

---

*IntelliVIEW* for Lotus Notes and Domino  
*Training Guide*

Cybernet Software Systems

Copyright Information © 2004

All rights reserved. No part of the material protected by this copyright notice may be reproduced or utilized in any form or by any means without written permission from copyright owner.

Cybernet Software Systems Inc.

3031 Tisch Way, Suite 1002

San Jose

CA 95128

[www.intelliprintplus.com](http://www.intelliprintplus.com)

This *IntelliVIEW for Notes* Training Guide is designed for a one-day training program on how to use *IntelliVIEW* to analyze Notes data and create ad-hoc reports and charts. It has content for four sessions of one and a half hours each, takes the user through a systematic process to start using the product, and includes the advanced options as well. There is an additional session for the Domino version of the product, if required.

In Session I

*Introduction to IntelliVIEW*, you will be given basic information on the product and its features.

*Installing/Uninstalling IntelliVIEW*, we will walk you through the installation and un-installation of the product.

*Working with IntelliVIEW*, you will be trained on how to start working with our product. You will be able to transpose data into *IntelliVIEW*, learn basic operations in *IntelliVIEW* as well as create and save a format on completion of this chapter.

In Session II

*Analysis in the IntelliVIEW Dynamic Grid*, here we will discuss data analysis, grouping, sorting, filtering data, adding group summary, finding min, max and average, finding unique count, querying, sorting by summary values, show/hide group summary, advanced filters, multi value and adding a new computed column.

In Session III

*Charting, Formatting, Printing*: here you will be introduced to additional qualities of *IntelliVIEW* like creating & formatting charts, Active Charts, formatting rows, columns, header, footer, conditional formatting, exporting options, exporting and saving and emailing with attachments.

In Session IV

*IntelliVIEW for Domino*, this chapter details the use of *IntelliVIEW for Domino*. The chapter covers the phases of “installation” and steps involved in “creating, saving, formatting, analyzing, exporting and printing in a Browser application”. This session is targeted for Administrators and Users who own *IntelliVIEW for Domino* only.

In Session V

*Questions and Answers session*, during the course of this session, feel free to ask questions and make use of the pages provided here to jot down those points. Ask specific questions about working with your own applications.

# Table of Contents

<b>What is IntelliVIEW?</b> .....	<b>2</b>
<b>IntelliVIEW Versions</b> .....	<b>2</b>
<b>About IntelliVIEW Features</b> .....	<b>3</b>
IntelliVIEW for Notes - Features .....	3
IntelliVIEW for Domino- Features .....	4
<b>How to Install IntelliVIEW</b> .....	<b>5</b>
IntelliVIEW Installation for Notes .....	5
Confirm Installation .....	6
Un-install IntelliVIEW .....	6
Automatic Un-installation .....	6
<b>Launching IntelliVIEW</b> .....	<b>7</b>
<b>Starting IntelliVIEW</b> .....	<b>7</b>
<b>Working on IntelliVIEW</b> .....	<b>9</b>
The IntelliVIEW User Interface .....	9
Menus .....	9
Toolbars .....	10
Views, Columns and Fields .....	10
IntelliVIEW Grid .....	10
Working on IntelliVIEW Grid .....	12
Views and Formats .....	12
Available Columns .....	12
Opening a Format .....	12
Operations from the Designer .....	14
<b>Data Analysis in the IntelliVIEW Grid</b> .....	<b>16</b>
Grouping Columns .....	16
Ungrouping Columns .....	18
Ungrouping Columns .....	19
Sorting Columns .....	19
Collapse and Expand Columns .....	20
Filtering data .....	20
Adding Group Summary .....	22
Finding Min, Max and Average and Unique Count .....	23
Sorting by summary values .....	23
Show/Hide Group Summary .....	24
Adding a new computed column .....	25
Multi Value fields .....	27
Handling Multi Value Fields .....	27
<b>Creating a Chart</b> .....	<b>31</b>
Formatting a Chart .....	35
Active Chart .....	42

Formatting Columns, Rows and Cells.....	45
Formatting Columns.....	45
Formatting Rows.....	48
Formatting Cells.....	49
Copy Cell.....	50
Adjust width/height cell.....	50
Formatting Headers and Footers.....	51
Conditional Formatting.....	57
Print Preview and Printing.....	58
Print Setup.....	60
Printing.....	61
Saving a Report.....	63
Exporting a Report.....	64
Exporting Summary data.....	65
Viewing data in Excel, PDF or Text.....	66
E-Mailing a Report.....	67
<b>IntelliVIEW for Domino.....</b>	<b>70</b>
Components and Installation.....	70
Components.....	70
Installing IntelliVIEW for Domino.....	71
New Installation.....	71
Configuring the Domino Server.....	72
Creating IntelliVIEW Report Formats in the Domino Server.....	73
Creating a Format.....	73
Creating Action Buttons to invoke IntelliVIEW from the Browser.....	73
Starting IntelliVIEW from the Browser.....	80
Saving a format on the Browser.....	81
IntelliVIEW ActiveX Plug-in.....	82
Data Analysis using IntelliVIEW for Domino.....	82
Formatting Reports on the Browser.....	83
Exporting Reports from the Browser.....	83
Previewing and Printing over the Browser.....	84
Print Setup.....	84
Previewing and Printing.....	85
What you can't do through the Browser?.....	86
<b>Notes.....</b>	<b>87</b>

# Introduction, Installing/Un-installing, and Working with IntelliVIEW



---

In this session, you will learn the following:

Lesson A	Introduction
Lesson B	Installing/Uninstalling <i>IntelliVIEW</i>
Lesson C	Working with <i>IntelliVIEW</i>



## Introduction

---

### What is IntelliVIEW?

*IntelliVIEW* is an add-on tool for Lotus Notes and Domino applications for dynamic querying, data mining and analytics. Data from Notes view is transposed into a spreadsheet like view. The spreadsheet is interactive allowing grouping, querying, sorting, filtering, counting etc. Dynamic addition and deletion of view columns, fields and computed columns with formulas are possible using *IntelliVIEW*.

Using *IntelliVIEW*, data can be analyzed, reports can be printed, exported to Text, PDF and MS Excel, shown in the form of charts, mailed to other users and so on. It enables easy data analysis for the business user.

### IntelliVIEW Versions

*IntelliVIEW* has two different versions, one for the Notes client, viz. *IntelliVIEW for Notes* and another for the Web, i.e., *IntelliVIEW for Domino* that works with web enabled applications.



## About IntelliVIEW Features

The features of both versions are listed below.

### IntelliVIEW for Notes - Features

- *IntelliVIEW for Notes* presents a unique working environment that integrates the designing and viewing aspects together.
- The new integrated User Interface enables viewing of columns appearing in the Viewer as the fields are selected, this makes design easy. Refer to topic, The *IntelliVIEW* User Interface.
- Reports can be created with data from any Server/Database. *IntelliVIEW* allows the selection of fields in the current View as well as other Views in the database. Hence, consolidated reports from assorted views in a database can be created.
- Once data is in the Grid, it can be manipulated at the user's will to provide in-depth analysis of data in Notes applications.
- *IntelliVIEW* provides grouping, querying, sorting, filtering, computing features to aid the user drill down and get reports.
- Grouping of data under a column can be done by just dragging the particular column header and dropping it on top of the Grid.
- Sorting of data is just by a click on the column header.
- It is also possible to add a new computed column besides fields from the database. *For details, refer to topics Grouping Columns, Sorting Columns and Adding a new computed column.*
- *IntelliVIEW* allows filtering of data based on single column values or even complex business logic spanning multiple columns. *For details, refer to topic Filtering data.*
- *IntelliVIEW* allows quick and easy creation of elegant columnar reports range of formatting, grouping and sorting options. You can select the required columns, add new columns using any field in the database, delete existing columns, rearrange and resize columns.

- Column, bar, Line, pie, Point or Area charts can be created from reports by simply clicking on the *IntelliVIEW* chart icon. Charts can be created for All Values or Summary Values by specific selection of X-Axis and Y-Axis.
- *IntelliVIEW* allows exporting data directly to PDF, Excel and Text formats, so the reports and charts can be shared with others.
- The option to E-Mail directly from *IntelliVIEW* launches the default E-Mail client attaches the report and mails it out.

*For details, refer to topic Exporting and E-Mailing Reports.*

- The reports generated can be previewed before printing. You can also select different paper sizes. Several views of the report such as actual size, Full Page and Fit to width etc, gives a WYSIWYG picture of the report that is to be printed.

*For details, refer to topic “Previewing and Printing”.*

## IntelliVIEW for Domino- Features

- This version is used for web-enabled applications.
- It is installed on a Domino server and hence anybody with access to that database can use it directly through action buttons in Domino application.
- Data is analyzed, manipulated in Browser to create and generate Reports
- It has all the features of *IntelliVIEW for Notes*, except the following:
  - Report formats are designed on the Notes Client and then saved on Domino Server.
  - On the Browser Columns can be deleted but cannot be added
  - Basic Filtering can be done in the Browser but Advanced filtering option is not available on the web
  - To e-mail reports created on Browser, first save it and then e-mail it.
  - To view *IntelliVIEW* Grid in Browser install the Active X plug-in on all Desktops.

## Installing/Un-installing IntelliVIEW



### How to Install IntelliVIEW

Installing *IntelliVIEW for Notes* is very easy and takes only a few minutes. Installation can be anew or upgrading from an older version. After installing, it can be used immediately to create report formats and data analysis.

### IntelliVIEW Installation for Notes

Perform the following steps if you are installing *IntelliVIEW* for the first time on your system or upgrading to a new version.

1. Execute the IVSetup.exe file. IntelliVIEW for Lotus Notes Setup screen is displayed. If Lotus Notes is running you will be prompted to close it. Close the Lotus Notes client to continue with the installation.

*Note: If you already have an older version of IntelliVIEW installed in the directory specified, the installer would give you two options - Modify and Remove. Select the option Modify to repair the previous installation or install the software in a new location. Select the option Remove to uninstall IntelliVIEW from your system.*

*Note: Formats created using older version of IntelliVIEW can be opened and saved in new version of IntelliVIEW*

IntelliVIEW for Lotus Notes. Read the agreement completely and accept the license agreement, if you wish to continue with the installation. Click on Next to continue.

3. Setup next prompts for the path for installation. By default, IntelliVIEW is installed in the notes directory. You can choose to accept the default path or choose a location of your choice to store the installation files and sample databases. Click Next to proceed with the installation.
4. Now you can select the modules to be installed. Select the desired modules and click Next to install the software.
5. Once the installation is over, the Installation Complete screen will be displayed. Select the option Yes, I want to launch readme file to view the contents of the readme file. Click on Finish to complete the installation. IntelliVIEW for Domino is installed in your system.

## Confirm Installation

To confirm the installation, start the Lotus Notes Client and invoke the 'Actions' menu. You will find the following three new menu items:

- IntelliVIEW – Open current View
- IntelliVIEW – Formats
- IntelliVIEW - selected entries.

You can also see a Program group - IntelliVIEW for Lotus notes, created in the Program menu and a shortcut for the application in you machine desktop.

## Un-install IntelliVIEW

### Automatic Un-installation

The following steps illustrate the process of automatic un-installation of *IntelliVIEW*:

1. Close IntelliVIEW
2. Click Start->Programs->IntelliVIEW for Lotus Notes ->Uninstall
3. Uninstall screen will appear, confirm the path and click uninstall button.



---

## Launching IntelliVIEW

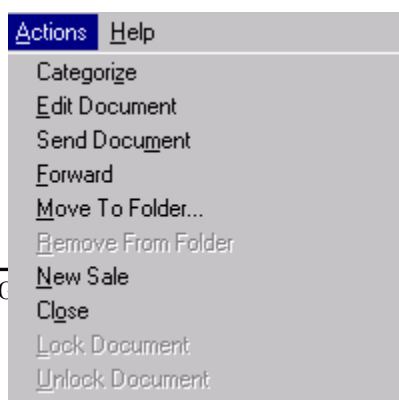
*IntelliVIEW* can be launched from the Actions menu in one of two ways:

- “IntelliVIEW – Open selected Entries” option allows creating a report format from the selected documents.
- “IntelliVIEW - Open Current View” option loads the records from the current Notes View onto the *IntelliVIEW* Grid.
- “IntelliVIEW - Formats” option allows creating a report format before processing the data. As well, saved formats can be opened, exported or printed directly from the Designer.

## Starting IntelliVIEW

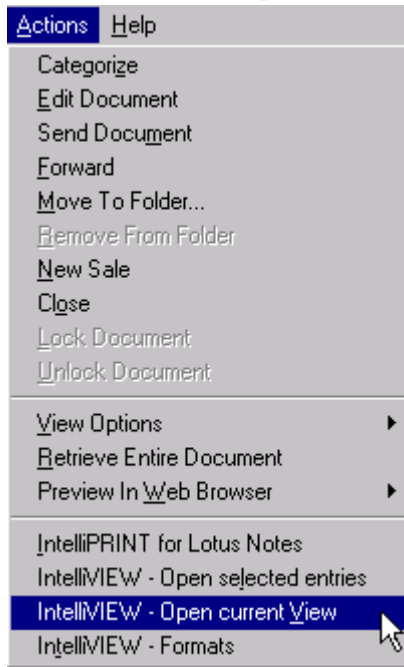
Starting *IntelliVIEW* can be done by two ways.

- 1) To open the selected documents in the *IntelliVIEW* Grid, select the documents from the Notes database and click Actions from the menu and then click on **IntelliVIEW – Open selected entries** as shown below.



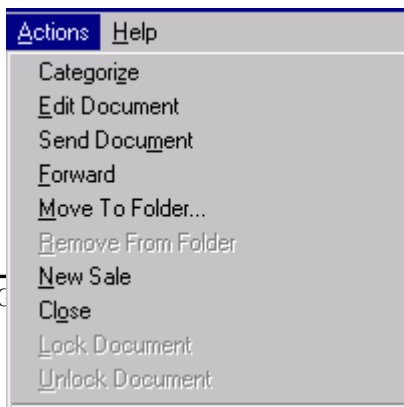
(Figure 1.4)

- 2) To open the current view in *IntelliVIEW Grid* click Actions from the menu and then click on **IntelliVIEW – Open current View** as shown below



(Figure 1.5)

- 3) To open a previously saved *IntelliVIEW* format or a View from any databases/servers, click Actions from the menu and then click on **IntelliVIEW –Formats** as shown below



(Figure 1.6)

## Working on IntelliVIEW

### The IntelliVIEW User Interface

The *IntelliVIEW* UI is composed of the following components.

- ❖ Menus
- ❖ Toolbars
- ❖ Format explorer and Available columns
- ❖ IntelliVIEW Grid

#### Menus

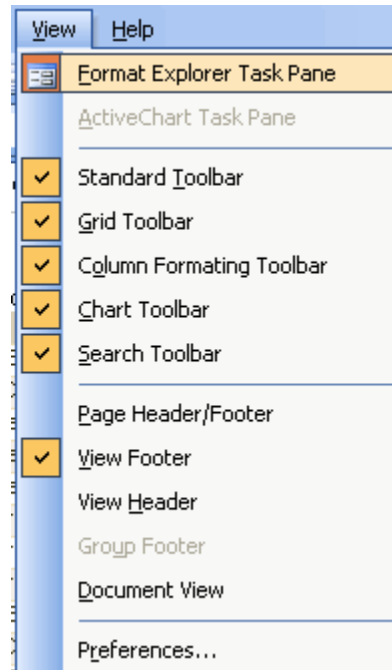
The *IntelliVIEW* application has the following menus.

- ❖ File Menu
- ❖ Grid Menu
- ❖ Chart Menu
- ❖ View Menu
- ❖ Help menu

## Toolbars

The *IntelliVIEW* window has a set of toolbars namely Standard, Grid, Column Formatting, Chart and Search.

These toolbars can be shown / hidden by selecting or deselecting the Standard Toolbar, Grid Toolbar and Search bar from the View -> Toolbars menu. Toolbars can be placed anywhere and resized.



## Views, Columns and Fields

The *IntelliVIEW* window displays Views, Formats and Fields on its right frame namely. The Views and Formats section displays all the views and formats in the database for selection. Similarly, Available Columns sections display all the columns and fields in the form and it allows selection or removal based on user requirement.

This pane can be shown / hidden using the toggle feature View -> Format Explorer Task Pane.

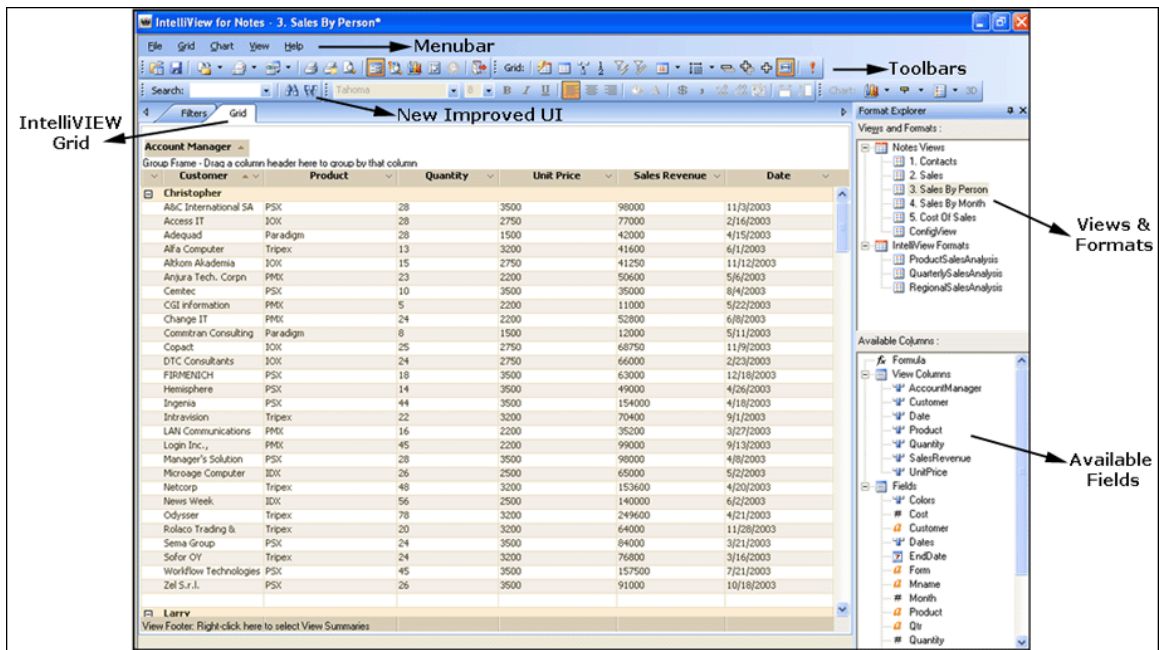
## IntelliVIEW Grid




The *IntelliVIEW* Grid is a dynamic spreadsheet facilitating ad-hoc analysis and report generation.

