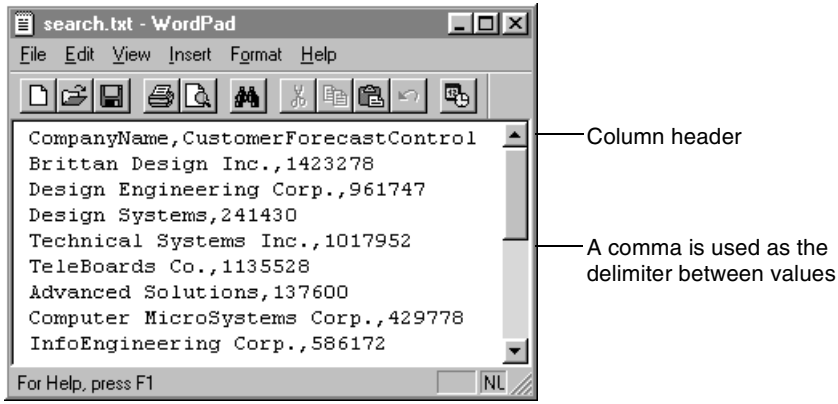
3 When you finish selecting the desired options, choose OK.

If you accessed the Search Export Options dialog box from the Select page, the Select page reappears.

If you accessed the dialog box from the Results page, Actuate sends the data to the locations specified in step 2.

4 If you are at the Select page, choose Search to start the search process.

The search results appear in the locations specified in step 2. If you used the settings as shown in the previous illustration, the results are written to Search.txt. The following illustration shows the contents of the file opened in WordPad.



How to export a portion of the search results

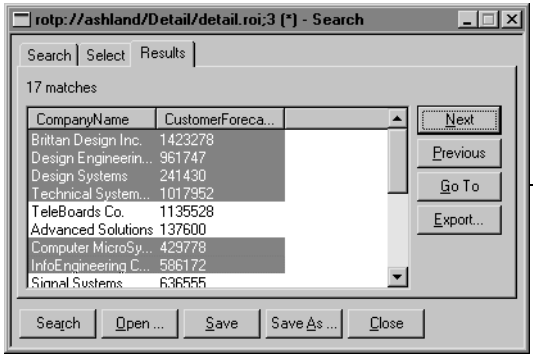
The instructions in this section assume you already specified search criteria and selected the objects whose values you want to appear in the result set. For

information about specifying search criteria, see “Using basic searching techniques,” “Executing a multi-object search,” and “Specifying data to display in the Results page,” earlier in this chapter.

1 Choose Search to start the search process.

The search results appear in the Results page.

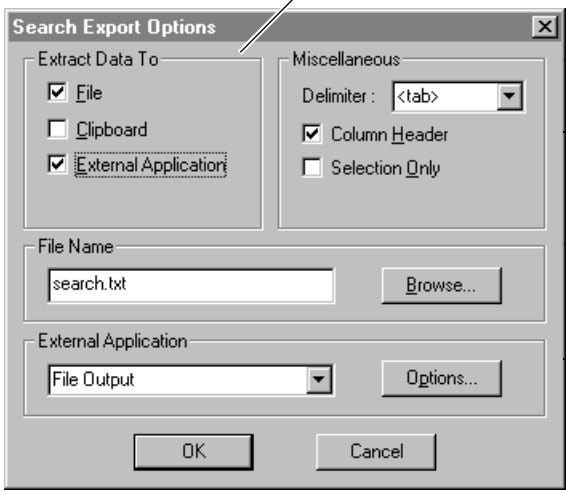
2 Select the matches you want to export.



To select multiple items to export, hold the Ctrl key while choosing the desired items

3 Choose Export.

The Search Export Options dialog box appears.



Select the location or locations to which to send the search results

Select the delimiter to use between values

Select Column Header to display the object names

If exporting data to a file, specify the file name or choose Browse to select an existing file

If exporting data to an application, select the application, and choose Options to configure extract options

4 Select the location or locations to which to send the search results. Portions of the dialog box are enabled or disabled, depending on the export locations you select:

- If the location is a file or the Clipboard, select the delimiter to use between values if the result set contains values from multiple objects. You can select a tab, comma, or space.

