

Actuate One™

One Design
One Server
One User Experience

Working with Actuate e.Reports

This documentation has been created for software version 11.0.5.

It is also valid for subsequent software versions as long as no new document version is shipped with the product or is published at <https://knowledge.opentext.com>.

Open Text Corporation

275 Frank Tompa Drive, Waterloo, Ontario, Canada, N2L 0A1

Tel: +1-519-888-7111

Toll Free Canada/USA: 1-800-499-6544 International: +800-4996-5440

Fax: +1-519-888-0677

Support: <https://support.opentext.com>

For more information, visit <https://www.opentext.com>

Copyright © 2017 Actuate. All Rights Reserved.

Trademarks owned by Actuate

“OpenText” is a trademark of Open Text.

Disclaimer

No Warranties and Limitation of Liability

Every effort has been made to ensure the accuracy of the features and techniques presented in this publication. However, Open Text Corporation and its affiliates accept no responsibility and offer no warranty whether expressed or implied, for the accuracy of this publication.

Document No. 170215-2-130371 February 15, 2017

Contents

About Working with Actuate e.Reports	iii
Chapter 1	
Introducing e.reports and Actuate iServer System	1
About e.reports and the e.Report option	2
About Actuate Information Console and Actuate Management Console	2
Chapter 2	
Viewing and printing a report	3
Opening and viewing a report	4
Navigating a report	5
Using the paging controls	5
Using the table of contents	5
Using hyperlinks	6
Magnifying a report	7
Exporting a report	8
Viewing and saving a report in PDF format	9
Working with large files	9
Viewing differences between PDF and DHTML files	9
Exporting a report to Microsoft Excel	10
Exporting a report to Microsoft PowerPoint	11
Exporting a report to RTF	11
Printing a report	11
Chapter 3	
Searching a report	13
About searching in e.reports	14
About searchable report fields	14
Identifying a searchable report field	14
Searching for report data	14
Understanding how a multifold search works	15
Creating search conditions	16
Using a search expression in the search conditions	19
Using operators in a search expression	19
Using a wildcard character in a search expression	20
Using a pattern in a search expression	20
Searching for the ?, *, #, and [] characters	20
Searching for a string that contains a special character	21
Using a nonprinting ASCII character	22

Using search results to navigate the report22
Saving and downloading search results23
About saving search conditions24
Opening and running a search definition file26
Analyzing search results26
Index 29

A b o u t W o r k i n g w i t h A c t u a t e e . R e p o r t s

Working with Actuate e.Reports includes the following chapters:

- *About Working with Actuate e.Reports.* This chapter provides an overview of this guide.
- *Chapter 1. Introducing e.reports and Actuate iServer System.* This chapter describes e.reports and the Actuate iServer System.
- *Chapter 2. Viewing and printing a report.* This chapter describes how to view e.reports in the DHTML viewer and how to download and print reports.
- *Chapter 3. Searching a report.* This chapter describes how to search e.reports in the DHTML viewer and how to analyze search results.

1

Introducing e.reports and Actuate iServer System

This chapter contains the following topics:

- About e.reports and the e.Report option
- About Actuate Information Console and Actuate Management Console

About e.reports and the e.Report option

In a diverse and global business enterprise, corporations need a way to create, publish, and distribute reports on a regular basis. The creation, storage, and viewing of reports now occurs using distributed, networked environments, such as the Internet, intranets, and extranets in addition to static web pages or traditional, paper-based reporting.

Using e.Report Designer Professional to develop e.reports provides an efficient, scalable, highly searchable, and easily updated solution to these new requirements. You can then store, view, and print e.reports remotely through a server. To perform these tasks, your computer must be able to access a server running Actuate iServer. You then access your reports using a web browser.

To generate e.reports, the Actuate iServer installation must have the separately licensed Actuate e.Report option.

About Actuate Information Console and Actuate Management Console

You work with e.reports using Actuate Information Console or Actuate Management Console:

- Actuate Information Console is a tool that report users use to access reports in an Encyclopedia volume. For more information about Actuate Information Console, see *Using Information Console*.
- Actuate Management Console is a tool that report developers use to deploy and test reports in an Encyclopedia volume. For more information about Actuate Management Console, see *Managing an Encyclopedia Volume*.

The server administrator installs Actuate Information Console and Actuate Management Console as part of Actuate iServer. You do not have to install any additional software on your computer. All you need is a web browser and the URL to access the Encyclopedia volume through Actuate Information Console or Actuate Management Console.

2

Viewing and printing a report

This chapter contains the following topics:

- Opening and viewing a report
- Navigating a report
- Magnifying a report
- Exporting a report
- Printing a report

Opening and viewing a report

When you log on to an Encyclopedia volume through Actuate Information Console or Actuate Management Console, the first page you see is the Documents or Files and Folders page. This page shows you the volume folders that you can access. You can navigate through the folder hierarchy by choosing the folder links. Your access to folders and files is set by the Encyclopedia volume administrator or the report developer. Each user has his or her own view of the volume contents.

You can open any report document for viewing by choosing the file link. When you choose a file link, the report appears in a browser window, as shown in Figure 2-1. The Actuate iServer System converts an e.report from its native format to DHTML format for viewing.



Figure 2-1 Viewing an e.report

If you have access to a large number of files, you can use the filter option to display only viewable report documents. You can also specify that the page display a partial list of reports that match a specified condition. For example, you can use the filter to display only report documents that begin with sales.

For more information about filtering files, see *Using Information Console*.

Navigating a report

There are a number of ways to navigate through an e.report. You can:

- Page through the report sequentially, go to the first or last page, or go to a specific page.
- Use the report's table of contents to traverse the content hierarchy.
- Use hyperlinks, if available in the report, to go from one part of the report to another part in the same or a different report.
- Use links to other applications, if available in the report.
- 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 searching.

Using the paging controls

When viewing a report, you can use the paging controls in the toolbar above the report to page through the report. The paging controls are context-sensitive. For example, when the first page is displayed, the First control is dimmed, as shown in Figure 2-2.

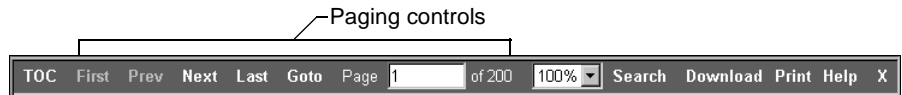


Figure 2-2 Using the paging controls

Using the table of contents

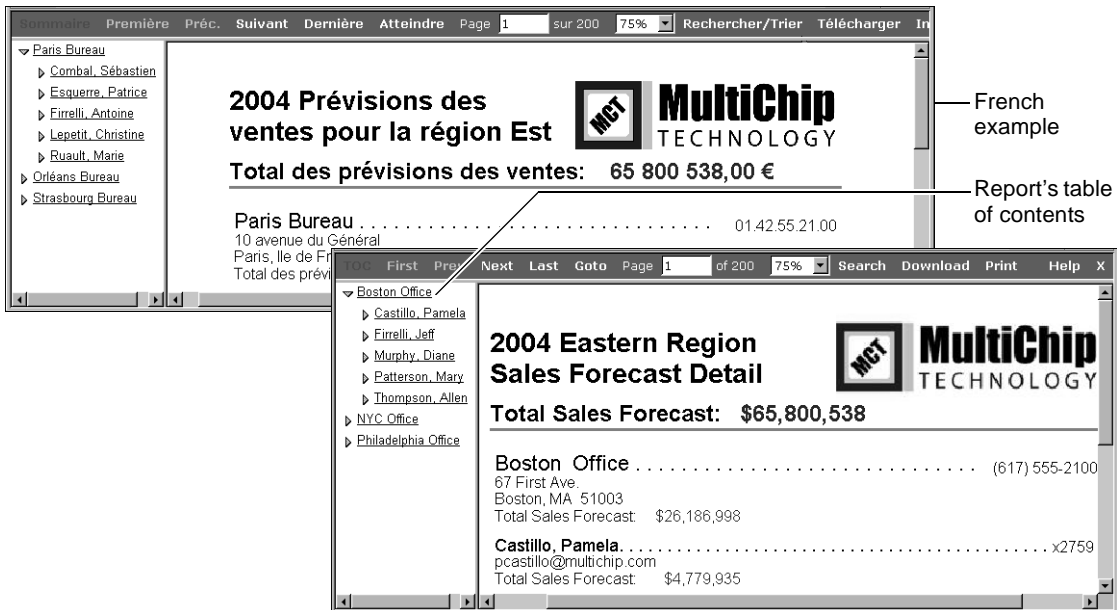
Reports typically contain a generated table of contents. If the report has a hierarchical structure, you can view the table of contents with sections collapsed or expanded depending on the level of detail you want to see. Figure 2-3 shows an example of a partially expanded table of contents for a report.