It has three Tabs - IVIEW, Filters and Chart. Each tab has the following options:

- “Grid” allows previewing Notes data in the Grid and performing analysis, formatting, adding fields, deleting fields and other options.
- “Filters” defines rules for selecting or removing data from the Grid
- “Chart” is displayed after creating charts



- Refresh Icon - When you add a new column to the *IntelliVIEW* Grid, click this icon  to fetch data and refresh the view.
- Fit to Page – If the columns are not properly positioned then click on the icon to fit the report to size of page.

## Working on IntelliVIEW Grid

Spreadsheets created using *IntelliVIEW* can be formatted as per user preference. To start with, let us consider the sample database in the Notes data directory. Click on the sales view to view the sales details.

Note: Through out this training guide Sample Database with sales view is considered as the example for all options.

### Views and Formats

Views and Formats will display the available views and format in a database.

To change the views click on the Note Views under View and Formats area select a view and then double click to view corresponding view on the grid.

To view formats, click on 'IntelliVIEW Formats' under 'Views and Formats' area select a format from the list and then double click to view corresponding format on the grid.

### Available Columns

Available columns will display all the columns that are in the view and fields from that form. This is divided into Formula, View Columns and Fields.

**Formula:** The user can add a new column by applying a Notes formula. Double click on the

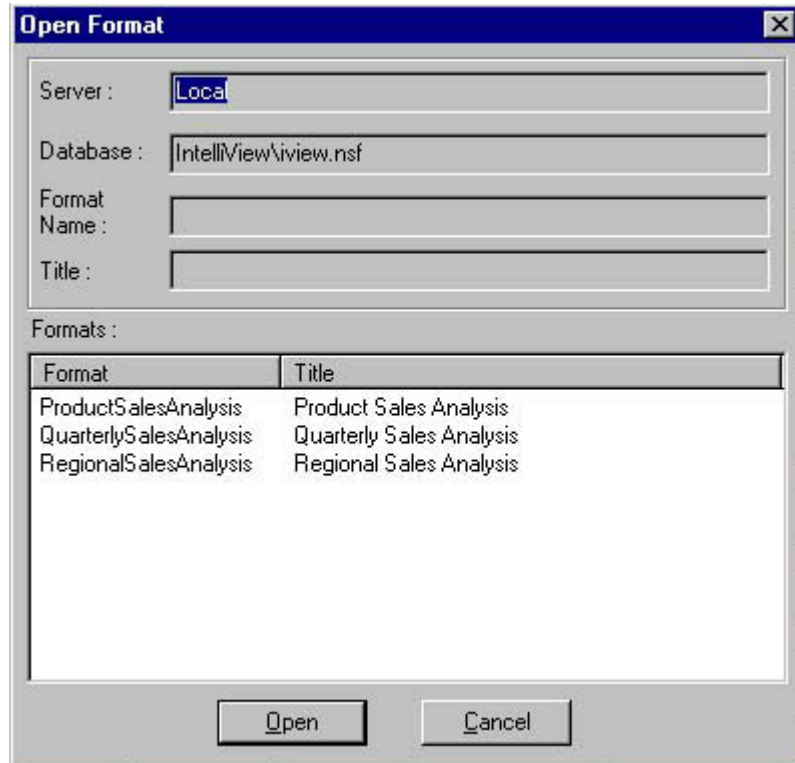
**View Columns:** Columns can be deleted in a spreadsheet by Clicking Check boxes on “Columns” field. While adding a column each time, refresh it. Click Refresh Grid icon to populate the rows with data from the selected Notes View.

### Opening a Format

A format is a database file that is used for creating reports. Format can be opened from a Designer or from the *IntelliVIEW* Client. To open a saved format from *IntelliVIEW* client please follow below steps:

### ***IntelliVIEW***

1. Select Format -> Open Format. The Open Format dialog is displayed.



(Figure 1.12)

2. All formats available in the current database are displayed.
3. Choose a required format and click Open to open the format in the *IntelliVIEW* Grid with empty rows.
4. Click Refresh icon to populate the rows with data.

### ***IntelliVIEW - Designer***

1. In the Lotus Notes client Select Actions -> IntelliVIEW – Formats from the menu
2. Choose a format that are available in the current database
3. Click “IView” to open the format in the *IntelliVIEW* Grid.
4. Click Refresh Grid icon to populate the rows with data.

### ***IntelliVIEW – Open selected entries***

1. Select the documents from the current database.
2. In the Lotus Notes client Select Actions -> IntelliVIEW – Open selected entries from the menu to open the selected documents in IntelliVIEW.

## Operations from the Designer

From the Designer, a user can choose to do a variety of quick operations:

- Select a database and open a View in the Grid
- Select and open a saved *IntelliVIEW* format
- Without opening the Notes View in the *IntelliVIEW* Grid:
  - Select and export a View to Excel, PDF, or Text
  - Select and print a View
  - Select a View and attach it as an Excel or PDF to email.

## Analysis in the IntelliVIEW Dynamic Grid



---

*IntelliVIEW* allows dynamic analysis, querying, drill down and creation of ad-hoc reports. On completing this session, you will be able to do:

- ❖ Data analysis in the *IntelliVIEW* Grid
- ❖ Grouping
- ❖ Sorting
- ❖ Filtering Data
- ❖ Adding Group Summary
- ❖ Finding Min, Max and Average
- ❖ Finding Unique Count
- ❖ Querying
- ❖ Sorting by Summary Values
- ❖ Show/Hide Group Summary
- ❖ Advance Filters
- ❖ Adding a new computed column

## Data Analysis in the IntelliVIEW Grid

1. Once data is in *IntelliVIEW* Grid, data can be manipulated at user's will to provide in-depth analysis and reports in Notes applications.
2. *IntelliVIEW* provides grouping, querying, sorting, filtering, computing features to aid the user drill down and get reports.
3. *IntelliVIEW* allows filtering of database on single column values or even complex business logic spanning multiple columns.

### Grouping Columns

Grouping data under certain key values can create both simple and complex reports. *IntelliVIEW* makes grouping data an effortless activity, through its drag and drop feature. For example, if a Sales spreadsheet has Customer, Product, Quantity, Unit Price, Sales Revenue and Account Manager as fields.

Drag a column header under which data has to be grouped, and drop it over the group frame. This is the easiest way of grouping data.

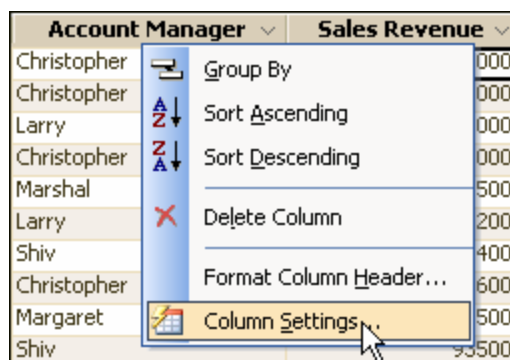
As shown in the below figure, data has been grouped with “Account Manager”.

Account Manager ▲						
Group Frame - Drag a column header here to group by that column						
▼	Customer ▲ ▼	Product ▼	Quantity ▼	Unit Price ▼	Sales Revenue ▼	Region ▼
⊕	Christopher					
⊕	Larry					
⊕	Margaret					
⊕	Marshal					
⊕	Shiv					
⊕	Thomas					

Dragging and dropping column headers subsequently can do multi-level grouping. Here, for example, drag and drop the column header “*Product*” under “*Account Manager*”.

Account Manager	Product	Customer	Quantity	Unit Price	Sales Revenue	Region
Christopher	PSX					
Christopher	Tripex					
Christopher	IDX					
Christopher	PMX					
Christopher	IOX					
Christopher	Paradigm					
Larry	Paradigm					
Larry	PMX					
Larry	PSX					
Larry	Tripex					
Larry	IOX					
Larry	IDX					

The other way to Group is by right clicking on a Column and selecting “Column Settings” or “Group by” from the options as shown below.

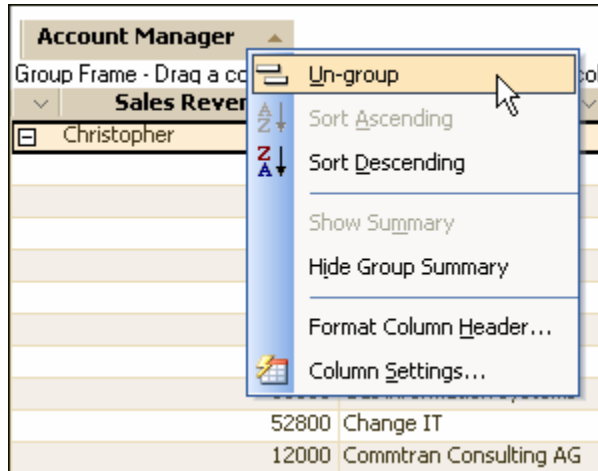






## Ungrouping Columns

Simply dragging the group header from the group frame back to the Grid can do ungrouping or by right clicking the group header and selecting Ungroup from the options.



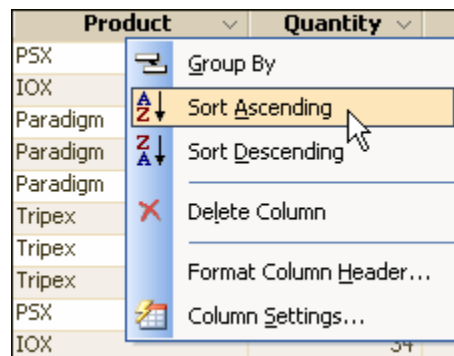
In case of multilevel grouping, only the grouping corresponding to the particular group header is undone.

## Sorting Columns

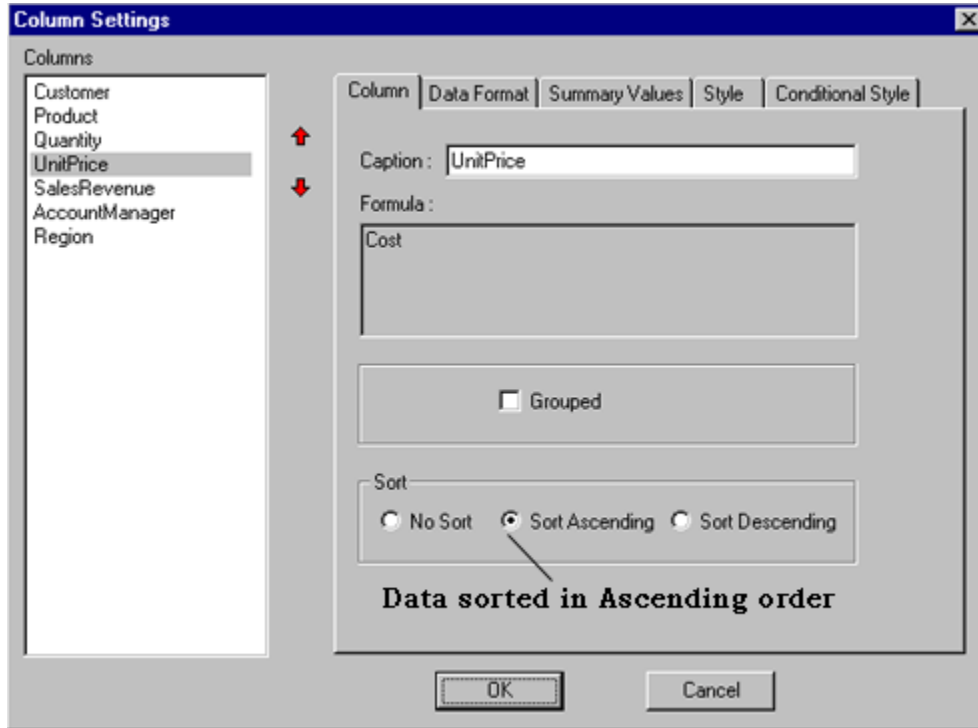
There are a number of convenient methods to sort a column in *IntelliVIEW*. Click on a particular column header to sort the column ascending or descending. The triangle pointer that appears indicates the order in which the column is sorted.

Right click on a column and select “Column Settings” to display the column settings dialog.



Note: The other way is to select “Sort Ascending” or “Sort Descending” to sort the data.




In the Column tab, click Sort Ascending or Sort Descending to sort the data.



## Collapse and Expand Columns


Collapse all groups by clicking the Collapse icons . “Expand” columns by clicking on  icon.

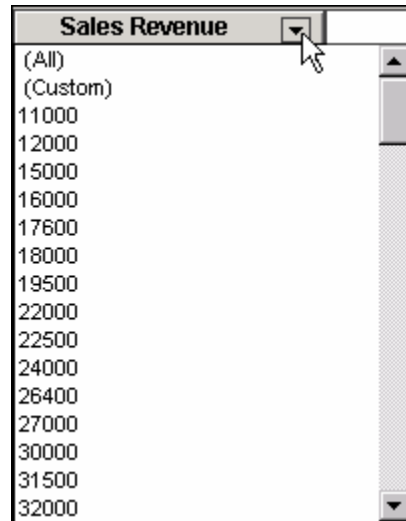
Note: You can also Expand Up to an intermediate level of grouping by clicking this  icon.

## Filtering data

*IntelliVIEW* provides two different features for filtering data.

### Basic Filtering

*IntelliVIEW* offers filtering options similar to Excel. Click the  button on a column header. A drop-down box lists all values appearing in the column.

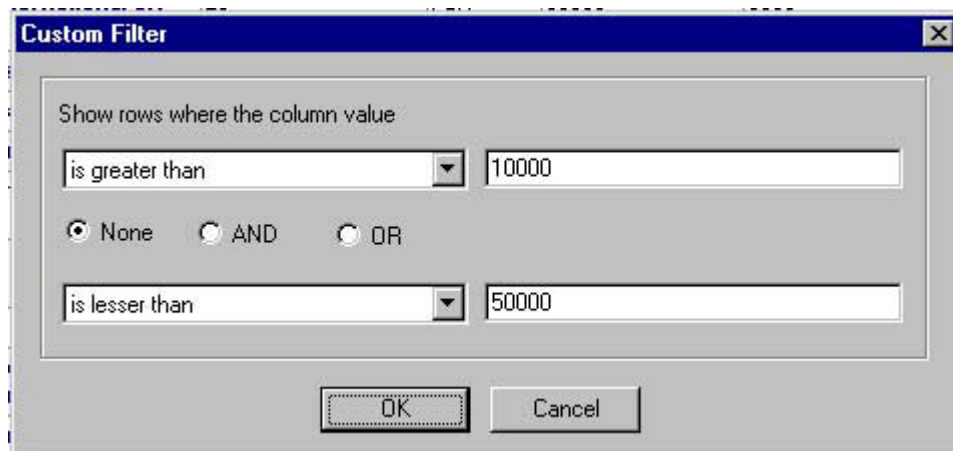


Select a Value to display only records containing that value.

Select All to display all records.

Select Custom to display records that fall under a specified condition.

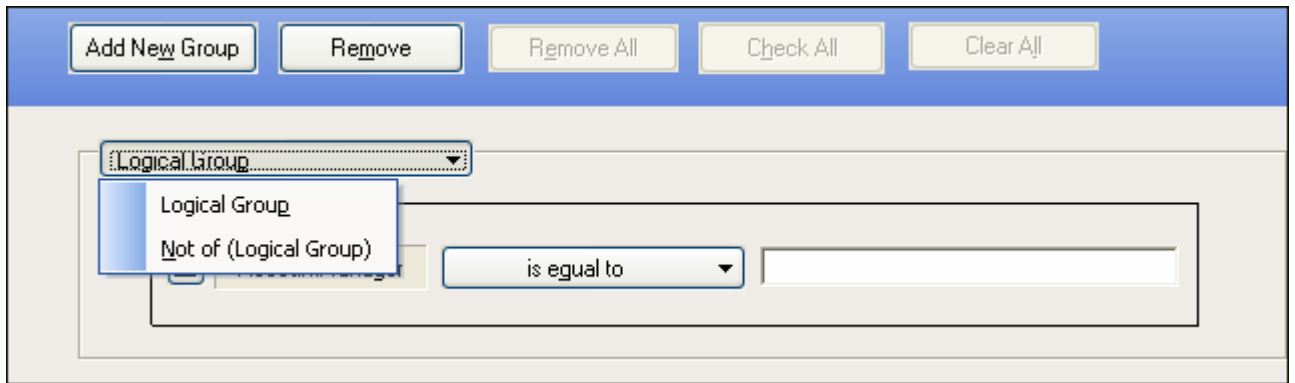
For example, Consider a condition that will show rows which have a value greater than 10000 and lesser than 50000 as shown below.



## Advanced Filters

The Filters tab available in *IntelliVIEW for Notes* and it is not provided in *IntelliVIEW for Domino*. Hence, it is not possible to apply business rules to multiple columns on Domino.

To apply advanced filters double click on any of the columns in ‘Available Columns’ and apply the condition. The user can group the conditions based on his requirement. The group can be either a logical group or non-logical group.



## Adding Group Summary

After grouping the data, it is now time to summarize the revenue for each of the customer.

The following steps are executed to accomplish the task.

1. The empty row that divides the groups is said to be the group footer. Right click on it.
2. Select the option Sum.

Sales Revenue	Region
34500	Europe
92400	Middle East
71500	
91000	
37500	
63250	
102400	
87500	
30000	
122500	
108800	
144000	
122500	
56000	
26400	
22000	
49500	
44000	
31500	
87500	
Sum=2734450	

## Finding Min, Max and Average and Unique Count

Following are the available summary values that can be applied for a group/column.

---

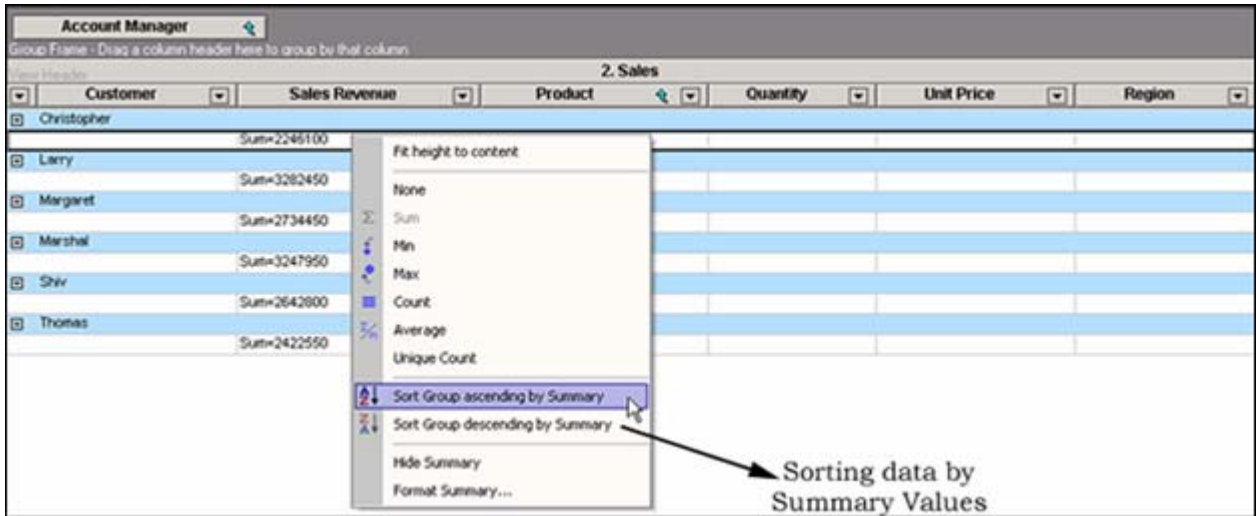
Summary Value	Description
Sum	Sum of the numeric values of a column in a group
Min	The least numeric value of a column in that group
Max	The largest value of a column in a group
Count	Number of documents in a group
Average	Average of the values of a column in a group
Unique Count	Number of unique values in a group i.e. records with duplicated values are not included in the count.