  Select Column Header to display the names of the objects in the result set.
- If the location is a file, specify a file name or use the default file name.
- If the location is an external application, select the application from the list and choose Options to set the options. For information about the options, see "Using the search extension options dialog box," later in this chapter.

5 Select Selection Only to export only the items you selected in step 2.

6 When you finish selecting the desired options, choose OK.

Actuate sends the data to the locations specified in step 4. If you used the settings as shown in the previous illustration, the results are written to Search.txt. The following illustration shows the contents of the file opened in WordPad.

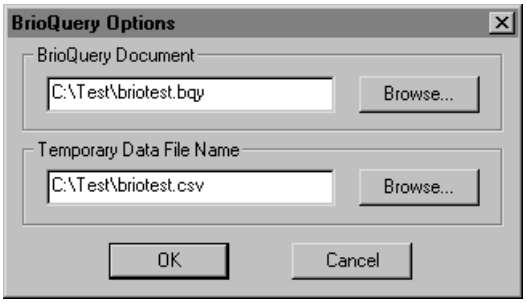
Using the search extension options dialog box

The next sections describe the fields in the Options dialog box you use for the different search extensions, BrioQuery, CorVu, Microsoft Excel, and text file. The configuration requirements for the BrioQuery and CorVu search extensions are also described.

Using BrioQuery search extension options dialog box

The following fields are in the BrioQuery Options dialog box:

- BrioQuery document specifies the destination BrioQuery document when the data is exported.
- Data file specifies the file name of the temporary data file used for transferring the data to BrioQuery. BrioQuery reads the data from this file. This field is required.



If you use BrioQuery 6.0 and change data stored in the temporary data file, choose the BrioQuery Process button in the BrioQuery web page to process the updated data. For example, you create an Actuate search that sends data to BrioQuery and then run the same search with different search criteria that updates the data in the temporary data file. Next you select the temporary data file in BrioQuery and choose the Process button to process the updated data.

Configuration requirements for the BrioQuery search extension

The search extension for BrioQuery versions 5.5 and 6.0 uses a BrioQuery document startup script to import data from a temporary data file created by Actuate. To use the BrioQuery search extension, you need to:

- Add the Brio executable directory installation directory to your system's PATH environment variable.
- Create a BrioQuery document containing a startup script that specifies the name of the file containing search data from Actuate.
- Set Actuate BrioQuery search extension options to specify a file containing Actuate data and a BrioQuery document.

To find the Brio executable directory, see your Brio documentation. To view and change your system's PATH environment variable, see your system documentation.

To create a BrioQuery document with the required document startup script, start BrioQuery. From the main menu, select FileDocument ScriptsStartup tab and add the following to the startup script:

- For BrioQuery 5.5, add the following two lines:

```
import doc root, '<file name>', 'csv'
process doc root
```

- For BrioQuery 6.0, add the following single line:

```
ExecuteBScript("import doc root, '<file name>', 'csv'; process doc root")
```

The <file name> is the full path and file name of the temporary data file created by Actuate. The following is a BrioQuery 5.5 example:

```
import doc root, 'C:\Temp\briodata.csv', 'csv'
process doc root
```

The following is a BrioQuery 6.0 example:

```
ExecuteBScript("import doc root, 'C:\\Temp\\briodata.csv', 'csv'; process doc
root")
```

After you add the information, choose OK and save the BrioQuery document.

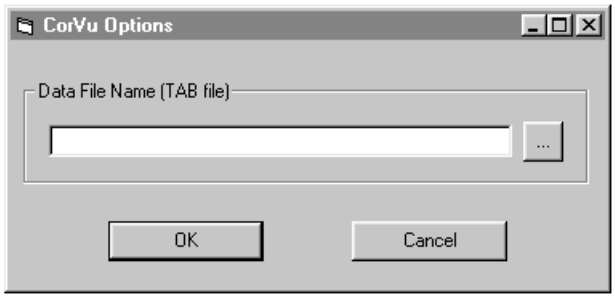
When using the Actuate BrioQuery search extension you need to specify the BrioQuery document containing the startup script and the file Actuate uses to temporarily store the Actuate data. In the Actuate Search Export Options dialog box, select BrioQuery 5.5 - 6.0 as the external application and choose the Options button to display the BrioQuery Options dialog:

- In the BrioQuery Document field, enter the name of the BrioQuery document you created.
- In the Temporary Data File Name field, enter the file name specified in the BrioQuery startup script.