To access the report's table of contents, choose TOC from the toolbar above the report. The table of contents for the report appears in a frame to the left of the report frame. You can adjust the size of the frames by moving the splitter bar separating the two frames.

To close the table of contents, choose TOC from the toolbar above the report. The TOC control toggles between displaying and closing the table of contents.

How to use the report's table of contents


- 1 To expand the table of contents to show more levels of information, choose ▶.



French example

Report's table of contents

Figure 2-3 Using the table of contents

- 2 To collapse the table of contents to show fewer levels of information, choose .
- 3 To go to an item displayed in the table of contents, choose the link.

Using hyperlinks

During the design process, the report developer has the option to provide hyperlinks in any e.report. Hyperlinks make it easy to move from information in one part of a report to related information in another part of the report or to another report. A developer can use a text field, for example, to link from that field to another field in the report. A developer can also add buttons, such as More or Back, to facilitate navigating from one part of a report to another. Not all reports include hyperlinks.

How to use a hyperlink

- 1 To find a hyperlinked field, pass the cursor over a field. The cursor changes to a small hand if the field contains a hyperlink. Figure 2-4 shows an example of a hyperlinked field.
- 2 Choose the hyperlinked field to go directly to the related field. Figure 2-5 shows the field to which the hyperlink connects.

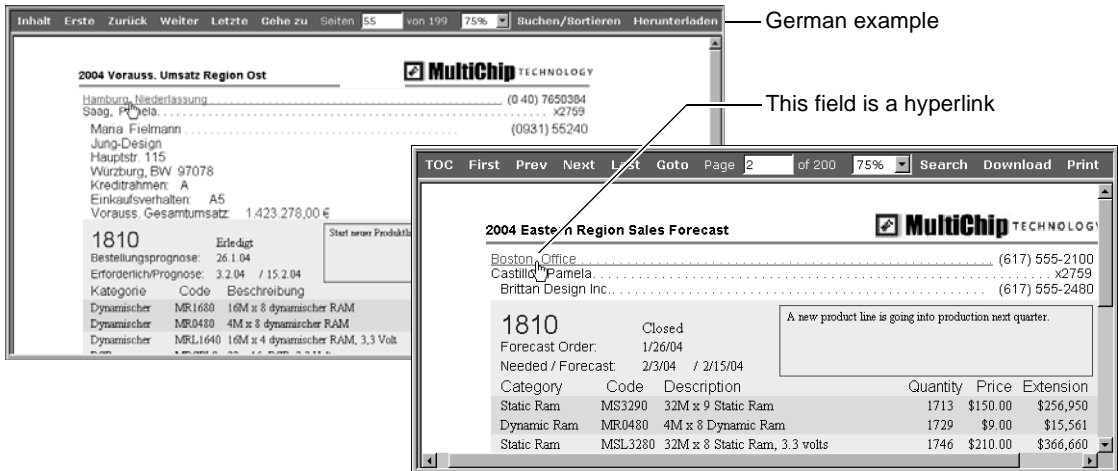


Figure 2-4 The cursor changes to a hand over a hyperlinked field

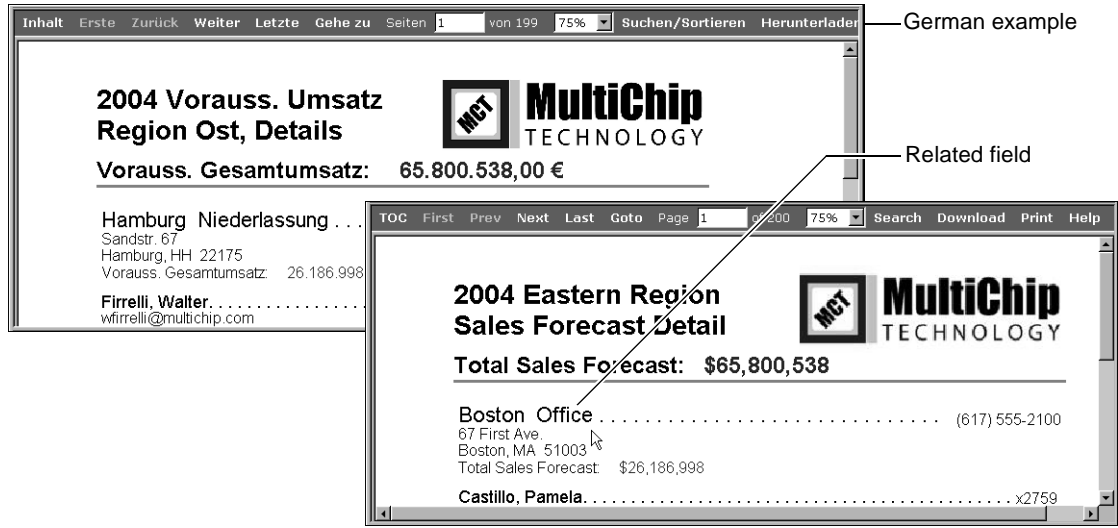


Figure 2-5 Displaying the field to which the hyperlink links

Magnifying a report

Zooming in and out of a report makes it easier to view specific sections of a report or an entire report page. The scaling range is from 25% to 400%. The viewer uses the last zoom setting you specified as the default magnification when opening reports. For example, if you previously viewed a report at 75%, the next

report you open is displayed at 75%. Figure 2-6 shows how to select a zoom setting.

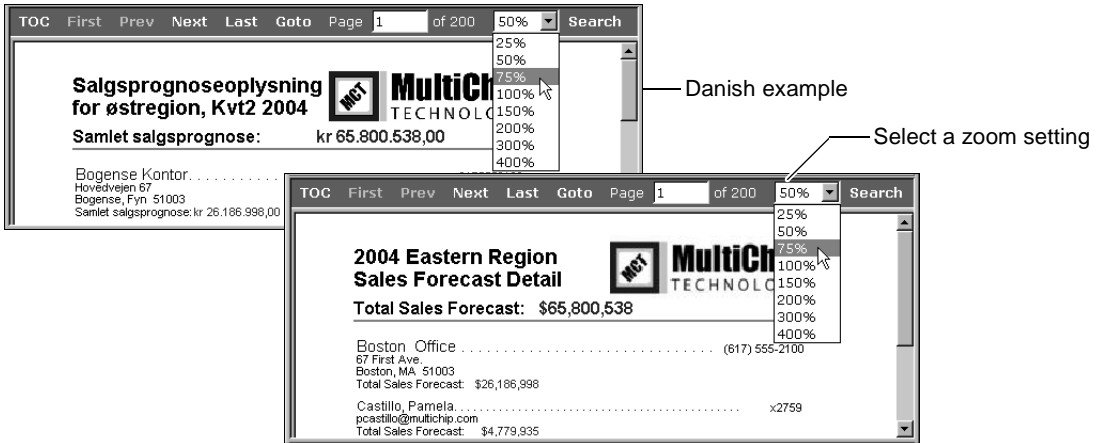


Figure 2-6 Selecting a zoom setting

Exporting a report

When you have a report open, you can save the report to an external location outside the encyclopedia. Reports can be viewed or saved in different file formats. To export a report to a different format, choose Download on the toolbar. Download appears, as shown in Figure 2-7.

