

Report2Web v4.7 Quick Start Guide

July 2020

(Updated 4 Aug 2020)

TABLE OF CONTENTS

- Overview.....2
 - Benefits and Features2
- Starting Report2Web.....3
- Getting Familiar with Report2Web4
 - The Home Page.....4
 - Basic Navigation.....4
 - Standard Report2Web Toolbar Icons5
 - Accessibility Support.....6
- Viewing Documents.....7
 - The Folder Tree.....7
 - Publication Lists8
- Viewing Documents/Reports9
 - The Standard Report Viewer Toolbar9
 - Adding and Viewing Document Notes..... 10
 - PageMart Report Toolbar Buttons..... 11
- Common Right-Click Options..... 12
- Subscriptions 13
 - Adding a Subscription to a Folder or Report 13
 - Managing Your Subscriptions 13
- Favorites and Selections..... 14
- Search 15
 - Quick Search 15
 - Advanced Search Wizard 16

OVERVIEW

Report2Web lets you look at County reports using the Web Browser on your desktop. Reports from many sources can be viewed in one place on the web – mainframe reports, database reports, Word documents, Excel spreadsheets, and Acrobat PDF files.

Reports are published into secure folders on the Report2Web site for viewing by County departments and agencies.

Benefits and Features

Report2Web offers the following benefits and features:

- You can look at your reports using only the web browser on your computer desktop – you do not need special software to see reports originally published in many formats, and employees in outlying locations can view the same reports over the internet using their browsers.
- Report2Web saves money because paper reports don't have to be printed and distributed.
- Your reports become available as soon as they have been generated – no waiting for the paper report to be distributed.
- You can be sent an email notification when a report in which you are interested is published.
- Any number of report versions can be made available on the web.
- Your reports are secured from unauthorized access.

STARTING REPORT2WEB

1. Open your Web browser: Chrome, Edge, or Firefox.
(The use of Internet Explorer is not recommended.)
2. When the browser window opens, enter the Report2Web address:
<http://s-wr2wprod2:8080/r2w/>

The Report2Web log in screen will be displayed

User Sign-in

Select Catalog
Sonoma

Enter User ID

Enter Password

Remember User ID

Sign in

English Contact your help desk for assistance Version V4.7.1

3. Enter your User ID and your network Password; click Sign In.
4. After you have successfully logged in, the Home page will be displayed.