After choosing OK, you can use the BrioQuery search extension to export Actuate search results to BrioQuery.

Using CorVu search extension options dialog box

The Data File Name field in the CorVu Options dialog box specifies the path and file name of the CorVu TAB file. This field is required. Use the Browse button to search for a file.



Data is transferred from the Actuate search results to the CorVu Graphical Analysis Module using the TAB file, a CorVu-specific data file, specified in this dialog box.

Configuration requirements the CorVu search extension

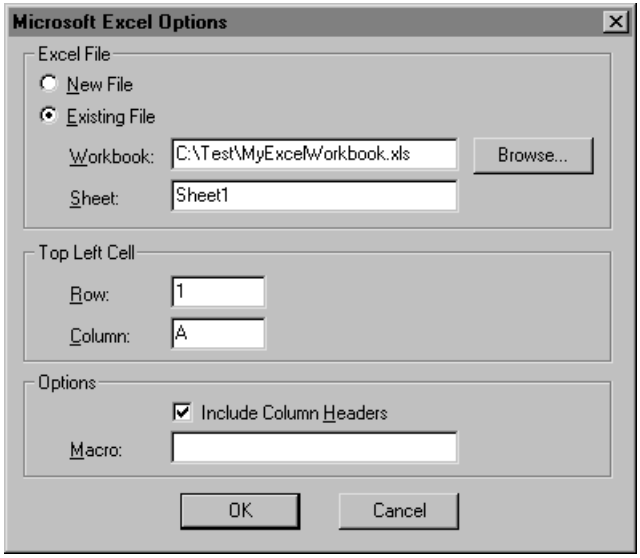
In order to use the CorVu search extension, the CorVu installation directory needs to be part of your system's PATH environment variable. To find the CorVu installation directory see your CorVu documentation. To view and change your system's PATH environment variable, see your system documentation.

Using Excel 97 search extension options dialog box

The following items are in the Microsoft Excel Options dialog box:

- New File specifies that the data transfers into a new, blank Excel workbook.
- Existing File specifies that the data transfers into the workbook specified in the Workbook field.
- Workbook specifies the name of the destination Excel workbook or document. This field is required if you select Existing File.
- Workbook sheet specifies the destination sheet within the specified workbook. This field is optional.
- Row specifies the row number of the top left cell of the workbook sheet where the exported data is placed. This field is optional.
- Column specifies the column letter or letters of the top left cell of the workbook sheet where the exported data is placed. This field is optional.
- Include Column Header specifies if column headings are written to the workbook. The default value is Enabled.
- Macro specifies a macro that executes after the data transfers to the Excel workbook. This field is optional.

Excel has a limit to how much data you can import. See the Microsoft Excel documentation for limitations.

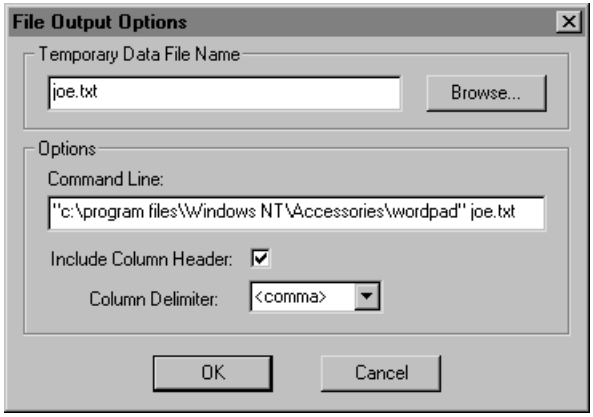


Using file output search extension options dialog box

The following items are in the File Output Options dialog box:

- Temporary Data File Name specifies the name of the output text data file. This field is required.
- Command line specifies a command line string that executes after the data is written to the file. This field is optional.
- Include Column Header check box specifies if the column headers are included in the data file. The default value is Enabled.

