

# CA Output Management Web Viewer

**User Guide**

**Release 12.1.00**



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# CA Technologies Product References

This document references the following CA Technologies products:

- CA ACF2™
- CA Bundl®
- CA Dispatch™
- CA Deliver™
- CA DRAS
- CA Top Secret®
- CA View®
- CA Spool™

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# Chapter 1: Overview

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This section contains the following topics:

[Audience](#) (see page 9)

[Using CA Output Management Web Viewer](#) (see page 9)

[Frequently Asked Questions](#) (see page 11)

## Audience

This document is for end users who want to use OM Web Viewer to view and manage their mainframe reports online using a web browser.

Detailed explanations and techniques that may be needed by you are provided in this document. Even users with minimal experience can access, view, and work with reports and subscriptions using OM Web Viewer.

**Note:** This document assumes that you have the credentials required to access the OM Web Viewer system, and also have the credentials required to view reports from CA Dispatch, CA Deliver, or CA View mainframe repositories.

## Using CA Output Management Web Viewer

You use OM Web Viewer with the following primary user tabs on the graphical user interface:

### Reports

This tab shows your subscriptions, reports, and report indexes of all kinds. You can also set a report as a browser favorite. Different sections of the in-view or hide annotations. You can email, save, and print reports and use the preset search criteria, or the search function to locate specific text within a report. The *Go To* function and other page navigation options let you access a specific page in a report directly.

Depending on what is assigned to you and your current setup, you can view the following report data:

- Mainframe text reports including subsections of text reports.
- Index-based report page range sections
- Binary reports
- The results of various preassigned search filters.

Menus, Toolbars, and Hot Keys provide immediate access to the various report actions you have permission to use. Depending on your permissions, you can perform the following tasks:

- Find Text
- Go To Page
- Display Notes
- Add Browser Favorite or Bookmark
- Print a Report
- Email a Report
- Export a Report

#### **Advanced Search**

Advanced Search lets you search for the following content:

- Various material or reports stored in the CA Dispatch, CA Deliver, or CA View mainframe repositories that you have permission to access.
- Cross-Report indexes and cross-report index-value matches in CA View mainframe repositories.

After you find your report, you can perform the following tasks:

- Add the report as a Favorite and even add the Favorite to a Subscription.
- Browse reports to find and perform various actions on the report, such as print or email.

**Note:** Only certain role types can see this tab.

#### **Configuration**

- The Repository Filter, Report List, Favorite List, and Report Action links let you customize your environment. You can modify your settings for favorites and reports. You can set fonts, sizes, your transform preferences, and so on. The selections are yours; they let you personalize your report viewing and managing experience.

- The After Login link lets you change to a different User Role--providing you have access to more than one Role.
- The Credential link lets you change default credentials for all repositories or specific credentials for individual repositories.

## Frequently Asked Questions

This section presents some Frequently Asked Questions (FAQs) that can help you use the product.

### **What is the purpose of the Favorites feature, and how do I access it?**

The favorite feature lets you create a shortcut to a frequently accessed report or report list filter setting, enabling you to locate quickly and access the reports in the future. For example, you primarily access three reports from a list of 100. By creating favorites to the three reports, the favorites list displays only the three reports instead of showing the 100 reports in the report list. This lets you quickly locate these important (to you) reports.

To access the Favorites page, select the Favorites tab.

**Note:** The Favorites tab only appears if you have the required access permissions to create internal favorites. Contact your administrator for access.

### **What is the difference between Browser Favorites and Internally Managed Favorites?**

#### **Browser Favorites**

A Browser Favorite (created through Add Browser Favorite) is a limited functionality feature that creates a favorite/bookmark managed by your web browser.

- You can copy or move the bookmark to your desktop and can also be shared with others (by email or other means), as long as the recipient is authorized to access the report through OM Web Viewer.
- When you use a Browser Favorite, a separate OM Web Viewer interface gives access to only the favorite report.
- A Browser Favorite is limited to the selected report, always giving the most current copy of the report.

**Note:** This feature is only available for CA View repositories with CA Spool.

### **Internally Managed Favorites**

The Internally Managed, nonbrowser favorites are managed through OM Web Viewer, using the Favorites tab or Subscription tab.

Distinguishing Properties:

- The Internally Managed Favorites are available for every repository type.
- The Web Viewer managed favorites include several different types of favorites.

Report favorites

Latest Report

Static Report (user choice)

- Filter favorites

You can save a filter for later use from several different panels.

- Can only be used from within CA OM Web Viewer.
- Can be shared with others users through a Subscription.

# Chapter 2: Using Subscriptions

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This section contains the following topics:

[How to Use Subscriptions](#) (see page 13)

[Favorites, Subscriptions and Roles - Overview](#) (see page 17)

[View the Subscription List](#) (see page 18)

[How Subscriptions Display](#) (see page 18)

[How Favorites Display in Subscriptions](#) (see page 19)

[Report Actions from the Subscription List](#) (see page 21)

## How to Use Subscriptions

Subscriptions are bundles of reports, report sections, or search filters designated as Favorites. Users with a role type of Advanced User or above can create Subscriptions for themselves. If you are not allowed to create subscriptions you will not see the subscriptions tab.

If your type of role is Advanced User, you can still create subscriptions for your own use. After creating a subscription, it displays in your report list automatically.

**Important!** All the options covered in this section are only available to users with at least the Advanced User type.

## Create a Subscription Using Favorites

Use subscriptions and bundle one or more favorites (reports or other types of data) that have been grouped into a named collection. When you create a subscription, it appears in your reports tab list automatically.

**Important!** Subscriptions include only the latest favorites which point to the latest version of the reports.

Administrators or Advanced Users can assign these subscriptions can be assigned to other users or they can be kept for personal use. Only Advanced Users and Administrators can create subscriptions. Only Administrators can assign subscriptions to other users.

**Note:** Users with a role type of Advanced User or above can create subscriptions for themselves. If you are not allowed to create subscriptions, the Subscriptions tab does not appear.

### Follow these steps:

1. From the Subscription tab, click Create.
2. Find the User Favorite List and verify that at least one favorite report appears in the list.

Because you build subscriptions with favorite reports, there must be at least one favorite available to include in the subscription. If you do not have at least one favorite in your list you must first designate one or more reports as favorites.

**Important!** Subscriptions include only the latest favorites which point to the latest version of the reports. To add a particular instance of a report in a subscription as favorite, use a filter favorite.

3. Enter a Subscription Name.

Administrators see this name when they add subscriptions to a role.

4. Enter a Subscription Description.

On the reports tab, users of the subscription will see this explanation of the subscription contents.

5. Select Private or Public:

#### Private

Assigned to one or more roles only by the creator of the subscription.

**Note:** Only a creator with admin rights or in the role of an Administrator can assign these private subscriptions to other roles.

#### Public

Assigned to a role by any System or Group Administrator who can edit the role.

**Note:** The difference between private or public is who can assign this Subscription to a Role. Typically, a non-administrator makes your entire subscriptions private, so that they cannot be assigned to other users. However, if you make one of your subscriptions public, an administrator can assign it to other roles.

6. Select at least one favorite.

From the subscription tab favorites list, locate a favorite that you want to designate as part of the subscription and select the checkbox in the left column.

7. Click the Create button at the top right corner of the pane.

The subscription is created.

### More information:

[Create and Use Each Type of Favorite](#) (see page 73)

[Report Search Filter Favorite](#) (see page 75)

## Add or Remove Favorites in a Subscription

Add or remove a favorite from a subscription by selecting or leaving clear the leftmost checkbox in the favorite's row.

**Note:** Cross-Report Index Filter Favorites (which return index names instead of reports), cannot be added to a Subscription. This type of favorite will not show up in this Subscription Tab Favorites list. For more information, see the Types of Favorites Table.

**Follow these steps:**

1. From the Subscription Tab, find the subscription list in the left pane.
2. Click on a subscription.

The Edit Subscription pane appears in the right pane.

3. (Optional) Update the following as required:

- Name
- Description
- Type

Click the appropriate option to change the designation.

**Note:** For more information about description of these settings, see Create a Subscription Using Favorites.

4. Do one of the following:
  - Click the checkbox on the right to add the Favorite to this Subscription.
  - Uncheck the box to remove the Favorite from this Subscription.
  - If all the Favorites in the Subscription are not displayed, use the navigation arrows to scroll through the list.

**Note:**

- If the subscription has been assigned to a certain Role, any newly selected Favorites in the Subscription will show up in that Roles' users' Report Tabs the next time they log into CA OM Web Viewer.
- You can optionally, change the display name or description of a favorite. For more information see Edit Favorite Properties.

5. (Optional) Click on the name of a favorite to display the report or apply the favorite's filter. This will let you see the information the favorite is pointing to.
6. Click Update in the upper-right corner of the pane.

The subscription is updated.

## Delete a Subscription

You can delete any unneeded or unused personal subscriptions. To remove a Subscription from a single Role, without deleting the Subscription, you must edit the Role.

**Important!** When deleting a Subscription, be certain that the Subscription has not been assigned to any other Roles because it is automatically removed from every Role that it is currently assigned to.

**Note:** You can safely delete any of your personal subscriptions, unless your subscriptions are likely to be assigned to a different Role.

**Follow these steps:**

1. From the Subscription Tab, find the Subscription in the left pane and click on a subscription.  
The Edit Subscription pane appears.
2. Click the Delete link above the Subscription list and confirm the deletion.



## Favorites, Subscriptions and Roles - Overview

A *Favorite* is a bookmark to a report or filter that you want to have quick access to online. Subscriptions can consist of any of the following favorite types:

- Report
- Report index
- Report index-value report section
- Cross-Report index-value report section
- Filter
  - Frequently used report filters
  - Cross-Report search filters
  - Cross-Report index-value filters

Most of the viewable or usable entities that you select can be added as a favorite. These types of data are frequently referred to as *reports*.

A *Subscription* is a group of favorites that has been given a name and description. The Administrators and Advanced Users can use the Subscription name to assign this bundle of reports to one or more Roles. Only Advanced Users and Administrators can create Subscriptions, and only Administrators can assign the Subscriptions to other Roles.

With a Subscription, you can provide access to reports to Basic User-type users who no longer have to remember which repositories contain which reports. These users do not have to search a repository, or even know the name of the report to view their reports online.

Subscriptions that you create are displayed in your report tab. With a Subscription, you can access reports without having to remember which repositories contain which reports. You do not have to search a repository every time you want to find the report.

## View the Subscription List

From the Subscriptions pane you can see a list of the Subscriptions you created.

**Follow these steps:**

1. From the Subscriptions tab, review the available Subscriptions in the left pane.  
This list contains all the subscriptions you have created.
2. (Optional) If there are more subscriptions than will fit in the pane, click the navigation arrows to find additional subscriptions:
  - >> displays the last group of subscriptions
  - > displays the next group of subscriptions
  - < displays the previous group of subscriptions
  - << displays the first group of subscriptions

## How Subscriptions Display

Each subscription displays in the Reports tab from the following sources:

- Subscriptions that you created  
**Note:** Users with a Role type of Advanced User or above can create subscriptions for themselves.
- Subscriptions that are assigned to your current Role

From the Reports tab, each subscription appears as a folder in left pane of the screen. With the expanded folder, you can see all the favorites available from that subscription.

The subscription name that appears in the Reports tab is the value that is entered in the Description field of the subscription. Favorites in the Subscription can list differently, depending on the type of the favorite. For example, certain Filter Favorites display in a subfolder with a list of reports in that subfolder.

**Note:** If the user lacks access to the repository where the favorite refers, some favorites from the subscription may not be listed. It is an administration error to assign a favorite to a user that the user cannot access. If this mistake happens, contact your System Administrator.

## How Favorites Display in Subscriptions

Unless you are an administrator or helping an administrator, typically, you only create subscriptions for your own use. When you create a subscription, it displays your Reports Tab list automatically.

- You view all subscriptions from the Reports tab.
- Subscriptions include internal Web Viewer Favorites, but not Browser favorites.





### Types of Favorites Table

This section discusses how the different types of favorites are displayed in the subscription list.

There are seven different types of internal favorites, but you can only include six of them in a subscription.

The display column describes how each type of favorite displays in the subscriptions pane.

Product Favorites	Description	Display
Report	This Favorite refers an entire Report.	Each report is displayed as an icon. The icon used depends on the format of the report.
Report Search Filter	<p>You can save a report filter.</p> <p>If you save a filter as a favorite, that filter can be used the next time you want to see all the reports that are selected by that filter.</p> <p>For example, the favorite filter is looking for A* and specifies the last 25 days on Repository nnn.</p> <p>Whenever this favorite is used, all the reports that start with the letter A that were added to Repository nnn in the last 25 days will be selected.</p>	<p>The reports matching this filter at runtime are listed in a subfolder of the subscription. Each time a user logs in and expands the folder the search filter checks to find reports matching the filter.</p> <p>You can expand and collapse the folder as needed.</p>
Cross-Report Search Filter	This type of favorite cannot be added to a subscription and is not listed on the favorites list of the subscription pane.	** Not applicable, because this type of favorite returns index names (not reports) so this type of favorite cannot be added to a subscription.