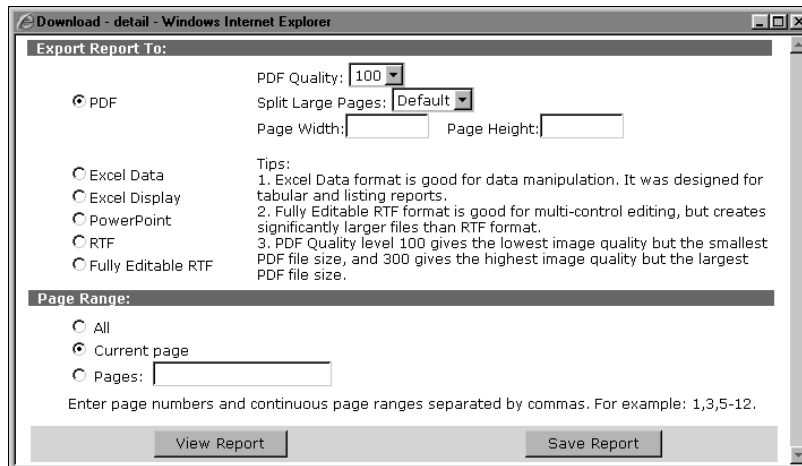


Figure 2-7 Exporting a report

You must have the appropriate viewing software installed to open the file after exporting it. Choosing View Report displays the report with the appropriate application, but does not save the PDF file on your computer. Choosing Save Report lets you save the file on your computer. You can export a report to PDF, Excel, PowerPoint, or RTF.

Viewing and saving a report in PDF format

When you view and save a report in PDF format, you can view or save the entire report or a specified set of pages. You can then open this file with the PDF Viewer.

Working with large files

Depending on the memory available on your system, the PDF Viewer can have problems opening or displaying large PDF files. When saving a large number of pages to PDF, your web browser can display a time-out message before the save operation is complete. To solve this problem, you can save the report in parts using multiple save operations.

If a report page is larger than a sheet of paper, the default behavior for the page's appearance in a PDF file is to split the page into fragments without truncating the data.

Viewing differences between PDF and DHTML files

When viewing or printing the PDF file, the PDF can appear different from the displayed DHTML 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 the differences over which the report developer does not have full control, for example:
 - Browser settings can affect word-wrap characteristics of the display. If the font is not installed on the computer where the report is viewed in PDF format, the PDF Viewer substitutes fonts.
 - If a report uses a font other than Courier, Times Roman, or Helvetica, the font must be installed on the computer where the report is generated and on the computer where the report is saved and viewed. If the font is not installed, Actuate substitutes Helvetica.

How to view or save a report in PDF format

Choosing a higher value in the PDF quality displays greater detail in the PDF and increases the size of the PDF file.

- 1 When the report is open, choose Download from the toolbar.

- 2 On Download, complete the following tasks:
 - Select PDF.
 - Choose the PDF quality.

PDF quality is the chart quality for a PDF file. The value ranges from 100, for the lowest chart quality (192 dpi) and the smallest PDF file size, to 300, for the highest chart quality (576 dpi) and the largest PDF file size.
 - To enable viewing and printing large pages, make the following selections:
 - Choose Yes from the Split large pages drop-down list.
 - Enter values for the page width and page height.
 - Select a Page Range option.
- 3 To save the report as PDF, choose Save Report.
- 4 To view the report as PDF, choose View Report.

Exporting a report to Microsoft Excel

To export a report so that the layout is retained, select Excel Display. Using this option does not display Excel row and column headings in the exported report. Although the layout of the report is retained when you make this choice, numbers are exported as string values.

To export a tabular or list report, select Excel Data. Using this option exports numbers, retaining their data type information. This option also displays data with row and column headings and grid lines. Do not use this option if the report contains images or a complex format.

A report that is exported to Excel does not display any controls that appear in page components of a report design. Typically, these types of control display page number. If you export a crosstab report to Excel, the appearance of the crosstab report in Excel can differ from the DHTML report. For example, the width of a column in the Excel spreadsheet can be narrower than in the crosstab report.

There is a limit to the number of pages that can be exported to Excel. The default for the page limit is 50. The Actuate iServer system administrator can change this limit.

How to export a report to Excel

- 1 When the report is open, choose Download from the toolbar.
- 2 On Download, complete the following tasks:
 - In Export Report To, select either Excel Display or Excel Data.
 - In Page Range, select a Page Range option.
- 3 To save the report in Excel format, choose Save Report.

- 4 To view the report in Excel format, choose View Report.

Exporting a report to Microsoft PowerPoint

Export to Microsoft PowerPoint for fully editable presentations of reports with charts and dynamic text.

How to export a report to PowerPoint

- 1 When the report is open, choose Download from the toolbar.
- 2 On Download, complete the following tasks:
 - Select PowerPoint.
 - Select a Page Range option.
- 3 To save the report in PowerPoint format, choose Save Report.
- 4 To view the report in PowerPoint format, choose View Report.

Exporting a report to RTF

When you export to RTF, the appearance of the exported report can be different from the appearance of the report in the DHTML Viewer. If you export a report that is densely populated with controls to RTF, Microsoft Word can take a long time to open the file. For example, opening a large RTF crosstab report in Microsoft Word can take several minutes. You can render data controls as text frames or text boxes. To render data controls as text frames, choose RTF. To render data controls as text boxes, choose Fully Editable RTF.

How to export a report to RTF

- 1 When the report is open, choose Download from the toolbar.
- 2 On Download, complete the following tasks:
 - In Export Report To, choose to render your data controls as either RTF or Fully Editable RTF.
 - In Page Range, select a Page Range option.
- 3 To save the report in RTF format, choose Save Report.
- 4 To view the report in RTF format, choose View Report.

Printing a report

After running a report and viewing it in DHTML format, you can print the report document from your web browser.

How to print a DHTML report from a web browser

If you have a DHTML report open in your web browser, follow these steps to print the document without saving it to your system.

Print

- 1 Choose Print. The report generates in Adobe Acrobat PDF format and appears in a new web browser window. Print appears, as shown in Figure 2-8.

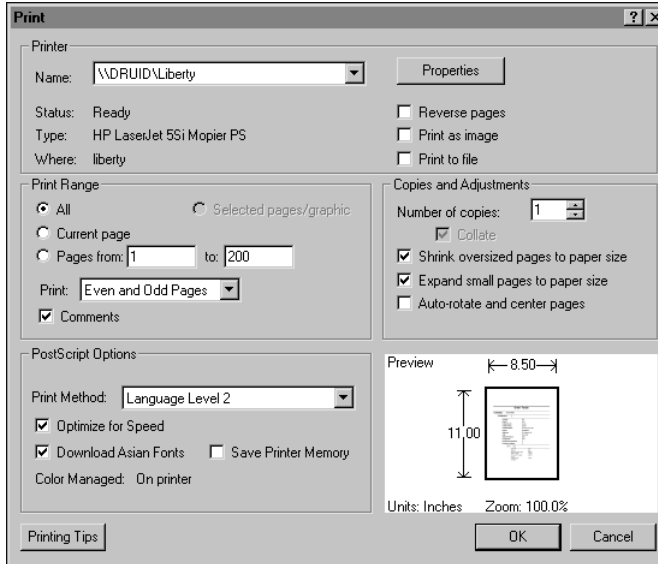


Figure 2-8 Printing a report

- 2 Select a printer and set the necessary options. Preview displays the report layout. Choose OK.

