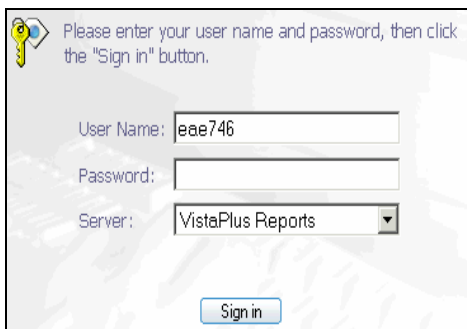


VistaPlus 5.3 Web View

LOGGING ON

In your web browser, go to the Web View URL.



Type your Vista Plus **User Name** and **Password** (both are case-sensitive), then click **Sign In**.

After logging in, you may be required to change your password. This option is set by a Vista Plus Administrator.

You'll see the Welcome screen, Browse view, or My Vista view, depending on your option settings.

Changing Your Password

Click **Options** on the top menu bar. Click **Change Password**. Type your current password, then your new password twice. Click **Save**.

Logging Off

When you're done, click **Sign Out** on the top menu bar.

Selecting a View or Function

The top menu bar displays at the top of all Web View windows except the Welcome screen and report viewer. Use it to select the function or view you want.

Using Browse View

Browse view displays the folders, bundles, and reports contained in your Home folder. The table below lists how to display or open folders, reports, bundles, and generations.

Admin's New Rpts

To open a listed folder, click its icon or name. This displays the first page of the folder's contents.



To return to a parent folder, click this icon at the top of the folder list.



To return to a recently visited folder, select it from the list box at the top of the folder list. This list resets whenever you return to a previous folder, then select a new folder.

Commissions

To open the most recent generation of a report, click the report icon or name. See the first note below.


(2 Generations)

To list a report's generations, click inside the parentheses following the report name. See the first note below.

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To open a report generation from a generation list, click its icon or name.

DISPLAYING INFORMATION

To display information about any folder, report, bundle, or bundle instance, click the information icon  next to its name.

Using My Vista View

The right side of My Vista view displays your report and folder favorites. Click a report to open its most recent generation. Click a folder to switch to Browse view with that folder as your Home folder.


The left side of My Vista is unique to your installation. Ask your Administrator if you have questions about it.


Adding Reports or Folders to Favorites

In Browse View, click the Information icon  for the folder or report. **Select Edit Favorite Status**.

To add a report or folder to the My Vista favorites list, check **List on My Vista**. To add a report as an e-mail favorite, check **Notify me via e-mail**. Click **OK**.

REMOVING REPORTS OR FOLDERS FROM FAVORITES

To remove a report or folder from the My Vista list, in My Vista view, click the **Remove** button .

To remove a report as an e-mail favorite, in Browse view, click its Information icon . Select **Edit Favorite Status**. Clear the **Notify me via e-mail** box. Click **OK**.

Finding the Report Generations

Web View offers three ways to find a report generation. To start any of these methods, click Find in the top menu bar.

SEARCHING BY REPORT NAME

Click the **Name** tab and type all or part of the name of the report to look for (you can use the * and ? wildcards). To search only one folder, click **Browse** and select it. To search only generations captured on certain dates, click **Which Generations?** and select the date range. Click **Find**.

Continue by specifying a full-text or index search.

SEARCHING A REPORT'S GENERATIONS

Click the **Content** tab. Click **Browse** and select the report to search. To search only generations captured on certain dates, click **Which Generations?** and select the date range and/or number of generations to find.

SEARCHING GLOBAL INDEXES

Click the **Global Index** tab. To search just a folder, type or select it. Select whether to **include subfolders**. Enter search criteria as in an index search. Select search options. To search only generations captures on certain dates, click **Which Generations?** and select the date range. Click **Search** to start the search.


Viewing Reports

To see other parts of the current report page, use the vertical and horizontal scroll bars or change the zoom setting. To move to other pages in the reports, use the buttons and field at the bottom right of the report viewer window.

Displays the first page of the generation. 

Displays the page before the current page. 

Moves to a particular page: type the page number in this field and press **Enter**.

Displays the page after the current page. 

Displays the last page of the generation. 

To change between **Normal** view and **Layout** view, click the appropriate tab at the lower left of the report viewer.

Layout view takes longer to display, but sometimes gives more accurate representations of the original report. We recommend you use layout view when creating columns; you must be in layout view to define an index or a hyperlink.