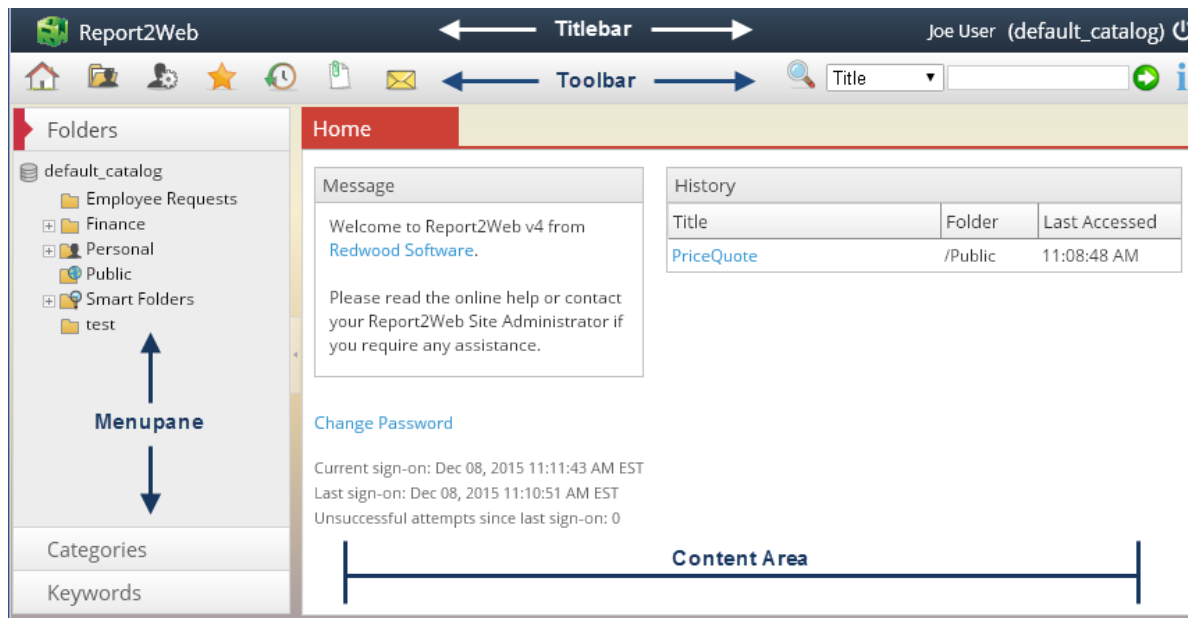
GETTING FAMILIAR WITH REPORT2WEB

The Home Page

The Home page is displayed when you first log in to Report2Web and includes a message, if any, from the Report2Web administrator and a History area, which displays the reports that you have most recently accessed. The Home page can be accessed from anywhere in Report2Web by clicking the “Home” icon in the Report2Web toolbar.

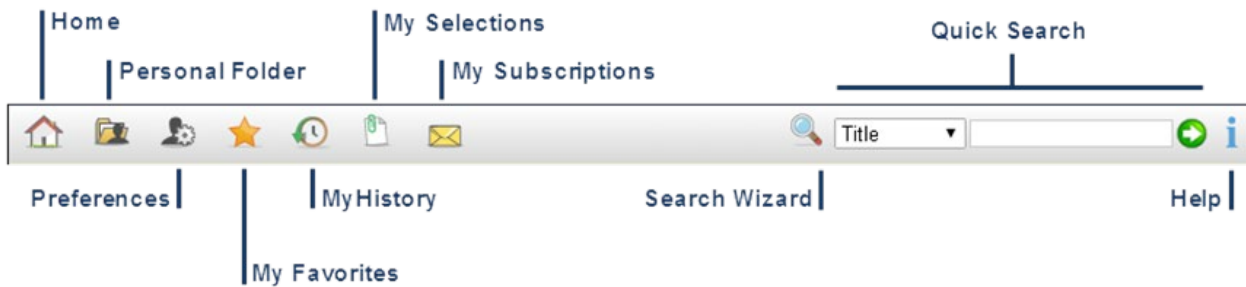
Basic Navigation

Report2Web consists of four main areas: Title Bar, Toolbar, Menu pane and the Content Area.



- The **Title Bar** provides a welcome message and indicates the current Catalog (in parentheses after the user’s name). The logout button is also found on the Title Bar.
- The **Toolbar** provides the user one-click access to commonly used Report2Web functions. In order, they are the Home Page, Personal Folders, My Favorites, My Action Items, My History, My Selections, My Subscriptions, Keyword Search, Quick Search and Online Help.
- The **Menu Pane** provides access to folder navigation as well as other end user and administrative menus (and associated icons).
- The **Content Area** varies based upon the task at hand.
For example: when viewing the Home Page, a summary of recent activity and messages is provided. When a folder is selected, the Content Area displays a list of documents contained within the folder. Similarly, when performing a search, the Content Area displays lists of search results. In both cases, once a document is selected, the Content Area also serves as the viewing area of the actual document.

Standard Report2Web Toolbar Icons



Home

Displays the Home page in Content Area.

Personal Folder

Displays content of your Personal Folder

Favorites

Displays links to most recent version of reports you have designated as “favorites.” [[More information about Favorites.](#)]

History

Displays a list of all the recent documents you have viewed.