<p>Cross-Report Index-Value Filter</p>	<p>This type of filter returns all report sections that match this index and value pair. The filter can be saved as a favorite.</p> <p>For example: Assume that you have a Cross-Report Index of <i>ACCOUNT</i> with a value of <i>12345678</i>. This might produce five different report page ranges, or report sections, where the index matches the given value. These report sections can actually be from different reports, if an index and value is in more than one report.</p> <p>Those report sections will be listed in a sub folder of the subscription on the Reports tab.</p>	<p>The matching report sections are listed in a subfolder of the subscription on the Reports tab.</p> <p>Each report section listed in the subfolder will appear as a text report with the text report icon. </p>
<p>Cross-Report Index-Value Report Section</p>	<p>A single report section</p> <p>A single Cross-Report Index Value match can be added as a favorite.</p> <p>This report section will appear, to a user of the subscription, as a text report listed in your subscription.</p>	<p>This report section will appear to a subscription user as a text report and is listed with the text report icon. </p>
<p>Report Index</p>	<p>Report Indexes can be added as favorites.</p> <p>This type of favorite lets the user of the subscription to select an index value, and then see the matching section of data from a report for that index value pair.</p>	<p>When a user selects this type of report, the user will be prompted for one or more index value selections.</p> <p>After the user selects the index values, a report section is displayed.</p> <p>This type of index appears with the report index icon. </p>
<p>Report Index-Value Report Section</p>	<p>A single report section</p> <p>A single report index value match can be added as a favorite.</p>	<p>This report section will appear, to a subscription user as a text report listed in the subscription. </p>

## Report Actions from the Subscription List

You can complete several actions from the Action button in the Action column. The first steps are basically the same as editing the Favorite Properties. For more information about report actions, see [Report Actions](#) (see page 113).

Additionally, you can browse the contents of a favorite by clicking its name in the Name column. For indexes, filters, and cross-report indexes, the format of data that appears in the subscription in the Reports tab is different than the data that are linked to it.

**Note:** Selecting a favorite for a report action can trigger a repository connection at runtime. If a repository connection fails because the user login credentials are invalid (for example, the password expires), OM Web Viewer prompts you for the new credentials to attempt another connection.



# Chapter 3: Using the Reports Tab

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This section contains the following topics:

[How to View Reports](#) (see page 23)

[How to Navigate the Pages](#) (see page 26)

[Report Actions from the Reports Tab](#) (see page 27)

## How to View Reports


The Reports tab displays the subscriptions assigned to your current role and the subscriptions that you created. A *subscription* is a group of favorites that has a name and description. You can assign these subscriptions to various roles, so that members of those roles have quick access to the favorites.

You can view reports represented by the various favorites and perform various report actions based on your role and permissions:

- [View Mainframe Text Reports](#) (see page 23)
- [View Report Index Favorites](#) (see page 24)
- [View Binary Reports](#) (see page 25)
- [View Search Criteria Favorites](#) (see page 25)

**Note:** Selecting a report for viewing can trigger a repository connection at runtime. If a repository connection fails because the user login credentials are invalid, OM Web Viewer prompts you for the new credentials to attempt another connection.

## View Mainframe Text Reports

Mainframe text reports are displayed with the  icon. To display these reports in the right pane, click the report name.

You can perform various report actions on these reports.

**Follow these steps:**


1. Click Reports tab.
2. Click report icon or name.

The report is displayed in the right pane.

**More information:**


[Report Actions from the Reports Tab](#) (see page 27)

## View Report Index Favorites

Index selection favorites are displayed with the  icon. First select an index value to see the report data. When you select an index value, a page range of the report is displayed in the right pane.

You can perform various report actions on the Reports sections.

**Follow these steps:**

1. From the Reports tab, locate the Report Index .
2. Click Report Index Favorite or its name.

One or more Index selection drop-down lists displays below the subscriptions list.

3. Select index values for each index.

After selecting a value for the last index, a section of the report corresponding to your index value selections is displayed in the right pane.

**More information:**

[Report Actions from the Reports Tab](#) (see page 27)



## View Binary Reports

Binary reports are displayed with a different icon for each type of report. These reports are displayed in a pop-up window. Depending on your browser configuration, you either see a dialog with save, open, and cancel options or the report is automatically displayed in your browser. How your browser handles different file types determines whether the file is automatically displayed in the browser, or you see the dialog.

**Follow these steps:**



1. From the Reports tab, locate the subscription that contains your report.
2. Click the binary report.

A window opens. If your browser can display the report, the report can be viewed immediately.

If your browser cannot display the report, you are prompted to either open or save the report.

The file extension of the report determines which program can open it.

## View Search Criteria Favorites

A search criteria favorite appears as a subfolder icon   inside the subscriptions main folder. An administrator-defined report search runs when you expand the folder. The report results are listed as a series of reports, which you click to open.

**Follow these steps:**

1. From the Reports tab, locate the Subscription folder.
2. Expand the subfolder by clicking the plus symbol.

A hidden search query is run, and your results are displayed as binary reports or mainframe text reports inside the subfolder.

3. Click any report in that subfolder to view it.

**Note:** For more information about viewing Binary or Mainframe text reports, see the View Reports section. For report results including offline reports, offline report icons are displayed for each type of report.

## How to Navigate the Pages

You can navigate through Mainframe text reports and report index favorites, and view required pages.


Mainframe text reports and report index favorites are displayed in the right pane.

**Note:** You can also use the Go to Page dialog for quick navigation.

Only the default number of pages of the report are displayed at any time, regardless of the size of the report. For example, if your administrator sets a default of five pages at a time, a maximum of only five pages are displayed.

You can navigate to other pages in page ranges that are not displayed.

**Follow these steps:**

1. Select a Mainframe text report or report index favorite, from the Reports tab.
2. Find the page range navigation buttons (top right of the display pane) and navigate to the page you want to display.
3. Click the Page Navigation icon  to go to a page number, enter a page number, and click Go.

The first page in the range of the targeted page is displayed.

**More information:**

[Go To Page in a Report](#) (see page 114)

[How to View Reports](#) (see page 23)

## Report Actions from the Reports Tab

The Report Actions section describes the options for viewing and using report data.

Because the reports do not reside on your computer, but on a centralized repository management system, you cannot edit the content. However, you can use the following Report Actions from the Reports Tab.

From the Reports Tab, you can perform the following report actions:

- Find Text
- Go To Page
- Display Notes
- Add Browser Favorite or Bookmark
- Print Report
- Email Report
- Export Report

**Note:** For more information about the report actions, see Report Action Dialogs.

**More information:**

[Using Report Actions](#) (see page 27)

## Using Report Actions

From the report pane you can perform various report actions using any of the following options:

- Menu
- Toolbar
- Hotkeys

**Notes:**

- The options of report actions available from the Reports tab are different from the options available from other panes.
- The report actions available are based on your current Role.

## Use the Menu

You can use the menu to perform various report actions.

**Note:** You can also use the toolbar or hotkeys to perform the same actions. Use the tooltip of each toolbar button to see which action it performs.

**Follow these steps:**

1. Select a Mainframe text report or report index favorite, from the Reports tab.
2. Move your cursor over one of the following drop-down menu, in the Reports tab, to view and use the options:
  - a. Edit Menu
    - Find Text
    - Go To Page
  - b. View Menu
    - Display Notes
  - c. Output Menu
    - Favorite or Bookmark (Browser)
    - Print
    - Email
    - Export
3. Click on the desired report action.

A report action dialog opens or in the case of Display Notes, the Notes icon is displayed.

**Note:** For more information about the Report Actions, see Report Action Dialogs.

**More information:**

[Notes](#) (see page 29)

[How to View Reports](#) (see page 23)

## Notes

You can display notes from reports on the reports tab, if you have the required permissions.

A note contains the following attributes:

- ID of the user that created the note
- Date of the note
- Brief text.

To see these notes, move your cursor over the View menu and click Display Notes. With Notes enabled, a note icon at the beginning of the line in the report identifies the note.

**Note:** From the reports tab, Notes are read-only. Some roles have permissions to add, delete, update, and view notes in a report while browsing a report from the Advanced Search tab.

Move your cursor over the View menu and Click Notes Off, to turn off displaying notes in the report.

**More information:**

[Annotations and Bookmarks](#) (see page 91)



# Chapter 4: Using the Report List

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The Report List tab under Advanced Search lets you search for reports on the repositories that you are allowed to access.

This section contains the following topics:

[Display a Report List](#) (see page 31)

[Customize Report List Display](#) (see page 31)

[Search for Reports](#) (see page 32)

[Report Actions from the Reports List](#) (see page 38)

## Display a Report List

To display a report list, select a repository, and then you select search criteria, and click Go.

The report list itself is a list of reports matching your criteria and displays some basic information about those reports.

**Note:** Selecting a repository triggers a repository connection at runtime. If a repository connection fails because the user login credentials are invalid, OM Web Viewer prompts you for the new credentials to attempt another connection.

## Customize Report List Display

You can customize the report list by designing various search criteria and applying filters.

**Follow these steps:**

1. Use the search filter criteria, such as creation date, versions, report id, mode, and online and offline status of documents, and click Go.

A report list based on your search and filter criteria is displayed.

2. Click a column heading.

The listed document data is sorted.

**Note:** For more information about filter criteria, see [Search for Reports](#) (see page 32).

## Search for Reports

You can use the various filter criteria that let you to select the documents that appear in the Report List.

**Note:** The columns you require can be customized through the Report List option under the Configuration tab.

### Follow these steps

1. Click Advanced Search after logging in to CA OM Web Viewer.  
The default Report List Filter Settings page opens.
2. Specify the desired search and filter criteria in the form.
3. (Optional) Click Add Filter Favorite.

You can save the search criteria as a favorite filter and use it when required.

4. Click Go.

A list of reports matching your criteria is displayed. Each report is listed as a row in the report list. Each column in the report list displays an attribute of the report.

### More information:

[Date & Version Criteria](#) (see page 33)

[Report Criteria](#) (see page 34)

[Report List Columns](#) (see page 36)



---

## Date & Version Criteria

You can use the following date and version criteria for your search.

- Creation Date
  - Filter the report list by the latest number of days or a range of dates.
  - Select date filter type.
  - If you select From, enter the number of days from that you want to filter the reports. Entering 0 implies that the reports are filtered from today, 1 implies from yesterday through today, and so on.
  - If you select Between for a range of dates, enter the start and end date in the format M/D/YY, where,
    - M specifies the month (for example, 8).
    - D specifies the day (for example, 5).
    - YY specifies the year (for example, 11).

**Note:** The date format varies based on your geographical location. For example, in the USA, M/D/YY format is used and in UK, DD/MM/YY is used.
- Versions
  - Filter the report list by report version, where version 1 is the most recent report in the date range, 2 is the next most recent.
  - Select the version type: All, Latest, or Range from.
  - If you select Latest for the CA View repository, enter the number of versions you want to display.

**Note:** For the CA Dispatch repository, only the latest (one) version is displayed.
  - If you select Range, enter the starting from 1 latest and ending up to 100 oldest versions to filter the reports.

For example, if you want only versions 3 through 6 of a report, you can enter the numbers 3 in the Range *from* and 6 in the *to* fields, and click Go.

**Note:** Available for CA View (all releases) and CA Dispatch (r11.0 or higher).

## Report Criteria

You can use the following report criteria for your search.

### Report ID

Filters the report list by report ID. If you want to filter documents by report ID, enter an ID or a mask in Report ID. You can use the asterisk (\*). An asterisk matches zero or more characters.

#### Note:

The administrator can restrict the use of a leading asterisk in the filter mask. For example, \*REPORT cannot be permitted. The administrator can also set up a rule to change your search so that your search term is padded with certain characters, and you do not have to type all the characters. For example, in an account field the administrator can choose to pad all numbers with zeros, so that the account number is eight digits. In this example, if you type 234, 234 could automatically be converted to 00000234 or 23400000 depending on admin settings.

For more information about filter criteria, usage of wildcards, see the *Administration Guide*.

## Report Criteria (CA View)

You can use the following report search criteria on CA View repositories only:

- Mode and Dist ID
  - Select a CA View mode (ALL, EXPO, EXP, SARO, or SAR) from the Mode drop-down list. For the modes EXP and SAR, specify a Dist ID.  
**Note:** This criteria is not available for the users login with a shared mainframe profile returned from exit calls with External Security EXIT authentication.
- On-line Reports only
  - If you want to see only online reports, select On-line reports. To see all reports regardless of online status, leave the On-line reports only option clear.

## Report Criteria (CA Bundl)

You can use the following report search criteria on CA Bundl repositories only:

### Application ID

Filters the report list by application ID. To filter documents by this method, enter an application ID or a mask in Application ID. You can use the asterisk (\*) and question mark (?) wildcards (for example, a\* and a?c). An asterisk indicates zero or more characters; a question mark indicates a single character.

### Mail Code

Select a mail code from the Mail Code drop-down list. If the mail code does not appear in the list, enter it in the text box.

## Report Criteria (CA Dispatch)

You can use the following report search criteria on CA Dispatch repositories only:

- Recipient
  - Select a CA Dispatch recipient from the Recipient drop-down list.
- On-line Reports only
  - If you want to see only online reports (that is, you want to exclude offline reports from your list), select On-line reports only. To see all reports regardless of online status, leave the On-line reports only option clear.