Column Delimiter specifies the delimiter between data fields. The default value is Comma.



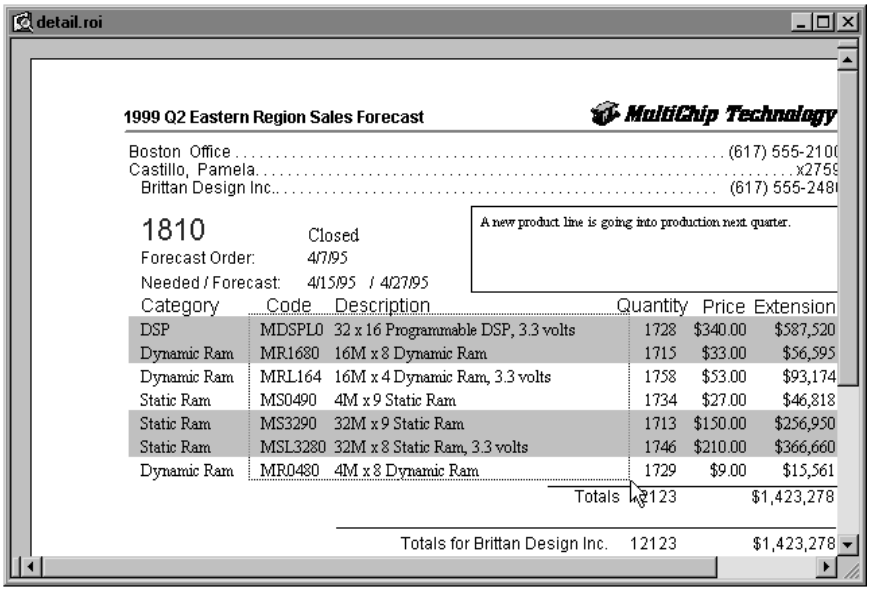
Copying report data to another document

You can copy data in the form of numbers, images, or text from an Actuate report and paste the data into another document. As with the standard Windows copy-and-paste operation, the report data you copy is stored in the Clipboard. You can then paste the data into any other document.

How to copy report data

1 Select text or images within a report. You can drag the mouse to enclose the area of interest, or hold the Shift key down and use the left mouse button to select multiple objects.

The following illustration shows a selected area in page 2 of Detail.roi.