Selections

Displays a list of documents selected during the current session. [[More information about Selections.](#)]

Subscriptions

Displays the list of all the documents/reports to which you are subscribed. [[More information about Subscriptions.](#)]

Search Wizard

Displays the Advanced Search options. [[More information about Searches.](#)]

Quick Search

Provides a way to search for documents based on predefined fields. [[More information about Searches.](#)]

Help

Displays the Report2Web User Guide.

Accessibility Support

How to navigate Report2Web using the keyboard.

Menu and Toolbar Navigation

- Advance through a menu or toolbar by pressing the Tab key.
- Press the Shift+Tab key to navigate backwards through the menu or toolbar.
- Press the Enter key to open the associated menu or toolbar dialog.
- With keyboard focus on the help Menu icon, press the Enter key twice to access the dialog. Press the Tab key to navigate through Help Menu options.

Folder Tree Navigation

- Advance through the folder tree by pressing the Tab key.
- Press the Shift+Tab key to navigate backwards through the folder tree.
- When keyboard focus is on the Expand-Collapse folder icon (plus or minus sign) within the tree, press the Up or Down arrow key to expand or collapse the folder as appropriate.
- When keyboard focus is on a folder name, press the Enter key to view the contents of the folder.

Context Menus

- This feature is deprecated in version 4.7.
~~To display any associated context menus, with focus on the targeted item, press the Shift+F10 key and then press the Tab key to navigate to the desired option.~~

Selection Lists

- Use the Tab key to navigate to a selection list. Once focused on the selection list, use the Up and Down arrow keys to navigate through selection options. You can also press the Enter key to expand the list of all possible selections and then use the Up and Down arrow keys to navigate to the targeted option. Press the Enter key to select your option. Press the Tab key to move to the next item.
 - NOTE: When using the Internet Explorer browser, the Enter key does not expand a Selection List. However you can still navigate and select your option using the Up and Down arrow keys.

Checkboxes

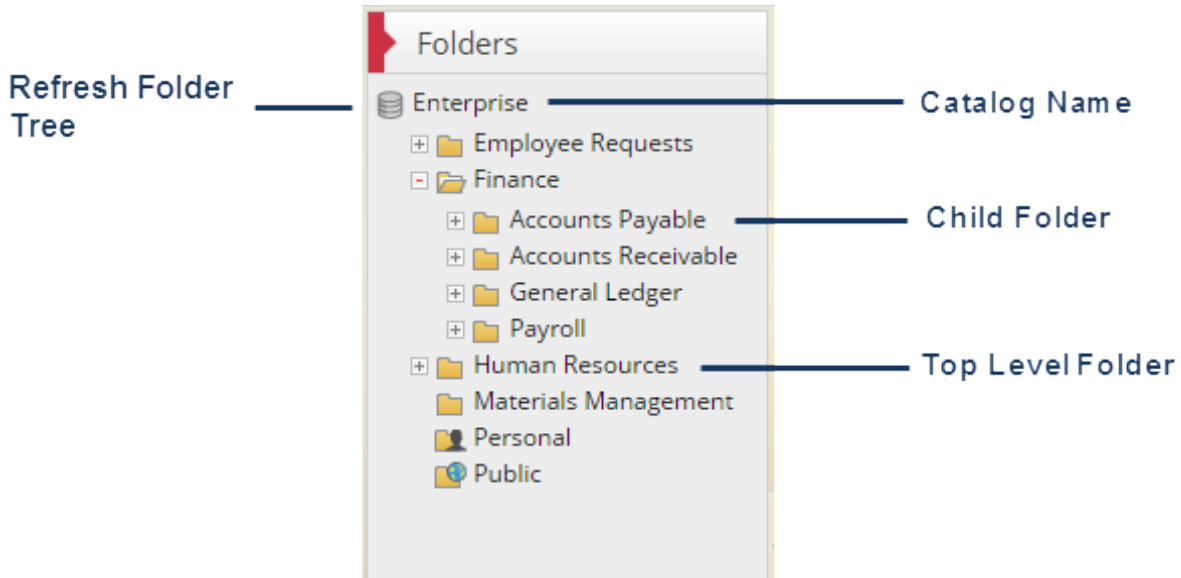
- Use the Tab key to navigate to a checkbox option. Once focused on the option, press the Space Bar to enable or disable the checkbox option.