## Browse Reports from the Report List

You can view various reports listed under the Report List based on the used search criteria.

### Follow these steps:

1. Click Advanced Search after logging in to CA OM Web Viewer.

The Report List Filter Settings page opens.

2. Specify the desired filter criteria in the form.
3. Click Go to apply the search criteria.

A list of matching reports is displayed.

4. Click the desired report.

**Note:** You can change the filter values, and click Go to find the correct report.

5. Click Home in the breadcrumbs to return to the initial Report List page.

You can now change the filter criteria, select a different report name, or both.

### More information:

[Using the Reports Tab](#) (see page 23)

[Search for Reports](#) (see page 32)

## Report List Columns

Most columns represent an attribute of the report. However, columns have special functions.

### Select Column

Helps you to select a report for various report actions, or to select a report so that it can be added as a favorite. For more information about selecting reports and the actions available, see [Report Actions from the Report Tab](#) (see page 27).

### (Optional) Action Column

Lets you select and perform various report actions on reports through Action.

**Note:** You can enable this column from the Report List section of the configuration pane.

## Report Attributes Columns

Each of the remaining columns (other than the Select and Action columns) displays different information about a report, such as creation date or the number of pages.

### Note:

- Depending on the repository configuration only some report attributes are displayed, by default.
- You can use the configuration pane to customize which report attributes are displayed on the report. For more information about customizing your report list layout, see Update the Report List Layout.

The following is a list of the possible Report List column attributes and their descriptions:

### Icon

Displays the file type icon for each report.

**Note:** Unknown file types display a default icon.

### Report ID

Displays the name or id of the report.

**Note:** To browse the report, click Report ID.

### Description

Displays a brief description of the report.

### Type

Displays the file type of the report.

**Lines**

Displays the number of lines in a report.

**Pages**

Displays the number of pages in the report.

**Comments**

Displays a comment about the report that can be edited.

**Note:** For information about editing report comments, see Report Actions from the Report List or Update Report Comment.

**Creation Date**

Displays the date on which the report was created in the repository.

**Creation Time**

Displays the time at which the report was created in the repository.

**Generation**

Displays the generation information of the report that was created in the repository.

**Job Name**

Displays the job name for the report that was created in the repository.

**Job ID**

Displays the job id for the report that was created in the repository.

**Location**

Displays whether the report is online or offline. The offline reports that are listed may not be accessible, or, you may have to request a recall of the report.

**Note:** For more information about browsing offline reports, see Offline Reports.

**Exception Code**

Displays the errors or problems with which the report was created in the repository.

**Source**

Displays the source, type of repository, on which the report was created.

**Distribution**

Displays the type of distribution, such as mail code, for the report that was created in the repository. This is applicable only to the CA Bundl reports.

**Application ID**

Displays the application ID of the report that was created in the repository. This is applicable only to the CA Bundl reports.

## Sort your Report List

You can sort the report list using most of the report list attributes.

**Follow these steps:**

1. Click Advanced Search after logging in to CA OM Web Viewer.  
The Report List Filter Settings page opens.
2. Specify the desired filter criteria in the form.
3. Click Go to apply the search criteria.  
A list of matching reports is displayed.
4. Click the attribute column heading, such as Report ID, Description.  
The reports are sorted, based on the attribute you selected, in ascending order.  
Clicking the attribute column heading again sorts the reports in descending order.

**More information:**

[Search for Reports](#) (see page 32)

## Report Actions from the Reports List

The Report Actions section describes the various options for viewing and using report data.

Because the reports do not reside on your computer, but on a centralized repository management system, you cannot edit the content. However, you can use the following report actions from the Reports List.

From the Reports List you can perform the following report actions:

- Edit Report Comment
- View Report Information
- Add reports as CA OM Web Viewer favorites (internally managed favorites, not browser favorites).
- Print Report
- Email Report
- Save Report
- Export Report

**Note:** For more information about the report actions, see Report Action Dialogs.

**More information:**

[Using Report Actions](#) (see page 39)

## Using Report Actions

From the report list pane you can perform various report actions using any one of the following options:

- Toolbar
- Hotkeys
- Action Drop-down

**Note:**

- The options of report actions available from the Reports List are different from the options available from other panes.
- The report actions available are based on your current Role.

## Use the Toolbar

You can use the toolbar to perform various report actions on one or more reports, from the Report List.

**Important!** The report actions available in the toolbar changes based on the selected reports.

**Note:** You can also use the hotkeys to perform the same actions. To see which action it performs, use the tooltip of each toolbar button.

**Follow these steps:**

1. Generate a report list.
2. Select the reports for the report action.

**Important!** The report actions available in the toolbar changes based on the selected reports.

3. (Optional) Click Select All.

**Note:** Locate the Select All the top of the select column, to the left of the Select label.

4. Click any one of the following report action icons, as required:

**Edit Report Comment** 

Available when you select a single report.

**View Report Information** 

Available only when you select a single report.

**Add the reports as the CA OM Web Viewer favorites** 

Available with any combination of selected reports.

**Print** 

Available with one or more selected mainframe text reports.

**Email** 

Available with any combination of selected reports.

**Save** 

Available with a single selected report of any format.

**Export** 

Available only with a single selected mainframe text report.

**Note:** If a report action is available to you with your current report selection, the corresponding action icon is enabled and shown in color. If the report action is not available with your current selection, the icon for that report action is disabled and shown in gray.

With the exception of adding a single CA OM Web Viewer favorite, your report action dialog must appear after clicking the report action icon.

**Note:** When adding the CA OM Web Viewer favorites from the toolbar, no dialog is displayed, because the process is automatic.

5. Continue with your report action.

**Note:** For more information about the Report Actions, see Report Action Dialogs.

**More information:**

[Browse Reports from the Report List](#) (see page 35)

[Favorite Actions](#) (see page 70)



## Use the Action Button

You can use the action button listed in the action column for each report to perform various actions on that single report.

**Note:** The action column is not displayed by default. You can enable this option from the configuration tab. For more information, see Show Advanced Options.

### Follow these steps:

1. Generate a report list.
2. Select reports for the report action.
3. Find the button labeled Action in your report's row.

**Note:** The Action button is in the second column. If there is no Action button and no Action column, this option must be turned off.

4. Click the Action button.

The report action drop-down list is displayed.

**Note:** The report actions available to you depend on the type of selected report.

5. Click on a report action from the drop-down list.

**Note:** The selected report action is applied only to that single report, even if you have selected multiple reports.

Your report action dialog appears.

6. Continue with your Report Action.

**Note:** For more information about the Report Actions, see Report Action Dialogs.

### More information

[Browse Reports from the Report List](#) (see page 35)



# Chapter 5: Using Cross-Report Indexes

---

Cross-Report indexes (available in CA View only) let you do the following:

- View matching pages from multiple reports that contain a specific index value.
- Quickly locate specific information in multiple versions a single report.

With cross-report indexing, you find the sections of reports that you want to view based on the index names and values you specify. The administrator determines which pages of a report are matched with an index value.

For example, a CA View administrator sets up an index named Account. They also set up a rule so that certain index values are found in a specific location on each report page. As reports come into CA View, they are scanned and the index values are built. In CA OM Web Viewer, you specify Account as the index name and 123 as the index value. If any report has this value, you see *only* those reports in your list. When you browse a report, you see *only* those pages that have this value.

This section contains the following topics:

[Page Selection and Report Sections](#) (see page 44)

[Cross-Report Index Selection](#) (see page 45)

[Cross-Report Value Selection](#) (see page 47)

[Cross-Report Match List](#) (see page 49)

[Report Actions from Cross-Report Match List](#) (see page 53)

## Page Selection and Report Sections

A report index groups certain pages of a report with a particular index value. An example would be a report that includes telephone bills. Each telephone bill is several pages of a report. When you enter an account number, that account's bill is listed. One account might be pages 10-15 and another account might be 27-31.

Cross-Report indexes are similar to report indexes except, a single index can be used in more than one report. If your value is found in two different reports, the resulting sections from each report are listed.

Both Report Indexes and Cross-Report Indexes have two parts:

- Index name

The index name corresponds to the type of value you are searching for. The index might be for a telephone number, SSN, or some other type of information.

- Index value

The actual value that you are searching for. In the case of a telephone number index you might search for 800-555-0199. Which pages of the report are matched with this index is determined by the administrator.

The index information entered for these values determines which pages of a report are displayed.

**Note:**

- Reports defined by cross-report indexing are dynamic; the information can change (if the reports change) each time you reconnect to the database.
- Sometimes indexes have multiple parts, so, you have to enter the index values for two to eight indexes at one time.

## Cross-Report Index Selection

The index filter pane lets you to find and select an index or multiple part indexes from the available indexes in your repository.

From this pane, you can select the particular index you are looking for. For example, if you are going to search for someone's SSN number, you might select an index called SSN.

From this pane you can filter the indexes in the following ways:

- Date & Version Criteria
- Report Criteria
- Index Criteria

**Note:** Date & Version Criteria and Report Criteria are the same as in the report list filter criteria.

**More information:**

[Search for Reports](#) (see page 32)

## Select Cross-Report Indexes

You can find and select an index or a multiple part index.

**Note:** After selecting an index, you can continue by selecting an index value. A list of report sections that each match the index-value pair you selected is displayed.

**Follow these steps:**

1. Click Advanced Search after logging in to CA OM Web Viewer.
2. (Optional) Select the CA View repository where you want to search for indexes.

**Note:** If you have only one repository that is assigned to you, or you have selected a default repository in your configuration, that repositories already selected.

3. Click the Cross-Report Indexes tab.
4. Specify the values in the Cross-Report Index Search Dialog.
  - a. Date & Version Criteria  
The criteria in this section are the same as the Report List criteria for a CA View repository.
  - b. Report Criteria  
The criteria are the same as the Report List criteria for a CA View repository.
  - c. Index Criteria  
For more information about the Index Criteria, see the [Page Selection and Report Sections](#) (see page 44) section.
5. Click Go.  
The list of possible results are:
  - a. A table of labeled Index Name List is displayed.  
In this case, go to step 6.
  - b. If only one index meets your criteria, you are automatically directed to the value selection pane.  
In this case, skip the remaining steps in this procedure, and continue with Cross-Report Index Selection.
  - c. A message informing you that no indexes matching your criteria were found is displayed.  
Repeat steps 4 and 5, with different criteria.
6. Find the column marked Index 1.  
This column has a link for each listed Index Name.  
**Note:** Multiple part indexes have links in the other columns; Index 2 – Index 8.
7. (Optional) Use navigation arrows to list other indexes.
  - >> displays the last group of Index Names
  - > displays the next group of Index Names
  - < displays the previous group of Index Names
  - << displays the first group of Index Names

8. To select click the name of an index.

The Index Value Selection pane is displayed.

**Note:** With multiple part indexes, you can click any links in the row. The resulting multiple part index is the same.

9. Continue Select Index Value Selection.

To continue with step-by-step instructions, see the procedure in Index Selection.

**More information:**

[Date & Version Criteria](#) (see page 33)

[Report Criteria](#) (see page 34)

[Report Criteria \(CA View\)](#) (see page 34)

[Cross-Report Index Selection](#) (see page 45)

## Cross-Report Value Selection

Select an index and an index value. If there are multiple indexes, select an index value for each index included in the multiple part index.

From the Cross-Report Value Selection pane, you can select the particular index value. For example, if you are going to search for a SSN number, you can select and enter 123-45-6789 or 123-45\*.

Selecting the index values produces a list of report sections that match the index-value pair you selected. This list looks similar to the Report List and can include several different reports. Each list having a matching section, or several different versions of a report that have matching report sections.

### Report Versions

If a report is generated weekly, each of these reports is listed as different versions of the same report.

## Select Cross-Report Values

You can select an Index Value from the list of possible index values. Additionally, you can mask your index value choices and reduce the list of choices.

**Follow these steps:**

1. Select an Index or Multiple Part Index.

The Index Value Selection pane is displayed.

**Note:** For more information about the procedure to select an index or multiple part indexes, see [Select Cross-Report Indexes](#) (see page 45).

2. (Optional) Do *one* of the following items:

- a. Select As Uppercase.

All the index values or values masks, such as R\*, that you type are converted to uppercase.

- b. Select As Type.

All the index values or values masks, such as R\*, you type are retained in the case you typed them.

3. Find the Indexes table.

The index name is listed next to a text box where you can enter a value or a value mask.

If a multiple part index, the Indexes table lists each index name, with a text box next to it, as a row in the table.

4. (Optional) Enter value mask in one or more of the index value text boxes.

**Note:** If the system administrator has the index value filter rules defined in the admin repository property level, index value filter rules apply.

To enter the value mask for a particular index, find the value text box in the same row of that index.

**Note:** A value mask is a partial value entry that uses a wildcard, such as 5?5 or T\*. An asterisk wildcard matches zero or more characters; a question mark wildcard matches a single character. The default mask is a single asterisk, \*.



5. Click Get Values.

A table of possible index values is displayed. Each possible value is displayed as a link in a row of the table.