---

## Sorting by summary values

When data is grouped, sorting based on summary values is now possible besides sorting on individual values.

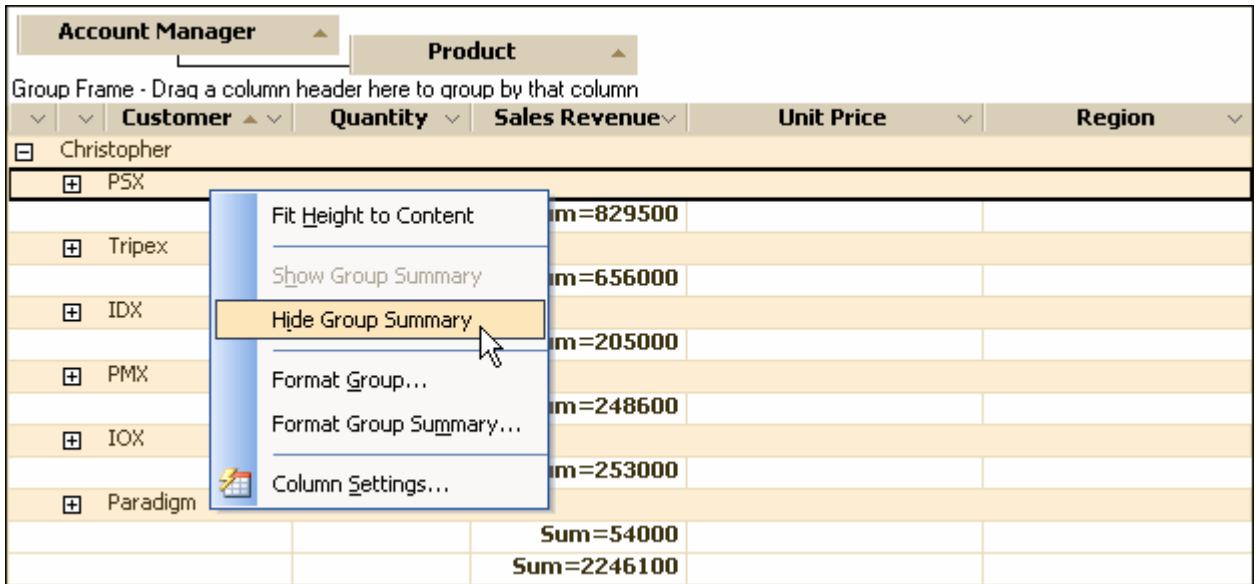
Right click on the summary value based on which the groups are to be sorted.  
Select Sort Ascending or Sort Descending.



## Show/Hide Group Summary

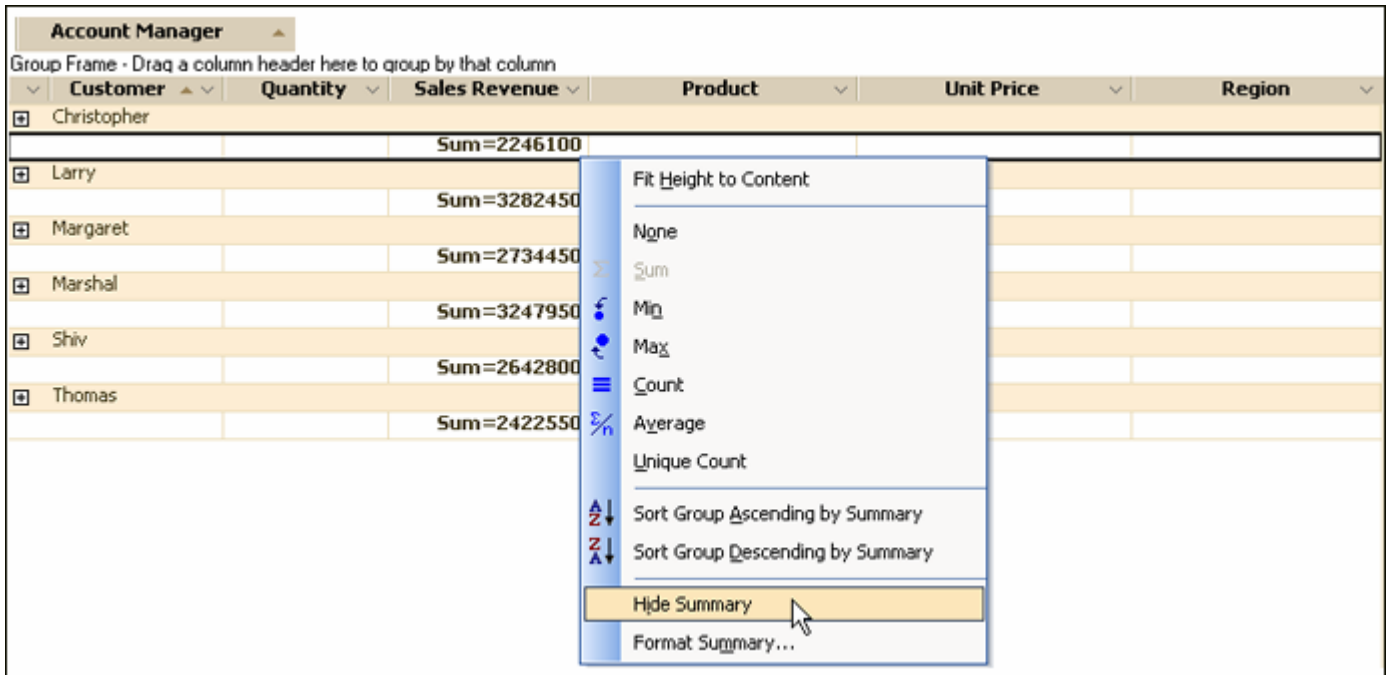
You can choose to show or hide the summary footer at any point of time. There are a number of ways to do this.

The same way right click the group header and select Hide Summary to hide the summary.

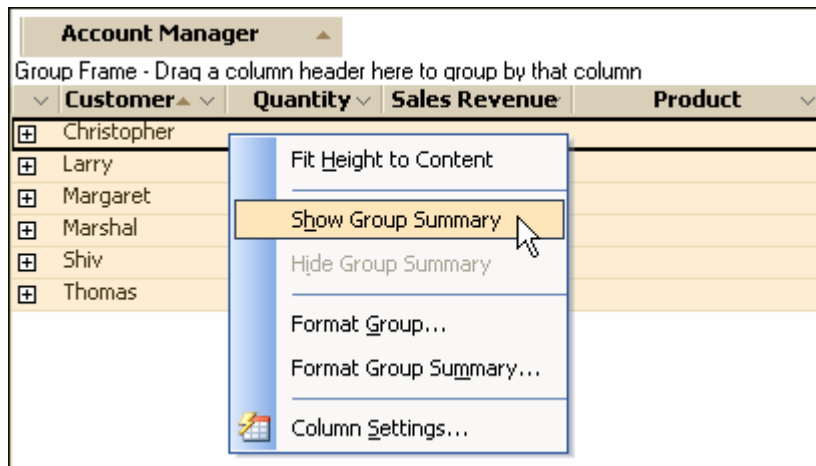


Note: In case of multilevel grouping, only the summary footer pertaining to that particular header will be hidden.

In the same way right click on the group summary footer and select Hide Summary to hide summary.

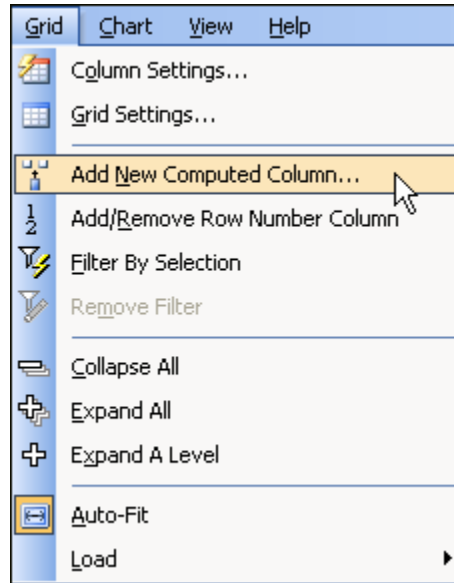


From the menu, select Grid -> Show/Hide -> Group Summary (This is a toggle feature.) to hide the summary or right click the group header. Select Show Summary.

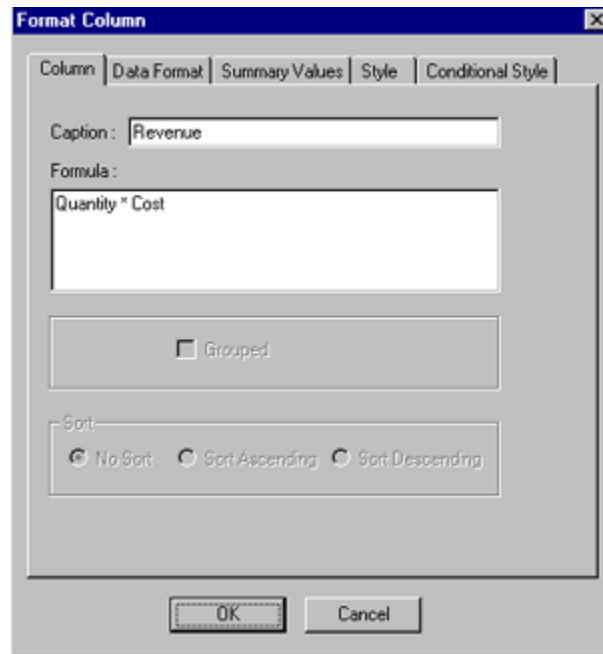


## Adding a new computed column

It is possible to add a new computed column to the report apart from the Notes View columns and fields existing in the database. This is typically used for calculating something that is not available in the database. Select Grid -> Add New Computed Column.



On clicking Add New Computed Column from the Grid Menu, the Format Column dialog is displayed.





A new computed column can be added from here. Enter the column heading or caption for the new column. Next, enter the formula for the calculation, for example to calculate Revenue, the formula is Quantity x Cost.

A new column is created called Revenue refresh the Grid, and the revenue is calculated based on the formula and displayed.

## Multi Value fields

IntelliVIEW fully supports Multi value fields. By default, IntelliVIEW will treat all the entries in Multi value fields as a single entry with a separator. However, the user can treat each value in Multi value fields as separate entries by changing the properties.

The following are the ways in which multi-value fields are handled:

- When IntelliVIEW encounters a multi-value field, by default it converts multi-value text fields into a single text or string, using the same Multi-value separator to separate the multiple values in the field. You can use other Multi-value separators to separate the multiple values by changing the properties of the field.
- You can view each value in Multi-value fields as separate entries by mapping with other fields.
- You can change the value to only one value by changing the properties.
- While handling 'multiple' multi-value fields, the user can map these fields in one to one and one to many co-relation methods.

## Handling Multi Value Fields

IntelliVIEW can handle multi-value fields largely. When IntelliVIEW encounters a multi-value field, by default it converts multi-value text fields into a single text or string, using the same Multi-value separator to separate the multiple values in the field.

The following are the ways in which multi-value fields are handled:

### **Multi-value fields with different separator**

Using IntelliVIEW, user can change the separator of Multi-value field to Coma, Space, Semicolon, New Line and none. Follow the steps below:

- Right click on the Column header and select Column Settings.
- In Column Settings, select Data Format tab, and under Multi-value settings check 'Show multi-value as single entry' check box and then select a separator from 'Multi-value separator' list box

### **Multi-value fields as single entry**

Using IntelliVIEW, user can change the properties of Multi-value fields to only one entry. Follow the steps below:

- Right click on the Column header and select Column Settings.
- In Column Settings, select Data Format tab, and under Multi-value settings check 'Show only first value' check box.

### **Multi-value fields treat each value as separate entry (One to All relation)**

Using IntelliVIEW, user can change the properties of Multi-value fields where each value can be viewed as a separate entry by mapping with other fields. Follow the steps below:

- Right click on the Column header and select Column Settings.
- In Column Settings, select Data Format tab, and under Multi-value settings check 'Show multi value as separate entries' check box and then check 'Map one value to all values of other multi-value columns'

### **Multi-value fields treat each value as separate entry (One to one relation)**

Using IntelliVIEW, user can change the properties of Multi-value fields where each value can be mapped to the other multi value field which is separated. In this case each value is mapped to all values of other multi-value fields. Follow the steps below:

- Right click on the Column header and select Column Settings.
- In Column Settings, select Data Format tab, and under Multi-value settings check 'Show multi value as separate entries' check box and then check 'Map each value to the previous separated multi-value column'.



## Charts, Formatting, Printing, Exporting

---

This session is mainly to do with formatting reports and sharing with others. On completing this chapter, you will be able to create charts, format reports and charts, preview and print, export to other formats and email reports.

- Lesson A      Charts
  
- Lesson B      Formatting
  
- Lesson C      Preview and Printing
  
- Lesson D      Exporting
  
- Lesson E      Emailing with Attachments

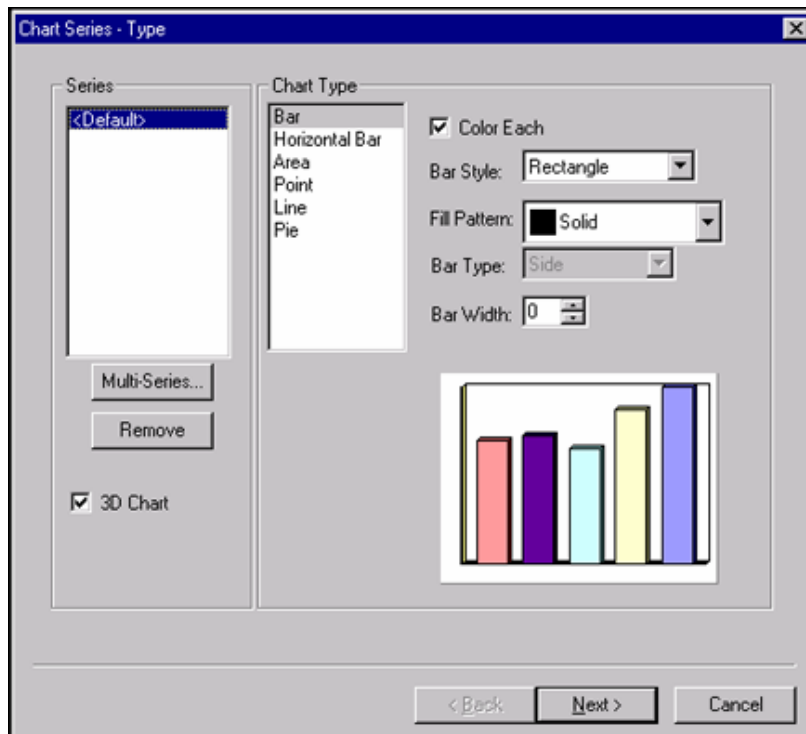
# Charts



## Creating a Chart

After data is arranged in *IntelliVIEW* Grid, it is easy to create a chart by using Chart wizard. Different types of charts like Column, Bar, Line, Pie, Point and Area charts can be created.

To start with the chart wizard, click chart  icon. The following dialog box is displayed.

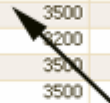



For example, to create a Chart for all Account Managers and their sales revenue region wise. Follow the steps given below

- First Group the spreadsheet with Account Manger and sum of their sales revenue as shown below.