Searching a report

This chapter contains the following topics:

- About searching in e.reports
- Searching for report data
- Using a search expression in the search conditions
- Using search results to navigate the report
- Saving and downloading search results
- About saving search conditions
- Opening and running a search definition file
- Analyzing search results

About searching in e.reports

When viewing an e.report, you can search for specific data within the report. With the search feature you can do the following:

- Find data that match a specified condition
- Display some or all of the search results
- Save the search results to a file
- Save the search conditions and display options to a file

If you run a report executable for immediate viewing, and the resulting report document is long, pages appear as the Actuate iServer System generates them. Because searching requires complete data, you can search a report only when it finishes loading in the report window.

About searchable report fields

Unlike searching capabilities in word processors or text editors, where searches are on a single text value, the Actuate Basic search feature looks for user-specified values in one or more report fields.

For example, you can find all customer names that begin with M by searching on a customer name field. A more complex search using multiple fields would be, for example, to find all customers in a particular region with purchases over a certain amount. In this example, you would search for certain values in a customer name field, a region field, and a purchase amount field.

The report fields on which you can search depend on which fields the report developer has designated as searchable.

Identifying a searchable report field

To locate searchable fields, choose Search on the toolbar, then move your cursor over fields in the report. If the cursor over a field turns into a hand icon and the word Searchable! appears, you can search on that field, as shown in Figure 3-1.

Searching for report data

To search for specific report data, you select one or more report fields to search, and specify the value to search for each selected field. Searching on one field is straightforward. When searching on multiple fields, however, it helps to understand the effect of selecting multiple fields for a search. Sometimes, it also helps to understand the structure of the report.

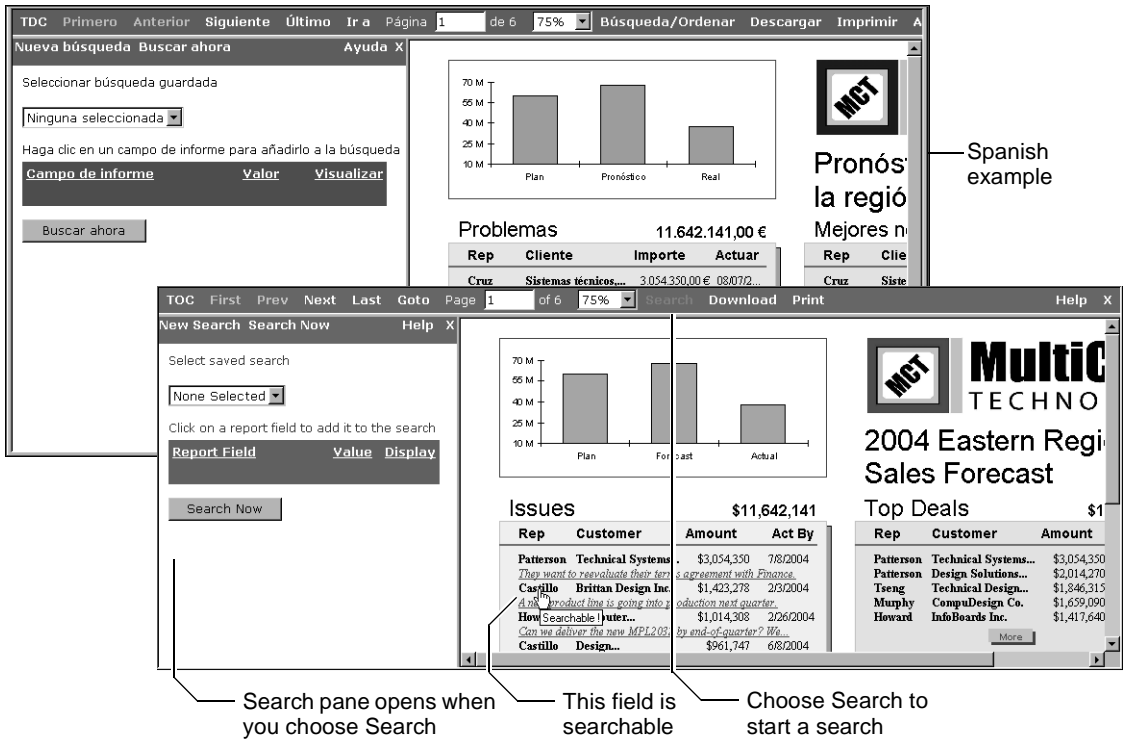


Figure 3-1 Searching in an e.report

Understanding how a multifield search works

In a multifield search, each field you add to the search condition adds an And logical operation. For example, if you select three fields and specify values for each, the search condition, in effect, is condition1 And condition2 And condition3. There is a match only if all conditions are true.

The fields you select for a search must relate to each other. As you add each field to the search list, the Actuate Basic search feature analyzes the relationships among the fields. If a field does not match a supported relationship, the Actuate Basic search feature displays an error message. The Actuate Basic search feature supports one-to-one and one-to-many relationships among fields.

For a successful search, you can add any fields that are contained within a selected parent field. For example, if a report lists all sales representatives by region, the parent field is the region, and the child field is the sales representative. In this scenario, you can create a search that finds the Western region (region field = Western) and sales representatives whose last names start with T (sales rep = T*). You can apply this parent-child principle when creating a search condition no matter how many hierarchical levels the report contains.

The best way to see the structure of a report is to view its table of contents, if one exists. To do so, choose TOC from the toolbar. If the report has a hierarchical structure, you can view the table of contents with sections collapsed or expanded, depending on the level of detail you want to see.

Creating search conditions

You create search conditions through the search pane. You can modify your search conditions or cancel a search any time before you execute the search process. For example, you can remove fields or change field values.

How to create search conditions

The following steps assume you already have a report open for viewing.

- 1 Choose Search from the toolbar. The search pane appears to the left of the report window.
- 2 Specify the field to search by choosing a searchable report field from the report in the right pane. The field name appears in the Report Field column in the search pane, as shown in Figure 3-2.

Czech example

1 Select a searchable report field

2 The selected field name appears in the search pane

Figure 3-2 Specifying the field to search

- 3 Specify the value to search. You can specify a literal value, or a search expression that contains operators and wildcard characters. If you leave the field value blank, the Actuate Basic search feature finds and returns all values for the field.
- 4 Check the Display option if you want to display the field results in the search results pane.
- 5 To search multiple fields, repeat steps 2 to 4. Figure 3-3 shows an example of the search pane with search conditions entered.

