



Report Portal User Guide

Version 6.2



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When you report a problem, it helps if you can tell us:

- The name of the software application
- The circumstances in which the problem arose
- What error messages you saw (if any);
- The version of the software that you were using.

Pitney Bowes Software Inc.

April 13, 2018

Contents

- Chapter 1: Introduction.....5**
 - Purpose.....6
 - Intended audience.....6
 - Related documentation.....6

- Chapter 2: Getting started.....7**
 - About the Report Portal.....8
 - Starting the Report Portal.....8
 - The start page.....9
 - Navigating in the Report Portal.....9

- Chapter 3: Running reports.....11**
 - Running reports.....12
 - Viewing the generated report.....12

- Chapter 4: Archived reports.....15**
 - Archiving reports.....16
 - Viewing archived reports.....16

- Chapter 5: Viewing reports.....19**
 - The Files tabbed page.....20
 - The View tabbed page.....20
 - The Details tabbed page.....20

- Chapter 6: Linking to reports.....21**
 - Linking to the Overview Page.....22
 - Linking to Run Report.....22

Linking to a report's archive.....	24
Linking to an archived report.....	24
ISO Latin-1 Character Set.....	25
Report Formats.....	32
Report View Actions.....	32

Introduction

In this section:

- **Purpose**6
- **Intended audience**6
- **Related documentation**6

Purpose

This document describes how to use Portrait Dialogue's Report Portal, a web based Customer Relationship Management tool.

Intended audience

This document is intended for people who will use the Report Portal to view, run and save report templates.

Related documentation

Document	Media (zip/dvd) and location
PD Visual Dialogue User Guide	Portrait Dialogue media in: \Documentation\ <i><language_code></i> \
PD Customer View User Guide	Portrait Dialogue media in: \Documentation\ <i><language_code></i> \
PD Telemarketing User Guide	Portrait Dialogue media in: \Documentation\ <i><language_code></i> \
PD Web Portal User Guide	Portrait Dialogue media in: \Documentation\ <i><language_code></i> \

Note: These documents and others can be downloaded from the Pitney Bowes Software website:
<http://www.pbinsight.com/support/product-documentation/p/>

Getting started

In this section:

- **About the Report Portal8**
- **Starting the Report Portal8**
- **The start page9**
- **Navigating in the Report Portal9**

About the Report Portal

Portrait Dialogue's Report Portal is used by marketers to define, manage and carry out structured communication processes with large numbers of customers, and is specifically designed to support the principles of one-to-one marketing.

The Report Portal provides you with an intuitive work environment for running report templates and viewing archived reports.

Starting the Report Portal

Report Portal supports two login methods which are set up by your System Administrator:

- **Normal login**

When using Normal login, you manually enter your username and password. If successfully authorized, you are taken to the [overview page](#).

- **Windows login**

When using Windows login, you do not have to enter your username and password. You are automatically authorized and logged in to Report Portal using your Windows domain user credentials.

Note: To use the Windows login option, you must have login rights to the Report Portal, and must be logged in to the corporate Windows domain. If not, you are taken to the normal login page.

Note: When starting Report Portal from Visual Dialogue, you are automatically logged in with the user credentials used for Visual Dialogue.

Advanced login

- **Instance**

When logging on to the Report Portal, the system can be set up to give access to different instances. To access this option, click on the Advanced button in the lower right corner. The window will expand and a drop down box will show available instances. Select the instance and continue.

- **Cache**

In order to speed up the performance in Report Portal, domain data is cached on the Web server. This data cache has to be recovered when the System Administrator makes changes in the domain data. To access this option, click **Advanced ->Clear Cache**.

The start page

The first window displayed when you start Report Portal is the **Overview** page.

The **Overview** page has the following:

- **Recent viewed reports**

This table lists the ten latest reports you have accessed in the report portal.

The table is sorted with the latest accessed reports at the top.

- **Available reports**

This table lists all available reports, organized in folders.

The number of reports in each folder is given in parentheses to the right of the folder name.

The reports available is dependent on your user rights (see Visual Dialogue - and Dialogue Admin documentation).