**Note:**

- If you are using multiple part indexes, each possible value is a combination of several index parts. For example, a value can look like: valueForIndex1:valueForIndex2:valueForIndex3.
- If you get a message that there are no index values that match the above search criteria, try changing your value masks.

6. (Optional) Use navigation arrows to list other possible index values:

- >> displays the last group of possible index values
- > displays the next group of possible index values
- < displays the previous group of possible index values
- << displays the first group of possible index values

7. Click the link for the index value.

A list of report sections that each match the index-value pair you selected is displayed.

**More information:**

[Select Cross-Report Indexes](#) (see page 45)

[Cross-Report Match List](#) (see page 49)

## Cross-Report Match List

The Cross-Report Match List lists all report sections that match your index, and index value criteria.

For example, if an SSN index is in all versions of a monthly telephone bill report, a value of 123-45-6789 could return a listing of each telephone bill for that user.

The report sections can be from multiple reports or multiple versions of a single report.

The information that is displayed about the report sections from this pane is also available from the report list.

**More information:**

[Cross-Report Match List Columns](#) (see page 50)

[Browse Reports from the Cross-Report Match List](#) (see page 53)

[Report Actions from Cross-Report Match List](#) (see page 53)

## Cross-Report Match List Columns

Most columns in the Cross-Report Match List table represent an attribute of the report. However, columns have special functions.

**Select Column**

Used to select report sections for various report actions, or to select a report section so that it can be added as a favorite.

**(Optional) Action Column**

Enabled from the configuration pane. This column has an action button that lets you select and perform various report actions on a single report.

**More information:**

[Report Actions from Cross-Report Match List](#) (see page 53)

## Report Attributes Columns

Each of the remaining columns (other than the Select and Action columns) displays different information about a report section, such as creation date or number of pages.

**Note:**

- Depending on the repository configuration, only some report attributes are displayed, by default.
- You can use the configuration pane to customize which report attributes are displayed on the report sections.

The following is a list of the possible Cross-Report Match List column attributes and their descriptions:

**Icon**

Displays the file type icon of each report.

**Note:** Unknown file types display a default icon.

**Report ID**

Displays the name or id of the report.

**Note:** To browse the report, click Report ID.

**Description**

Displays a brief description of the report.

**Type**

Displays the file type of the report.

**Lines**

Displays the number of lines in a report.

**Pages**

Displays the number of pages in the report.

**Comments**

Displays a comment about the report that can be edited.

**Creation Date**

Displays the date on which the report was created in the repository.

**Creation Time**

Displays the time at which the report was created in the repository.

**Generation**

Displays the generation information of the report that was created in the repository.

**Job Name**

Displays the job name for the report that was created in the repository.

**Job ID**

Displays the job id for the report that was created in the repository.

**Location**

Displays whether the report is online or offline. The Offline reports that are listed may not be accessible, or, you may have to request a recall of the report.

**Exception Code**

Displays the errors or problems with which the report was created in the repository.

**Source**

Displays the source, type of repository, on which the report was created.

**Distribution**

Displays the type of distribution, such as mail code, for the report that was created in the repository. This is applicable only to CA Bundl reports.

**Application ID**

Displays the application ID of the report that was created in the repository. This is applicable only to CA Bundl reports.

**More information**

[Report Actions from the Reports Tab](#) (see page 27)

[Update Report Comment](#) (see page 136)

[Customize Report List Display](#) (see page 31)

[Offline Reports](#) (see page 109)

## Sort your Cross-Report Match List

You can sort the report list that is based on the Cross-Report Match List attributes.

**Follow these steps:**

1. Generate Cross-Report Match List.
  - a. To select the Cross-Report indexes, follow the procedure.
  - b. Select Cross-Report Values.

A list of matching report sections is displayed.
2. Click the attribute column heading, such as Report ID or Description.

The reports are sorted, based on the attribute you selected, in ascending order.

Clicking the attribute column heading again sorts the reports in descending order.

**More information:**

[Select Cross-Report Indexes](#) (see page 45)

[Select Cross-Report Values](#) (see page 48)

## Browse Reports from the Cross-Report Match List

You can view various reports that are listed under the Cross-Report Match List based on the used search criteria.

**Follow these steps:**

1. Generate Cross-Report Match List.
  - a. Select Cross-Report Indexes.
  - b. Select Cross-Report Values.

A list of matching reports is displayed.

2. Click the required report name, which is a link.

Your report section is displayed.

**Note:** AFP report sections are displayed in a pop-up window.

**More information:**

[Select Cross-Report Indexes](#) (see page 45)

[Select Cross-Report Values](#) (see page 48)

[Browsing Reports](#) (see page 85)

## Report Actions from Cross-Report Match List

The Report Actions section describes the various options for viewing and using report data.

Because the reports do not reside on your computer, but on a centralized repository management system, you cannot edit the content.

From the Cross-Report Match List you can perform the following report actions:

- Edit Report Comment
- View Report Information
- Add report sections as CA OM Web Viewer favorites (internally managed favorites, not browser favorites).
- Print Report
- Email Report
- Save Report
- Export Report

**Note:** For more information about the report actions, see Report Action Dialogs.

**More information:**

[Cross-Report Match List](#) (see page 49)

[Using Report Actions](#) (see page 54)

## Using Report Actions

From the Cross-Report match list pane you can perform various report actions using any one of the following options:

- Toolbar
- Hotkeys
- Action Button Drop-down

**Note:**

- The options of report actions available from the Cross-Report Match List are different from the options available from other panes.
- The report actions available are based on your current Role.

## Use the Toolbar

You can use the toolbar to perform various report actions on one or more reports, from the Cross-Report Match List.

**Important!** The report actions available from the toolbar changes based on the selected reports.

**Note:** You can also use the hotkeys to perform the same actions. To see which action it performs, use the tooltip of each toolbar button.

**Follow these steps:**

1. Generate Cross-Report Match List.

- a. Select Cross-Report Indexes.

For a step-by-step procedure on how to select Cross-Report Indexes, [see Select Cross-Report Indexes](#) (see page 45).

- b. Select Cross-Report Values.

For a step-by-step procedure on how to select a Cross-Report Value, see [Select Cross-Report Values](#) (see page 48).

A list of matching reports is displayed.

2. Select the reports for the report action.

**Important!** The report actions available from the toolbar changes based on the selected reports.

3. (Optional) Click Select All.

**Note:** At the top of the select column to the left of the Select label, is the Select All.

4. Click any one of the following icons, as required:

**Edit Report Comment** 

Available only when you select a single report.

**View Report Information** 

Available only when you select a single report.

**Add the reports as the CA OM Web Viewer favorites** 

Available with any combination of selected reports.

**Print** 

Available with one or more selected mainframe text reports.

**Email** 

Available with a combination of selected reports.

**Save** 

Available with a single selected report of any format.

**Export** 

Available with a single selected mainframe text report.

**Note:** If a report action is available to you with your current selection, its icon is enabled and shown in color. If the report action is not available with your current selection, the icon for that report action is disabled and shown in gray.

5. Continue with your report or favorite action.

With the exception of adding a single CA OM Web Viewer favorite, your report action dialog must appear after clicking the report action icon.

**Note:**

- When adding CA OM Web Viewer favorites from the toolbar, no dialog is displayed, because the process is automatic.
- For more information about the Report Actions, see Report Action Dialogs.

**More information:**

[Favorite Actions](#) (see page 70)

## Use the Action Button

You can use the action button that is listed in the action column for each report to perform various actions on that single report.

**Note:** The action column is not displayed by default. You can enable this option from the configuration tab.

**Follow these steps:**

1. Generate Cross-Report Match List.
  - a. To select cross-report indexes, follow the procedure.  
For a step-by-step procedure on how to select cross-report indexes, see [Select Cross-Report Indexes](#) (see page 45).
  - b. Select Cross-Report Values.  
For a step-by-step procedure on how to select a cross-report value, see [Select Cross-Report Values](#) (see page 48).

A list of matching reports is displayed.

2. Select the reports for the report action.
3. Find the button that is labeled Action in your reports row.

**Note:** The Action button is in the second column. If there is no Action button and Action column, this option must be turned off.

4. Click the Action button.

The report or favorite action drop-down list is displayed.

**Note:** The report actions available to you depend on the type of selected report.



5. Click a report action from the drop-down list.

**Note:** The selected report action is applied only to that single report, even if you have selected multiple reports using the checkboxes.

Your report action dialog appears.

6. Continue with your Report Action.

**Note:** For more information about the Report Actions, see Report Action Dialogs.



# Chapter 6: Using Favorites and Shortcuts

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CA OM Web Viewer provides two methods for using favorites: CA OM Web Viewer internally managed favorites and browser favorites. You can also use CA OM Web Viewer shortcut keys.

**Note:** Unless mentioned specifically, this entire chapter refers to internally managed favorites.

This section contains the following topics:

[Internally Managed Favorites](#) (see page 59)

[Browser Favorites](#) (see page 60)

[Favorite List](#) (see page 60)

[Types of Favorites](#) (see page 67)

[Favorite Properties](#) (see page 69)

[Favorite Actions](#) (see page 70)

[Create and Use Each Type of Favorite](#) (see page 73)

[Shortcut Keys](#) (see page 84)

## Internally Managed Favorites

CA OM Web Viewer internally managed favorites are created in, accessed from, and managed within CA OM Web Viewer.

The CA OM Web Viewer Internally managed favorites lets you save various types of favorites such as reports favorites, favorite filter settings, and cross-report index favorites.

The report favorites can refer to a specific instance of the report or the latest version of the report.

Various CA OM Web Viewer report and favorite actions are available for a favorite.

**More information:**

[Report and Favorite Actions from the Favorites List](#) (see page 63)

[Types of Favorites](#) (see page 67)

[Edit Favorite Properties](#) (see page 71)

## Browser Favorites

The browser favorites let you create a favorite or bookmark that is managed by your web browser. CA OM Web Viewer creates the favorite and displays the report, but you can select or manage the favorite through your web browser. The browser favorites are limited to CA View 11.0 or higher repositories.

**More information:**

[Browse Link Access](#) (see page 108)

## Favorite List

The favorites list is a list of all the internally managed CA OM Web Viewer favorites you have created in a particular repository.

From the favorite list, you can browse favorite reports or report sections. For filter favorites, you can apply the filter from the favorites list.

Additionally, you can perform various report and favorite actions from the favorite list.

To view your favorites for a particular repository, select that repository and click the favorites tab.

**Follow these steps:**

1. Click Advanced Search after logging in to CA OM Web Viewer.
2. (Optional) Select the repository to which you added the favorite.

**Note:** If you only have one Repository assigned to you, or if you have selected a default repository in your configuration, that repository will already be selected.

3. Click the Favorites tab.

The favorites from your selected repository are displayed.

Each favorite is listed as a row in the favorite's list table. Each column in the table is an attribute about the favorite.

**More information:**

[Favorite List Columns](#) (see page 61)

[Report and Favorite Actions from the Favorites List](#) (see page 63)

[Favorite Actions](#) (see page 70)

## Favorite List Columns

Most columns represent an attribute of the favorite. However, two columns have special functions.

### Select

Used to select favorites for various report or favorite actions. This column is also used to select favorites for removal from the favorites list.

### Action

Enabled from the configuration pane. This column has an action button that lets you select and perform various report or favorite actions on reports.

### More information:

[Use the Action Button](#) (see page 41)

[Report and Favorite Actions from the Favorites List](#) (see page 63)

## Favorite Attributes

The remaining columns each display different information about a favorite, such as creation date or the type of favorite.

### Note:

- Depending on the repository configuration, only some favorite attributes are displayed, by default.
- You can use the configuration pane to customize which favorite attributes are displayed on the report.

The following is a list of the possible favorite list column attributes and their descriptions:

### Icon

Displays the icon for the file type of the report.

**Note:** Certain unknown file types display a default icon.

### Name

Displays the favorite name. You can modify the name of the favorite using the Edit Favorite Properties dialog.

### Report ID

Displays the unique report identification for the favorite report. Available only for report favorites.

**Description**

Displays the description of the favorite. You can modify the description of the favorite using Favorite Properties.

**Type**

Displays the type of favorite.

**Latest Report**

- The actual report data is dynamic and the user may see it change over time.
- If there are new versions of the report, the favorite always points to the latest version.

**Static Report**

- Refers to one particular version of a report.
- The actual report data seen by the user does not change over time.

**Note:** A reorganization of your mainframe repository can break this link. For example, merging or splitting repositories in CA View could cause these favorites to point to the wrong report.

**Filter Settings**

- Refers to saved search filter settings.
- You can use this type of favorite to reuse a search at a later time.

**Modification Date**

Displays the date the favorite was created or the last time the favorite's properties were changed.

**Creation Date (Report or Report Section Favorites Only)**

Displays the date of creation of the report this favorite refers to.

**Note:** This value is displayed only when the favorite is static type.

**Creation Time (Report or Report Section Favorites Only)**

Displays the time of creation of the report this favorite refers to.

**Note:** This value is displayed only when the favorite is static type.

**More information:**

[Customize Report List Display](#) (see page 31)

[Favorite Properties](#) (see page 69)

## Report and Favorite Actions from the Favorites List

The Report Actions and Favorite Actions sections describe various options for viewing and using report data. This section describes the Report and Favorite Actions that are available in the Favorites List.