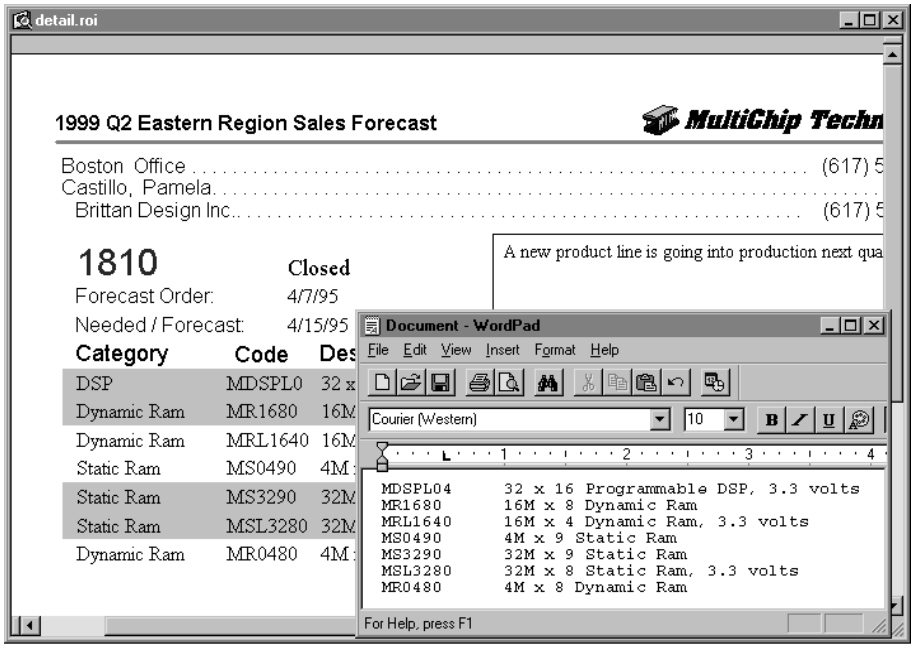


2 Choose the copy button on the Actuate toolbar.

3 Move to the destination document in an external application.

4 Use Edit➛Paste in the destination document to insert the copy into the destination document.

The following illustration shows the report data pasted into a WordPad document.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MultiChip Techn
Boston Office . . . . . (617) 5
Castillo, Pamela. . . . . .
Brittan Design Inc.. . . . . (617) 5
1810
Closed
Forecast Order: 4/7/95
Needed / Forecast: 4/15/95
A new product line is going into production next qua
Category Code Des
DSP MDSPL0 32 x
Dynamic Ram MR1680 16M
Dynamic Ram MRL1640 16M
Static Ram MS0490 4M
Static Ram MS3290 32M
Static Ram MSL3280 32M
Dynamic Ram MR0480 4M
Document - WordPad
File Edit View Insert Format Help
Courier (Western)
10
MDSPL04 32 x 16 Programmable DSP, 3.3 volts
MR1680 16M x 8 Dynamic Ram
MRL1640 16M x 4 Dynamic Ram, 3.3 volts
MS0490 4M x 9 Static Ram
MS3290 32M x 9 Static Ram
MSL3280 32M x 8 Static Ram, 3.3 volts
MR0480 4M x 8 Dynamic Ram
For Help, press F1

Chapter

4

Printing and distributing a report

This chapter contains the following topics:

- Comparing viewing and printing
- Printing reports from your desktop
- Command line options for printing
- Saving reports in HTML format
- Printing reports in a Report Encyclopedia
- Distributing a report from your desktop
- Linked and embedded objects in the report

Comparing viewing and printing

A major feature of the Actuate reporting system is the live, interactive presentation of online reports. You can also print Actuate reports.

Printing reports from your desktop

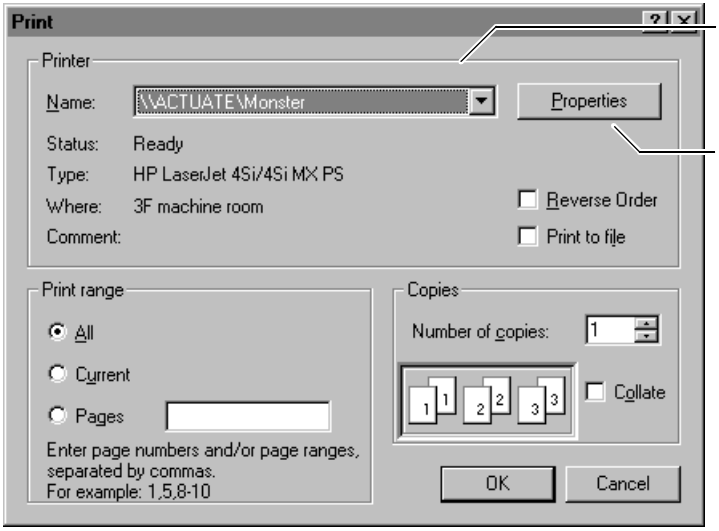
To print an Actuate report, you use the standard Windows procedure to select a printer and set printer properties. In addition, Actuate provides printing options specific to Actuate reports.

How to print a report from your desktop

1 Open the report you want to print.

2 Choose File➛Print from the browser menu or the report's context menu, or choose the Print button from the Actuate toolbar.

The Print dialog box appears. The options available from this dialog box let you select the printer and report printing options such as page range and number of copies.