Radio Buttons

- Use the Tab key to navigate to a radio option. Once focused on the option, press the Enter key to select the radio option.

VIEWING DOCUMENTS

The Folder Tree



Each user will only be able to see the folders that they have been given authorization to view.

If a Top Level/Parent folder has any Sub/Child folders, a plus sign (+) will be displayed next to the folder icon. Click the plus sign to expand or collapse the folders.

To view the contents of a folder, click on the folder name and the Publication List will be displayed in the Content Area.

If at any time you wish to refresh the entire list of folders that are available to you, click the Database icon next to the name of the Catalog.

Publication Lists

Public		Format Type	Filter Current Page	Filter
Title	File Name	Author	Date ▼	
My Attachment	My Attachment		Mar 11, 2016 11:10:00 AM	
FirstAutoContacts	FirstAutoContacts		Oct 22, 2015 02:20:22 PM	
UB04	UB04		Mar 18, 2015 09:27:00 AM	
Raleigh Campus	Raleigh Campus	Marketing	Sep 25, 2012 02:19:00 AM	
Privacy Policy	Privacy Policy		Aug 30, 2012 10:57:00 AM	
project flowchart	project flowchart		Aug 21, 2012 04:56:00 PM	
Travel expense report	Travel expense report	HR Manager	Jul 11, 2012 02:51:00 PM	
Admin Files	Admin Files	Training Admin	Jun 15, 2012 08:18:00 PM	
Absence Request	Absence Request	HR Manager	Apr 17, 2012 12:30:00 PM	
Drill Down [A]	Drill Down	Finance Manager	Dec 27, 2011 12:33:00 PM	
New Text Document (1)	New Text Document	Joe User	Oct 18, 2011 12:59:00 PM	

File Type Icons

An icon associated with the file type: PDF, Excel, Word, or PageMart (Report2Web’s proprietary file type, usually associated with old IBM mainframe reports).

If a document is available in multiple formats (e.g. PDF and Excel), the file type icon shown is the default format.

If there are multiple versions of a document, the file type icon will include a plus sign (+).

Sorting Order

When opening any publication list view, the default sort order is by Date, with the newest documents displayed at the top of the list.

By clicking on the Title, Name, or Date column headings, the sort order can be changed. Clicking multiple times will toggle the order between ascending and descending order.

Viewing Notes

Report2Web allows adding Notes to a document. If a note has been added to a document, an icon will be displayed in the publication list view. [\[More information about Notes.\]](#)