Because the reports do not reside on your computer, but on a centralized repository management system, you cannot edit the content.

From the Favorites List you can perform the following report actions on Report or Report Section Favorites only:

- Edit Favorite Properties
- Browse Favorite Report
- Browse Favorite Report in a New Window
- View Report Information
- Remove CA OM Web Viewer Favorites (internally managed favorites, not browser favorites).
- Print Report
- Email Report
- Save Report
- Export Report

From the Favorites List you can perform the following report actions on Filter Favorites only:

- Edit Favorite Properties
- Apply Favorite Filter
- Remove CA OM Web Viewer Favorites (internally managed favorites, not browser favorites).

**Note:** For more information about the report actions, see Report Action Dialogs.

### Use Report and Favorite Actions

From the favorite list pane you can perform various report or favorite actions using any one of the following options:

- Toolbar
- Hotkeys
- Action Drop-down

#### Notes:

- The options of report actions available from the Reports List are different from the options available from other panes.
- The available report actions are based on your current Role.

## Use the Toolbar

You can use the toolbar to perform various report actions on one or more favorites, from the Report List.

**Important!** The report actions available in the toolbar changes based on the selected reports.

**Note:** You can also use the hotkeys to perform the same actions. To see which action it performs, use the tooltip of each toolbar button.

#### Follow these steps:

1. Click Advanced Search after logging in to CA OM Web Viewer.
2. (Optional) Select the repository to which you added the favorite.

**Note:** If you only have one Repository assigned to you or you have selected a default repository in your configuration, that repository is already selected.

3. Click the Favorites tab.
4. Select one or more of the favorites for favorite or report action.

**Important!** The report actions available from the toolbar can change based on the selected reports.

5. (Optional) Choose Select All.

**Note:** The Select All is at the top of the select column, to the left of the Select label.



- Click any one of the following icons, as required:

**Edit Favorite Properties** 

Available only when you select a single favorite.

**View Report Information** 

Available only when you select a single favorite. Additionally, the favorite type must be a favorite that can refer only to a single report.

**Remove the CA OM Web Viewer favorites.** 

Available with any combination of selected reports.

**Print** 

Available with one or more selected favorites. However, each of the selected favorites must be a favorite type that can refer only to a single report.

Additionally, all the selected favorites must be mainframe text reports only.

**Email** 

Available with one or more selected favorites. However, each of the selected favorites must be a favorite type that can refer only to a single report.

**Save** 

Available with a single selected favorite. Additionally, the favorite type must be a favorite that can refer only to a single report.

**Export** 

Available with a single selected favorite. Additionally, the favorite type must be a favorite that can refer only to a single report.

**Note:** If a report action is available to you with your current selection, its icon is enabled and shown in color. If the report action is not available with your current selection, the icon for that report action is disabled and shown in gray.

- Continue with your report or favorite action.

With the exception of removing the CA OM Web Viewer favorites, your favorite or report action dialog must appear after clicking the report action icon.

**Note:**

- When adding the CA OM Web Viewer favorites from the toolbar, no dialog is displayed, because the process is automatic. For more information about removing favorites, see [Remove Favorites](#) (see page 70).
- For more information about the Report Actions, see Report Action Dialogs.

**More information:**

[Report Favorite](#) (see page 73)

[Cross-Report Index-Value Report Section Favorite](#) (see page 79)

[Report Index Favorite](#) (see page 80)

[Report Index-Value Report Section Favorite](#) (see page 81)

## Use the Action Button

You can use the action button that is listed in the action column for each favorite to perform various report or favorite actions on that favorite report.

**Note:** The action column is not displayed by default. You can enable this option from the configuration tab.

**Follow these steps:**

1. Click Advanced Search after logging in to CA OM Web Viewer.
2. (Optional) Select the repository to which you added the favorite.

**Note:** If you only have one Repository assigned to you or you have selected a default repository in your configuration, that repository can already be selected.

3. Click the Favorites tab.
4. Select one or more of the favorites for favorite or report action.
5. Find the button that is labeled Action in your report row.

**Note:** The Action button is in the second column. If there is no Action button and no Action column, this option must be turned off. You can change this option from the configuration panel.

6. Click the Action button.

The report or favorite action drop-down list is displayed.

**Note:** The report or favorite actions available to you depend on the type of selected report.

7. Click a report or favorite action from the drop-down list.

Your report action dialog appears.

**Note:** The selected report action is applied only to that single favorite, even if you have selected multiple reports.

8. Continue with your Report Action.

**Note:** For more information about the Report Actions, see Report Action Dialogs.

## Types of Favorites

There are seven different types of internal favorites in CA OM Web Viewer.

This section discusses the internal product favorites.

Product Favorites	Description
Report	Refers to an entire report.
Report Search Filter	<p>You can save a report filter.</p> <p>If you save a filter as a favorite, that filter can be used the next time you want to see all the reports that are selected by that filter.</p> <p>For example, the favorite filter is looking for A* and specifies the last 25 days on Repository nnn.</p> <p>Whenever this favorite is used, all the reports that start with the letter A that were added to Repository nnn in the last 25 days are selected.</p>
Cross-Report Search Filter	This type of favorite cannot be added to a subscription and is not listed on the favorites list of the subscription pane.
Cross-Report Index-Value Filter	<p>This type of filter returns all report sections that match this index and value pair. The filter can be saved as a favorite.</p> <p><b>Example</b></p> <p>Assume that you have a Cross-Report Index of <i>ACCOUNT</i> with a value of <i>12345678</i>. This can produce five different report page ranges, or report sections, where the index matches the given value. These report sections can actually be from different reports, if an index and value are in more than one report.</p> <p>Those report sections are listed in a sub folder of the subscription on the Reports tab.</p>
Cross-Report Index-Value Report Section	<p>A single report section.</p> <p>A single Cross-Report Index-Value match can be added as a favorite.</p> <p>This report section appears, to a user of the subscription, as a text report listed in their subscription.</p>
Report Index	<p>Report Indexes can be added as favorites.</p> <p>This type of favorite lets the user of the subscription to select an index value, and then see the matching section of data from a report for that index-value pair.</p>

<b>Product Favorites</b>	<b>Description</b>
Report Index-Value	A single report section.
Report Section	A single report index-value match can be added as a favorite.

## Favorite Properties

The favorite properties have a number of effects on how users see favorites in subscriptions. The favorite properties can be viewed from the edit favorite properties dialog. The description column of the table includes how each property affects the subscription table.

The following list describes the favorite properties:

### **Favorite Name**

Specifies the name that is displayed in the subscription on the Reports tab.

### **Favorite Description**

Specifies the tooltip that is displayed in the subscription on the Reports tab.

### **Favorite Type**

Specifies one of the following favorite types:

#### **Latest Report**

- The actual report data the user sees can change over time.
- If new versions of the report exist, the favorite always points to the latest version.

#### **Static Report**

- Refers to one particular version of a report.
- The actual report data does not change over time.
- You cannot include static favorites in a subscription.

**Note:** A reorganization of your mainframe repository can break this link. For example, merging or splitting repositories in CA View can cause these favorites to point to the wrong report.

#### **Filter Settings**







- Refers to saved search filter settings.
- Use this type of favorite to rerun a search later.
- You cannot add the Cross-Report Index filters to a subscription.

### **Last Modification**

Refers to either the creation date of the favorite, or the last time a user modified it after its creation.

### **Attributes**

Different favorite types list different attributes. The following table lists the various favorite types with their attributes:

Type of Favorite	Icon	Attribute
Report or Report Section Favorite (Dynamic)		Attributes section includes only the Report ID.
Report or Report Section Favorite (Static)		Attributes section includes only the Report ID.
Report Filter Favorites		Various Filter criteria used to create the filter.
Cross-Report Index-Value Filter Favorites		Various filter criteria used to create this filter, with the index name and value.
Report Index Favorites (Dynamic)		Attributes section includes only the Report ID.
Report Index Favorites (Static)		Attributes section includes the Report ID, and the create date and time of the report this favorite is referring to.
Non-Text Reports (Dynamic)		Attributes section includes only the Report ID.
Non-Text Reports (Static)		Attributes section includes the Report ID, and the create date and time of the report this favorite is referring to.

## Favorite Actions

### Remove Favorites

You can remove a favorite you no longer want. You can remove favorites only from the favorite list.

**Important!** If you remove a favorite, that favorite is automatically removed from any subscriptions that the favorite was added to. If other users are using your subscription, they can lose access to the report.

You can remove one or more favorites at the same time.

**Follow these steps:**

1. Click Advanced Search after logging in to CA OM Web Viewer.
2. (Optional) Select the repository to which you added the favorite.

**Note:** If you only have one Repository that is assigned to you, or you have selected a default repository in your configuration, that repository is already selected.


3. Click the Favorites tab.

The favorites from your selected repository are displayed.

Each favorite is listed as a row in the favorite's list table. Each column in the favorite's list table is an attribute about the favorite.

4. Select one or more favorites for removal.
5. (Optional) Select Select All.

The Select All is at the top of the Select column, to the left of the Select label.

6. Click the Remove Favorite icon .

A delete confirmation dialog appears.

7. Click Ok to delete the favorite.

The favorite is removed and the favorites list is refreshed.

**More information:**

[Favorite List Columns](#) (see page 61)

## Edit Favorite Properties

The edit favorite properties dialog is used to change the properties of a favorite.

The edit favorite properties dialog can be started only from the Subscriptions tab or the Favorites List.

**Note:** You can edit a Favorite's type, static, or dynamic, only by opening the Favorites Properties dialog from the Favorites list.

### Follow these steps:

1. To open favorite properties, use *one* of the following options:
  - Open the Edit Favorite Properties Dialog from the Subscription Panel.
    - a. Click the Subscriptions tab.
    - b. Click a Subscription on the Subscription list or Create a Subscription.
    - c. Find the Action button in your favorite’s row.

**Note:** The Action button is in the second column. If there is no Action button and Action column, this option must be turned off. You can change this option from the configuration panel.
    - d. Click the Action button.

The available actions drop-down list displays.
    - e. Click Favorite Properties.
  - Open the Edit Favorite Properties Dialog from the Favorites Panel.
    - a. Click the Advanced Search tab.
    - b. Select the repository where the favorite was created.
    - c. Click the Favorite sub tab.
    - d. Find the Action button in your favorite’s row.

**Note:** The Action button is in the second column. If there is no Action button and Action column, this option must be turned off. You can change this option from the configuration panel.
    - e. Click the Action button.

The available actions drop-down list displays.
    - f. Click Favorite Properties.
2. Edit the Favorite Name.

**Note:** This is the name of the favorite a user sees on the Reports tab, if the favorite, after the subscription, is assigned to them.
3. Edit the Favorite Description.

This is the tooltip of the favorite the users see in the subscription on the Reports tab, after the subscription is assigned to them.
4. (Only from the favorites list) Edit whether a favorite is static or dynamic.

**Note:** You cannot change this property from the subscription favorites list. Also, static type favorites are not shown on the subscription pane, because they cannot be added to the favorite's pane.



5. Click Ok.

The properties of the favorite are updated. If you change any properties, the calling pane must be refreshed to display the new changes.

**More information:**

[Favorite Properties](#) (see page 69)

## Create and Use Each Type of Favorite

The following sections describe the various types of favorites. To know more about that type of favorite, and how you can use the favorite, Click any of the following favorite links.

**Note:** For more information about how to add favorites to subscriptions, see Managing Subscriptions in the *Administration Guide*.

**More information:**

[Report Favorite](#) (see page 73)

[Report Search Filter Favorite](#) (see page 75)

[Cross-Report Search Filter Favorite](#) (see page 76)

[Cross-Report Index-Value Filter Favorite](#) (see page 78)

[Cross-Report Index-Value Report Section Favorite](#) (see page 79)

[Report Index Favorite](#) (see page 80)

[Report Index-Value Report Section Favorite](#) (see page 81)

## Report Favorite

An entire report can be added as a favorite for quick access later.

### Add a Report Favorite

You can add a report to your favorites and then add those favorite reports to create a subscription.

**Follow these steps:**

1. Navigate to the Report List and select the report that you want to add as a favorite.
2. Click Add Favorite.

The report is added as a favorite and can be accessed from the Favorites tab of the Advanced Search tab.

## Use a Report Favorite

You can view a report that was saved as a favorite and can use various actions that are permitted to your role on that report.

### Follow these steps:

1. Click Advanced Search, then the Favorites tab.  
Your favorites list is displayed.
2. Click your report favorite to browse the report.
3. Browse the report and perform all actions available to your role.
4. (Optional) Select from the following additional options, for your favorite report, in the Action drop-down menu in the Favorites List page:

The Action drop-down menu contains various options for the report.

**Note:** The action column is not displayed by default. You can enable this option from the configuration tab.

### Favorite Properties

Displays the Favorite Properties Dialog.

### Remove Favorite

Removes the selected favorite from the Favorites List.

- a. Click Ok to confirm the delete action, in the Confirm the Delete Action dialog.  
A confirmation message displays that the favorite has been successfully deleted.
- b. Click Cancel to return to the favorites list without deletion.