Select a different printer from this drop down list

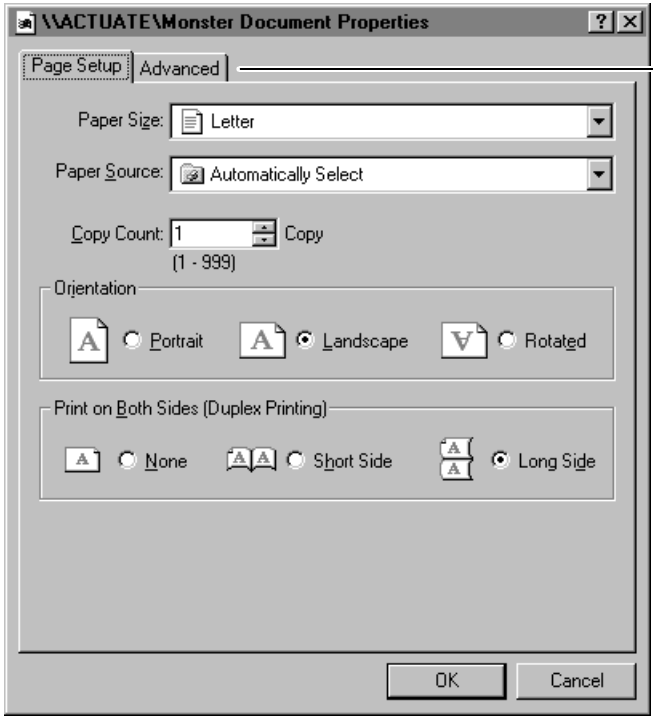
Choose Properties to change the printer's settings

Select the pages to print and other options

3 Select the desired printing options, the printer, the pages to print, the order in which to print the pages, the number of copies to print.

4 To specify a printer's other properties, or to change the printer's default settings, choose Properties.

The Document Properties dialog box appears. The following illustration shows the Page Setup tab of the dialog box for an HP LaserJet 4Si MX printer driver. Options and defaults are different for different printers.



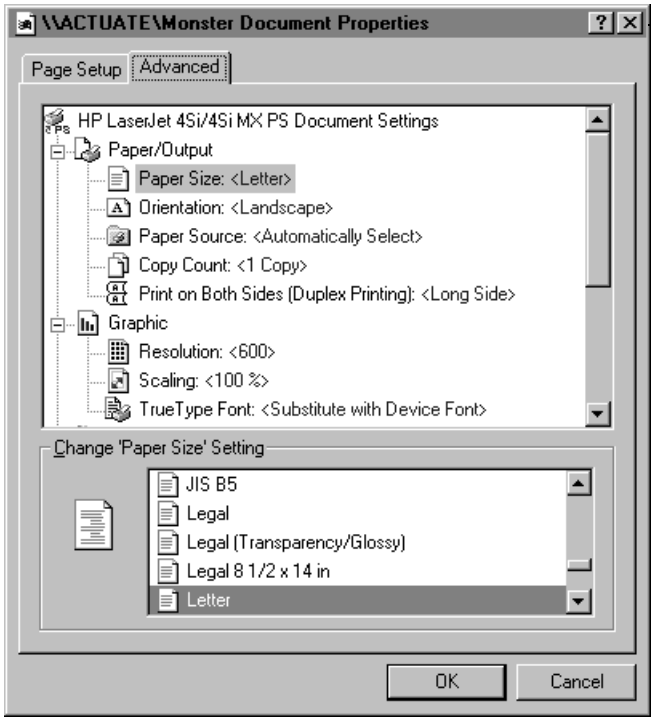
Choose Advanced to display other printer options

5 Set the options in this dialog box to specify paper related settings such as paper size and duplex printing.

The layout of the report when the report is designed determines the printed report's page orientation.

6 To view and change other printer settings, choose the Advanced tab.

The following illustration shows the Advanced properties tab for a HP LaserJet 4Si MX printer. Options and defaults are slightly different for different printers.



Use this dialog box to specify various printing options

7 Set the desired printer properties, then choose OK.

8 When the Print dialog box reappears, choose OK to start printing.

Command line options for printing

You can print an Actuate report document from the command line using Actuate desktop applications. With the Actuate LRX, you can use the command line only to print a report from the command line. To view a report with the Actuate LRX, open the report in your web browser. This is the command line syntax for printing reports:

```
<desktop application> -p <file>.roi [-rox <filename>.rox] -rspn<printer>[ -h]
```

The <desktop application> is the Actuate desktop application. You can use these Actuate applications, End User Desktop, Viewer, LRX, Administrator Desktop, e.Report Designer Professional.