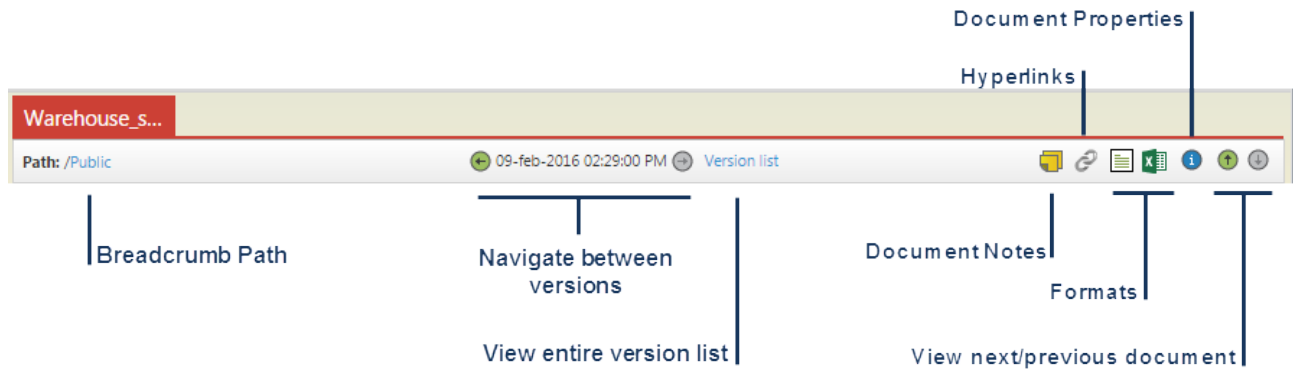
Page Filter

The filter allows you to quickly find a document *by Title* on the current page. If a folder contains more documents than can be displayed on one page, the filter will only search the current page’s documents, not the previous or next pages.

VIEWING DOCUMENTS/REPORTS

When viewing reports/documents in Report2Web, the view depends on the report format. PageMart (mainframe), PDF, HTML, and Text files will open in Report2Web; Excel and Word documents will open in their respective applications.

The Standard Report Viewer Toolbar



When viewing any document, the toolbar is available, but the options displayed on the toolbar will vary by document type.

Typical Report Viewer Toolbar Items

- Breadcrumb path – easy method of navigating back to the folder publication list.
- Version Navigation Arrows – navigate between versions of a document (when more than one exists).
- Version List – displays the Version list view (all available versions) for the selected document.
- Document Notes – displays the Notes dialog box (Add/View notes)
- Hyperlinks – only displayed when someone has added hyperlinks to a given document.
- Format icons – displays alternate formats that the document is available in.
- Open in 3rd Party Application – when available, allows you to open the current document in another application.
- Document Properties – displays all metadata associated with the document.
- Next/Previous Document Arrows – navigates to the next or previous document in the folder without having to go back to the original list view.
- Close Tab button – only displayed when multiple tabs are open.

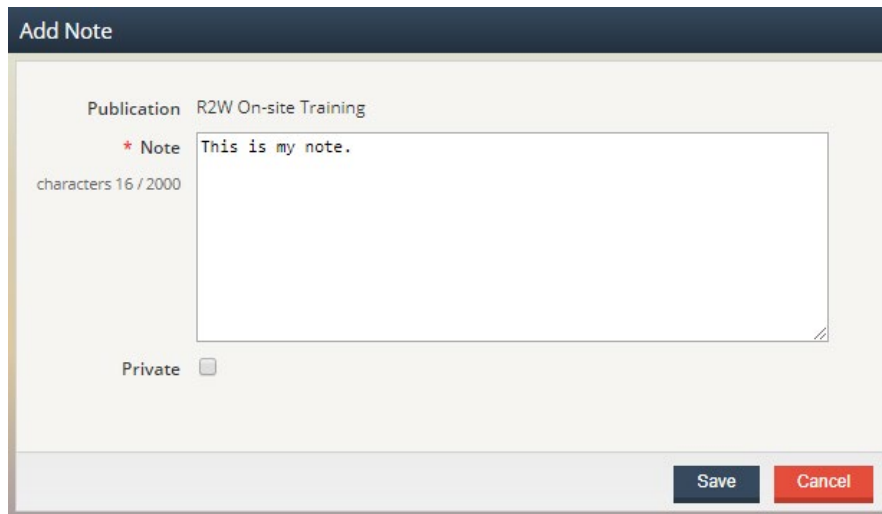
Adding and Viewing Document Notes

Document Notes can be added to a document and can include comments, attachments and/or hyperlinks. The Notes are only attached to that particular version of the document, once the document expires and is purged from Report2Web, the Notes will also be purged.

Please be aware that Notes can be viewed by anyone else who can view the document and will include your user ID and a date-time stamp.

To Add a Note

Right-click on the report in the list view and select “Add Note” from the context menu; or while viewing the report, click the Notes icon in the toolbar. The Add Note dialog box will appear.