Account Manager								
Group Frame - Drag a column header here to group by that column								
Customer	Quantity	Product	Unit Price	Sales Revenue	Region	Month	UnitPrice8	
LAN	16	PMX	2200	35200	Middle East	3	2200	
Login Inc.,	45	PMX	2200	99000	Asia	9	2200	
Manager's	28	PSX	3500	98000	Asia	4	3500	
Microage	26	IDX	2500	65000	Africa	5	2500	
Netcorp	48	Tripex	3200	153600	Asia	4	3200	
News Week	56	IDX	2500	140000	North America	6	2500	
Odyssey	78	Tripex	3200	249600	Asia	4	3200	
Rolaco Trading	20	Tripex	3200	64000	North America	11	3200	
Sema Group	24	PSX	3500	84000	Africa	3	3500	
Sofor OY	24	Tripex	3200	76800	Asia	3	3200	
Workflow	45	PSX	3500	157500	Europe	7	3500	
Zel S.r.l.	26	PSX	3500	91000	Middle East	10	3500	
				<b>Sum=2246100</b>				
Larry								
Addco Group	16	Paradigm	1500	24000	Europe	5	1500	
Agnati	16	Tripex	3200	51200	South America	10	3200	
Alma	10	PSX	3500	35000	Europe	4	3500	
Alpha Data	27	PSX	3500	94500	Middle East	7	3500	
Ares	42	PMX	2200	92400	Europe	2	2200	
Arthur	12	PSX	3500	42000	Europe	2	3500	
Astranet S.l.	32	PSX	3500	112000	Europe	9	3500	
Avalis AG	10	Tripex	3200	32000	Africa	5	3200	
Blue Age	23	PSX	3500	80500	North America	2	3500	
Byelex B.V.	18	PSX	3500	63000	Middle East	1	3500	
Connectica SAS	30	Tripex	3200	96000	Africa	6	3200	
ECSOft	32	PSX	3500	112000	South America	9	3500	
EIT Plus	30	Paradigm	1500	45000	South America	7	1500	
ENI Service	52	IDX	2500	130000	Middle East	2	2500	
ExecuTrain of	24	PMX	2200	52800	Middle East	10	2200	
Finsiel S.P.A.	45	PSX	3500	157500	Asia	8	3500	
Hawkware OY	27	PSX	3500	94500	South America	4	3500	

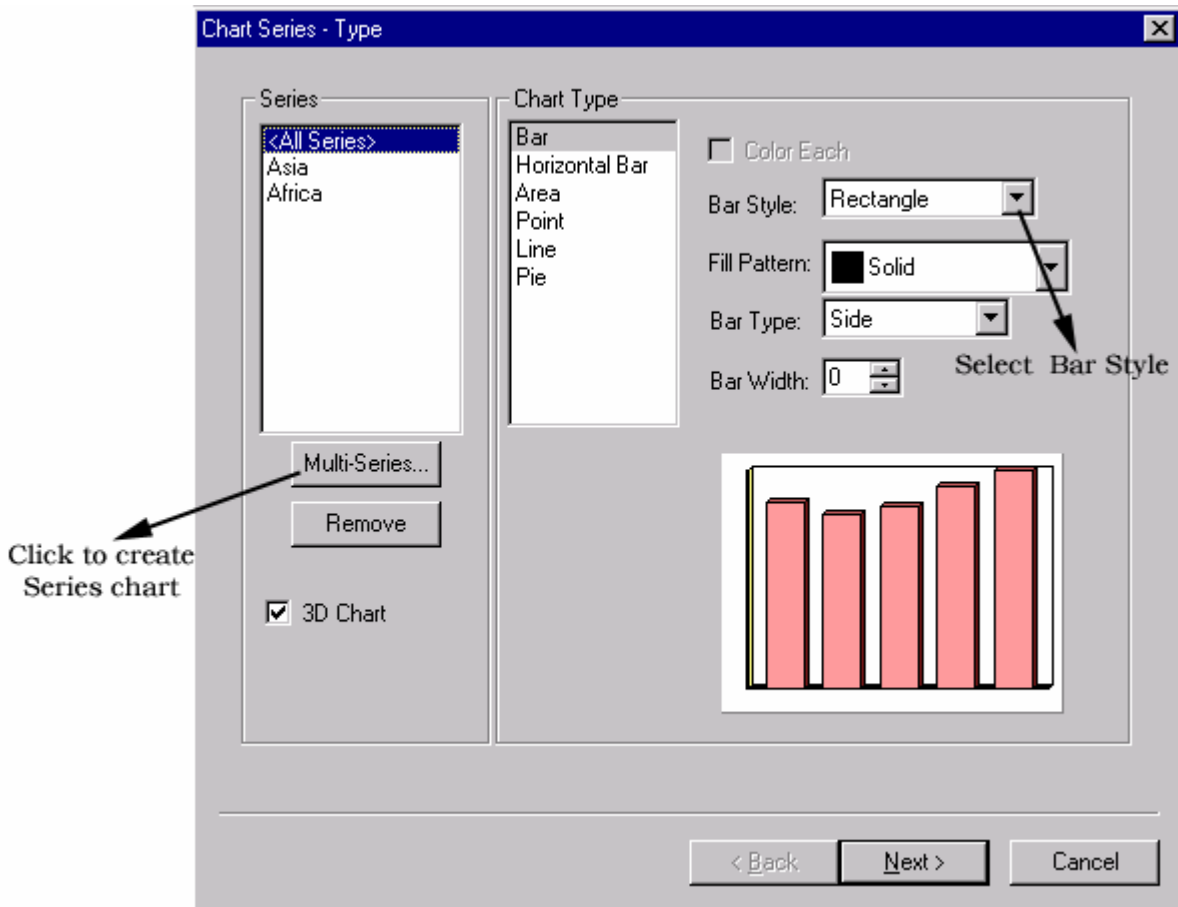
Summary of Sales Revenue



- Click chart wizard  icon from Toolbar Menu.
- On Series box, the user can either select “Default” series or by clicking on “Multi-Series”.
- Click on Multi-Series, select “Region” and select Asia and Africa from the list.

**Note:** We can select all Regions by clicking  and to uncheck all fields click .

- On Chart Type box, select a Chart type.
- Check the checkbox Color Each to color each value.
- Select a Bar style from the Bar Style list, select a pattern from Fill Pattern list, select a Bar Type from Bar Type list and in the Bar Width box type or select the width.



- Click "Next" to select value for X-axis. In the Column box, select a field that should appear on the X-Axis of the chart. (Only the non-numeric fields are available here for selection). In the Values box, select specific values to appear in the X-Axis based on the field selected in the Column list. (All the values of the selected field gets listed here, with provision to check or un-check the values.)
- Click "Next" to select value for Y-axis. In the Column box, select a field that should appear on the Y-Axis. (Only the numeric fields on the grid are listed here). In the Value by, select a group summary function from Sum, Average, Count, Maximum and Minimum.

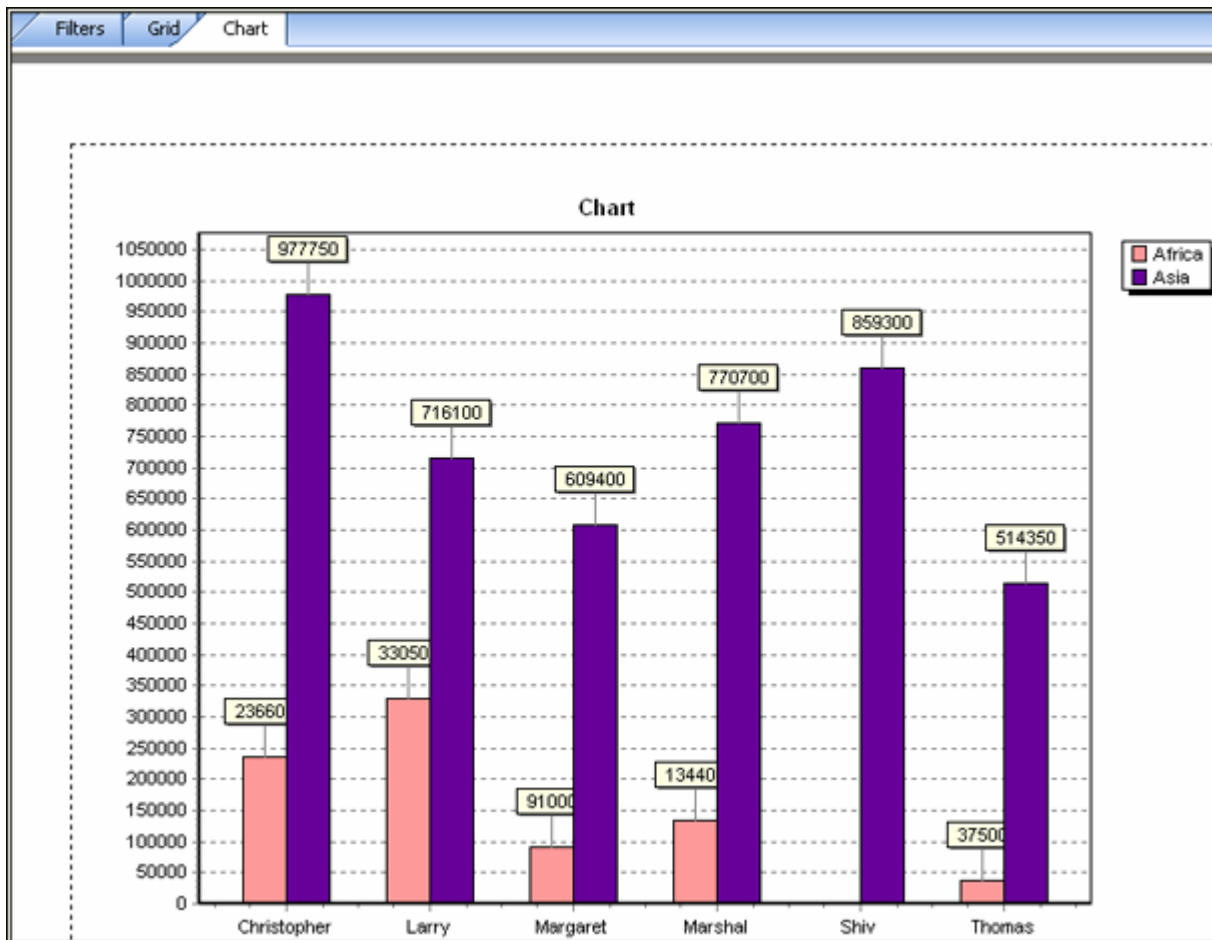
- For example, select AccountManager as the X- Axis, SalesRevenue as the Y - Axis, and select Sum to display the sum of sales revenue of each account manager against their respective names.

**Note:** Select the values to be displayed in chart by clicking on check box. . To check all fields click on



icon, to uncheck all fields click on .

- Click Finish to display the chart, as designed, in a new tab, chart as shown below.






## Formatting a Chart

Once created, the properties of the chart can be altered as needed.

### **Format Chart Title**


To add Chart Title, X-axis Title and Y-axis Title follow the below steps:

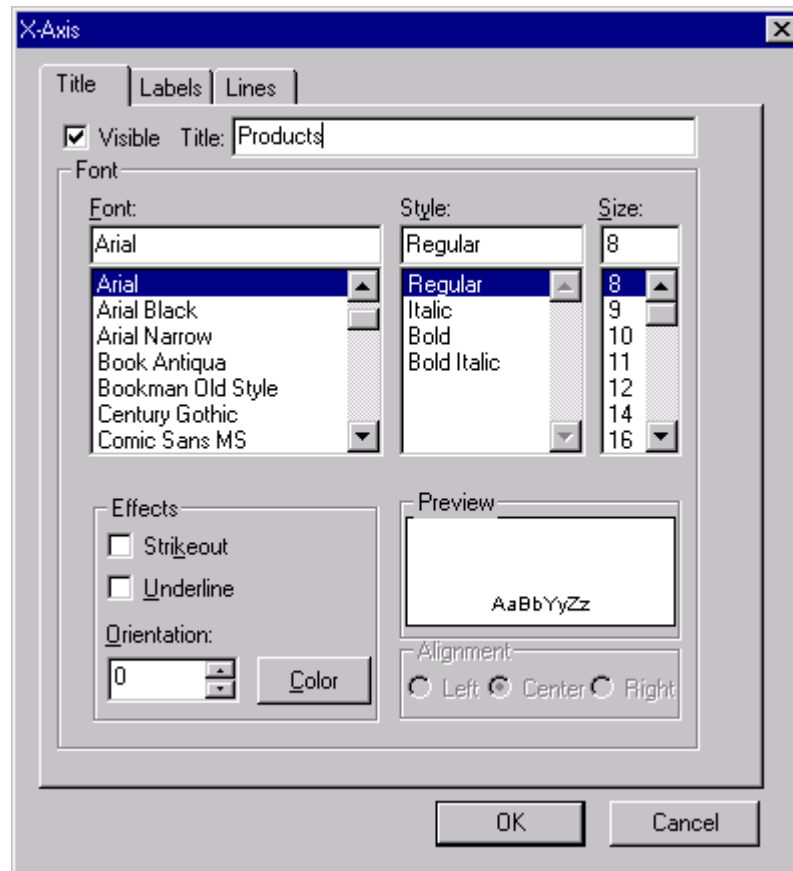
- Click the Format Chart icon  and select Chart Title or “**Right click**” on the chart and select Format Chart and Chart Title to change chart title and font.



- On Title tab, check Visible to view the Chart Title in Chart. Enter the chart name in the Title Text box.
- On Font tab, format the chart title font by selecting a suitable Font name and size. Align the Chart Title by selecting an alignment from the Alignment radio button.


## Format X-axis

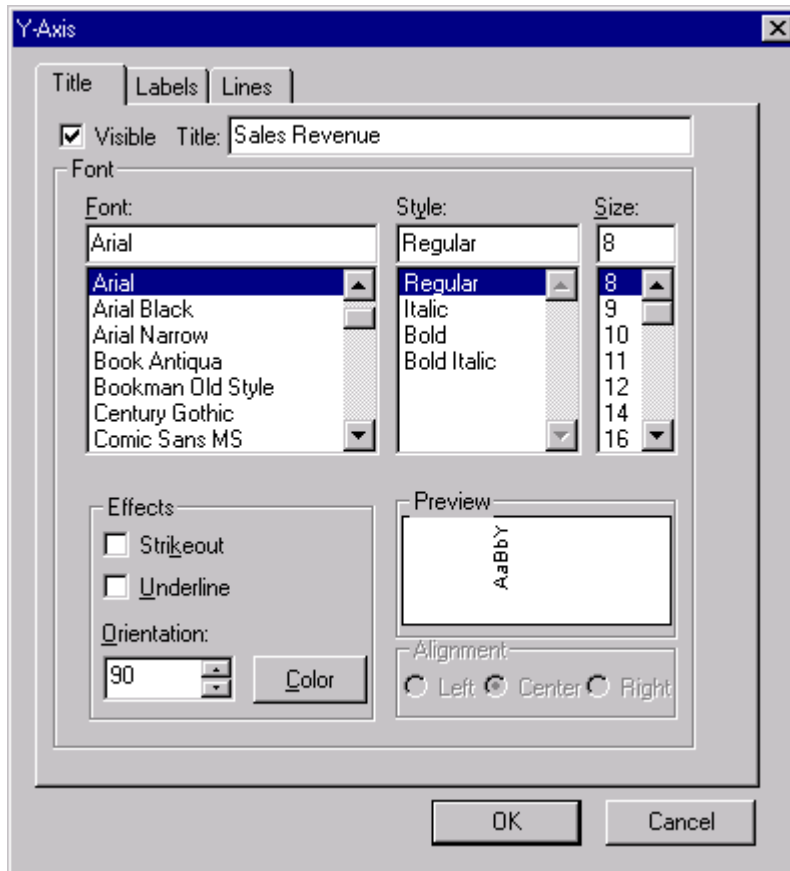
- Click the Format Chart icon  and select **X-Axis** or right click on the chart and select Format Chart and X-Axis to format X-axis.



- On Title tab, check Visible to view the Chart Title in Chart. Enter the chart name in the Title Text box.
- On Labels tab, format the label style by selecting a suitable Font name and size. Align the label text by selecting an alignment from the Alignment radio button. Change the orientation of the labels.
- On Lines tab, check Visible to view the lines. Format the line style by selecting a suitable style, weight and color. The user can scale the values of x-axis by selecting values.


## Format Y-axis

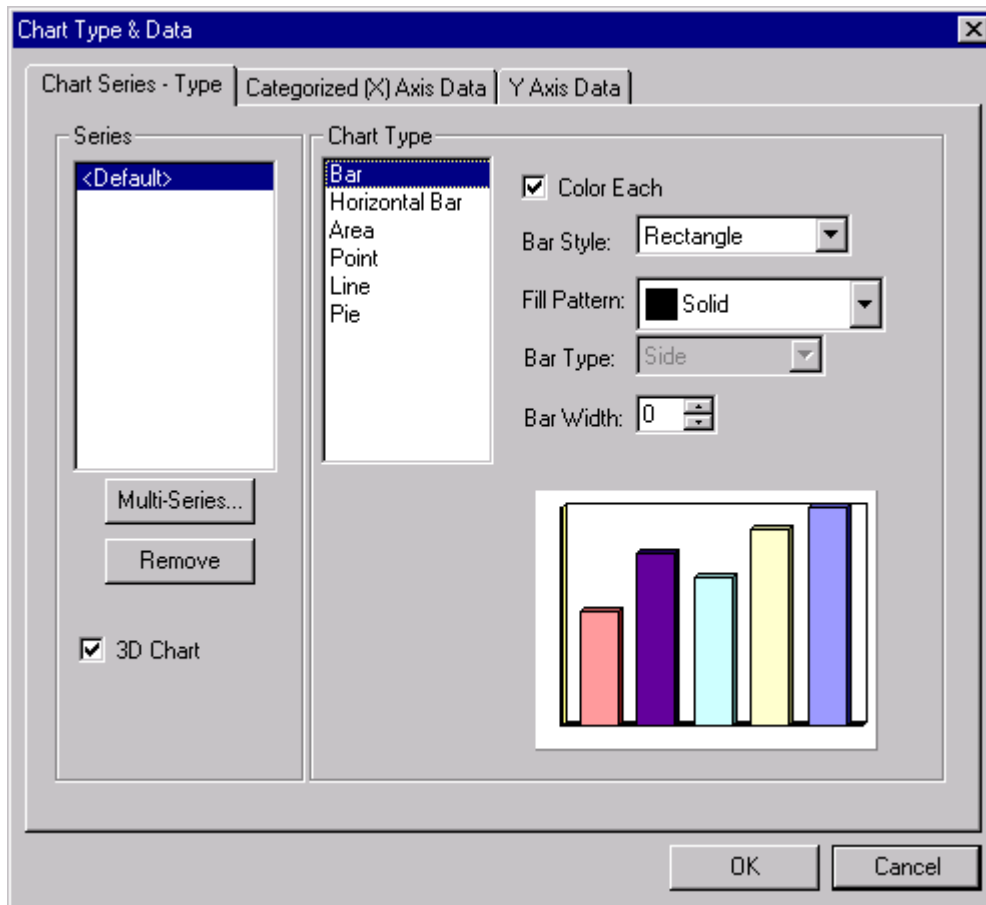
Click the Format Chart icon  and select **Y-Axis** or right click on the chart and select Format Chart and Y-Axis to format Y-axis.



- On Title tab, check Visible to view the Chart Title in Chart. Enter the chart name in the Title Text box.
- On Labels tab, format the label style by selecting a suitable Font name and size. Align the label text by selecting an alignment from the Alignment radio button. Change the orientation of the labels.
- On Lines tab, check Visible to view the lines. Format the line style by selecting a suitable style, weight and color. The user can scale the values of y-axis by selecting values.

### Format Chart Type and Data

Click the Format Chart icon  and select Chart Type & Data or right click on the chart and select Format Chart and Chart Type & Data to change chart Type, chart series, X-axis data and Y-axis data.