Running reports

In order to run a report shown in either of the tables, click **Run report**.

See [Running reports](#) for details on running reports.

Viewing archived reports

To open a report's archive, click **Archived versions**. The number of reports archived for a given report is given in parentheses to the right of the **Archived versions**.

See [Viewing archived reports](#) for details about viewing archived reports.

Navigating in the Report Portal

The Report Portal is a web-based application that runs in Microsoft Internet Explorer. When navigating the application, use the Report Portal's built-in navigation functionality and not the browsers Back and Forward buttons.

Other navigation tips:

- When generating new reports, or accessing archived reports, you will automatically be taken to the correct pages.
- When working with a report template or an archived report, the left menu will automatically be updated with the necessary links.
- Use the Report Portal's back button to go back. This will load the page previously accessed.

Note: If you have Report Portal open, and open another web link (for example, clicking a link within MS Outlook), the new link may open in the same window as Report Portal. To avoid this, change your settings in Windows Explorer or open a new explorer window before clicking on the link.

Running reports

In this section:

- **Running reports**12
- **Viewing the generated report**12

Running reports

The reports available in Report Portal is dependent on your user rights (see Visual Dialogue- and Dialogue Admin documentation).

Running a report

In order to run a report in Report Portal, simply open the [Overview page](#), browse to find the desired report and click **Run report**.

This will open the "Run report" page; This is where you set the report parameters and the report format. The page consists of the following:

- **Template Details**

This table lists all the template's details. Click **Show detailed view** in order to view all the report template's details.

- **Report Parameters**

This table lists all parameters defined for the report, if any.

- **Report Format**

This table lets you specify the report's format. The two most common formats are directly available, all other formats are listed in the "Other" dropdown-list.

The report's default format is selected by default.

Note: The format can be changed after the report is generated.

Generating the report / Viewing the result

Set the desired parameters and the report's format and click **Run report** to (run)generate the report; The report will then be generated and displayed on the **View report** page.

Viewing the generated report

After running a report, the result will be displayed on the **View report page**.

This page is organized with the following tabbed pages:

- **Files**

Lists all report files.

See [The Files tabbed page](#) for details.

- **View**

Displays the report files inline in your browser.

See [The View tabbed page](#) for details.

- **Details**

Lists details about the report generated.

See [The Details tabbed page](#) for details.

- **Archiving**

This page provides functionality for archiving the generated report.

See the [Archiving reports](#) page for details.

Rerunning the report

In order to rerun the report, simply click the **Rerun** link in the left menu. This will load the [Run report page](#), with all parameter values set.

Note: This will unload the report generated. Archive the report first, if desired.

Viewing the report's archive

In order to view the report's archive, simply click the *Archive* link on the left menu. This will load the report's [archive page](#), listing all archived version of the report.

Note: This will unload the report generated. Archive the report first if desired.

Archived reports

In this section:

- [Archiving reports](#)16
- [Viewing archived reports](#)16

Archiving reports

Reports generated in Report Portal can be saved to the report's archive.

To do this, **run a report** and click the **Archiving** tabbed page when viewing the generated report.

This tabbed page provides functionality for archiving the generated report.

To archive the generated report, enter a name for the archived report and click **Archive report**.

After the report is archived, a link to the archived report, and a link to the report's archive list are displayed.

Viewing archived reports

In order to open a report's archive and display an archived report, follow these steps:

1. Open the **Overview page**.
2. Find the report to which archive you want to view and click the **Archive** link.

This will display the report's archive page. This page consists of the *Template Details table* and the *Archived report versions table* (described below).

3. To open one of the archived reports in the list, click the report's name. This will display the archived report.

Template details

This table lists all the template's details. Click **Show detailed view** in order to view all the report template's details.

Archived report versions

This table lists all archived versions of the report. The table has the following columns:

- **Name**
The name of the archived report.
- **Format**
The format of the archived report.
- **Date**
The time and date the report was archived.
- **Delete**
Click the "delete icon" in order to delete the archived report. The action must be confirmed.