The -p <filename>.roi parameter is required and specifies the name of the report document. The .roi extension is required.

The parameter -rox <filename>.rox is optional and is the name of the report executable ROX file used with the report document. Use this parameter if the ROX name stored within the ROI is not sufficient to locate the ROX. If used, the .rox extension is required.

The parameter -rspn <printer> is required and specifies the printer name. Use the UNC name for the printer. For example, \\myserver\printer3 is the printer named printer3 on the machine myserver.

The parameter -h is optional and enables silent (hidden) mode. If you use the -h option, the Actuate desktop application does not open a window and error messages appear on the command line. The LRX always uses hidden mode. If you do not use the -h option, the Actuate desktop application opens a window and the startup splash screen appears.

For example, the following command uses the Actuate Viewer to print a report that is in the c:\actuate\viewer\bin directory to a printer on the network:

```
viewer –p forecast.roi –rox forecast.rox –rspn \\actuate\printer3 -h
```

Saving reports in HTML format

To save an Actuate report document in HTML format, use a standard Windows save dialog box to specify a location and name of the HTML file. Actuate converts the report document to HTML format and attempts to preserve Actuate report document formatting by using HTML tables and text formatting.

How to save a report in HTML format

1. Open the report document (ROI) you want to save.
2. From the report's context menu, choose Save as HTML.

   The New HTML File dialog box appears. Use the items in the dialog box to navigate to a directory. Specify the file name in the File Name edit box and choose Save to save the report in HTML format.

Printing reports in a Report Encyclopedia

You can print any report at any time. To do so, choose Print➛Print Report from the report's context menu or choose the Printer icon.

When you print a report from a UNIX report server to a UNIX printer, the printout might appear different from the displayed report or the report

printed on a local Windows printer. This might be due to the UNIX printer configuration or the report server printing configuration. Contact your report server administrator if this occurs.

Distributing a report from your desktop

There are two ways to distribute a report from your desktop to users throughout an organization. You can:

- Send the report through e-mail or fax software.
- Copy the report to the Report Encyclopedia and inform the users of the report's location. From the Report Encyclopedia you can specify who can access the report and allow them to view the report in DHTML format.

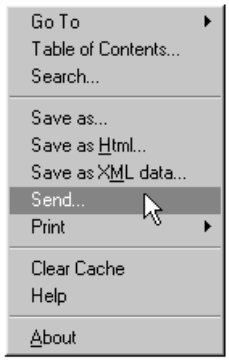
  To copy a report to the Report Encyclopedia, requires access to the Report Encyclopedia and an Actuate Desktop application such as the Actuate Viewer, Actuate End User Desktop, or e.Report Designer Professional.

To send a report, you provide the appropriate report files and Actuate Viewer, if required. The Viewer is required if the recipients do not have any Actuate desktop applications.

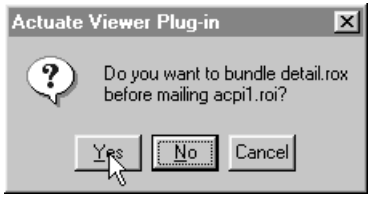
When a user opens a report for viewing or printing, Actuate runs the report executable from which the report was generated. Therefore, when you distribute a report to other users, you need to include the executable as well. To simplify the distribution process, Actuate provides the option of bundling the executable with the report so you need to send only one file.

How to distribute a report from your desktop using e-mail

1. Open the report document you want to distribute using your web browser and the LRX. You can also use e.Report Designer Professional, End User Desktop, or the Administrator Desktop to open the report.
2. If you use the LRX, choose Send from the report's context menu.