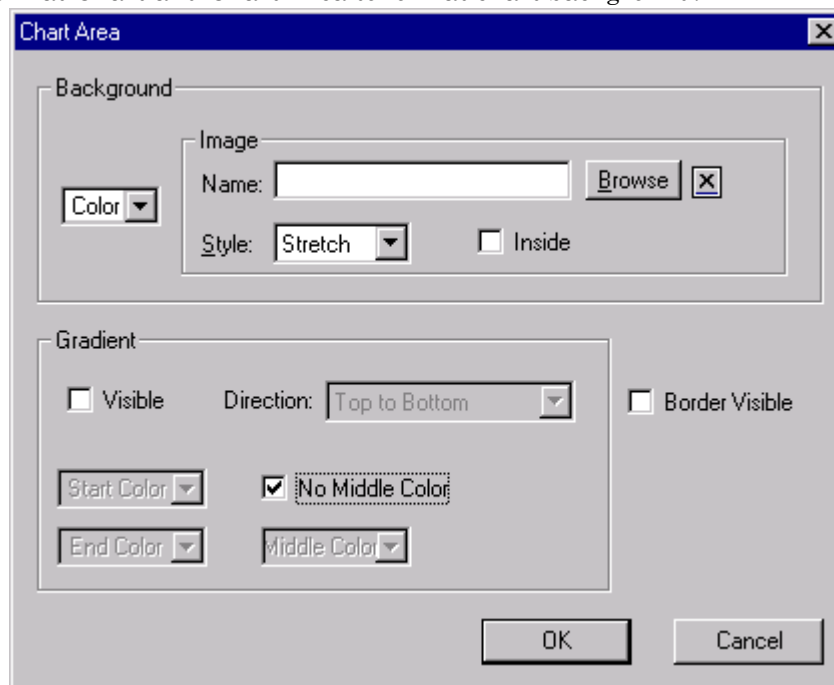
On Chart Series- Type tab,

- Series - Select "Default" series to create Charts. To create charts with a Series, click on "Multi-Series" and select fields.
- Chart Type - Select a Chart from the chart type box, the chart can be formatted by selecting the following options:
  - Color Each - Check the box to color each area of the Chart

- Bar Style - Format the bar style for Bar and Horizontal Bar charts by selecting a bar style from Bar Style drop-down list, adjust the Bar Width, choose a Fill Pattern from Fill Pattern drop-down list to change the look and feel of bars.
- Format Area charts by selecting a point style from Point Style drop-down list and check the Stairs option to show area in stairs.
- Format Point charts by selecting a point style from Point Style drop-down list and adjust the height and width of the point.
- Format Line charts by selecting a point style from Point Style drop-down list and check the Stairs option to show the line as stairs.
- Format Pie charts by selecting Angle, Radius. Check Semi Pie to display the pie chart in Semi pie. Check Explode Biggest to show the highest value separately from the Pie chart.
- On Categorized (X) Axis tab, format the X-Axis by selecting different fields and a user can select all the values of a field by selecting All in Value radio button, to select specific values select Selected in Value radio button.
- On Y Axis tab, format the Y-Axis by selecting different fields and Value by options

### Format Chart background

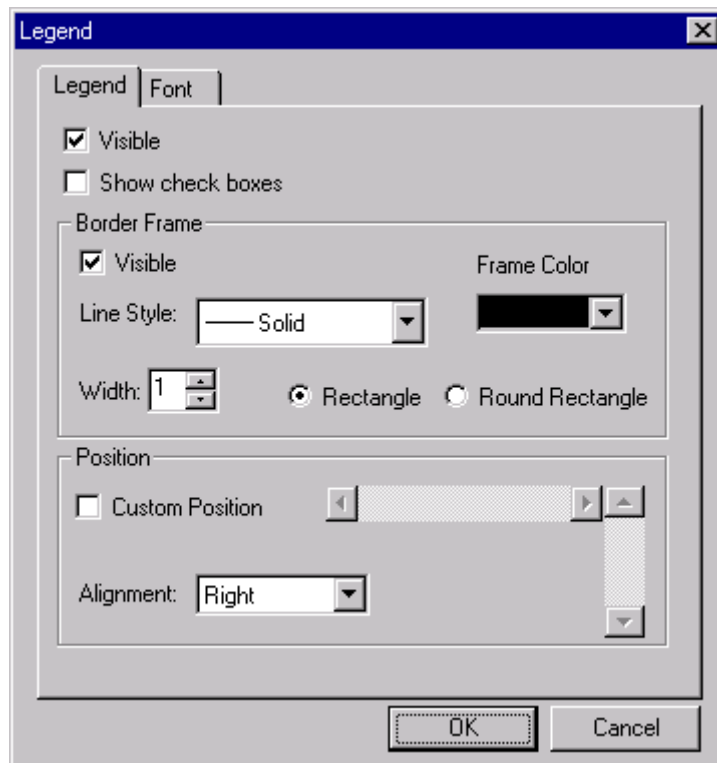
Click the Format Chart icon  and select Chart Area or right click on the chart and select Format Chart and Chart Area to format chart background.



- Insert a background Image for the chart.
- Apply a background color to the chart.
- On Gradient area, to view grids in the chart check Visible, to view border check Border visible.


### Format Legend

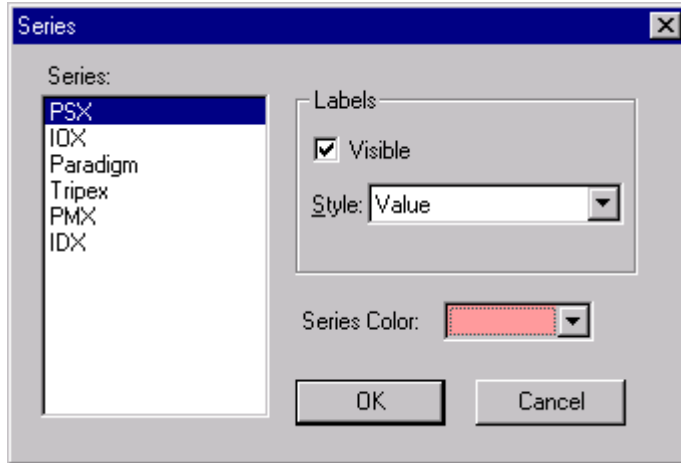
Click the Format Chart icon  and select Legend or right click on the chart and select Format Chart and Legend to format legend.



- On Legend tab, check Visible to view the Legend in Chart. Format the frame of the Legend and position the Legend.
- On Font tab, format the label style by selecting a suitable Font name and size. Change the orientation of the labels


**Format Series**

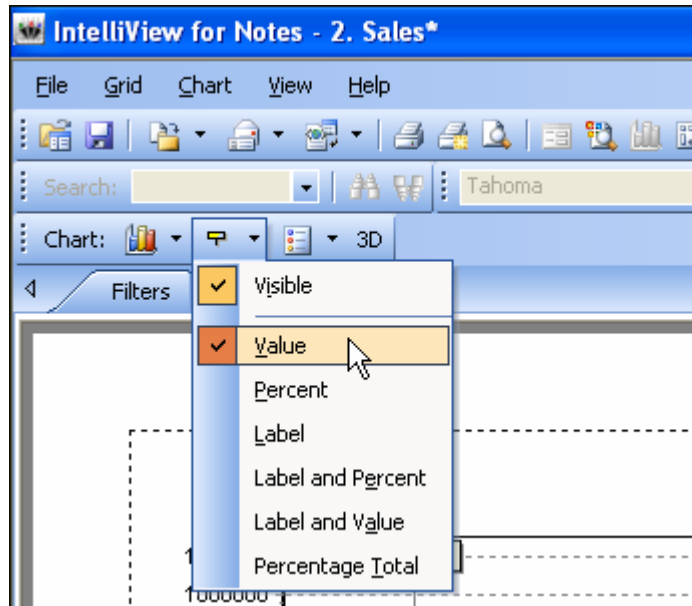
Click the Format Chart icon  and select Series or right click on the chart and select Format Chart and Series.





- Check Visible to view labels in Chart. Select the value style from Style drop-down box.
- Change the series color by selecting each series value.

**Format Labels**

Click the  button or right click on chart and select Labels to select one of the different types of marks over the chart.



**Options**

- Visible – Toggle the visibility of Legend details.
- Mark Type – Select a type from the available list to appear as labels over the chart
  - Value – The Y-axis value at the point is displayed
  - Percent – Percentage value of Y-axis value is displayed
  - Label – The X-Axis value at the point is displayed
  - Label and Percent – combination of X-axis field values and percentage of Y-axis field values as labels
  - Label and Value – combination of X-axis field values and value of Y-axis field appear as chart labels
  - Percentage Total – combination of percentage of Y-axis field values and total of all the field values in Y-axis as chart labels
- Click the  button or right click on chart and select Show/Hide Legend to toggle the visibility of Legend detail.
- Click the  button or right click on chart and select Toggle 3D to toggle the appearance of 3D effect in the chart.

## Active Chart




IntelliVIEW for Notes has a powerful Interactive chart interface where in the user can create WYSIWYG Charts. You can fully customize the appearance of the charts to present any data with maximum visual impact.

A user can create Chart in two ways. One is through Chart wizard and second is through Active chart. In this section, we will see how to create charts using Active chart option.


There are two ways one can use Active chart option.

- 1) Create charts using Active chart option
- 2) Changing the properties of the chart using Active chart option


### **Create charts using Active chart**

Creating chart using Active chart is simple and straightforward. Click on the Active chart Icon  or click on the menu Chart --> Chart, this will populate chart tab and Active chart pane. In Active chart pane you will have two tabs Series and Categories. Using Active chart the user can create both simple and series charts.

To create a simple chart follow the steps below:

1. Click on the Active chart Icon 
2. In the Active chart pane go to Series tab, fields will be grouped based on the field that has numbers.
3. Expand the numeric field with which you want to create a chart and select the values.
4. The output can be seen on the chart tab of your workspace as you select values.

To create a series chart follow the steps below:

1. Click on the Active chart Icon 
2. In the Active chart pane go to Categories tab, select a field name from Column box and select the fields from Values box to create series chart
3. Click on Series tab to check the fields needed to be added in the chart.
4. The output can be seen on the chart tab of your workspace as you select values.

### **Changing the properties of the chart using Active chart option**

Change the properties of the chart using Active chart is easier. The user will not have any difficulty to create the chart again and can change the fields by selecting fields from Active chart pane.



# Formatting


---

## Formatting Columns, Rows and Cells

*IntelliVIEW* extends its formatting options to each row, column and cell.

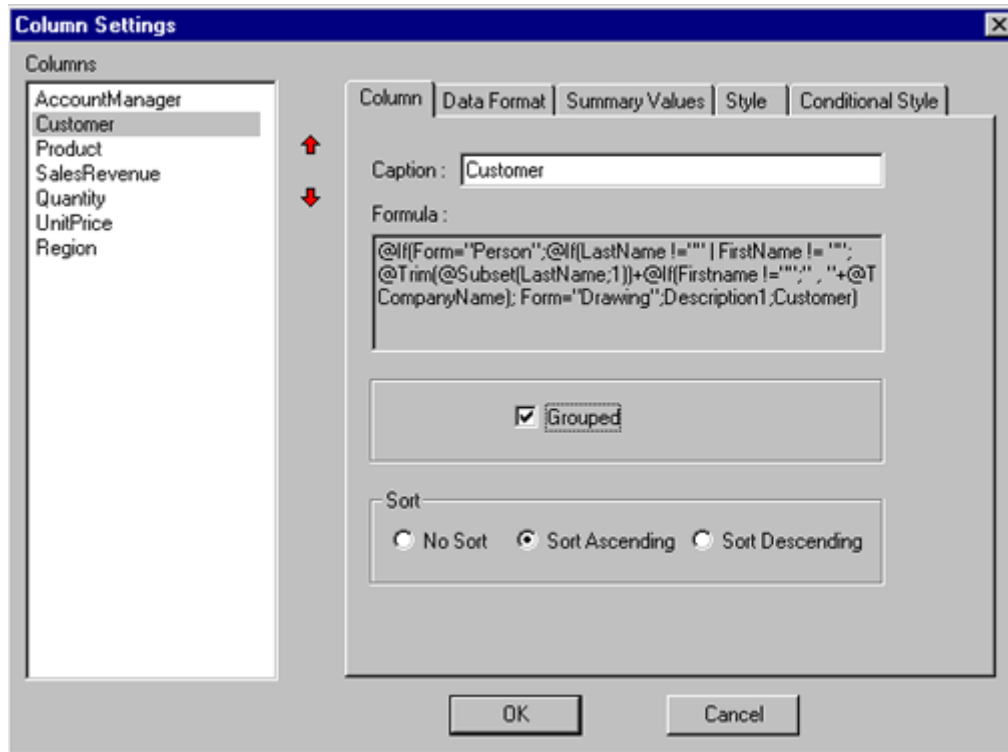
### Formatting Columns

Formatting columns has a lot more than just applying style. The data format, decimal places (Numeric columns), and summary type can be defined here.

Click the Columns Settings icon  or right click the column header band, Grid cells or group header, and selecting Format Column The format column dialog. The format column dialog can also be invoked by clicking the Column Settings icon

The format column dialog contains five tabs as shown in the figure.

Select the column to be formatted from the list available in the left pane of the Column Settings dialog.



(Figure 3.13)

The five tabs and their usage are explained below:

- ❖ Column
- ❖ Data Format
- ❖ Summary Values
- ❖ Style
- ❖ Conditional Style

## Column

- **Caption** – Enter the column title.
- **Formula** – Displays the formula that defines the column. This is Not editable.
- **Grouped** – Click on the check box to group a particular column.
- **Sort** – Select the sorting option.

## Data Format

- **Data Type** – Select the column data type (String, Number, Date-Time or Image)
- **Number format** – Enabled, if data type is Number
- **Decimal places** – Enter or Select the decimal places required in the number field.
- **Currency** – Check this option, if the numeric column value is currency.
- **Punctuated at thousands** – Check this option, if the punctuation is needed at thousands for the numeric column values.
- **Date-Time format** – Enabled if data type is Date-Time
- **Date** – Select the format for the date value (Select No Date, if time alone need to be displayed).
- **Date separator** – Select the date separator.
- **2 digit year** – Check this option, if the year values in the date need to be two digits.
- **Time** – Select the format for the time value (Select No Time, if date alone need to be displayed).
- **Time separator** - Select the separator for time.
- **24 hour format** – Check this option, if the time needs to be in 24-hour format.

## Summary Values

The summary values appearing in the group summary footer or report footer for a particular column can be specified in this section.

- **Group Footer Summary** - If the selected column has data grouped under it, then you can specify the group summary values in this section.
- **Summary type** - Select a summary type from the list.
- **Label** - Assign a suitable label for the footer.

Note: We can specify Summary values by right clicking on the group summary footer. See Formatting Summary.

- **Report Footer Summary** - Report Footer summary values can be specified for any column. It summarizes all the values appearing in that column.
- **Summary type** - Select a summary type from the list.

Note: Arithmetic operations such as Sum, Min, Max and Average will be listed only for numeric columns.

## Style

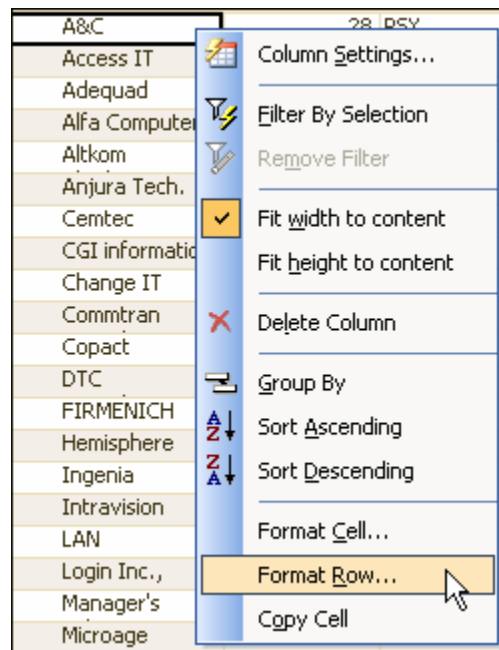
- **Font** - Select the font name, size, color and style such as Bold, Italic, Underline and Strikethrough for the column values.
- **Alignment** - Select the alignment of the column values.
- **Background Color** - Select the background color for the column values.

## Conditional Style

- **Condition List** - Name for the condition can be given using the Add button. Clicking the Add button will give the pop up in which the condition name can be given. Clicking the Delete button, will delete the selected condition.
- **Condition** - Select the condition to be applied to the selected column value. Enter the value to be compared with the selected column value
- **Style** - Select the style to be applied for the column values that matches the entered condition.
- **Font** - Select the font name, size, color and style such as Bold, Italic, Underline and Strikethrough for the column values.
- **Alignment** - Select the alignment of the column values.
- **Background Color** - Select the background color for the column values.

## Formatting Rows

Right click on any Grid cell and select Format Row.



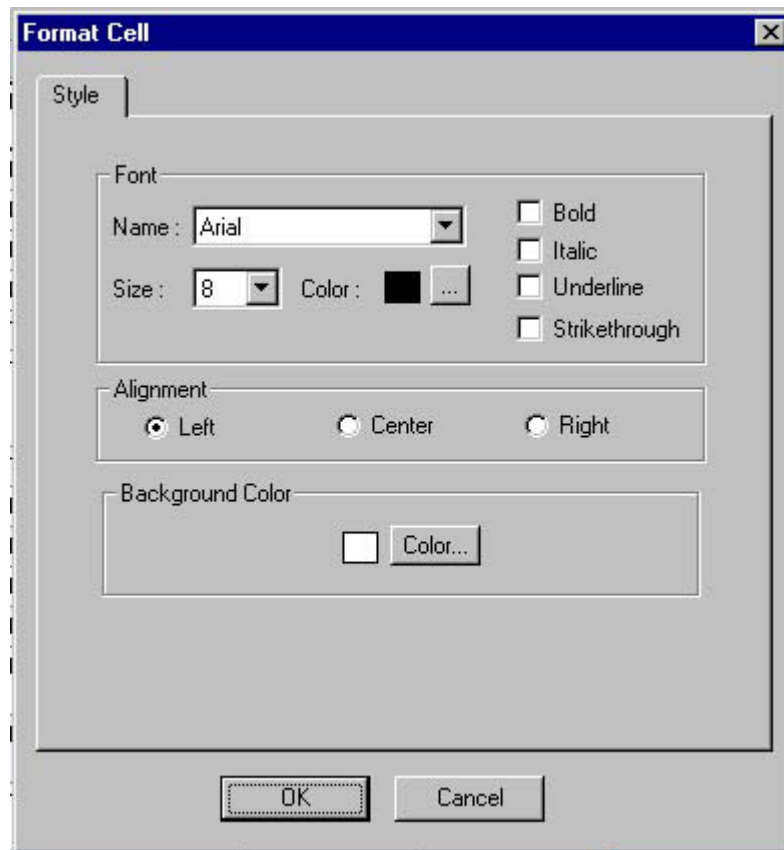
The Format Row dialog is displayed as shown below.



- **Font** - Select the font name, size, color and style such as Bold, Italic, Underline and Strikethrough for the selected row.
- **Alignment** - Select the alignment of the row content.
- **Background Color** - Select the background color for the row.

## Formatting Cells

Right click on any Grid cell and select Format Cell. The Format Cell dialog is displayed as shown below.



- **Font** - Select the font name, size, color and style such as Bold, Italic, Underline and Strikethrough for the cell content.
- **Alignment** - Select the alignment of the cell content.
- **Background Color** - Select the background color for the Grid cell.

## Copy Cell

Right click on a cell and select Copy Cell to copy the cell value on to Windows clipboard. You can paste this value in any document that supports Windows clipboard items.

## Adjust width/height cell

Adjust the width and height of a cell by performing the following options:

- Right click on a cell and select “Fit width to content” to adjust the cell as per width of text content.



- Right click on a cell and select “Fit height to content” to adjust the cell as per height of the text content.