Clicking **Show detailed view** replaces the **Date** column with two new columns:

- **Run start**

Shows the time and date the report started archiving.

This is the same field as the **Date** column in "normal view".

- **Run finished**

Shows the time and date the report finished archiving.

Viewing reports

In this section:

- The Files tabbed page20
- The View tabbed page20
- The Details tabbed page20

The Files tabbed page

This tabbed page lists all the report files.

Opening files

To open one of the files, click the **Open** link. This will open the file in a new browser window.

The action performed to open this file depends on the report format and settings in your browser.

Saving files to disk

To save one of the report's files to your workstation, simply click the **Save** link. This will display the **Save as** dialog.

The View tabbed page

This View tabbed page displays the report files inline in your browser.

The page is available only if the report format can be previewed inline in your browser.

Paging

If the report consists of multiple pages, use the navigation bar to navigate between the pages.

Zoom

In order to zoom the report page, simply enter the desired zoom percentage and press enter.

Print

To print the current report page, click the **Print** button. This will display the **Print** dialog.

Save page

If you want to save the displayed report page, click the **Save** button. This will display the "Save as" dialog.

The Details tabbed page

This tabbed page lists the details and the parameters used when the report was generated.

Template Details

The template details are listed in the **Template Details** table.

Report Parameters

The parameters used when generating the report are listed in the **Report Parameters** table.

Linking to reports

In this section:

- [Linking to the Overview Page](#)22
- [Linking to Run Report](#)22
- [Linking to a report's archive](#)24
- [Linking to an archived report](#)24
- [ISO Latin-1 Character Set](#)25
- [Report Formats](#)32
- [Report View Actions](#)32

Linking to the Overview Page

The Overview page is Report Portal's default page. Linking directly to the web application will open the Overview page.

The URL link

The URL format described:

```
http://<server>/MHReportal
```

Note: You can also open the overview page in Report Portal and copy the URL from your web browser's address field.

Related information

The [login page](#) will be display if necessary.

[Click here](#) to view the World Wide Web Consortium's URL standard specification.

Linking to Run Report

It is possible to link to the Report Portal and directly run a report, with or without parameters.

Linking without report parameters

When running a report without report parameters, the only URL-parameter required is the template id (the report's template id can be located in the **Report templates browser** in Visual Dialogue).

The URL format described:

- `http://<server>/MHReportal/RunReport.aspx?TemplateID=[TEMPLATE-ID]`
- The report's format index can be specified in the url in order to override the report's default format. The URL will then look this:
`http://<server>/MHReportal/RunReport.aspx?TemplateID=[TEMPLATE-ID]&FormatIndex=[FORMAT-INDEX]`
- The action can be specified in the url in order to override the default action. The URL will then look this:
`http://<server>/MHReportal/RunReport.aspx?TemplateID=[TEMPLATE-ID]&Action=[ACTION]`

See [Report View Actions](#) for an overview of the different report actions available.

URL parameters:

- The `TemplateID` parameter is required ([TEMPLATE-ID] in the URL must be replaced with the id of the report template).
- The `FormatIndex` and `Action` parameters are optional.

Examples:

- `http://<server>/MHReportal/RunReport.aspx?TemplateID=1030`
- `http://<server>/MHReportal/RunReport.aspx?TemplateID=1030&FormatIndex=6`
- `http://<server>/MHReportal/RunReport.aspx?TemplateID=1030&Action=Print`

Linking with report parameters

When running a report with report parameters, the template id and the report parameters must be supplied.

When specifying report parameters in the URL, the parameter name and value (and optionally the parameter operator) must be given. If the report parameter operator is not specified, the default operator is used.