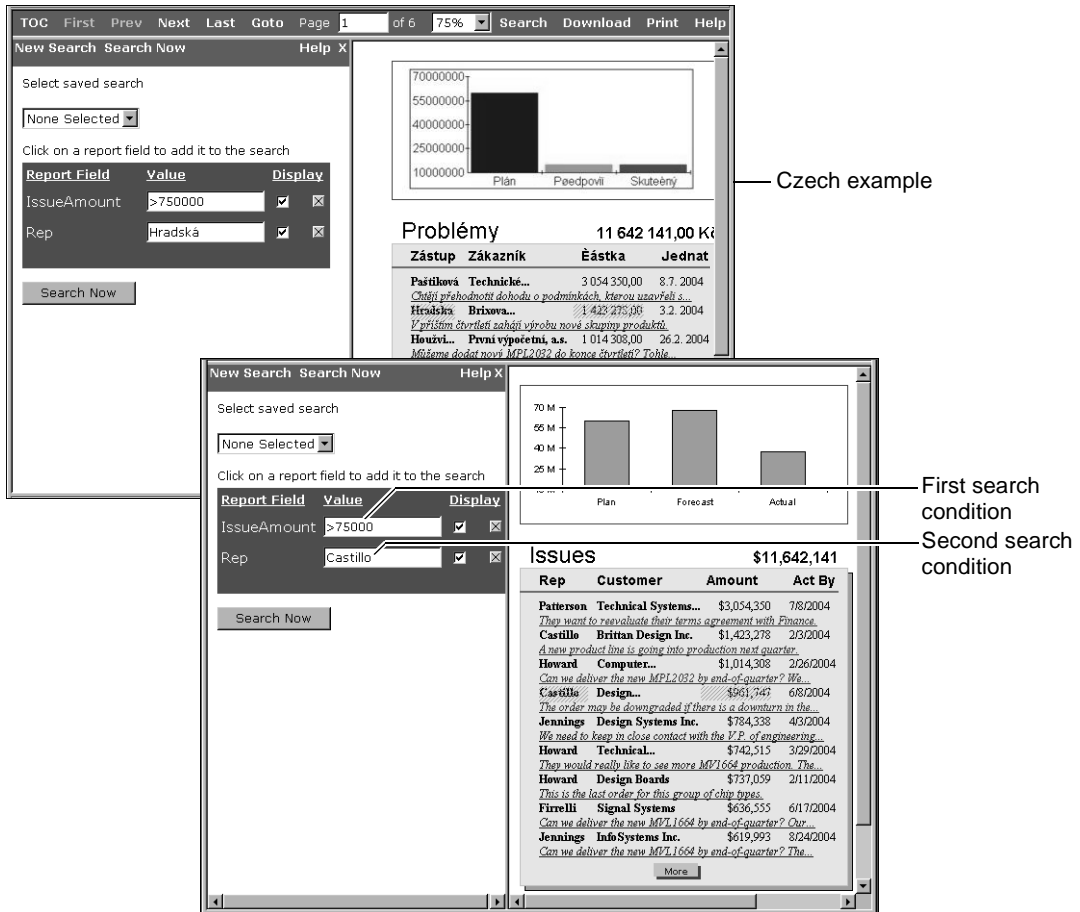


Figure 3-3 Displaying multiple search conditions

Choose Search Now to start the search process. The search results appear in the search pane, as shown in Figure 3-4. In each column, the data appears in

the order in which it appears in the report. The order in which the columns appear can be different from the order in which you choose the report fields.

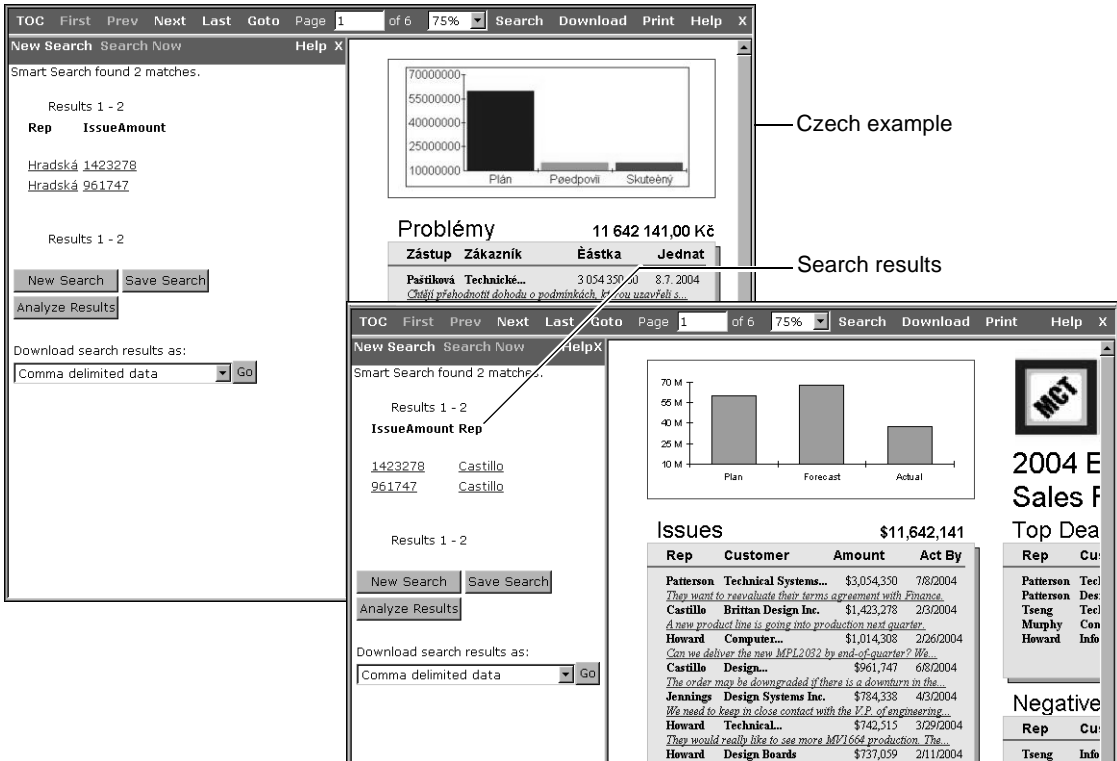


Figure 3-4 Displaying search results

How to modify search conditions

You can change your search conditions any time before you choose Search Now, which starts the search process.

- 1 To remove a field from the search, choose the X button next to the Display checkbox.
- 2 To remove all the fields from the search, choose New Search.
- 3 To stop searching altogether, choose the X option at the top of the search pane. This closes the search pane.

Using a search expression in the search conditions

When you specify the value to search for in a report field, you can specify a literal value, such as Leslie Thompson, to search for one match. Typically, though, you specify a search expression to find a set of matches. For example, you can specify the expression, "*Thompson" to find all names that end with Thompson.

e.Reports support several operators and wildcard characters that you can use in search expressions. You can create complex expressions that use a combination of operators and wildcard characters.

Using operators in a search expression

Table 3-1 lists and describes the operators you can use in search expressions specified in the Value column in the search window.

Table 3-1 Search expression operators

Operator	Description	Examples	Matches
=	Equals. By default, the = operator is implied.	=MR1500 MR 1500	MR1500 MR1500
>	Greater than or alphabetically after	>100 >Ace	101, 115, 200 Acer, Adobe
<	Less than or alphabetically before	<100 <Ace	10, 50, 99 Aamco, Abel
>=	Greater than or equal to	>=100 >=Ace	100, 101, 200 Ace, Adobe
<=	Less than or equal to	<=100 <=Ace	10, 50, 100 Ace, Aamco
-	Range. Hyphen separates upper and lower limits of the range. For strings, - can mean the following: <ul style="list-style-type: none">■ b- is equivalent to >=b■ -b is equivalent to <=b■ - is equivalent to * (match all values)	10 - 20 A - C -Ace Ace-	10, 15, 20 Ace, Bell, Core Ace, Aamco Ace, Adobe
,	Or. Comma separates two values.	1,2 Ace, Ford	1, 2 Ace, Ford
!	Not	!1000 !MA	998, 999, 1001 CA, NJ, OH

Using a wildcard character in a search expression

Use wildcard characters to do pattern matching on text objects. Table 3-2 lists and describes the wildcard characters you can use in search expressions specified in the Value column in the search window.

Table 3-2 Wildcard characters

Wildcard	Description	Example	Matches
?	Find any one character	M?1680	MR1680, MS1680
*	Find any number of characters	3M*	3M A1, 3M B2
#	Find any one ASCII numeric character (0 - 9)	MS##90	MS0490, MS3290

Using a pattern in a search expression

Use patterns in a search expression to qualify a search. Patterns let you search for characters in a range, or select only certain characters for searching. Use the brackets ([]) to place a pattern inside a search expression. Table 3-3 lists and describes examples of patterns you can use.

Table 3-3 Pattern examples

Pattern	Description	Example	Matches
[character list]	Match any one character inside the brackets	M[PRS]16	MP16, MR16, MS16
[a-z]	Match any lowercase character	m[a-f]1800	ma1800, mc1800
[0-9]	Match any ASCII numeric character	MX150[1-5]	MX1502, MX1503, MX1505
[a-z0-9]	Match any lowercase character and ASCII numeric character	m[a-c1-3]	ma1, ma3, mb2, mc3
[a-z-]	Match any character or hyphen	m[a-z-]	ma, mb, m-
[^]	Match one caret	*[^]1650	a^1650, b^1650

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

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 use one of the following methods:

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

Table 3-4 lists and describes examples of how to search for special characters.