The screenshot shows a dialog box titled "Add Note". At the top, it displays "Publication R2W On-site Training". Below this is a text input field containing the text "* Note This is my note." To the left of the text field, it says "characters 16 / 2000". At the bottom left of the dialog, there is a "Private" checkbox which is currently unchecked. At the bottom right, there are two buttons: "Save" and "Cancel".

To View Notes

In the List view, click the Notes icon to the left of the Title; or while viewing the report, click the Notes icon in the tool bar. Previously added Notes will be displayed.

To Delete Notes

Only the person who created the Note, or the Report2Web administrator, can delete a Note. While viewing the previously created Notes, click the Delete (garbage can) icon to the right of the Note.

PageMart Report Toolbar Buttons

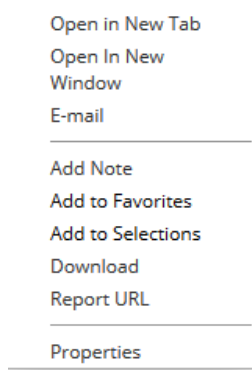


The Report Toolbar buttons will vary by the type of document that you are viewing. PDF, Excel and Word documents will display their native application toolbars.

The PageMart Report Toolbar buttons are (from left to right):

- Hide/Show Filter Pane – toggles the display of the report filters pane.
- View Line Item Notes – displays any line item notes, which are notes attached to a specific line of a report, rather than attached to the report as a whole.
- Print Report – opens the Print dialog box.
- Export Report – saves the report to your computer.
- Page Navigation – jump to the first page, move back one page, move forward one page, or jump to the last page.
- Go To Page – enter a specific page number to move to.
- Toggle “Greenbar” Stripes – toggles the display of the green and white stripes.
- Increase/Decrease Font Size
- Freeze Columns/Rows – allows you to specify report heading columns or rows to “freeze” so that they remain in view as you scroll up and down the page.
- Search Within Document – allows to search for word(s) contained within the current document.
- Filter Properties – if the report is filtered, the filter name and filter view/value will be displayed.

COMMON RIGHT-CLICK OPTIONS



When viewing a report publication list, you can right-click on the report Title to display a menu of actions that can be performed on the document.

The menu items that you can see will vary by your security authorization.

Open

The Open menu item includes a submenu with two different options: Open In New Tab and Open In New Window. Both of these options allow you to open multiple reports at the same time.

Email

Email the report or a link to the report

Download

Save a copy of the default format of the report to your computer.

Report URL

Get a hyperlink to the specific report in Report2Web.

Add To Favorites/Selections

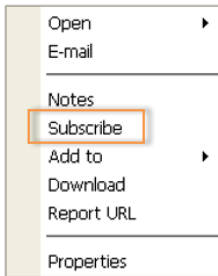
Adding a report to your Favorites allows you to have a list of most-viewed/favorite reports that is saved until you remove the report from Favorites. A Selection works like Favorites, but the list of Selections expires as soon as you log out of your session.

SUBSCRIPTIONS

A report subscription allows you to be notified via email when a new version of a report has been published in Report2Web. You can add or delete your own subscriptions.

Adding a Subscription to a Folder or Report

To subscribe to a report, right-click on the report Title in the Report Publication List and select Subscribe from the context menu. To subscribe to a folder (and all of the reports inside of that folder), right-click on the Folder in the Folders page and select Subscribe from the context menu.



The Create Subscription dialog box will open, which allows you (based on your security) to set some parameters, including whether you receive the subscription notification immediately when a report is published or if you receive a daily digest of all new reports published for the day.

Managing Your Subscriptions

To view and/or change your subscriptions, click on the My Subscriptions icon in the Report2Web Toolbar.



A list of all your current subscriptions will be displayed.

To edit or delete a subscription, click on the Subscription Name link. The Edit Subscription dialog box will open; you can edit some of the subscription properties, or click the Delete button to delete the subscription.


FAVORITES AND SELECTIONS

Favorites and Selections allow you to display reports from different folders in a single publication list.