The URL format described:

```
http://<server>/MHReportal/RunReport.aspx?TemplateID=[TEMPLATE-ID] &
class="- topic/p ">
pname[1,2...]=[PARAMETER-NAME] &
pvalue[1,2...]=[PARAMETER-VALUE] &
poperator[1,2...]=[PARAMETER-OPERATOR] &
FormatIndex=[FORMAT-INDEX]
```

- The `TemplateID` parameter is required (the [TEMPLATE-ID] in the URL must be replaced with the id of the report template).
- Specify the first report parameter like this:

```
pname1=[PARAMETER-NAME] &pvalue1=[PARAMETER-VALUE]
```

Specify the second report parameter like this:

```
pname2=[PARAMETER-NAME] &pvalue2=[PARAMETER-VALUE]
```

and so on..

- The `FormatIndex` parameter is optional ([FORMAT-INDEX] in the URL must be replaced with the desired format-index).

Examples:

- `http://<server>/MHReportal/RunReport.aspx?TemplateID=1030&FormatIndex=6`
- `http://<server>/MHReportal/RunReport.aspx?TemplateID=1030&pname1=CustomerID&pvalue1=10003&poperator1=in`

Remarque : The URL may be copied or saved and used later. Note that opening the URL always will generate the report over.

All URL parameters must be url encoded - This implies that protected URL characters (like "=" and "&") must be converted into their respective hexadecimal character code as specified in the [ISO Latin-1 Character Set \(ISO 8859-1\)](#).

Related information

The [login page](#) will be display if necessary.

See [Report Formats](#) for an overview of the different report formats available.

See [Report View Actions](#) for an overview of the different report actions available.

[Click here](#) to view the World Wide Web Consortium's URL standard specification.

Linking to a report's archive

It is possible to link directly to a report's archive list. This will open the [Report Archive page](#) in Report Portal.

The URL format described:

- `http://<server>/MHReportal/Reportal.aspx?Page=Archive&TemplateID=[ARCHIVE-ID]`
- The TemplateID parameter is required (the `[ARCHIVE-ID]` in the URL must be replaced with the archived report's id).

Example:

- `http://<server>/MHReportal/Reportal.aspx?Page=Archive&TemplateID=1030`

Note: >You can also open Report Portal, open a report's archive and copy the URL from your web browser's address field.

Related information

The [login page](#) will be display if necessary. [Click here](#) to view the World Wide Web Consortium's URL standard specification.

Linking to an archived report

It is possible to link directly to an archived report. This will open the [View archived report page](#) in Report Portal.

The URL link

The URL format described:

- `http://<server>/MHReportal/Reportal.aspx?Page=ViewArchived&ArchiveID=[ARCHIVE-ID]`
- The report's format index can be specified in the url in order to override the archived report's default format. The URL will then look this:

`http://<server>/MHReportal/Reportal.aspx?Page=ViewArchived&ArchiveID=[ARCHIVE-ID]&FormatIndex=[FORMAT-INDEX]`

- The action can be specified in the url in order to override the default action. The URL will then look this:


```
http://<server>/MHReportal/RunReport.aspx?TemplateID=[TEMPLATE-ID]&Action=[ACTION]
```

URL parameters:

- The ArchiveID parameter is required (the [\[ARCHIVE-ID\]](#) in the URL must be replaced with the id of the archived report).
- The FormatIndex and Action parameters are optional.

Examples:

- `http://<server>/MHReportal/Reportal.aspx?Page=ViewArchived&ArchiveID=1333`
- `http://<server>/MHReportal/Reportal.aspx?Page=ViewArchived&ArchiveID=1333&FormatIndex=7`
- `http://<server>/MHReportal/Reportal.aspx?Page=ViewArchived&ArchiveID=1333&FormatIndex=7&Action=print`

Note: You can also open Report Portal, display an archived report and copy the URL from your web browser's address field.

Related information

The [login page](#) will be display if necessary.

See [Report Formats](#) for an overview of the different report formats available.

See [Report View Actions](#) for an overview of the different report actions available.

[Click here](#) to view the World Wide Web Consortium's URL standard specification.

ISO Latin-1 Character Set

The following table contains the complete ISO Latin-1 character set, alias ISO-8859-1.

The table provides the decimal code, hexadecimal code, and a brief description for each character.