## Formatting Headers and Footers

The headers and footers that you can add to your report are listed below:

- Report Header
- Page Header and Footer
- Group Header
- Column Header
- Group Summary Footer
- Report Footer

The screenshot shows the IView Grid interface with a report titled "3. Sales By Person". The report is grouped by "Product" (IDX, IOX, Paradigm). The data is displayed in a table with columns: Account, Customer, Quantity, Unit Price, Sales Revenue, Date, and Qtr. Annotations with arrows point to various report elements:

- Report Header:** "3. Sales By Person"
- Page Header:** "Product" dropdown
- Group Header:** "LARRY" (row in the first group)
- Column Header:** "Unit Price" (column)
- Group Summary Footer:** "Sum=295000" (row at the end of the first group)
- Page Footer:** "View Footer: Right-click here to select View Summaries"

Account	Customer	Quantity	Unit Price	Sales Revenue	Date	Qtr
<b>Product: IDX</b>						
Larry	ENI Service	52	2500	130000	2/21/2003	Q1
Marshal	Securitas AB	22	2500	55000	1/26/2003	Q1
Shiv	Reston AB	22	2500	55000	3/25/2003	Q1
Thomas	CMID	22	2500	55000	2/21/2003	Q1
				<b>Sum=295000</b>		
<b>Product: IOX</b>						
Christopher	Access IT	28	2750	77000	2/16/2003	Q1
Christopher	DTC Consultants	24	2750	66000	2/23/2003	Q1
Larry	Netwell Ltd	36	2750	99000	3/8/2003	Q1
Larry	Polygon Ltd	38	2750	104500	3/9/2003	Q1
Marshal	ATR Computer	15	2750	41250	1/2/2003	Q1
Shiv	Allegiance	34	2750	93500	1/17/2003	Q1
				<b>Sum=481250</b>		
<b>Product: Paradigm</b>						
Larry	Teiture OY	22	1500	33000	3/23/2003	Q1
Margaret	Avalis AG	21	1500	31500	3/9/2003	Q1
Marshal	Cyber Trade	25	1500	37500	2/21/2003	Q1
Marshal	Price Water House	23	1500	34500	1/15/2003	Q1
Marshal	The Danish Poultry	12	2200	26400	1/18/2003	Q1
Shiv	Conceptos As	33	1500	49500	2/24/2003	Q1
Shiv	Genius inside	38	1500	57000	3/20/2003	Q1

## Report Header

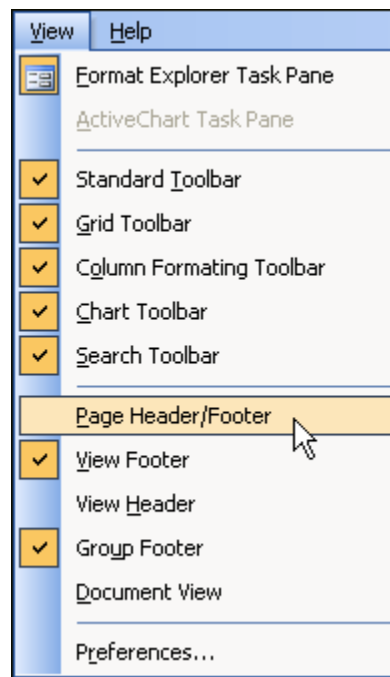
Report Header displays the report title and it is displayed only on the first page, while previewing or printing. Report Header appears as the first band in the Grid. By default, the name of the selected view is displayed as report title, which can be changed as required.

The following operations can be performed on the Report header.

- **Resizing** - The band thickness of the report header can be increased or decreased by dragging its bottom margin.
- **Rename Title** - Right click the Report Header (View Header) select “Rename Title” to display the respective dialog. Enter a suitable title for your report and click “OK”.
- **Format Title** - Right click the Report Header (View Header) select Format Title to display the respective dialog. Modify the font style, color and background color of the column header.

## Page Header & Footer

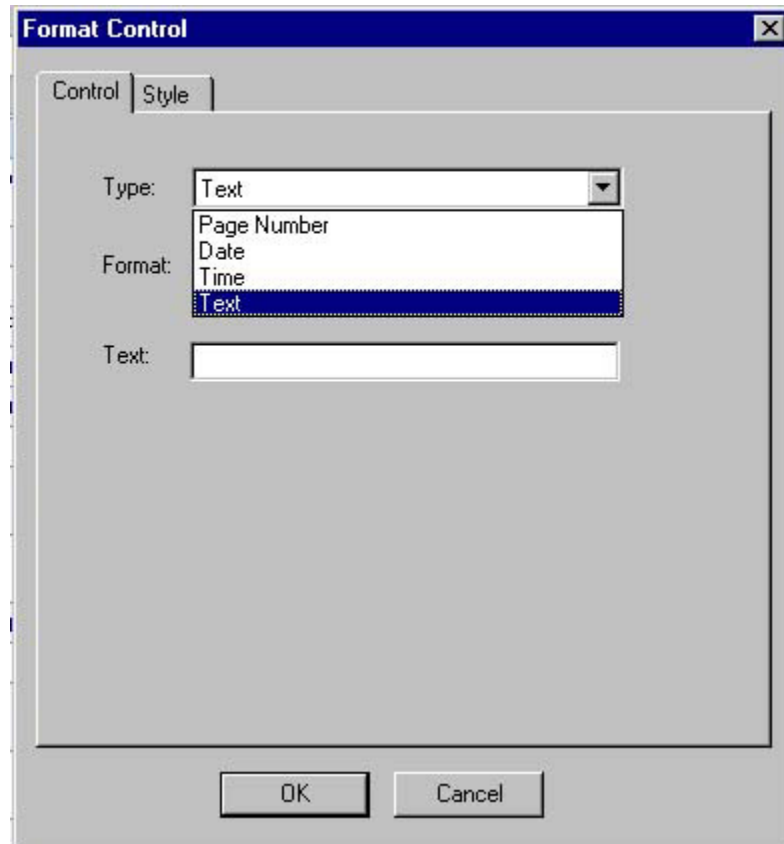
Page Header and Footer appear on each page of the *IntelliVIEW* report, while previewing or printing. The page header and footer can be shown or hidden using the toggle option View-> Page Header Footer.



Right click the page header or footer to display the following options.

- Format Control
- Delete Control
- Add Text
- Add Page Number
- Add Date
- Add Time

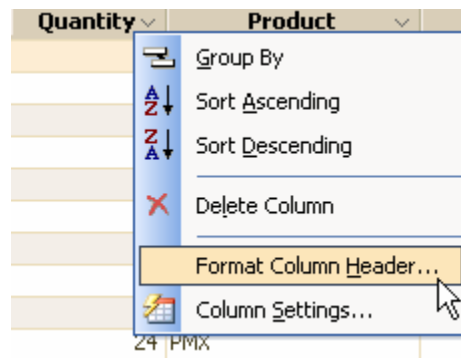
Select Page Number, Date, Time and Text as Page Header as shown below. Text can be formatted in Style Tab.



## Column header

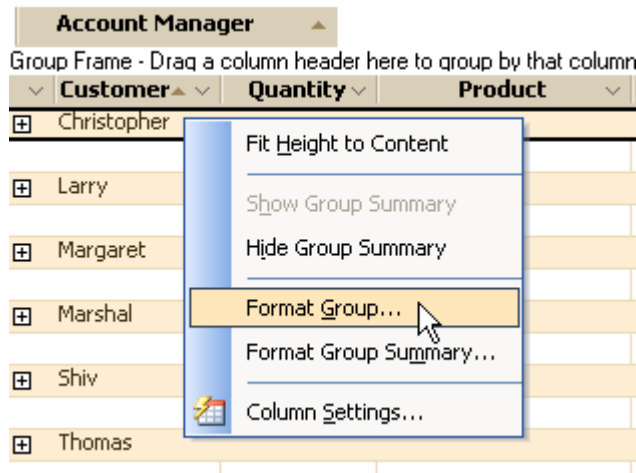
The column header displays the caption of all columns. The following operations can be performed on the column header.

- **Resizing** - The band thickness of the column header can be increased or decreased by dragging its bottom margin.
- **Applying Style** - Right click on any Column header and choose Format Column Header where style of font can be changed. Modify the font style, color and background color of the column header.



## Group Header

The Group Header displays the values of the column under which data is grouped. The group header band cannot be resized. Right click the Group Header and select Format Group to Format font style, color and background color for that group header. Modify the font style, color and background color of the group header.



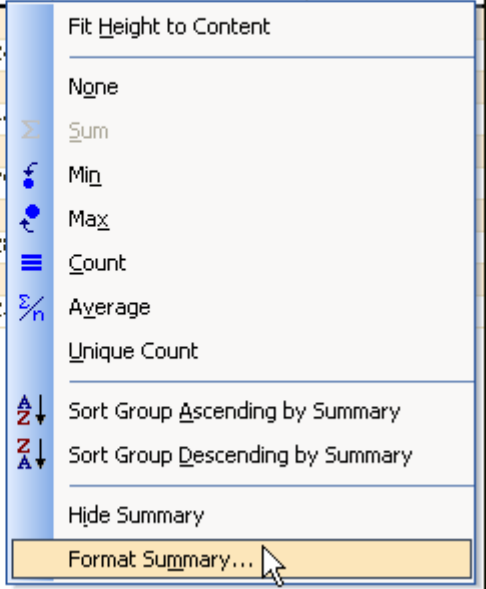
## Group Summary Footer

Group summary footer is the band displayed at the bottom of each group. It is used to display the summary value pertaining to that group.

The following operations can be performed on the group summary footer.

- **Format Summary** - Right click on group summary footer and select Format Summary. Select a summary type from drop-down list. Change the default label if required, by typing a suitable text. Click the tab Style to change the font style, alignment of the summary values and background color.
- **Hide Summary** - Right click on group summary footer and select Hide Summary to hide the summary footer from report.

Customer	Quantity	Sales Revenue	Product	Unit Price
Christopher		Sum=2246100		
Larry		Sum=3282		
Margaret		Sum=2734		
Marshal		Sum=3247		
Shiv		Sum=2642		
Thomas		Sum=2422		



## Report Footer

Report footer displays the summary values pertaining to the whole report and it is displayed only on last page of report.

The following operations can be performed on the report footer.

- Format Summary** - Right click the Report footer (View Footer) select Format Summary. Select a summary type from the drop-down list. Change the default label if required, by typing a suitable text. Click on Style Tab to change the font style, alignment of summary values and background color.
- Footer Background color** - The background color of the Report footer can be changed without selecting the Format summary option. Right click the Report footer and select Footer Background color. Color palette is displayed select a suitable color for the footer background.

## Conditional Formatting

Conditional formatting is used to show up a field in a different color if it meets criteria specified by the user. The Conditional Style tab in the Column Setting dialog is used to apply a particular style.

For example, the background color of the column Account Manager can be changed only in those cells of the column where its value is Christopher.

To highlight Sales revenue greater than \$50,000 use Conditional style formatting

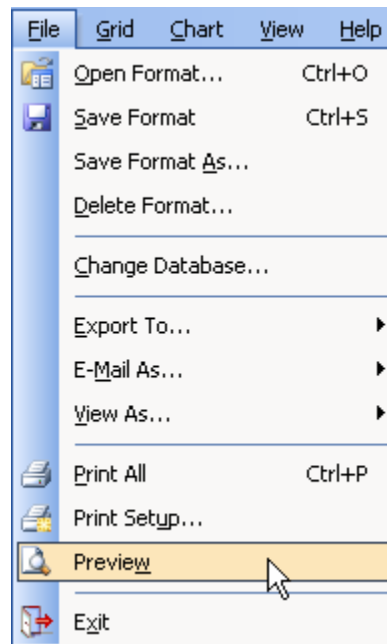
Group Frame - Drag a column header here to group by that column					
Customer	Account Manager	Quantity	Sales Revenue	Product	Unit Price
A&C International SA	Christopher	28	\$98,000.00	PSX	3500
Access IT	Christopher	28	\$77,000.00	IOX	2750
Addco Group	Larry	16	\$24,000.00	Paradigm	1500
Adequad	Christopher	28	\$42,000.00	Paradigm	1500
AGA Gas	Marshal	35	\$52,500.00	Paradigm	1500
Agnati	Larry	16	\$51,200.00	Tripex	3200
Aladdin Knowledge Systems	Shiv	22	\$70,400.00	Tripex	3200
Alfa Computer	Christopher	13	\$41,600.00	Tripex	3200
Alitalia	Margaret	25	\$87,500.00	PSX	3500
Allegiance	Shiv	34	\$93,500.00	IOX	2750
Alma	Larry	10	\$35,000.00	PSX	3500
Alpha Data	Larry	27	\$94,500.00	PSX	3500
Altkom Akademia	Christopher	15	\$41,250.00	IOX	2750
Anjura Tech. Corpn	Christopher	23	\$50,600.00	PMX	2200
Ardvark Consulting	Shiv	22	\$70,400.00	Tripex	3200
Ares	Larry	42	\$92,400.00	PMX	2200
ARTHUR ANDERSEN LLP	Shiv	25	\$62,500.00	IDX	2500
Arthur Anderson	Larry	12	\$42,000.00	PSX	3500
Asia Computers S.r.l.	Thomas	42	\$147,000.00	PSX	3500
Asmuscon	Shiv	35	\$112,000.00	Tripex	3200
Astranet S.l.	Larry	32	\$112,000.00	PSX	3500
ATR Computer Systems	Marshal	15	\$41,250.00	IOX	2750
Avalis AG	Larry	10	\$32,000.00	Tripex	3200
Avalis AG	Margaret	21	\$31,500.00	Paradigm	1500
Axisoft Co Ltd	Thomas	45	\$67,500.00	Paradigm	1500
Befas	Thomas	58	\$87,000.00	Paradigm	1500
Belsoft AG	Marshal	20	\$70,000.00	PSX	3500
Belsoft AG	Shiv	12	\$42,000.00	PSX	3500



## Preview and Print

### Print Preview and Printing

*IntelliVIEW* has powerful features for previewing and printing reports directly from the Notes application. Once the formatting is complete, a WYSIWIG preview of the report can be seen before printing.




Select File -> Preview.

The preview of the report is launched in a separate window as shown in the following figure.



Customer	Account Manager	Quantity	Sales Revenue	Product	Unit Price	Region	Month	Init Price
Abic International SA	Christopher	28	\$98,000.00	PSX	3500	Middle East	11	3500
Access IT	Christopher	28	\$77,000.00	IOX	2750	Middle East	2	2750
Addco Group	Larry	16	\$24,000.00	Paradigm	1500	Europe	5	1500
Adequad	Christopher	28	\$42,000.00	Paradigm	1500	North America	4	1500
AGA Gas	Marshal	35	\$52,500.00	Paradigm	1500	Middle East	9	1500
Agnati	Larry	16	\$51,200.00	Tripex	3200	South America	10	3200
Aladdin Knowledge Systems	Shiv	22	\$70,400.00	Tripex	3200	Europe	10	3200
Alfa Computer	Christopher	13	\$41,600.00	Tripex	3200	Africa	6	3200
Alkala	Margaret	25	\$87,500.00	PSX	3500	North America	10	3500
Allegiance	Shiv	34	\$93,500.00	IOX	2750	Europe	1	2750
Alma	Larry	10	\$35,000.00	PSX	3500	Europe	4	3500
Alpha Data	Larry	27	\$94,500.00	PSX	3500	Middle East	7	3500
Alkoms Akademia	Christopher	15	\$41,250.00	IOX	2750	Middle East	11	2750
Anjura Tech. Corpn	Christopher	23	\$50,600.00	PMX	2200	South America	5	2200
Ardvark Consulting	Shiv	22	\$70,400.00	Tripex	3200	Asia	5	3200
Ares	Larry	42	\$92,400.00	PMX	2200	Europe	2	2200
ARTHUR ANDERSEN LLP	Shiv	25	\$62,500.00	IDX	2500	Asia	12	2500
Arthur Anderson	Larry	12	\$42,000.00	PSX	3500	Europe	2	3500
Asia Computers S.r.l.	Thomas	42	\$147,000.00	PSX	3500	Middle East	10	3500
Asmuscon	Shiv	35	\$112,000.00	Tripex	3200	Middle East	2	3200
Astranet S.L.	Larry	32	\$112,000.00	PSX	3500	Europe	9	3500
ATR Computer Systems	Marshal	15	\$41,250.00	IOX	2750	Europe	1	2750
Avalis AG	Larry	10	\$32,000.00	Tripex	3200	Africa	5	3200
Avalis AG	Margaret	21	\$31,500.00	Paradigm	1500	Africa	3	1500
Axisoft Co Ltd	Thomas	45	\$67,500.00	Paradigm	1500	Middle East	7	1500
Befas	Thomas	58	\$87,000.00	Paradigm	1500	North America	9	1500
Belsoft AG	Marshal	20	\$70,000.00	PSX	3500	North America	3	3500
Belsoft AG	Shiv	12	\$42,000.00	PSX	3500	Middle East	5	3500
Bitech S.P.A	Marshal	20	\$64,000.00	Tripex	3200	Middle East	10	3200
Blue Age	Larry	23	\$80,500.00	PSX	3500	North America	2	3500
Blue Age Sistema	Thomas	25	\$37,500.00	Paradigm	1500	South America	10	1500

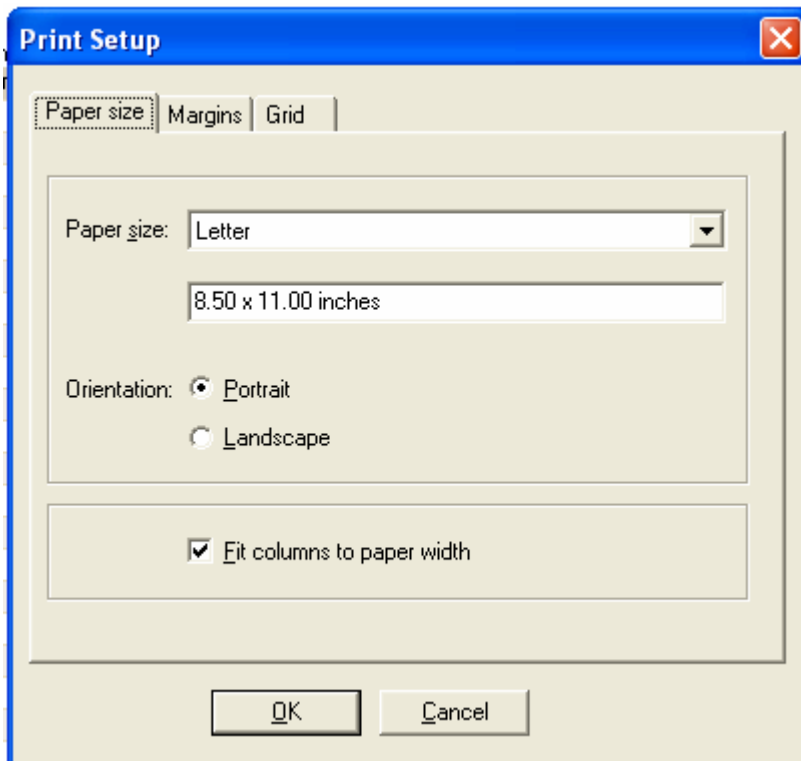
The buttons in the preview window enable different types of views of the report.

You can directly print the report from the preview window by clicking the Print icon .