### More information:

[Report Actions](#) (see page 113)

[Favorite Properties](#) (see page 69)

## Report Search Filter Favorite

You can save a report filter as a favorite, and that filter can be used the next time that you want to see all the reports that the filter selected.

For example, the favorite filter is looking for A\* and specifies the last 25 days on Repository nnn.

Whenever this favorite is used, all the reports that start with the letter "A" that were added to the Repository *nnn* in the last 25 days is selected.

## Add a Report Search Filter Favorite

You can save the search and filter criteria that you used to search for reports as favorites and use them later.

### Follow these steps:

1. Enter the search and filter criteria and click Add Filter Favorite.

The search criteria are added to the favorites list as a Filter Favorite.

The default favorite name is Report Filter on Repository Name.

**Note:** You can move the cursor over the icon to know the favorite type. A confirmation message that the Report Search Filter was successfully created is also displayed.

2. (Optional) Customize the favorite's properties such as Favorite Name, Description.

### More information:

[Edit Favorite Properties](#) (see page 71)

## Use a Report Search Filter Favorite

You can apply a report search filter favorite and it displays a list of reports that match your criteria.

### Follow these steps:

1. Click Advanced Search, then the Favorites tab.

Your favorites list is displayed.

2. Click your favorite Report Search Filter Favorite.

The search criteria are applied and the report search filter settings and the report list are displayed.

- (Options) Locate your Report Search Filter Favorite in the Favorites tab and choose from the following options in the Action drop-down menu:

### **Apply Favorite Filter**

Applies the search and filter criteria and displays the Report List.

### **Favorite Properties**

Displays the Favorite Properties –Webpage Dialog.

### **Remove Favorite**

Removes the selected favorite from the Favorites List.

- Click Ok to confirm the delete action, in the Confirm the Delete Action dialog.

A confirmation message displays that the favorite has been successfully deleted.

- Click Cancel to return to the favorites list without deletion.

### **More information:**

[Using the Report List](#) (see page 31)

[Favorite Properties](#) (see page 69)

## Cross-Report Search Filter Favorite

Cross-Report Search Filter favorites return index names instead of reports.

For example, you have a Cross-Report Search Filter, that returns all the Cross-Report Indexes that start with A\* in the last 365 days.

**Note:** This type of favorite is not displayed in the Subscription tab Favorites list, because the result of the filter is not a report, report list, or report section and therefore it cannot be added to a subscription.

## Add a Cross-Report Search Filter Favorite

You can create and use Cross-Report Search Filter Favorites.

### **Follow these steps:**

- Click Advanced Search after logging in to CA OM Web Viewer.
- (Optional) Select the repository to which you added the favorite.

**Note:** If you only have one Repository assigned to you, or if you have selected a default repository in your configuration, that repository is already selected.

3. Click the Cross-Report Indexes tab.
4. Enter your Date & Version criteria.
5. Enter your Report Criteria.
6. Enter your index criteria.
7. Click Add Filter Favorites.

The favorite is added as a Cross-Report Search Filter Favorite.

## Apply a Cross-Report Search Filter Favorite

When you apply a Cross-Report Search Filter Favorite, the Cross-Report Indexes tab is displayed. However, if your search filter finds only one Cross-Report Index, the value selection pane for the index is displayed.

### Follow these steps:

1. Click Advanced Search after logging in to CA OM Web Viewer.
2. (Optional) Select the repository to which you added the favorite.

**Note:** If you only have one Repository assigned to you, or if you have selected a default repository in your configuration, that repository is already selected.

3. Click the Favorites tab.
4. Click the Favorite name.

The Cross-Report Filter is applied.

A list of all the matching cross-report indexes is displayed with the filter criteria used in the search.

**Note:** If only one cross-report index matches the filter criteria, you are automatically moved to the value selection pane for that index.

5. Follow the steps in the Cross-Report Index Search.

## Cross-Report Index-Value Filter Favorite

The Cross-Report Index-Value Filter returns a mini report list of all the report sections that match this cross-report index and value pair. The filter can be saved as a Favorite.

### Example

Assume that you select a Cross-Report Index of *ACCOUNT* with a value of *12345678*. This filter can produce five different report sections, where the index matches the given value. If an index and value are in more than one report, these report sections can actually be from different reports.

These report sections are basically the parts of a report, page ranges within a report, where a certain cross-report index has a certain value.

## Add a Cross-Report Index-Value Filter Favorite

You can save as favorites the search and filter criteria that you used to search for indexes and use them later.

### Follow these steps:

1. Click Advanced Search after logging in to CA OM Web Viewer.
2. (Optional) Select the repository from which you want to add a favorite.  
**Note:** If you only have one Repository assigned to you, or if you have selected a default repository in your configuration, that repository is already selected.
3. Click the Cross-Report Indexes tab.
4. Complete the Cross-Report Index Search Dialog.
5. Click Go.
6. Select a Cross-Report Index.  
The Cross-Report Index-Value selection pane is displayed.
7. Select a cross-report index-value.  
A list of report sections that match the index-value pair you selected is displayed.
8. Click the Add Filter Favorite button (top right of the report list pane).  
The Cross-Report Index-Value Filter is added as a favorite.

## Use a Cross-Report Index-Value Filter Favorite

Clicking a Cross-Report Index-Value Filter Favorite produces a mini report list of report sections. This report section has an index-value that matches your selected favorite.

**Follow these steps:**

1. Click Advanced Search, Favorites.  
Your favorites list is displayed.
2. Click your favorite Cross-Report Index-Value Filter Favorite.  
The Cross-Report Match List is displayed.

**More information:**

[Cross-Report Match List](#) (see page 49)

## Cross-Report Index-Value Report Section Favorite

You can add a single report section from a Cross-Report Match List as a favorite.

These report sections are the parts of a report, page ranges within a report, where a particular cross-report index has a specific value.


This type of favorite lets you mark and select these matching report sections as favorite for later use.

You can browse the report section later, using the favorite.

## Add a Cross-Report Index-Value Report Section Favorite

You can add a single Cross-Report Index-Value match as a favorite and can browse the report section later.

**Follow these steps:**

1. Complete steps 1 through 7 in the Use a Cross-Report Index-Value Filter Favorite section.  
A list of report sections that match the Index-Value pair you selected is displayed.
  2. Select one or more report sections in the cross-report match report list.
  3. Click the Add Favorite icon .
- A message confirming that your favorites have been added is displayed.

You can browse this report section later, using the favorite.

## Browse a Cross-Report Index-Value Report Section Favorite

Clicking a Cross-Report Index-Value Filter Favorite displays a mini report list of report sections. This report section has an index-value that matches your selected favorite.

**Follow these steps:**

1. Click Advanced Search, Favorites.  
Your favorites list is displayed.
2. Click your favorite Cross-Report Index-Value Report Section Favorite.  
The report section is displayed.

## Report Index Favorite

Report Indexes can be added as favorites.

This type of favorite lets you save a particular report index for later use. This type of favorite lets you enter different index values each time you use this favorite.

**Example**

You work in a telephone bank and had to search for account numbers in a search report often. You can save the account number index as a favorite. This allows you to access the index later, and supply a different account number to it each time.

## Add a Report Index Favorite

You can add a report index as a favorite and later apply various index values to that index.

**Follow these steps:**

1. Browse a report with indexes.
2. Select a Logical View that has at least one index.
3. Click the Add Index Favorite button.  
Your favorite is now added to the Favorites and listed in the favorites pane.
4. (Optional) Navigate to the Favorites list, and confirm that the favorite is displayed.

**Note:** We recommend renaming your favorite, because the default favorite names are generic.



**More information:**

[Report Browsing Options](#) (see page 85)

[Select Logical Views](#) (see page 102)

## Browse a Report Index Favorite

You can click on a Report Index Favorite to display the index value selection pane and select any value match listed for that index.

**Example:**

If your favorite refers to a Social Security Number index, you can select this favorite, and then index a social security number.

**Follow these steps:**

1. Click Advanced Search, Favorites.  
Your favorites list is displayed.
2. Click your Report Index Favorite.  
The index value selection pane opens.
3. (Optional) Select an index value.  
A report section is displayed in the right-hand pane.

**More information:**

[Select Index Values](#) (see page 102)

## Report Index-Value Report Section Favorite

A single section of a report where an index matches a certain value can be added as a favorite.

**Example**

You want to save only the eastern division section of the sale report. You do not have to save the entire report as a favorite. Instead, you can locate and bookmark the report section referring to the sales of the eastern division.

## Add a Report Index-Value Report Section Favorite

You can add a report index as a favorite and later apply various index values to that index.

**Follow these steps:**

1. Browse a report with indexes.
2. Select a Logical View that has at least one index.
3. Click Get Values.
4. Select an index value by clicking that index value link.  
A report section is displayed in the right-hand pane.
5. Click the Add Favorite button.  
The favorite is added to your favorites list.
6. (Optional) Navigate to the favorites list, and confirm that the favorite is displayed.

**Note:** We recommend renaming your favorite, because the default favorite names are generic.

## Browse a Report Index-Value Report Section Favorite

You can store an index value combination as a favorite for later use. When you return to the favorite it either finds the same section of the same report, or it finds the equivalent section in the latest copy of the report, depending on whether the favorite is static or dynamic.

If the favorite is a static favorite, you are pointed to the same section in the same report. If the favorite is a dynamic favorite, the matching report section from the latest report is displayed.

**Follow these steps:**

1. Click Advanced Search, then the Favorites tab.  
Your favorites list is displayed.
2. Click your report index-value report section favorite.  
The report section matching your index value combination is displayed.

## Static Favorite

A static favorite points to a specific version of a report, unlike the dynamic favorite which always points to the latest version of a report.


You can create a static favorite by either using the following procedure or editing a dynamic favorite's properties to make it static.

**More information:**

[Edit Favorite Properties](#) (see page 71)

## Add a Static Favorite

You can add a static favorite only from the action drop-down list.

**Note:** When you select one or more objects and click Add Favorite  on the toolbar, the favorites are added as dynamic favorites by default.

**Follow these steps:**

1. Open a Report List or Cross-Report Match List.
2. Find the Action button in your report's row.

**Note:** The Action button is in the second column. If there is no Action button and Action column, this option must be turned off. You can change this option from the configuration panel.

3. Click the Action Button for the report you want to add as a favorite.

The available report actions drop-down list displays.

4. Click Add Favorite.

The New Favorite Properties dialog displays. The fields in this panel are the same as the favorite properties panel.

5. Set the Favorite type to Static Report.
6. Click Create.

The selected report is added as a static favorite.

**More information:**

[Search for Reports](#) (see page 32)

[Edit Favorite Properties](#) (see page 71)

[Using Cross-Report Indexes](#) (see page 43)

### Use a Static Favorite

You can use a static favorite as you use a dynamic favorite, except that you cannot add a static favorite to a Subscription.

## Shortcut Keys

**Note:** Some users refer to shortcut keys as *access keys* or *accelerators*.

CA OM Web Viewer indicates its Alt shortcut keys by underlining them in its menu options. For example, the Edit, Find option in the CA OM Web Viewer menu indicates that its shortcut key is Alt + E, followed by Alt+F.

In Internet Explorer, to apply a shortcut key for a CA OM Web Viewer menu option, press Alt, followed by the keys. For example, for Edit, Find, press Alt+E for Edit, then Alt+F for Find.

Firefox reserves all Alt+ keys for browser menu functions. Therefore in Firefox, use one of the following options to apply a shortcut key for a CA OM Web Viewer menu option:

- Once per Firefox session, enable shortcut keys for applications (including CA OM Web Viewer) by pressing Ctrl+Shift+M. This action enables Responsive Design View mode.

Next, to apply a shortcut key for a CA OM Web Viewer menu option, press Alt+Shift, followed by the keys. For example, for Find, press Alt+Shift+F. For Print, press Alt+Shift+P.

- Enable shortcut keys for all Firefox sessions. For the details, see the Mozilla website, Mozilla.org.

Next, to apply a shortcut key for a CA OM Web Viewer menu option, press Alt+Shift, followed by the keys. For example, for Find, press Alt+Shift+F. For Print, press Alt+Shift+P.

**Note:** If you update your version of Firefox, verify that shortcut keys continue to work.

#### More information:

[Report Favorite](#) (see page 73)

[Report Search Filter Favorite](#) (see page 75)

[Cross-Report Search Filter Favorite](#) (see page 76)

[Cross-Report Index-Value Filter Favorite](#) (see page 78)

[Cross-Report Index-Value Report Section Favorite](#) (see page 79)

[Report Index Favorite](#) (see page 80)

[Report Index-Value Report Section Favorite](#) (see page 81)

# Chapter 7: Browsing Reports

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This section contains the following topics:

[Report Browsing Options](#) (see page 85)

[Browse Mainframe Text Reports](#) (see page 86)

[Report Actions when Browsing Mainframe Text Reports](#) (see page 89)

[Annotations and Bookmarks](#) (see page 91)

[Browse in New Window](#) (see page 100)

[Browse in Logical View](#) (see page 101)

[AFP Reports](#) (see page 105)

[Browse Binary Reports](#) (see page 107)

[Browse Reports from Reports Tab](#) (see page 108)

[Browse Link Access](#) (see page 108)

[Offline Reports](#) (see page 109)

## Report Browsing Options

There are a number of report-browsing options available from within CA OM Web Viewer. Your current role determines which report viewing options are available to you. This section briefly describes the different report viewing options and helps you to get more information about them.