Character	Decimal code	Hexadecimal code	Description
---	9	9	Horizontal tab
---	10	A	Line feed
---	13	D	Carriage Return
	32	20	Space
!	33	21	Exclamation mark
"	34	22	Quotation mark
#	35	23	Number sign
\$	36	24	Dollar sign
%	37	25	Percent sign

Character	Decimal code	Hexadecimal code	Description
&	38	26	Ampersand
'	39	27	Apostrophe
(40	28	Left parenthesis
)	41	29	Right parenthesis
*	42	2A	Asterisk
+	43	2B	Plus sign
,	44	2C	Comma
-	45	2D	Hyphen
.	46	2E	Period (fullstop)
/	47	2F	Solidus (slash)
0	48	30	Digit 0
1	49	31	Digit 1
2	50	32	Digit 2
3	51	33	Digit 3
4	52	34	Digit 4
5	53	35	Digit 5
6	54	36	Digit 6
7	55	37	Digit 7
8	56	38	Digit 8
9	57	39	Digit 9
:	58	3A	Colon
;	59	3B	Semicolon
<	60	3C	Less than
=	61	3D	Equals sign
>	62	3E	Greater than
?	63	3F	Question mark
@	64	40	Commercial at
A	65	41	Capital A
B	66	42	Capital B
C	67	43	Capital C
D	68	44	Capital D

Character	Decimal code	Hexadecimal code	Description
E	69	45	Capital E
F	70	46	Capital F
G	71	47	Capital G
H	72	48	Capital H
I	73	49	Capital I
J	74	4A	Capital J
K	75	4B	Capital K
L	76	4C	Capital L
M	77	4D	Capital M
N	78	4E	Capital N
O	79	4F	Capital O
P	80	50	Capital P
Q	81	51	Capital Q
R	82	52	Capital R
S	83	53	Capital S
T	84	54	Capital T
U	85	55	Capital U
V	86	56	Capital V
W	87	57	Capital W
X	88	58	Capital X
Y	89	59	Capital Y
Z	90	5A	Capital Z
[91	5B	Left square bracket
\	92	5C	Reverse solidus (backslash)
]	93	5D	Right square bracket
^	94	5E	Caret
_	95	5F	Horizontal bar (underscore)
`	96	60	Acute accent
a	97	61	Small a
b	98	62	Small b
c	99	63	Small c

Character	Decimal code	Hexadecimal code	Description
d	100	64	Small d
e	101	65	Small e
f	102	66	Small f
g	103	67	Small g
h	104	68	Small h
i	105	69	Small i
j	106	6A	Small j
k	107	6B	Small k
l	108	6C	Small l
m	109	6D	Small m
n	110	6E	Small n
o	111	6F	Small o
p	112	70	Small p
q	113	71	Small q
r	114	72	Small r
s	115	73	Small s
t	116	74	Small t
u	117	75	Small u
v	118	76	Small v
w	119	77	Small w
x	120	78	Small x
y	121	79	Small y
z	122	7A	Small z
{	123	7B	Left curly brace
	124	7C	Vertical bar
}	125	7D	Right curly brace
~	126	7E	Tilde
	160	A0	Nonbreaking space
¡	161	A1	Inverted exclamation
¢	162	A2	Cent sign
£	163	A3	Pound sterling

Character	Decimal code	Hexadecimal code	Description
¤	164	A4	General currency sign
¥	165	A5	Yen sign
	166	A6	Broken vertical bar
§	167	A7	Section sign
¨	168	A8	Diæresis / Umlaut
©	169	A9	Copyright
ª	170	AA	Feminine ordinal
«	171	AB	Left angle quote, guillemet left
¬	172	AC	Not sign
-	173	AD	Soft hyphen
®	174	AE	Registered trademark
–	175	AF	Macron accent
°	176	B0	Degree sign
±	177	B1	Plus or minus
²	178	B2	Superscript two
³	179	B3	Superscript three
´	180	B4	Acute accent
µ	181	B5	Micro sign
¶	182	B6	Paragraph sign
·	183	B7	Middle dot
¸	184	B8	Cedilla
¹	185	B9	Superscript one
º	186	BA	Masculine ordinal
»	187	BB	Right angle quote, guillemet right
¼	188	BC	Fraction one-fourth
½	189	BD	Fraction one-half
¾	190	BE	Fraction three-fourths
¿	191	BF	Inverted question mark
À	192	C0	Capital A, grave accent
Á	193	C1	Capital A, acute accent
Â	194	C2	Capital A, circumflex