Favorites are saved as part of your Report2Web profile and available to you each time you log in to Report2Web. Favorites provide a convenient way of organizing important or frequently used reports.

Selections are a handy way to group several reports – especially from different folders – and email or download them all at once. Selections are temporary and only saved during the current session; when you log out, your Selections will be reset.

Managing and Viewing Favorites

- To add a report to Favorites, right-click on the report in the publication list and select Add To -> Favorites from the menu.
 - To add Selections to your Favorites, go to My Selections (see below), select one or more reports, right-click on the Title and select Add to Favorites from the menu.
- To view your current Favorites, click the My Favorites icon  in the Report2Web Toolbar.
- To remove a Favorite, while in My Favorites, right-click on the report and select Remove Favorites from the menu.

Managing and Viewing Selections

- To add a report to Selections, right-click on the report in the publication list and select Add To -> Selections from the menu.
- To view your current Selections, click the My Selections icon  in the Report2Web Toolbar.
- To remove a Selection, while in My Favorites, right-click on the report and select Remove Selections from the menu. (Selections will automatically be cleared after you log out.)

Multi-Selection of Reports

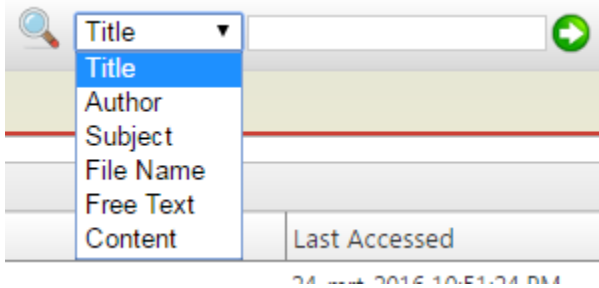
You can select more than one report at a time from a list view by using Shift+Click or Ctrl+Click. Use Shift+Click to select one or more reports that are contiguous in the list; use Ctrl+Click to pick reports that are not contiguous in the list. This is an easy way to perform actions on multiple reports at the same time, such as adding to Favorites/Selections, downloading, or emailing.

SEARCH

There are two different ways to search for documents in Report2Web: Quick Search or Search Wizard.

Quick Search

The Quick Search is found in the Toolbar and allows you to do a simple search on files in the Report2Web catalog, based on predefined search options.



The Quick Search uses “implied wild cards”, meaning “sometext” and “*sometext*” will return the same results.

Examples of ways to search:

Search String	Implied Search String	Sample Results
text1 text2 text1* text2	*text1* OR *text2*	The text1 report My sometext2 file Text1 and text2 report
text1 AND text2	*text1* AND *text2*	My text1 annual text2 report
text2	*text2*	My sometext2 file Text1 and text2 report
or	*or*	The text1 report Text1 and text2 report This or that file
“text1 text2”	“text1 text2”	<i>None of the above reports would match.</i>


Advanced Search Wizard

The Advanced Search Wizard allows for more advanced searches, not only by Title, Subject, and File Name, but also by date, folder and more.

(Although the Wizard includes Categorization search by Keyword and Category, County of Sonoma has not implemented these features.)

The screenshot shows the 'Advanced Search Wizard' interface. The window title is 'Advanced Search' and 'Keyword Search'. The 'General' tab is selected. The search criteria include: Title, Subject, Description, File Name, File Extension, Date (with radio buttons for 'All', 'Past', and a date range), Folder (with radio buttons for 'All' and a folder icon), Author, and Content. At the bottom are four buttons: 'Back', 'Next', 'Finish', and 'Cancel'.

The search is an “implied AND” search, meaning that all of the search criteria that you enter must match in order for the document to be returned in the results. In other words, if you enter a partial title and a date parameter, and the report you are looking for does not meet one or both of the criteria, then you will get no results.

After you have viewed a report from the search results, you can click the “Back to Search Results” icon  to return to the document list returned by the search.