Table 3-4 Searching for special characters

Special characters	Description	Examples	Matches
[?] or "\\?"	Match one question mark	M[?]1600 M"\"?"1600	M?1600
[#] or "\\#"	Match one pound sign	M[#]1600 M"\"#"1600	M#1600
[*] or "*"	Match one asterisk	M[*] 1600 M"\"*"1600	M*1600
[[] or "\\["	Match one open bracket	M[[[]A[]]6 M"\"["A"\"]"6	M[A]6
[]] or "\\]"	Match one close bracket	M[[[]A[]]6 M"\"["A"\"]"6	M[A]6
["\\["-"\\]"	Match any ASCII character between [and]	M["\\["-"\\]"	M[A] M[b]

Searching for a string that contains a special character

If a search text string contains one or more special characters, you must type a backslash (\) before each special character and enclose the string in quotation marks. Special characters include the following characters that are operators in a search expression:

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

For example, the string:

```
16M x 1 Dynamic Ram, 3.3 volts
```

must contain a backslash (\) before the comma and the string must be enclosed in quotation marks:

```
"16M x 1 Dynamic Ram\, 3.3 volts"
```

If you do not type a backslash (\) before the comma, the comma is interpreted as an OR, and matches the following two values:

```
'16M x 1 Dynamic Ram%'
```

```
'3.3 volts%'
```

Using a nonprinting ASCII character

Tabs, line feeds, and carriage returns are examples of nonprinting ASCII characters. With the backslash as an escape character, use the nonprinting ASCII characters shown in Table 3-5.

Table 3-5 Nonprinting ASCII characters

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

Using search results to navigate the report

The search results are linked to the report. You can choose an item in the search results pane to go to the report page that contains the corresponding data. Items are listed in the order in which they occur in the report. Figure 3-5 shows a search with five items found, and the page that appears when the first item is chosen.

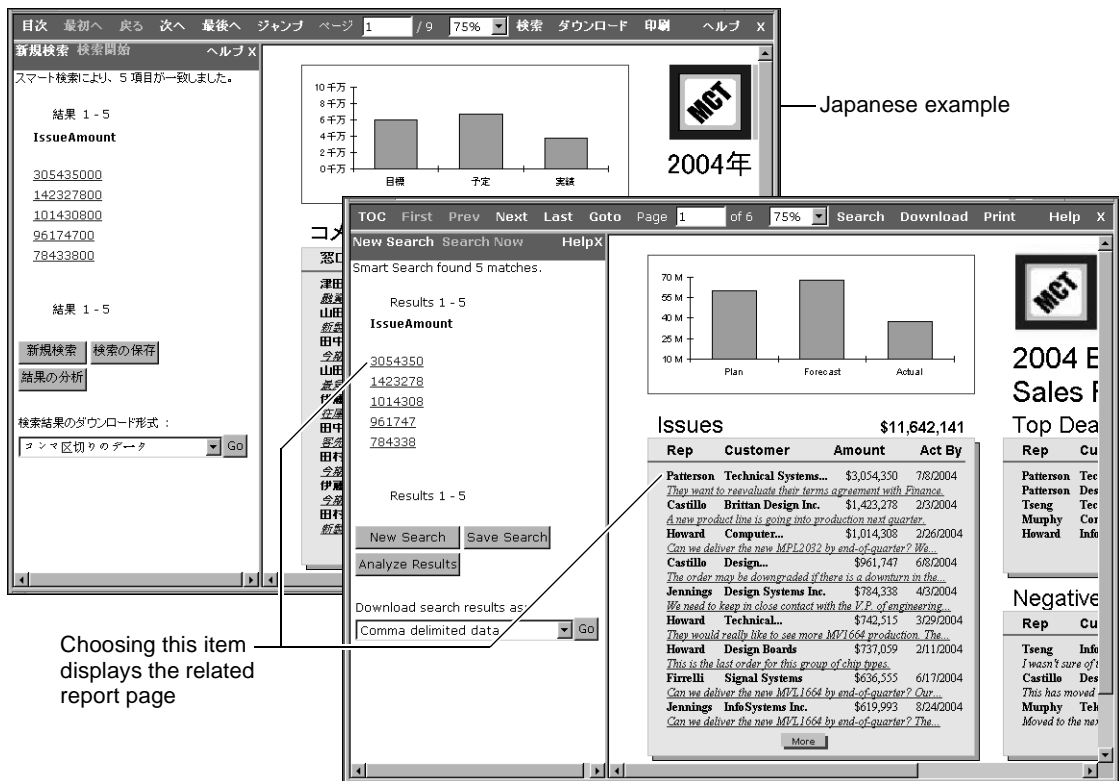


Figure 3-5 Using search results to navigate a report

Saving and downloading search results

You can export search results to a file for analysis in an external tool, such as Microsoft Excel. The Search panel supports exporting the values found by a search in the following formats:

- Comma-delimited data

If you save the search results as comma-delimited data, the Actuate iServer System downloads data to a CSV (comma separated values) file. If you have Microsoft Excel installed on your computer, the CSV file is saved as an Excel file. Otherwise, the CSV file is saved and opened with the application registered with the CSV file type, as defined in your Windows Folder Options→File Types settings.

- Unicode comma-delimited data
If you save the search results as Unicode comma-delimited data, the Actuate iServer System downloads data to a CSV file with Unicode UCS-2 encoding.
- Tab-delimited data
If you save the search results as tab-delimited data, the Actuate iServer System saves it as a TXT file usually associated with a text editor such as Notepad.
- Unicode tab-delimited data
If you save the search results as Unicode tab-delimited data, the Actuate iServer System saves it as a TXT file with Unicode UCS-2 encoding.
- Microsoft Excel
If the search results exceed 255 characters, only the first 255 characters are saved to the Excel file; the 256th character is an asterisk (*) to indicate that some of the contents are missing. Search results might contain a large amount of data if, for example, they contain the contents of a dynamic text control, which can display a large and variable amount of text.

How to save search results to a file

- 1 Select one of the options from the Download Search Results As list box, as shown in Figure 3-6.
- 2 Choose Go. The File Download dialog prompts for information about how to handle the file.
- 3 Choose Open to display the file. The file opens in the application associated with the selected file type.
- 4 Choose Save to save the file then complete the following tasks:
 - 1 In the Save As dialog that appears, specify the file name and location in which to save the file.
 - 2 In the Download Complete dialog, choose Open to display the file, or Close to close the dialog.

About saving search conditions

After you complete a search, you can save the search conditions and display options to a search definition (.ros) file. The names of search definition files that depend on the .rox file from which the .roi file is generated appear in a drop-down list in the search pane. A search definition file that appears in this list is not necessarily compatible with the .roi file, however. For example, an .rox file can create controls dynamically and thereby generate .roi files that differ in structure. You save the search definition (.ros) file in the Encyclopedia volume folder that contains the report document (.roi) file.