Character	Decimal code	Hexadecimal code	Description
Ã	195	C3	Capital A, tilde
Ä	196	C4	Capital A, diæresis / umlaut
Å	197	C5	Capital A, ring
Æ	198	C6	Capital AE ligature
Ç	199	C7	Capital C, cedilla
È	200	C8	Capital E, grave accent
É	201	C9	Capital E, acute accent
Ê	202	CA	Capital E, circumflex
Ë	203	CB	Capital E, diæresis / umlaut
Ì	204	CC	Capital I, grave accent
Í	205	CD	Capital I, acute accent
Î	206	CE	Capital I, circumflex
Ï	207	CF	Capital I, diæresis / umlaut
Ð	208	D0	Capital Eth, Icelandic
Ñ	209	D1	Capital N, tilde
Ò	210	D2	Capital O, grave accent
Ó	211	D3	Capital O, acute accent
Ô	212	D4	Capital O, circumflex
Õ	213	D5	Capital O, tilde
Ö	214	D6	Capital O, diæresis / umlaut
×	215	D7	Multiply sign
Ø	216	D8	Capital O, slash
Ù	217	D9	Capital U, grave accent
Ú	218	DA	Capital U, acute accent
Û	219	DB	Capital U, circumflex
Ü	220	DC	Capital U, diæresis / umlaut
Ý	221	DD	Capital Y, acute accent
Þ	222	DE	Capital Thorn, Icelandic
ß	223	DF	Small sharp s, German sz
à	224	E0	Small a, grave accent
á	225	E1	Small a, acute accent

Character	Decimal code	Hexadecimal code	Description
â	226	E2	Small a, circumflex
ã	227	E3	Small a, tilde
ä	228	E4	Small a, diæresis / umlaut
å	229	E5	Small a, ring
æ	230	E6	Small ae ligature
ç	231	E7	Small c, cedilla
è	232	E8	Small e, grave accent
é	233	E9	Small e, acute accent
ê	234	EA	Small e, circumflex
ë	235	EB	Small e, diæresis / umlaut
ì	236	EC	Small i, grave accent
í	237	ED	Small i, acute accent
î	238	EE	Small i, circumflex
ï	239	EF	Small i, diæresis / umlaut
ð	240	F0	Small eth, Icelandic
ñ	241	F1	Small n, tilde
ò	242	F2	Small o, grave accent
ó	243	F3	Small o, acute accent
ô	244	F4	Small o, circumflex
õ	245	F5	Small o, tilde
ö	246	F6	Small o, diæresis / umlaut
÷	247	F7	Division sign
ø	248	F8	Small o, slash
ù	249	F9	Small u, grave accent
ú	250	FA	Small u, acute accent
û	251	FB	Small u, circumflex
ü	252	FC	Small u, diæresis / umlaut
ý	253	FD	Small y, acute accent
þ	254	FE	Small thorn, Icelandic
ÿ	255	FF	Small y, diæresis / umlaut

Report Formats

Introduction

A number of formats are available to display reports. A Format Index is used to specify the formats when working with URLs to access the Report Portal and the Report Viewer web applications.

Report formats overview

The table below defines the different formats available.

Format Index	Description	Output files
0	Adobe Acrobat PDF-files.	One PDF file is generated.
1	HTML - with page breaks	One HTML file per page is generated. Pictures and charts are returned as JPG files.
2	HTML - one page	One HTML file containing all pages is generated. Pictures and charts are returned as JPG files.
3	XHTML	One XHTML file per page is generated. Pictures and charts are returned as JPG files.
4	Rich Text Format	One RTF file is generated.
5	Microsoft Excel - Single page	One Excel sheet is generated. Does not include graphics.
6	JPEG image format	One JPG file per page is generated.
7	GIF image format	One GIF file per page is generated.
8	BITMAP image format	One BMP file per page is generated.
9	Window Metafile	One WMF file per page is generated.
10	Enhanced Windows Metafile	One EMF file per page is generated.
11	Microsoft Excel - Multi page	One Excel sheet per report page is generated. Includes graphics (e.g. images). Graphs will be included as images.