Here are several options for browsing reports in CA OM Web Viewer.

- Browse Report Tab  
Used to browse the favorites in your subscriptions.
- Browse Mainframe Text Report  
Used when your mainframe text report has no Logical Views other than the default native view.
- Browse Logical View  
Used when your mainframe text report has Logical Views other than the default native view.
- Browse AFP Reports  
Depending on your options AFP reports can either be converted to PDFs or viewed by a third-party AFP viewer.

**Important!** If you are not converting an AFP report to PDF, and you do not have an AFP viewer that is installed, you will be prompted to download the AFP file, rather than view it.

- Browse Binary Reports

This type of browse is a pop-up window that either displays a report or prompts the user to download the report, depending on the file type.

**Note:** This functionality can be started from any pane that lists a binary report.

- Browse Link Access

You can also access a pane similar to the mainframe text report browse from browse favorites or html links.

- Browse in New Window

You open the appropriate browse option in a new window.

**More information:**

[How to View Reports](#) (see page 23)

[Browse Mainframe Text Reports](#) (see page 86)

[Browse in Logical View](#) (see page 101)

[AFP Reports](#) (see page 105)

[Browse Binary Reports](#) (see page 107)

[Browse Link Access](#) (see page 108)

## Browse Mainframe Text Reports

You can use this option when your mainframe text report has no Logical Views other than the default native view.

**Note:** The options available from this pane are similar to the options available from browsing Link Access or Logical Views. This is because browsing Link Access and Logical Views use mainframe text reports.

The mainframe text report browsing pane has the following features:

- Page Navigation Arrows
- Report Page Selection
- Bread Crumbs
- Toolbar and Menu Options
- Annotations
- Other Report Actions

**Important!** Many of the available options that are discussed here are also used in browsing Link Access, Logical View, and the Browse in New Window functionality.

**More information:**

[Browse in New Window](#) (see page 100)

[Browse in Logical View](#) (see page 101)

[Browse Link Access](#) (see page 108)

## Page Navigation

You can navigate through Mainframe text reports and report index favorites, and view required pages.


Mainframe text reports and report index favorites are displayed in the right pane.

**Note:** You can also use the Go To Page dialog for quick navigation.

Only the default numbers of pages of the report are displayed at any time, regardless of the size of the report. For example, if your administrator sets a default of five pages at a time, a maximum of only five pages are displayed.

You can navigate to other pages in page ranges that are not displayed.

**Follow these steps:**

1. Select a Mainframe text report or report index favorite, from the Reports tab.
2. Do one of the following steps:
  - a. Find the page range navigation buttons (top right of the display pane) and navigate to the page you want to display.
    - >> displays the last group of Pages.
    - > displays the next group of Pages.
    - < displays the previous group of Pages.
    - << displays the first group of Pages.
  - b. Click the  (Go To a page number) button, enter a specific page number and click Go.

The first page in the range of the targeted page is displayed.

**More information:**

[Go To Page in a Report](#) (see page 114)

[How to View Reports](#) (see page 23)

## Select Report Pages

You can select pages to be used for various report actions. These pages are listed in the Current Selected Pages radio option of Print, Email, Save, and Export.

This procedure lets you select pages for the various report actions.

**Note:** You can also enter a page selection in the report action dialog.

**Follow these steps:**

1. Browse a Mainframe Text Report or Report Section.
2. Select the page selection options.

The page selection option is at the top-left of each page, in the blue page header bar.

3. (Optional) Select Additional Pages.
4. Start a print, email, save, or export option.

The Current Selected Pages option displays your page selection.

**More information:**

[Browse Reports from Reports Tab](#) (see page 108)

## Bread Crumbs

The term *bread crumbs* means the navigation path that you used to get to your current location.

For example, if you browse to a favorite report named RPT\_SAMPLE\_1, the top of the browse dialog displays as follows:

Favorites > RPT\_SAMPLE\_1

If you click Favorites in the example, you are returned to the favorites page.



## Report Actions when Browsing Mainframe Text Reports

The Report Actions section discusses various options for viewing and using report data.

Because the reports do not reside on your computer, but on a centralized repository management system, you cannot edit the content. However, you can use the following Report Actions from the Reports Tab.

From the Reports Tab you can perform the following report actions:

- Find Text
- Go To Page
- View Report Information
- Display Notes
- Show Annotations
- Show Annotations List
- Add Browser Favorite or Bookmark
- Print Report
- Email Report
- Save Report
- Export Report

**Note:** For more information about the report actions, see Report Action Dialogs.

**More information:**

[Using Report Actions](#) (see page 90)

[Annotations and Bookmarks](#) (see page 91)

## Using Report Actions

From the report pane you can perform various report actions using any one of the following options:

- Menu
- Toolbar
- Hotkeys

**Notes:**

- The options of report actions available from the Reports tab are different from the options available from other panes.
- The report actions available are based on your current Role.

## Use the Menu

You can use the menu to perform various report actions.

**Note:** You can also use the toolbar or hotkeys to perform the same actions. To see which action it performs, use the tooltip of each toolbar button.

**Follow these steps:**

1. Select a Mainframe Text Report or Report Index favorite, from the Reports tab.
2. To view and use the options, move your cursor over one of the following drop-down menus, in the Reports tab:
  - a. Edit Menu
    - Find Text
    - Go To Page
  - b. View Menu
    - Display Notes
    - Annotations
    - Annotation List
  - c. Output Menu
    - Favorite or Bookmark (Browser)
    - Print
    - Email
    - Save
    - Export

3. Click the desired report action.

A report action dialog opens or in the case of either annotation option, the annotation icons are displayed.

**Note:** For more information about the Report Actions, see Report Action Dialogs.

**More information:**

[How to View Reports](#) (see page 23)

[Annotations and Bookmarks](#) (see page 91)

## Annotations and Bookmarks

CA OM Web Viewer lets you mark certain lines of a mainframe text report with notes or bookmarks.

**Note:** CA OM Web Viewer supports annotations only for text documents residing in CA View repositories. The minimum release of CA View for which annotations are supported is r11.

### Annotations

Annotations associate one or more notes with a text line in a single version of a report. An annotation is a container for notes; if there are no notes, it is automatically deleted. Similarly, if all the notes in it are private, no one else can see the annotation; if the annotation contains public notes, other users can see the annotation.

### Bookmarks

Bookmark a particular line of a report, so that you can find and use it again later.

### Notes

Associate a note, or text, with a line of a single version of a report. Notes can be private or public. Private notes can be viewed only by the author of the note. Public notes can be viewed by anyone with access to annotation mode and the version of report to which the note is attached.

## Annotation Mode

With annotations mode on, each displayed line of your report has an icon to indicate whether that line has a note, bookmark, both, or neither.

If you move your mouse over a report line which has public notes or private notes you created, a pop-up is displayed listing all the notes.

Additionally, the other feature, annotation mode is turned on.

### More information:

[Toggle Annotation Mode - On or Off](#) (see page 92)

## Features

Turning on annotation mode has the following effects:

- Line Indicator Icons are shown
- The Annotation List is enabled

Click Annotation List to display a list of all the annotations in this version of the report.

- Mouse over note reading is enabled

When you move your mouse over a particular line of data, the note data for that particular line of data is displayed in a pop-up.

- Each line in the report which can be clicked is highlighted

Clicking on a line opens the Annotation dialog. Whether the line has notes, bookmarks, both, or neither, changes what is displayed in the Annotation dialog.


### More information:

[Annotation Lists](#) (see page 93)

## Toggle Annotation Mode - On or Off

You can turn on Annotations mode and view notes.

### Follow these steps:

1. Browse a mainframe text Report or Report Section using Logical Views or Logical Views and indexes.
2. Click the Show Annotations Icon  in the toolbar to enable Annotation mode.
3. (Optional) Click the icon again to turns off Annotation mode.


**More information:**

[Report Browsing Options](#) (see page 85)


## Line Indicator Icons

The line indicator icons indicate whether each line has a note or bookmark. The icons are found on the left side of the browser pane near the beginning of each line. To turn on the line indicators turn on Annotation mode.

There are four different line indicator icons in Annotation mode:

 The add annotation or bookmark button. No note or bookmarks are present on this line.

Clicking on a line with this icon opens the New Annotation or Bookmark pane of the Annotation dialog.

 A bookmark is present on this line.

 A bookmark and a note are present on this line.

 A note is present on this line.

Clicking on a line in any one of the above three icons opens the line's annotation and bookmark list.

## Annotations Dialog

The annotation dialog has a number of different components and panes.

### Annotation Lists

On the left pane there is a tab bar, which includes an Annotation List tab and an Annotation tab.

- Annotation List Tab
  - Displays a list of all the annotations and bookmarks in the report.
- Annotation Tab
  - Displays a list of all the annotations and bookmarks on a particular line of a report.

## Annotation Pane

The right pane displays the following panes as needed.

- View/Edit Annotation
- View/Edit Note
- New Note Pane
- Create New Annotation/Bookmark Pane

## Use Annotation Dialog



This section describes some of the procedures available to users from the Annotation dialog.

**Note:** Depending on the permissions to the repository on which you are working, you may not be able to perform some of these operations. For more information, contact your system administrator.

## Display Annotation List

You can display a list of all the annotations in a version of a report.

### Follow these steps:

1. Browse a mainframe text Report or Report Section using Logical Views or Logical Views and indexes.
2. Click the Show Annotations icon  in the toolbar.  
Annotation Mode is now On and the Show Annotation List button is enabled.
3. Click the Show Annotation List icon  in the toolbar.  
The annotation dialog is displayed with Annotation List in the Annotation List tab.
4. (Optional) Click on annotation or bookmark.  
Information about the bookmark or annotation is displayed in the right pane. Additionally, your report browse page is forwarded to the location of that annotation or bookmark. The line of the bookmark or annotation is highlighted in yellow.

### More information:

[Report Browsing Options](#) (see page 85)

## View Annotations and Bookmarks on a Line

You can browse a report and view annotations and bookmarks on a line. An annotation is a group of one or more notes.





### Follow these steps:

1. Browse a mainframe text Report or Report Section using Logical Views or Logical Views and indexes.

2. Click the Show Annotations icon  in the toolbar.

Annotation Mode is now On.

Line indicator icons are turned on:

-  A bookmark is present on this line.
-  A bookmark and a note are present on this line.
-  A note is present on this line.
-  This is the add annotation or bookmark button. No note or bookmarks are present on this line.

You can click on any line which has an indicator icon.

3. Click on a line with a bookmark , note , or note and bookmark .

The annotation dialog is displayed with the Annotations tab selected. The Annotations tab displays a list of all bookmarks and annotations on the line.

### More information:

[Report Browsing Options](#) (see page 85)

[Line Indicator Icons](#) (see page 93)


## View and Edit Annotations

You can view an annotation to see all the notes included in that annotation. Additionally, you can edit the annotation description.

**Note:** An annotation is a group of one or more notes.





### Follow these steps:

1. Browse a mainframe text Report or Report Section using Logical Views or Logical Views and indexes.

2. Click the Show Annotations icon  in the toolbar.

Annotation Mode is now On.

Line indicator icons are turned on:

-  A bookmark is present on this line.
-  A bookmark and a note are present on this line.
-  A note is present on this line.
-  This is the add annotation or bookmark button. No note or bookmarks are present on this line.

You can click on any line which has an indicator icon.

3. Click on a line with a note , or note and bookmark .

The annotation dialog is displayed with the annotations tab selected. The annotations tab displays a list of all bookmarks and annotations on the line.

4. Click the Annotation.

In the left pane, a list of all the notes in the annotation is displayed below the annotation.

In the right pane, the notes are also listed in a table. The following information is included in the table about each note:

**User**

Displays the author of the note.

**Creation**

Displays the creation date and time.

**Access**

Displays whether the note is public or private.

- Public notes can be viewed by anyone with access to this version of the report, and access to annotations mode.
- Private notes can only be viewed by the note's creator.

5. (Optional) Edit the annotation description.
  - a. Change the value in the Description field.
  - b. Click Update.

The changed description is updated.



**More information:**



[Report Browsing Options](#) (see page 85)

[Line Indicator Icons](#) (see page 93)

## Navigate to a Bookmark or an Annotation

You can navigate to the location in a report of a particular bookmark or annotation.

**Follow these steps:**

1. Browse a mainframe text Report or Report Section using Logical Views or Logical Views and indexes.
2. Click the Show Annotations icon  in the toolbar.  
Annotation Mode is now On.  
The Show Annotation List is enabled.
3. Click the Show Annotation List icon  in the toolbar.  
The annotation dialog is displayed with annotation list in the annotation list tab.
4. Click on annotation or bookmark you want to navigate to.  
Your report browse page is forwarded to the location of that annotation or bookmark. The line of the bookmark or annotation is highlighted in yellow.

**More information:**

[Report Browsing Options](#) (see page 85)

## Create an Annotation

You can add an annotation to a particular line.

An annotation is a group of one or more notes and adding a new annotation requires adding at least one new note.