## Print Setup

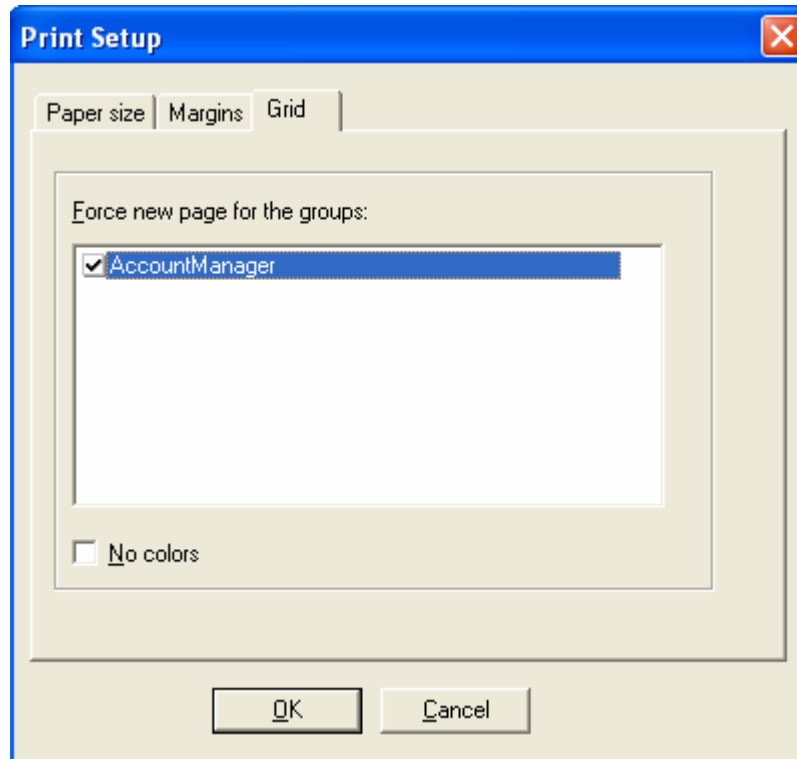
There is a facility to force new pages for each group (if the report contains groups) and select from a range of paper sizes, before previewing.

Select File -> Preview Setup or click the  icon to display the following dialog.




- **Paper size tab** - Select a Paper size by clicking on drop-down list. Select any page Orientation that is suitable for report.
- **Margins tab** - Change the margins of the report by adjusting the inches.
- **Grid tab** - Each group can be forced to be printed in a separate page and to print a page without colors by clicking on No colors check box.

By checking on Account Manager check box, Pages are spited as per groups

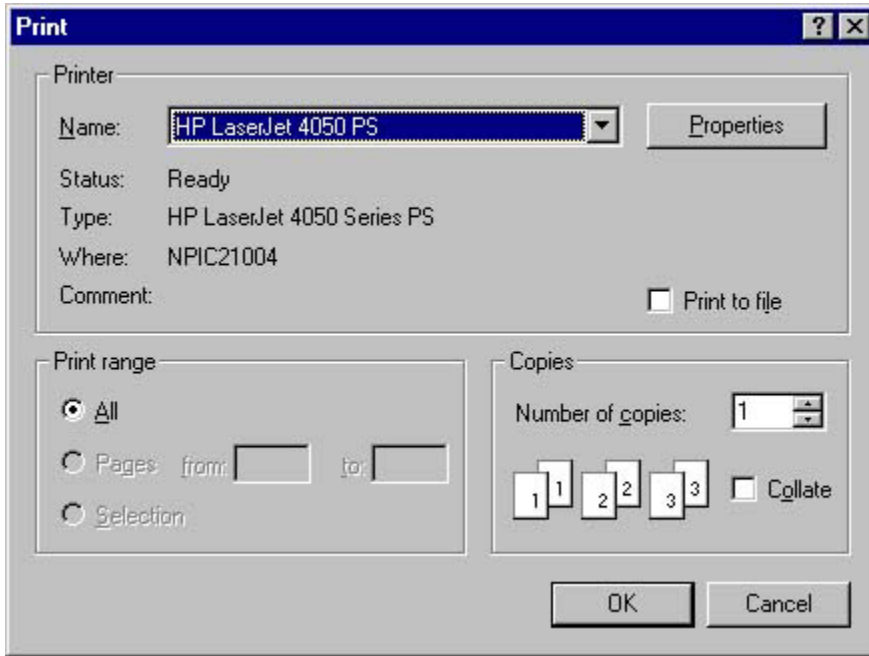


## Printing

Reports generated using *IntelliVIEW* can be printed from different printers and on various paper sizes.

Select File -> Print or click on the  icon. The Print dialog is displayed in which you select the printer, specific pages for selection, and number of copies of the report.

After setting all the required properties, click OK to trigger printing action.






## Saving, Exporting and Viewing

### Saving a Report

After formatting the data on Grid, the format can be saved as a notes document. Select

File → Save Format from menu or click on  icon to save a report.


Type a Format Name and Title in the dialog box and click on “Save” button to save a report

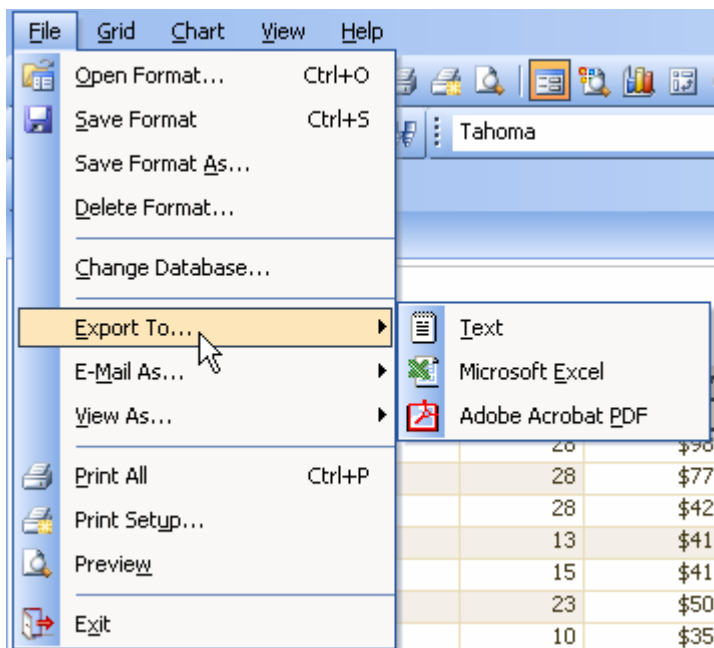
Format	Title
ProductSalesAnalysis	Product Sales Analysis
QuarterlySalesAnalysis	Quarterly Sales Analysis
RegionalSalesAnalysis	Regional Sales Analysis

Buttons: Save, Cancel

## Exporting a Report

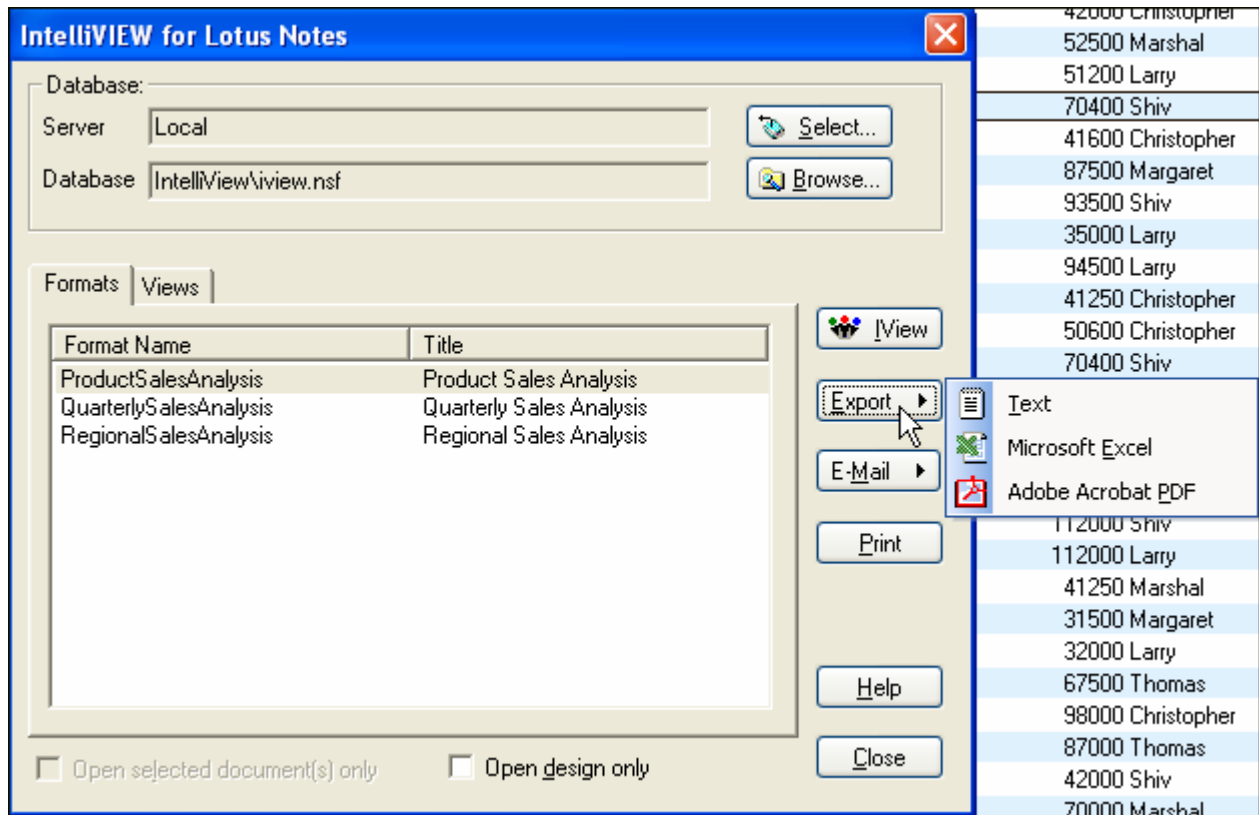
Reports generated in *IntelliVIEW* can be exported and saved in any file format. *IntelliVIEW* provides exporting options, which enables to export summary values and reports with filtered data. Reports created can be exported Text, Excel and PDF.

Select Format -> Export to... and then choose the required file type form the submenu that is displayed. Alternatively, click on the Export icon . Specify the destination folder and click Save to save the report.



## Alternative Method

Select “IntelliVIEW – Formats” from “Actions” menu. The startup dialog is displayed.



Select the View/Format that has to be exported. Click the Export button and choose the required file format from the submenu to export the selected report.


Note: Using the above options, charts can be exported to PDF only or copied to a PowerPoint or Word file.

## Exporting Summary data

Exporting Summary and Filtered data as present on the Grid can be done easily.

If the report contains groups, then it is possible to export only the group headers with summary values to a different file format. Similarly, data filtered using Filters are also not displayed in the exported reports. In short, *IntelliVIEW* offers you WYSIWIG export to different file formats.


Perform the following steps to export summary data.

- Collapse all groups by click on the “Collapse all” icon .
- Select Format -> Export to... and choose the required file format.

The report is exported to the specified file format with only the group header values and summary values.

Note: You can also expand up to an intermediate level of grouping by clicking the  icon.

## Viewing data in Excel, PDF or Text

If you just want to view data in the IView Grid in Excel, PDF or Text, click on the View As icon . This will open the data in the selected file format immediately.



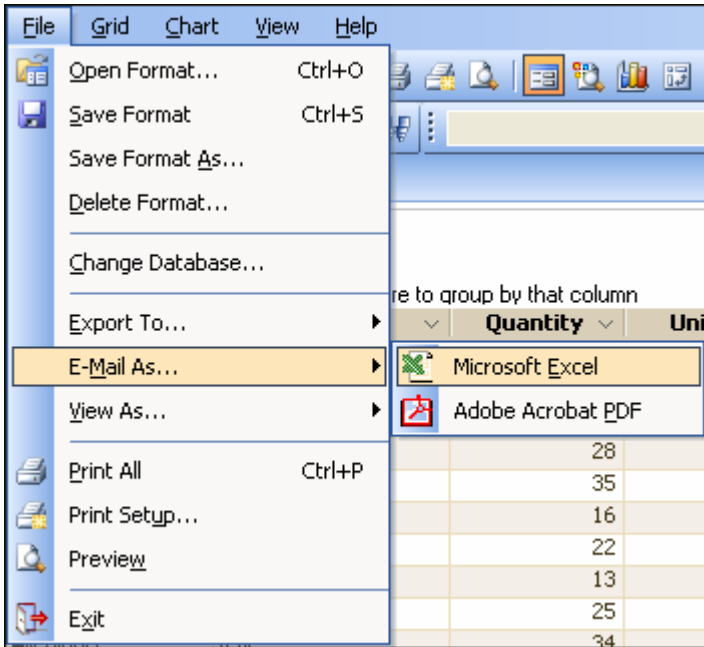


# Emailing with attachment

## E-Mailing a Report

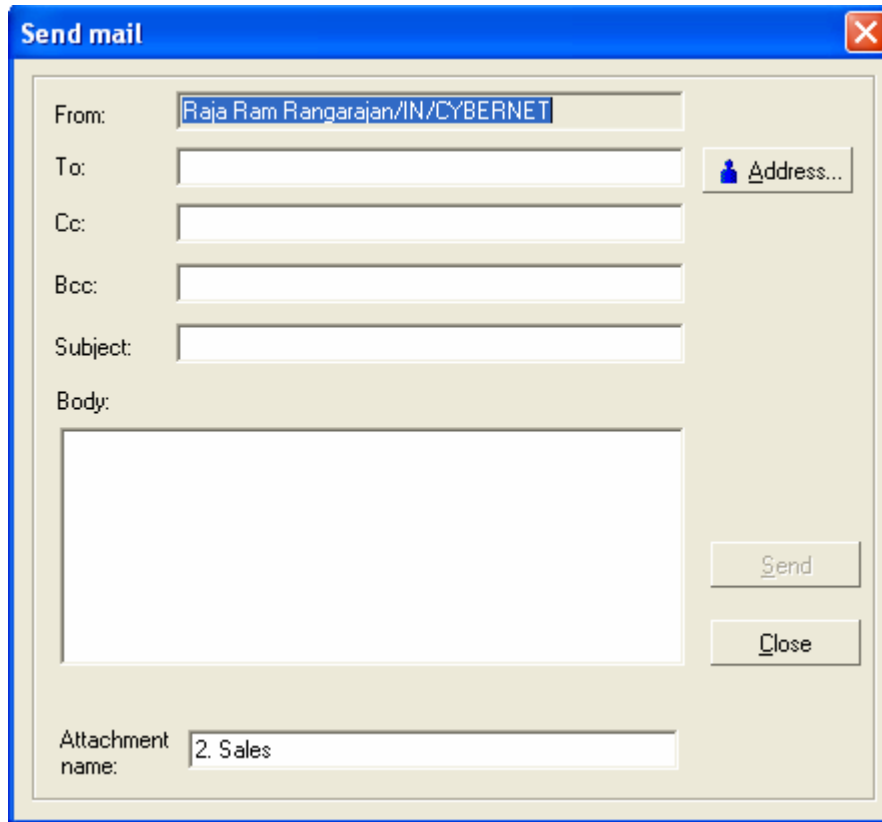
The report generated can be mailed in the form of Excel or PDF file attachments. The following steps illustrate the exporting of a report.

1. Go to Format menu, then select E-Mail, and then choose Excel.



2. A Mail dialog is displayed, From address will be automatically populated with the current working id of the Notes application. The user can even rename the attachment.


Enter the To address, Subject and Body of the mail and click on Send.



The screenshot shows a 'Send mail' dialog box with the following fields and buttons:

- From:** Raja Ram Rangarajan/IN/CYBERNET
- To:** (empty) with an 'Address...' button
- Cc:** (empty)
- Bcc:** (empty)
- Subject:** (empty)
- Body:** (empty text area)
- Attachment name:** 2. Sales
- Buttons:** Send, Close

A mail is sent to the specified address with the report as an excel file attachment and a confirmation message is displayed to the user.

Note: You can do the same action by clicking on the Email icon on the toolbar  icon.



## IntelliVIEW for Domino

---

*IntelliVIEW for Domino* has most of the features of *IntelliVIEW for Notes*, but not all. In addition, it works with the web-enabled applications through the Browser. This session deals with topics specific to using *IntelliVIEW for Domino*:

Lesson A      For Administrators

Lesson B      For Users

Lesson C      Limitations

## For the Administrators



---

## IntelliVIEW for Domino

### Components and Installation

#### Components

- Install *IntelliVIEW for Domino* on the Server where the Notes web enabled applications are installed
- To view the *IntelliVIEW* Grid in the Browser, the Active X plug-in needs to be installed on all desktops. This can be done in two ways.
  - The first one is an automated process; while clicking on the *IntelliVIEW* button for the first time the Active X plug-in will be installed automatically.
  - The other way is to open the IVAxSetup.exe file to install the Active X plug-in in your system. The same can be downloaded from the following URL  
<http://www.synaptris.com/products/intelliprint/public/download/IVAxSetup.exe>
- To create reports or formats install one licensed copy of *IntelliVIEW for Notes* designer on the Notes client.

## Installing IntelliVIEW for Domino

Perform the following steps to install *IntelliVIEW for Domino* in the Domino Server. It can be accessed from client machines with the *IntelliVIEW* ActiveX plug-in installed on them. Installation can be anew or upgrading from an older version.

### New Installation

1. Install IntelliVIEW for Domino on the Server where the Notes web enabled applications are installed. Open the IVDomSetup.exe file. The IntelliVIEW for Lotus Domino Setup screen is displayed.

*Note: If you already have an older version of IntelliVIEW installed in the directory specified, the installer will give you two options - Modify and Remove. Select the option Modify to repair the previous installation or install the software in a new location. Select the option Remove to uninstall IntelliVIEW from your system.*

2. The Setup then displays the License Agreement for the purchase and usage of IntelliVIEW for lotus Notes. Read the agreement completely and accept the license agreement, if you wish to continue with the installation. Click on Next to continue.
3. Setup next prompts for the path for installation. By default, IntelliVIEW is installed in the notes directory. You can choose to accept the default path or choose a location of your choice to store the installation files and sample databases. Click 'Next' to proceed with the installation.
4. Now you can select the modules to be installed. Select the desired modules and click Next to install the software.
5. Once the installation is over, the Installation Complete screen will be displayed. Select the option Yes, I want to launch readme file to view the contents of the readme file. Click on Finish to complete the installation. IntelliVIEW for Domino is installed in your system. It can be accessed from client machines with the IntelliVIEW ActiveX plug-in installed in them.

## Configuring the Domino Server

After installing *IntelliVIEW for Domino* on the Domino Server, the administrator needs to configure the Server for *IntelliVIEW*.

The following configuration settings should be made in the Server Document of the Domino Server:

Open the Server Document of the Domino Server in the Notes client.

Go to the tab Security.