Report View Actions

Introduction

When a report is viewed using a URL, different view actions can be specified as URL parameters.

Report view actions overview

The table below defines the different view actions available.

Action	Description
Portal	<p>The report file is opened in the Report Portal. This view action is suitable for all report formats.</p> <p>Note: This is the default action. Thus if no action is specified, this action will be used.</p>
Open	<p>The report file is opened in the web browser. The default open behavior of the file type will be used.</p> <p>Note: If the report consists of multiple files (for example, HTML with page breaks), the first page will be opened by default.</p>
Save	<p>The report file is downloaded and the user will be prompted by the browser to save it to a location.</p> <p>Note: If the report consists of multiple files (e.g. HTML with page breaks), only the first page will be downloaded.</p>
Browse	<p>The report is displayed in the web browser with a navigation bar. This view action is suitable for reports consisting of multiple files (e.g. HTML with page breaks).</p> <p>Note: If the report is on a format which cannot be displayed inside an HTML page, view action Open will be used.</p>
Print	<p>The report file is opened by the web browser and the window print dialog is opened.</p> <p>Note: This action will only work using HTML formats, otherwise the action Open will be used.</p>
PrintClose	<p>The report file is opened by the web browser and the Window Print dialog is opened. After printing the report, the window is closed (needs user confirmation if page is not opened from another web page).</p> <p>Note: This action will only work using HTML formats, otherwise the action Open will be used.</p>

Index

A

About Report Portal 8
Adobe Acrobat PDF-files 32
Advanced login 8
All URL 22
Archive 9, 12, 16
archived report 24
Archived report 16, 24
archived reports 16
ArchiveID 24
Archiving 16

C

Clicking 16
copy 22, 24
Copy 22, 24
Customer Relationship Management 8
Customer View 8

D

Date 16
Details 20
Dialog Admin 9, 12
Dropdown-list 12

E

EMF file 32
Enhanced Windows Metafile 32

F

Files tabbed page 20
Format Index 32

G

generated report 12
Generated report 12

H

HTML 32

I

Inline 12, 20
ISO Latin-1 Character Set 25

J

JPEG 32
JPG 32

L

link 22
Linking 22, 24
login 8
Login 8

M

Metafile 32
Microsoft Excel 32
Microsoft Internet Explorer 9
MS Excel file 32

N

Normal login 8

O

Open 20, 22
opening 22
Overview Page 22

P

PARAMETER-NAME 22
PARAMETER-VALUE 22
PDF file 32
Pname 22
Pname1 22
Pname2 22
Poperator 22
Print 20
Print button 20
Pvalue 22
Pvalue1 22
Pvalue2 22

R

replaces 16
Replaces 16
Report Formats 12, 32
Report Parameters 12, 20
Report Portal 8, 9, 12, 16, 22, 24, 32
Report Portal application 8
Report Portal's 9
Report Viewer 32
report's archive 24
Report's archive 24
reports 12, 16
Reports 12, 16
Rerun 12
Rich Text Format 32
RTF file 32
Run Report 22
Running 9, 12

S

Save 20
Save button 20
Show 12, 16
Start page 9
Starting 8
System Administrator 8

T

Tabbed page 20
Template Details 12, 16, 20
TemplateID 22, 24
types 8
Types 8

U

URL 22, 24, 32
URL-parameter 22
use 9
Use 9
Username 8

V

view 22, 24
View 12, 16, 20, 22, 24
Viewing 12, 16
Visual Dialog 8, 9, 12

W

Web 8
Windows Explorer 9
Windows login 8
WMF file 32
World Wide Web Consortium's URL 22, 24

X

XHTML 32