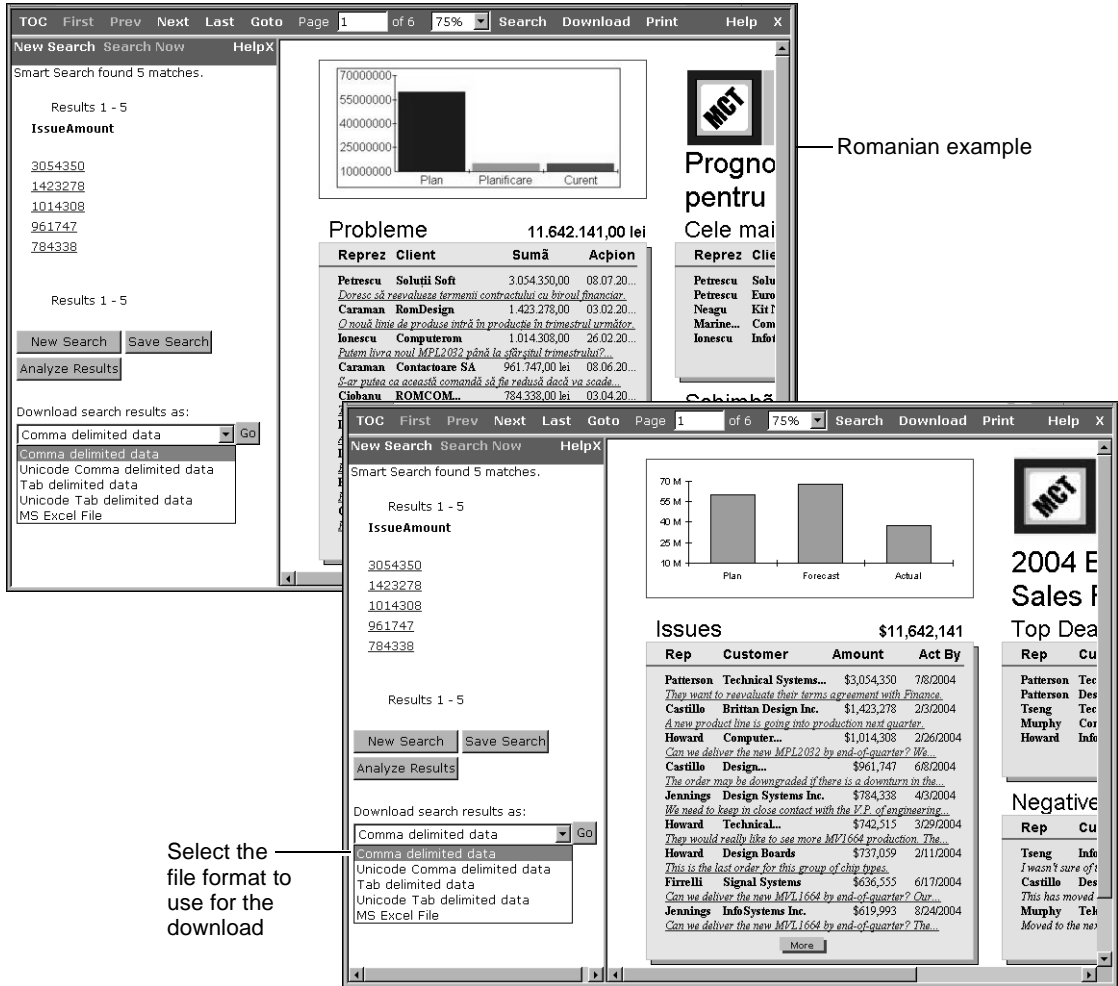


Figure 3-6 Saving search results

How to save a search definition file

Save Search

- 1 In the search results pane, choose Save Search. Search definition (.ros) file options appear.
- 2 Provide values for the options. Choose Save.

Opening and running a search definition file

You can access, open, and run a search definition (.ros) file from an Encyclopedia volume or from the search pane. If you run a .ros file from an Encyclopedia volume and all the .roi files that depend on the .rox file have the same name, the Actuate iServer System displays the latest version of the .roi file. If the .roi files have different names, however, the Actuate iServer System cannot determine which is the latest version.

How to open and run a search definition file

You can open and run a search definition (.ros) file in the following ways:



- In an Encyclopedia volume in Documents You Can View or Files and Folders, choose a search definition (.ros) file.
- In the search pane, select a saved search from the drop-down list, as shown in Figure 3-7.

The search conditions appear in the search pane.



Choose Search Now. The search results appear.



Figure 3-7 Selecting a saved search

Analyzing search results

The e.Analysis application is an add-on product that works with DHTML reports. You use e.Analysis to analyze the results of a search. If e.Analysis is available, the Analyze Results button appears on the search page, as shown in Figure 3-8.

For more information about e.Analysis and how to use it, see *Using e.Analysis*.

TOC First Prev Next Last Goto Page 1 of 6 75% Search Download Print Help X

New Search Search Now Help X

Smart Search found 5 matches.

Results 1 - 5

IssueAmount

3054350
1423278
1014308
961747
784338

Results 1 - 5

New Search Save Search

Analyze Results

Download search results as:
Comma delimited data Go

70000000
50000000
40000000
25000000
10000000

Plan Tahmin Gerçekleşen

Sorunlar 11.642.141,00 TL

Temsil	Müşteri	Tutar	Sorun
Polat	Teknik Sistemler	3.054.350,00	08.07.20...
<i>Sisteme koşullarını Finance bölümüne yeniden görüşmek...</i>			
Köksaldı	İrmitli Tasarım	1.423.278,00	03.02.20...
<i>Önümüzdeki çeyrekte yeni bir ürün hattı sıratına geçecek...</i>			
Özberk	Bilgi Mühendislik...	1.014.308,00	26.02.20...
<i>Yeni MPL2032'yi bu çeyreğin sonuna kadar teslim edebilir...</i>			
Köksaldı	Tasarım...	961.747,00 TL	08.06.20...
<i>Endüstriyel olumsuz bir gelişme olursa sipariş analabilir...</i>			
<i>Ç...</i>			

Temsil Müş Müp

Polat	Tekni
Polat	Tasan
Şerbeti	Tekni
Esenli	BIITel
Özberk	Sisten

2004 2. Doğu B
Önemli S

Türk example

TOC First Prev Next Last Goto Page 1 of 6 75% Search Download Print Help X

New Search Search Now Help X

Smart Search found 5 matches.

Results 1 - 5

IssueAmount

3054350
1423278
1014308
961747
784338

Results 1 - 5

New Search Save Search

Analyze Results

Download search results as:
Comma delimited data Go

70 M
65 M
40 M
25 M
10 M

Plan Forecast Actual

ISSUES \$11,642,141

Rep	Customer	Amount	Act By
Patterson	Technical Systems...	\$3,054,350	7/8/2004
<i>They want to reevaluate their terms agreement with Finance.</i>			
Castillo	Brittan Design Inc.	\$1,423,278	2/3/2004
<i>A new product line is going into production next quarter.</i>			
Howard	Computer...	\$1,014,308	2/26/2004
<i>Can we deliver the new MPL2032 by end-of-quarter? We...</i>			
Castillo	Design...	\$961,747	6/8/2004
<i>The order may be downgraded if there is a downturn in the...</i>			
Jennings	Design Systems Inc.	\$784,338	4/3/2004
<i>We need to keep in close contact with the VP of engineering...</i>			
Howard	Technical...	\$742,515	3/29/2004
<i>They would really like to see more MV1664 production. The...</i>			

This button appears if e.Analysis is available

Figure 3-8 Analyzing search results

Index

Symbols

- , (comma) character
 - finding 21
 - search expressions and 19
- , operator 19
- ! (exclamation point) character
 - as literal value 21
- ! operator 19
- ? wildcard character 20
- [] (square brackets) characters
 - search expressions and 20, 21
- * wildcard character 20
- \ (backslash) character
 - as escape character 22
 - finding 21, 22
 - search expressions and 21, 22
- # wildcard character 20
- < operator 19
- <> (angle brackets) characters
 - finding 21
- <= operator 19
- = (equal sign) character
 - searching for 21
- = operator 19
- > operator 19
- >= operator 19
- (hyphen) character
 - finding 21
 - search expressions and 19
- operator 19

A

- accessing
 - Encyclopedia volumes 2
 - folders 4
 - reports 2
- Actuate Viewer. *See* DHTML Viewer
- adding hyperlinks 6
- alphanumeric searches 19, 20
- Analyze Results button 26
- analyzing search results 26
- And operations 15

- angle brackets (<>) characters
 - finding 21
- applying data filters 4
- ASCII characters 21, 22

B

- backslash (\) character
 - as escape character 22
 - finding 21, 22
 - search expressions and 21, 22
- browsers. *See* web browsers
- buttons 6