In the Server Access section specify “No” against the option only allow server access to the users listed in this directory.

In the Agent Restrictions section, add the User ID (or the group in which it is a member) who has signed the database to both Run restricted Lotus Script/Java agents as well as Run unrestricted Lotus Script/Java agents. If you don't want to change these values in the server document, then you should sign the Notes Database\* with the User ID who has access to run Lotus script agents on the Domino Server.

\*The Notes database mentioned is the one on which you want to use *IntelliVIEW for Domino*.

Go to the tab Ports and then click the sub tab Notes Network Ports tab.

Specify the correct Net Address (name of the machine which runs Domino server) for the TCPIP Port.

**Note:** The Domino Server should be given appropriate access in the database access control lists (ACL) and the roles should also be enabled, so that the server has access to all the documents in the database.

# Creating IntelliVIEW Report Formats in the Domino Server

*IntelliVIEW* report formats are created using Lotus Notes Client.

To create *IntelliVIEW* report formats on the Domino Server, the administrator has to sign on the Notes client at the Domino Server, and create formats using the *IntelliVIEW for Domino* component installed in it. Then these reports are published to web through an action button or a link in the web page.

## Creating a Format

This is done in the same way as for the Notes version of the product. Please refer session 1.

## Creating Action Buttons to invoke IntelliVIEW from the Browser

Having configured the Domino Server, we now need to create Action buttons on the Domino application for activities such as starting *IntelliVIEW*, exporting reports from the Browser, printing etc.

The following activities are involved in creating *IntelliVIEW* action buttons for any database.

- Copy the script libraries IPDeclarations and IVForDominoV2 available in the sample database (generally in the directory; Intelliview\iview.nsf) to the user's database.
- Copy the agent named LaunchIViewV2 from the sample database to the user's database
- Create an action button named *IntelliVIEW* in the View of the user's database, from which *IntelliVIEW* needs to be invoked.
- In the Click event, place the code given below.

```
DBPath:= @ReplaceSubstring(@Subset(@DbName;-1);"\\";" "/"+"");
URL := "/" + DBPath + "/LaunchIViewV2?OpenAgent&View=SalesByPerson&FileType=0";
@URLOpen(URL)
```

Specify the view name in &View=, to open the particular View.

Specify the format name in &format=, to open a particular format.

In &FileType= specify one of the following:

- 0 – to launch the format/ view as IntelliVIEW dynamic spreadsheet in the Browser
- 1 – to export the view/format to PDF
- 2 – to export the view/format to TXT
- 3 – to export the view/format to XLS

#### Script Layer Function Declarations for Notes

Use this below declarations before using *IntelliVIEW* Script Layer functions for Notes. This can be written in the Declaration area of a Script library, agent etc.

Declare Function IVSExport Lib "NIVIEW.DLL" (Byval strServerName As String, Byval strDbPath As String, Byval strViewName As String, Byval strFormatName As String, Byval iExportType As Integer, Byval strFilePath As String) As Long

Declare Function IVSView Lib "NIVIEW.DLL" (Byval strServerName As String, Byval strDbPath As String, Byval strViewName As String, Byval strFormatName As String) As Long

Declare Function IVSBrowse Lib "NIVIEW.DLL" (Byval strServerName As String, Byval strDbPath As String, Byval ViewName As String) As Long

Using IVSGetData to open the *IntelliVIEW* Grid on the Browser

The function IVSGetData is used to create the action button for opening the *IntelliVIEW* Grid on the Browser

*The* syntax, arguments and API declaration for this function are given below.



## Syntax

Function IVSGetData Lib "IVSVR.DLL" (Byval svrname As String, Byval dbpath As String, Byval filename As String, Byval httppathOfFile As String, Byval viewname As String, Byval formatname As String) As Long

---

Arguments	Description
svrname	Name of the server
dbpath	Path of the database
filename	Path of the directory in which the <i>IntelliVIEW</i> files will be created i.e., domino data folder\domino\html\iview\filename (any unique file name)For example, D:\Lotus\Domino\data\domino\html\iview\IV_RNIA-5F5DMY (any unique file name)
httppathOfFile	The entire URL with which the generated IVIEW files can be viewed through the Browser i.e., http://servername/iview/filename (any unique file name)For ex: http://203.197.140.172(Server IP address)/iview/ IV_ RNIA-5F5DMY (any unique file name)
viewname	Name of the View, which needs to be previewed in the Browser
Formatname	Name of the format that needs to be previewed in the Browser.

**Note:** Either viewname or formatname can be given as argument. If both the arguments are given, viewname takes precedence.

#### Return values

Long.

Returns zero if no error occurred while previewing the document. Otherwise returns *IntelliVIEW* error code.

#### API declaration

Declare Function IVSGetData Lib "IVSVR.DLL" (Byval svrname As String, Byval dbpath As String, Byval filename As String, Byval httpPathOfFile As String, Byval viewname As String, Byval formatname As String) As Long

#### Sample Usage

```
Dim filename As String
```

```
Dim httpPathOfFile As String
```

```
Dim ret as long
```

```
filename = "D:\Lotus\Domino\Data\domino\html\IVIEW\"
```

```
filename = filename + "IV_ RNIA-5F5DMY"
```

```
httpPathOfFile = "http:// 203.197.140.172/iview/ IV_ RNIA-5F5DMY"
```

```
ret = IVSGetData("CSSDEV2/CYBERNET", "Intelliview\IVIEW.NSF", filename,
```

```
httpPathOfFile, "SalesByMonth", "")
```

Using IVSEExport to export reports from the Browser

The function IVSEExport is used to create the action button for exporting reports from the Browser.

The syntax, arguments and API declaration for this function are given below.

Syntax

```
Function IVSEExport Lib "NIVIEW.DLL" (Byval strServerName As String, Byval strDbPath  
As String, Byval strViewName As String, Byval strFormatName As String, Byval  
iExportType As Integer, Byval strFilePath As String) As Long
```

---

Arguments	Description
strServerName	Name of the server
strDbPath	Path of the database
strViewName	View name to be previewed with <i>IntelliVIEW</i>
strFormatName	Name of the format to be previewed with <i>IntelliVIEW</i>
iExportType	Specify the format in which the report has to be exported.  1 – PDF 2 – TXT 3 - XLS
strFilePath	Path to export the file in the specified format i.e., domino data folder\domino\html\iview\filename (any unique file name)  For example: <i>D:\Lotus\Domino\data\domino\html\iview\IV_RNIA-5F5DMY</i>

Note: Either strViewName or strFormatName can be given as argument. If both the arguments are given, strViewName takes precedence.

Return values

Long.

Returns zero if no error occurred while previewing the document. Otherwise returns *IntelliVIEW* error code.

API declaration

Declare Function IVSEExport Lib "NIVIEW.DLL" (Byval strServerName As String, Byval strDbPath As String, Byval strViewName As String, Byval strFormatName As String, Byval iExportType As Integer, Byval strFilePath As String) As Long

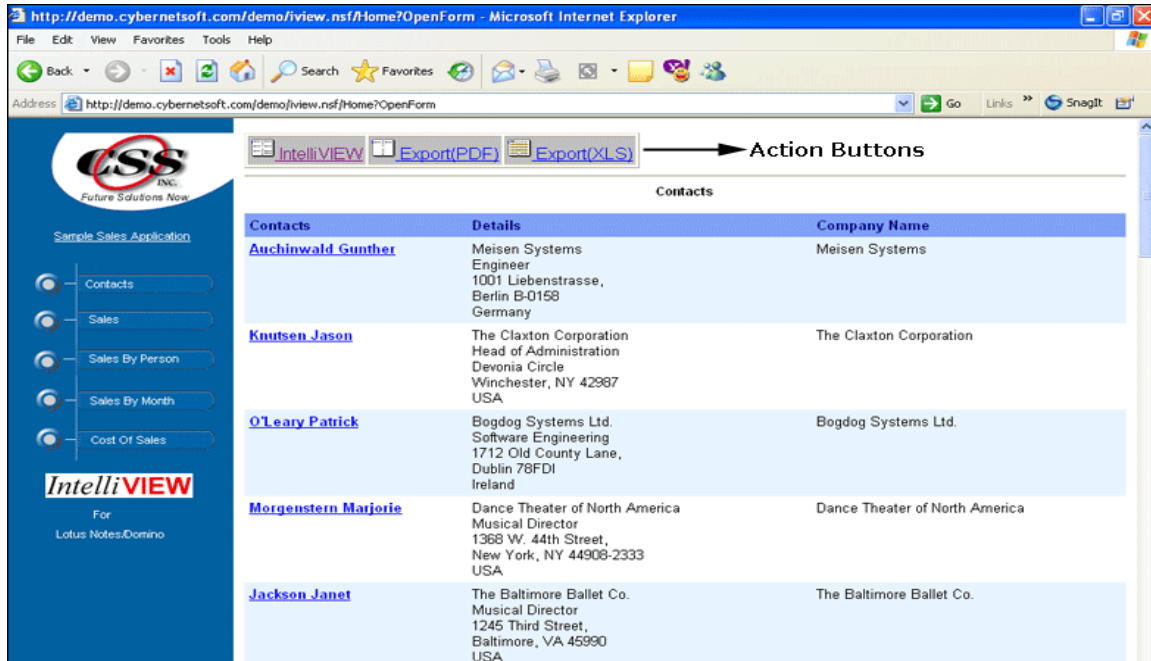


## For Users

### Starting IntelliVIEW from the Browser

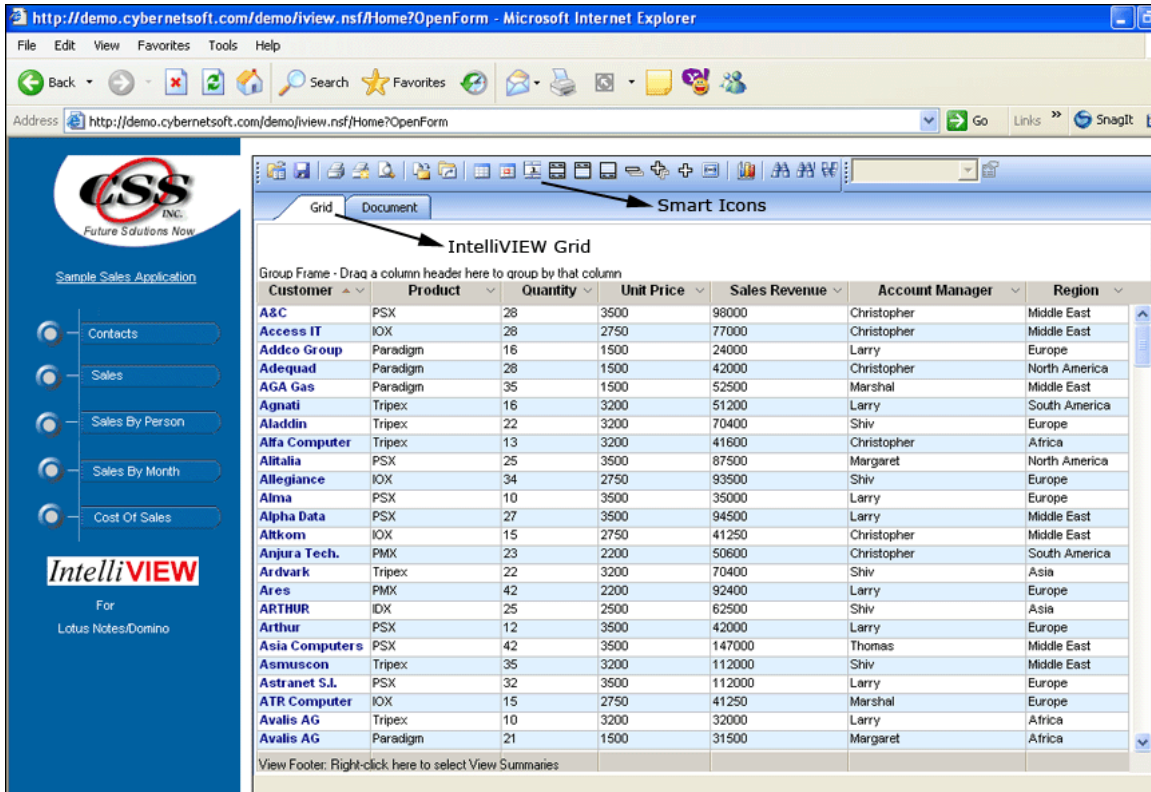
Once the necessary configuration is done and Action Buttons are created, the user can launch the *IntelliVIEW* client by clicking the *IntelliVIEW* Action button. Open the Domino application in the Browser and start using *IntelliVIEW*.

Type the unique IP address of the Domino database on your Browser's address box. *For ex: http://209.10.58.133/demo/iview.nsf.* (This will open a sample Domino application that has been configured for IntelliVIEW) The Domino application is displayed with action buttons as shown below.




Select a View and click the “IntelliVIEW” button to invoke *IntelliVIEW*.

The *IntelliVIEW* Grid is displayed with the data in the selected View as shown below. Views can be switched using the navigation pane on the left. (if you are starting *IntelliVIEW* for the first time from your Browser, the ActiveX plug-in will download automatically and then you will be able to see the *IntelliVIEW* Grid in your Browser)




## Saving a format on the Browser

*IntelliVIEW* for Domino allows you to save reports and formats after performing ad-hoc analysis over the Browser.

Click the Save icon  to save the format in any available network place.

The format is saved as an *IntelliVIEW* data file. (With an extension .IVDAT)

Clicking the Open icon can open the saved formats. 

## IntelliVIEW ActiveX Plug-in

After installing *IntelliVIEW for Domino* in a Domino server, it is mandatory to get the *IntelliVIEW* ActiveX plug-in installed in all its client machines to enable them to display the *IntelliVIEW* Grid on their Browsers.

Open the IVAxSetup.exe file to install the plug-in in your system.

## Data Analysis using IntelliVIEW for Domino

The prime objectives of *IntelliVIEW for Domino* is to enable users analyze data over the web and create ad-hoc reports.

All the data analysis operations are possible using *IntelliVIEW for Domino*.




## Formatting Reports on the Browser

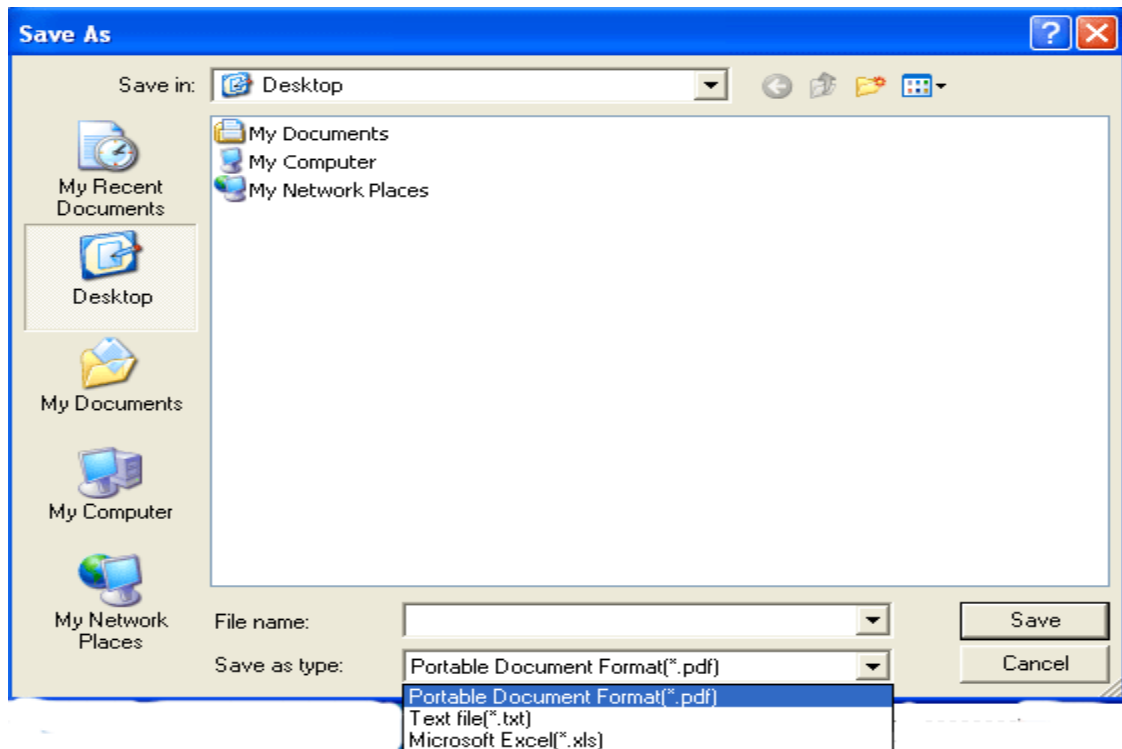
*IntelliVIEW for Domino* offers all the formatting options available in *IntelliVIEW for Notes*. With the following features, you will be able to create elegant reports quickly and easily, even over the Web.

- Grid Settings
- Formatting Columns, Rows and Cells
- Formatting Headers and Footers

## Exporting Reports from the Browser

To export reports from the Browser, perform the following steps.

Click the  icon. The Save as dialog is displayed with provision to Save as type PDF, Excel or Text.




Select the required file type and click Save to save the report in the specified location.

## Previewing and Printing over the Browser



The Preview of reports from the Browser, is launched in Acrobat PDF, from which they can be printed. Perform the following steps to print the report displayed on the *IntelliVIEW* Grid.

### Print Setup

There is a facility to force new pages for each group (if the report contains groups) and select a paper size, before previewing.

- Click the  icon. The Print Setup dialog is displayed.
- Select a group name by checking the check box, if it should start from a fresh page.
- Click the tab Size.
- Select the required paper size from the drop-down list.
- Select the type of page orientation, suitable to your report.

## Previewing and Printing

Click the  icon to preview the report. To print the report click the  icon

## Limitations




---

### What you can't do through the Browser?

There are a few limitations in *IntelliVIEW for Domino* when compared to *IntelliVIEW for Notes*. This section lists out the operations not possible with *IntelliVIEW for Domino* but which are available in *IntelliVIEW for Notes*.

- **Opening a View from a different database** - *IntelliVIEW for Domino* can be used only when each database is customized with the respective action buttons. Hence, opening a View from a different database is not possible.
- **Adding columns to the Grid** - After opening a View in the browser through *IntelliVIEW* Grid it is possible to remove columns. (Right click on a column and select Delete Column.) However, it is not possible to add additional columns to the Grid by selecting fields from the database.
- **Advanced Filtering** – Basic Filtering can be done in *IntelliVIEW for Domino*. However, Advanced Filtering option is not available.
- **Active Chart** – Charts can be created using chart wizard. However, Active chart is not available.
- **E-Mailing Reports** - The feature of E-Mailing reports directly from the *IntelliVIEW* application using the default client id, is not available in *IntelliVIEW for Domino*.

# Question and Answer Session



---

## Notes

A series of horizontal dashed lines for taking notes.