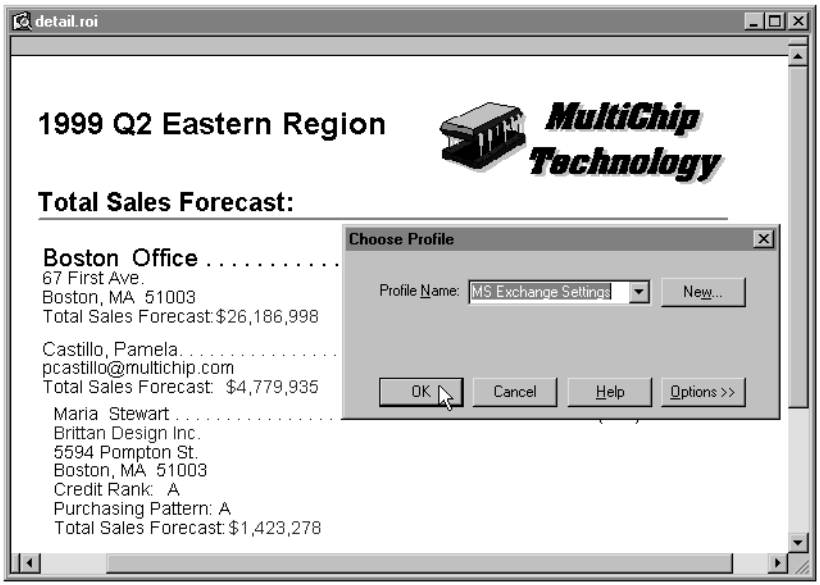


Actuate displays a message prompting you to bundle the executable with the report.



3 Choose Yes to start the bundling process.

The Choose Profile dialog box appears. This dialog box provides the option of distributing a report through various services. The default choice is Microsoft Exchange. You can, however, choose other mail services.



4 Choose the service to distribute the report, then choose OK.

A mail dialog box appears, prompting you to enter your mail user name and password.

5 Type the required information in the mail dialog box, then choose OK.

A mail window appears with the report as an attachment.

6 Address the mail message and send it.

The recipients receive the report as a mail attachment.

How to distribute Actuate Viewer

Actuate Viewer is a royalty free tool for viewing Actuate reports. You can distribute copies of Actuate Viewer freely. Use one of the following methods to distribute Actuate Viewer:

- Download the Viewer installation file from the Actuate web site http://www.actuate.com to a location all users have access to and let the users download and install the Viewer.
- Allow users to download the Viewer installation file from the Actuate web site.
- Copy the Viewer installation files from the an Actuate CD-ROM to a location all users have access to and let the users install the Viewer. If the Actuate CD-ROM contains the Viewer installation files, the files are located

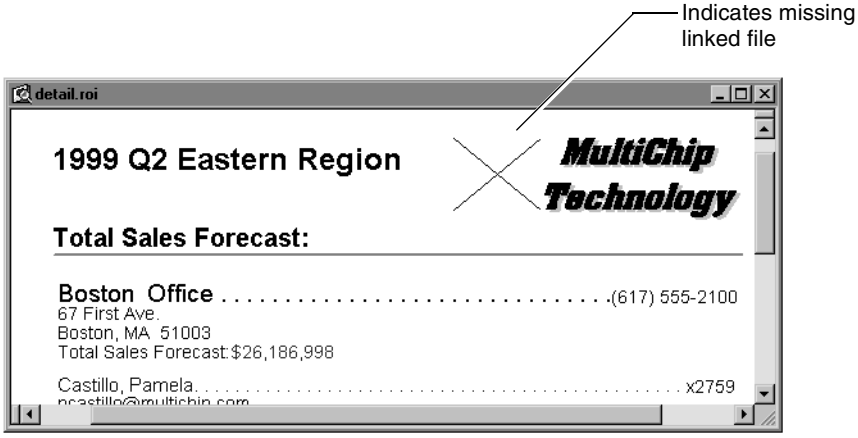
in the \Viewer directory. For the viewer install to work, you must copy all the files and maintain the directory structure in the \Viewer directory

Also, users can install the Actuate LRX to view Actuate reports using a web browser.

Linked and embedded objects in the report

Report developers can use bitmaps, spreadsheets, or other files as part of a report design. If these external objects are linked to the report, the distributed report searches the path to find them. If it cannot find the path, the linked object does not appear in the report.

If you see an X in your report, a necessary file might not have been included when the report was distributed. Embedded objects, on the other hand, are part of the report. If you distribute a report that you designed, it is best to embed objects in the report design. The following illustration shows a report that lost a link to an external object. For more information about linked and embedded objects, see "Using links to other Windows applications," in Chapter 2, "Viewing a report".



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