C

- carriage return characters 22
- changing search conditions 18
- character strings. *See* strings
- characters
 - matching specified 21
 - searching for 20, 21
- charts
 - setting PDF formats for 10
- closing
 - search windows 18
 - table of contents 5
- collapsing table of contents items 6
- column headings 10
- column names. *See* column headings
- columns
 - adding hyperlinks to 6
 - Excel formats and 10
 - getting all values for 17
 - removing from search conditions 18
 - searching on 14, 15
- comma (,) character
 - finding 21
 - search expressions and 19
- comma-delimited data 23
- comma-separated values 23
- controls 11
- creating
 - PDF files 9

creating (*continued*)

- RTF files 11
- search expressions 19–22
- criteria. *See* search conditions
- crosstab reports 10
- CSV files 23

D

data

- converting to RTF 11
- searching for specific 14
- setting export options for 10

data filters 4

default settings 7

DHTML conversions 4

DHTML reports

- analyzing search results for 26
- compared to PDF 9
- exporting 10
- printing 11, 12

DHTML Viewer

- opening table of contents for 5
- paging controls for 5
- selecting hyperlinked fields in 6
- zooming in 7

dimmed controls 5

displaying

- large pages 10
- PDF reports 9
- reports 4
- search results 17
- specific report sections 7
- table of contents 5

document files. *See* report object instance files

documents

- See also* reports
- filtering 4
- opening RTF 11
- searching for 26

Documents page 4

downloading search results 23, 24

dynamic text controls 24

E

e.Analysis 26

e.Report Option 2

e.Reporting Server. *See* iServer

e.Spreadsheet reports

- exporting 10
- Encyclopedia volumes
- displaying reports in 4
- managing tasks for 2

equal sign (=) character

- searching for 21

equals operator 19

error messages 15

Excel Display setting 10

Excel spreadsheets

- exporting to 10, 23, 24
- saving search results as 24

exclamation point (!) character

- as literal value 21

expanding table of contents items 5

Export Data option 10

Export Report page 9, 10, 11

exporting data

- to Excel formats 23, 24

exporting reports 10–11

expressions

- adding nonprinting ASCII codes to 22
- creating search 19–22

extranets 2

F

fields

- adding hyperlinks to 6
- Excel formats and 10
- getting all values for 17
- removing from search conditions 18
- searching on 14, 15

file links 4

files

- exporting to RTF 11
- filtering 4
- opening PDF 9
- reducing size of PDF 9
- selecting 4

Files and Folders page 4

filters 4

finding

- hyperlinked fields 6
- searchable fields 14

- folder links 4
- folders 4
- font substitutions 9
- fonts 9
- formats
 - exporting to Excel and 10
 - search results and 23

G

- graphics 10
- greater than operator 19
- greater than or equal to operator 19

H

- hand cursor 6
- hand icon 14
- hyperlinks 6
- hyphen (-) character
 - finding 21
 - search expressions and 19

I

- images 10
- Information Console
 - filtering file lists for 4
 - overview 2
- installation 2, 9
- Internet 2
- intranets 2
- iServer 2

L

- large PDF files 9
- less than operator 19
- less than or equal to operator 19
- line feed characters 22
- links (table of contents) 6
- list reports 10
- literal characters 17
 - search expressions and 19
- locating
 - hyperlinked fields 6
 - searchable fields 14
- lowercase characters 20

M

- magnification 7
- Management Console
 - filtering file lists for 4
 - overview 2
- matching specific characters 19, 20, 21
- memory 9
- modifying. *See* changing
- moving through reports 5–6, 22
- multifield searches 14, 15, 17, 18
- multiple save operations 9

N

- native formats 4
- navigating through reports 5–6, 22
- navigational tools 5, 6
- networked environments 2
- nonprinting ASCII characters 22
- not operand 19
- numeric searches 20

O

- opening
 - PDF files 9
 - reports 4
 - RTF documents 11
 - search definition files 26
 - search window 16
- operators 17, 21
- or operand 19

P

- page range options 10, 11
- paging controls 5
- pattern matching 20
- PDF files
 - opening 9
 - reducing size of 9
 - saving reports as 9, 10
 - setting options for 10
- PDF formats 9, 10
- PDF Quality setting 10
- personal views 4

- PowerPoint
 - exporting 11
 - exporting to 11
- PowerPoint reports
 - exporting 11
- previewing reports 12
- Print icon 12
- printing
 - from Adobe Acrobat Reader 9
 - large pages 10
 - reports 11

R

- range operator 19
- reducing size of PDF files 9
- relationships 15
- Report Encyclopedia. *See* Encyclopedia volumes
- Report Field column 16
- report files
 - filtering 4
 - opening with Acrobat Reader 9
 - selecting 4
- report servers. *See* iServer; servers
- reports
 - adding hyperlinks 6
 - analyzing search results for 26
 - displaying 4
 - exporting 10–11
 - filtering viewable 4
 - moving through 5–6, 22
 - opening 4
 - overview 2
 - previewing 12
 - printing 11
 - saving 9, 10
 - viewing as PDF 9
 - viewing specific sections 7
- resizing table of contents 5
- .roi files. *See* report object instance files
- row headings 10
- .rox files. *See* report object executable files
- RTF (Fully Editable) setting 11
- RTF files 11
- RTF setting 11

S

- Save Report command 9
- saving
 - reports 9, 10
 - search conditions 24
 - search results 23–24
- scaling range 7
- search conditions
 - See also* search expressions
 - adding multiple fields to 15, 17
 - changing 18
 - creating 16–18
 - entering 19
 - specifying 17
- search definition files 26
- search definitions 24
- Search dialog
 - entering wildcard characters in 20
- search expressions
 - adding nonprinting ASCII codes to 22
 - adding pattern operators to 20
 - adding wildcard characters to 20
 - creating 19–22
 - entering in search window 17
 - locating special characters with 20, 21
 - wildcards in 17
- Search icon 16
- search results
 - analyzing 26
 - as navigational tool 22
 - displaying 17
 - saving 23–24
- search window
 - closing 18
 - displaying search results in 17
 - entering search expressions in 17
 - opening 16
 - running search definition files from 26
 - saving search definitions 25
 - selecting items in 22
- searchable report fields 14, 16
- searching
 - for nonprinting characters 22
 - for special characters 20, 21
 - for specific data 14
 - on literal values 19

- on multiple fields 14, 15, 17
- reports 14–26
- with conditions 16
- selection criteria. *See* search conditions
- servers 2
- small hand cursor 6
- software requirements 2
- special characters
 - searching for 20, 21
- Split Large Pages drop-down list 10
- splitter bar 5
- spreadsheets 10
 - See also* e.Spreadsheet reports; Excel spreadsheets
- square brackets ([]) characters
 - search expressions and 20, 21
- strings
 - literal characters in 17
 - locating special characters in 21
 - searching 19

T

- tab characters 22
- tab-delimited data 24
- table of contents 5, 16
- tabular reports 10
- text
 - searching for 19, 20, 21
- text boxes 11
- text fields 6
- text files 24
- text frames 11
- text strings. *See* strings
- time out messages 9

U

- Unicode comma-delimited data 24
- Unicode tab-delimited data 24
- URLs 2

V

- values
 - searching on literal 19
- View Report command 9
- Viewer
 - opening table of contents for 5
 - paging controls for 5
 - selecting hyperlinked fields in 6
 - zooming in 7
- viewing
 - large pages 10
 - PDF reports 9
 - reports 4
 - search results 17
 - specific report sections 7
 - table of contents 5
- views 4
- volumes. *See* Encyclopedia volumes

W

- web browsers
 - accessing Encyclopedia from 2
 - opening reports for 4
 - printing from 11
 - timing out 9
- wildcard characters 20
- wildcards 17
- wordwrapping 9

Z

- zooming 7