CHANGING THE DISPLAY SIZE

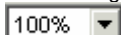
Increases the magnification of the display by 20%.



Decreases the magnification of the display by 20%.



Set the magnification to the percentage



Sets the width of the report page to equal the width of the report viewer window. If you change the size of the window, click this button twice (to turn the option off, then back on) to change the report magnification to match.

TURNING GRAPHICS DISPLAY ON AND OFF

Click the Customize button  Check or clear the Show Text Only box. Click OK.

CREATING A HEADER

Select at least part of the line you want to be the bottom of the header area. Click **Create Header**.



To lock or unlock a header, move the mouse pointer into the header, then click the **Header Lock**



icon. The dot in the center of the icon is green when the header is unlocked.

Printing Reports

LOCAL PRINTING

You cannot print directly from Web View, instead, you can download to a PDF file and print it. To do so:



Click the **Print** button. Select **All** to download the whole report or select **Pages** and enter the pages to download.

Select whether to have the browser create a link to the file rather than open it and whether to include online notes and what format to include them in. Click **OK**.

If you requested a link, you can now click the link to open the file or right-click the link and select **Print Target** to print it.

If you did not request a link, what happens next depends on your browser and operating system settings. In most cases, the file will open in a browser window. You can then print it.

Copying Data to Other Applications

You can use your browser's select and copy features (in the browser's Edit menu) to copy all or part of the information from a report page to the clipboard.

Note: Text formatting (font, size, bold, italic, etc.) is lost when the data is copied to the new application. Also, for some reports (especially PostScript), the copied and pasted text may appear out of order. For an entire page, we recommend you use the Download feature.

Downloading Reports

Downloading saves a report in a format that can be used in other applications. Click the **Download**



Report button.

Type the file name to give the report. Select the file type.

Note: Be sure to define columns before downloading to the .csv, format. CSV files open with Microsoft Excel

Select **All** to download the whole report or select **Pages** and enter the pages to download. Select whether to include page breaks (for .txt files only) and blank lines.

Select whether to have the browser create a link to the file rather than open it; for .pdf files, choose whether to include online notes and what format to include them in. Click **OK**.

If you have requested a link, you can now click the link to open the file or right-click the link and select **Save Target As** to save it.

If you did not request a link, what happens next depends on your browser and operating system settings. In most cases, the file will open in a browser window.

CREATING COLUMNS

To **create columns**: Make sure the text to use (generally the report column headings) is displayed. Switch to layout view and set zoom to 100%. Drag to outline the text to base columns on; the top line of this area will be used.



Click the **Create Columns** button. To make these columns the report's default, check the **Set as default...** box. Click **Set**.

To **modify columns**: Switch to Layout view and set zoom to 100%. Hold down **Shift** and click the heading of the column to change. You can then change the column heading or width, delete it, or split it into two columns. Repeat for each column you want to change.

To remove all columns, click the **Create Columns** button and click **Delete**.

Searching Reports

The interaction of search entries and options can be very flexible. Please see the online help for complete information.

SIMPLE SEARCH



Click the **Search** button. (To search just part of each page, in Layout view, select the area first).

Select whether to search the entire report (**Text**), or just an **Index** or **Region** (the selected area). For an index search, select the index. If it's a numeric index, the search will be for a numeric value match.

Type the text or number to search for. For text, you can use the * and ? wildcards. For an index or region search, select the operator to use. To set search options, click **Options**.

OPTIONS

Forward Search – Searches forward from the current page. If cleared, searches backward from the current page.

Case Sensitive – Finds only text in the same case (upper and/or lower) as the search string.

Whole Words – Skips matches that include the search test as part of a larger word. (In an index search, the test will have to match the entire index).

Extract Sub-report – Creates a subreport containing the search values. Select **By Pages** to have the subreport include each page that contains a match or **By Lines** to have it include only lines containing matches. If **By Lines**, select whether to include the report header in the subreport.

Show Match List – Displays search matches in a separate window, from which you can select the match to display.

Click **Search** to start the search.

VIEWING SEARCH MATCHES

If **Show Match List** is not selected, the first page with matches is displayed, with the matches

highlighted. Use the **Search Previous**  or



Search Next button to continue searching the report.

If **Show Match List** is selected, you see a list of the first several matches found. Click a match to display that report page, or click **More** to display more matches.

If **Extract Sub-report** is selected, the subreport opens.