**Follow these steps:**

1. Browse a mainframe text Report or Report Section using Logical Views or Logical Views and indexes.





2. Click the Show Annotations icon  in the toolbar.

Annotation Mode is now On.

Line indicator icons are turned on:

-  A bookmark is present on this line.
-  A bookmark and a note are present on this line.
-  A note is present on this line.
-  This is the add annotation or bookmark button. No note or bookmarks are present on this line.

You can click on any line which has an indicator icon.

3. Do *one* of the following:
  - a. Add an annotation to a line which already has an annotation or bookmark
    - Click on a line with a bookmark , note , or note and bookmark .
    - The annotation dialog is displayed with the Annotations tab selected. The Annotations tab displays a list of all bookmarks and annotations on the line.
    - Click the create link above that line's Annotation List  
The New Annotation/Bookmark pane displays in the right pane.
  - b. Add an annotation to line with a bookmark or annotation.
    - Click on a line with a no bookmarks or notes.
    - Clicking on a line with the add annotation symbol  takes you directly to the New Annotation/Bookmark pane.

With either choice in step 3, you should now see the New Annotation/Bookmark pane.

4. Select a Type:

To create an annotation you have to select one of the first two types.

### **Public Annotation**

Creates a new annotation with a public note.

### **Private Annotation**

Creates a new annotation with a private note.

### **Private Bookmark**

Creates a new bookmark. (If creating a bookmark skip steps 7 and 8).

**Note:** There is nothing as a public bookmark. All bookmarks are private and personal use only.

5. Enter the following:

**Note ID**

Displays the name of the Annotation in both report level Annotation List and the line level Annotation List.

**Description**

Defines a field that other users can see and update. It can be used to give extra information about the purpose of the annotation or the notes in this annotation.

**Note**

Defines the note which is required for an annotation. Therefore to create an annotation you must supply the first note.

6. Click Create.

You will receive a confirmation if the annotation is successfully created.

**More information:**

[Report Browsing Options](#) (see page 85)

[Line Indicator Icons](#) (see page 93)

## Add a Bookmark

You can add a particular line of a report as a bookmark. You can then use this bookmark to navigate directly to the page of the report later.

To create a bookmark, follow the procedure for creating an annotation with the following modifications.

**Follow these steps:**

1. In step 4, select the option Private Bookmark.
2. Skip steps 5 and 6.

The bookmark is created.

**More information:**

[Create an Annotation](#) (see page 97)

## Add a Note

You can add a new note to an existing annotation.

**Follow these steps:**

1. Select and view an existing Annotation.
2. Click the New Note link.  
The Note Creation pane appears in the right pane.
3. Select Public or Private for the note type.
4. Enter the note text in the Note text box.
5. Click Create.  
You are returned to the annotation view pane.

**More information:**

[View and Edit Annotations](#) (see page 95)

## Browse in New Window

The browse in new window option opens a pop-up browse window for the report you selected. The browse in new window option lets you browse more than one report at the same time.

## Open a Browse Window

The browse in new window option can be used from any of the report or favorite lists. To open a browse window, select browse in new window from the action drop-down list.

**Note:** For more information about starting the browse in new window option, see the documentation for the report of favorite list you are working on.

## Special Options

When you browse a report in a new window, most of the options are the same as you are browsing a report in the main window.

For example, if you are browsing a report with logical views set up, you can still see the logical view select pane when you browse the report in a new window.

However, there are two exceptions:

- Breadcrumbs

When browsing a report in a new window breadcrumbs to report to the previous page are not available.

- Close Button

The close button closes your pop-up window. It appears only when you are browsing a report in a new window.

## Browse in Logical View

A Logical View is a manipulated view of part or all of a mainframe text report. A Logical View produces either a report section or a report index selection pane.

**Note:** From the index selection pane you can create other report sections based on your report index selection.

### Logical View Selection

If your report has more than one logical view defined, and you have the correct permission to view more than one logical view, a logical selection pane is displayed when you browse a report.

**Note:** Logical Views are set up by an administrator.

### Index Value Selection

A logical view can also include an index value selection option. This option lets you display different sections of a report based on an index value.

For example, you can display a different section of report based on an SSN. For example, each person's bill can be indexed to their SSN.

### Report Sections

Logical Views, and Index Value Selections are used to produce report sections. These report sections all like mini mainframe text reports. You can perform report actions on the reports; such as print and email, and even add one report section as a Favorite.

**Note:** For more information about performing actions on these report sections, see Report Actions.

## Select Logical Views

A Logical View is a manipulated view of part or all of a mainframe text report.

If your report has more than one logical view defined, a logical view selection pane is displayed when you browse a report.

You must select a logical view to see the report section for that Logical View.

**Follow these steps:**

1. Select a report from any of the following:

- Reports tab
- Advanced Search tab
- Favorites

If a Logical View has been set up, the Logical View drop-down list is displayed.

2. Select a Logical View from the Logical View drop-down list.

One of the following is displayed:

- If index selections are required with this Logical View, an index selection pane is displayed in the left section of the page.
- A report section is displayed in the bottom section of the page.

3. (Optional) Browse report or perform report actions.

**More information:**

[Report Browsing Options](#) (see page 85)

[Select Index Values](#) (see page 102)

## Select Index Values

You can use the indexes to go directly to specific sections of the report that you want to view.

**Follow these steps:**

1. Select a report from any of the following tabs:

- Reports tab
- Advanced Search tab
- Favorites

If a Logical View has been set up, the Logical View drop-down list is displayed.

2. Select a Logical View from the Logical View Drop-down list.

One of the following is displayed:

- If index selections are required with this Logical View, an index selection pane is displayed in the left section of the page.
- A report section is displayed in the bottom section of the page.

If a report section is displayed instead of the index value selection pane that means this logical view has no indexes associated with it.

The Index Value Selection pane is displayed.

3. (Optional) Do *one* of the following steps:

- a. Select the As Uppercase option button.

All the index values or values masks, such as R\*, that you type, are converted to uppercase.

- b. Select the As Type option button.

All the index values or values masks, such as R\*, are retained in the same case as you typed them.

4. Find the Indexes table.

The index name is listed next to a text box where you can enter a value or a value mask.

If it is a multiple part index, the Indexes table lists each index name with a text box next to it as a row of the table.

5. (Optional) Enter value mask in one or more of the index value text boxes.

To enter the value mask for a particular index, find the value text box in the same row as that index.

**Note:** A value mask is a partial value entry that uses a wildcard, such as 5?5 or T\*. An asterisk wildcard matches zero or more characters; a question mark wildcard matches a single character. The default mask is a single asterisk, \*.

6. Click Get Values (in the table).

A table of possible index values is displayed. Each possible value is displayed as a row of the table with a link.

**Note:** If you are using multiple part indexes, each possible value is a combination of several index parts. For example, a value can look like:  
valueForIndex1:valueForIndex2:valueForIndex3.

If you get the message, There are no index values that match the above search criteria, try changing your values masks.

7. (Optional) Use navigation arrows to list other possible index values.

- >> displays the last group of possible index values
- > displays the next group of possible index values
- < displays the previous group of possible index values
- << displays the first group of possible index values

**Note:**

- Arrows are displayed only if there is more than one group of values.
- You can scroll to an index value in the group by using the scroll bar shown within the index value table for Internet Explorer, or shown on the Logical View pane for Firefox.

8. Click the link for the index value.

The report section matching your index value selection is displayed in the bottom left side pane.

You can browse this report section as you typically browse a mainframe test report. Additionally, you can perform various report actions on this report section.

**More information:**

[Report Browsing Options](#) (see page 85)

[Browse Mainframe Text Reports](#) (see page 86)

[Report Actions Available](#) (see page 104)

## Report Actions Available

The report actions available from the browse logical view section are nearly the same as the report actions available from standard mainframe browse section.

The main difference is report actions in these report sections only affect the report section, not the entire report.

For example, if your logical view displays pages 1-5 of a report, a text search in that report section will only display results from pages 1-5.

**More information:**

[Browse Mainframe Text Reports](#) (see page 86)



## AFP Reports

You can browse either a subsection of an AFP report or the entire report.

- When browsing a report in its entirety, it is displayed in a new window.
- When browsing an index of the report, the index is displayed in the main window.

Depending on your available options, AFP reports can either be converted to PDFs or be viewed by a third-party AFP viewer.

**Important!** If you are not converting an AFP report to PDF, and you do not have an AFP viewer installed, you are prompted to download the AFP file, rather than view it.

## Browse AFP Report

When you browse an AFP report, the entire report is downloaded without the index, whether the report is converted to PDF or not.

**Follow these steps:**

1. Navigate to Report List, Favorites List, Subscription Creation Pane, or Cross-Report Match List.
2. Find an AFP Report.
3. Click the Report's Name, to browse the report.

**Note:** Whether your report is displayed in PDF or AFP format is controlled by the Transform AFP Report.

## Select AFP Index Value

AFP index value selection lets you to find a report section associated with a certain index value.

AFP index value selection is similar to the logical view index value selection.

**Follow these steps:**

1. Navigate to Report List, Favorites List, Subscription Creation Pane, or Cross-Report Match List.
2. Find an AFP Report.

3. Find Action in your report's row.

**Note:** The Action button is in the second column. If there is no Action button and no Action column, this option must be turned off.

4. Click Action.

The report or favorite action drop-down list is displayed.

**Note:** The report or favorite actions available to you depend on the type of selected report.

5. Click Index Selection.

The AFP index view selection pane is displayed.

6. Select an AFP Index View from the drop-down list.

The Index Value Selection pane is displayed.

7. (Optional) Do one of the following:

- Select As Uppercase

All the index values or values masks, such as R\*, that you type, are converted to uppercase.

- Select As Type

All the index values or values masks, such as R\*, are retained in the same case as you typed them.

8. Find the Indexes table.

The index name is listed next to a textbox where you can enter a value or a value mask.

9. (Optional) Enter value mask in one or more of the index value text boxes.

To enter the value mask for a particular index, find the value text box in the same row as that index.

**Note:** A value mask is a partial value entry that uses a wildcard, such as 5?5 or T\*. An asterisk wildcard matches zero or more characters; a question mark wildcard matches a single character. The default mask is a single asterisk, \*.

10. Click Get Values (in the above table).

A table of possible index values is displayed. Each possible value is displayed as a row of the table with a link.

**Note:** If you get a message, such as, there are no index values that match the above search criteria, try changing you values masks.

11. (Optional) Use navigation arrows to list other possible index values.

- >> displays the last group of possible index values
- > displays the next group of possible index values
- < displays the previous group of possible index values
- << displays the first group of possible index values

**Note:** Arrows are displayed only if there is more than one group of values.

12. Click the link for the index value.

The report section matching your index value selection is displayed in the bottom left side pane.

You can browse this report section as you would typically browse a mainframe text report. Additionally, you can perform various report actions on this report section.

**More information:**

[Browse Mainframe Text Reports](#) (see page 86)

[Report Actions Available](#) (see page 107)

## Report Actions Available

The report actions available to you depend on your computer's AFP browsing application.

If you are converting AFP reports to PDF format the report actions available to you depend on the available report actions from your PDF viewer.

## Browse Binary Reports

You can browse a binary report in a pop-up window that displays either a report or prompts the user to download the report depending on report's file type.

This functionality can be started from any pane that lists a binary report.

All file types other than mainframe text, are browsed using this type of pane. Even .txt reports, PC text reports are treated as binary reports.

CA OM Web Viewer uses your web browser's default file type handling for these file types. For example, if you browse automatically renders .txt report in the browse window, a .txt report is displayed within your browser. Other files types, such as PDF, can require a browser plug-in. For more information, see your browser's Help document on how to add plug in for various file types.

**Note:** If no plug-in is found for your file type, you are prompted to download the file.

## Browse Reports from Reports Tab

The report browsing options are described in the Reports Tab section.

**More information:**

[How to View Reports](#) (see page 23)

## Browse Link Access

You can use this special browse option to view a single report. Typically, this option is used with one of your browse favorites or with a link sent to you.

Browsing through a link is used in a number of different contexts:

- Deliver Email Interface (a link created by CA Deliver and sent to you by email)
- CA OM Web Viewer Browser Favorites
- A CA OM Web Viewer Report Link sent to you by Email

## Log In

You must log in to access your link and browse the report.

**Follow these steps:**

1. Select your favorite or click your link.

A login screen similar to the main login window of CA OM Web Viewer appears.

**Note:** The report name of the report or report section you are attempting to open is displayed below the password field.

2. Enter your Credentials.
3. Click Log In.  
The Link Access Browse is displayed.
4. (Optional) Perform report actions on your report or report section.

**More information:**

[Add a Report as a Browser Favorite](#) (see page 115)

## Log Out

When you are finished with browsing a link access report, click log out.

**Important!** To browse a different report you must start a new session or click a different favorite/link. It can be helpful to have a separate browser favorite that points to the CA OM Web Viewer login window. Alternately, manually typing the address of your CA OM Web Viewer server will also reset your login pane back to the browser window.

## Report Actions Available

The report actions available from the Link Access browse pane are the same as the report actions available from the browse pane.

**More information:**

[Browse Mainframe Text Reports](#) (see page 86)

## Offline Reports

An offline report is a report that has been archived. Depending on the Admin setup, you cannot view the report, or you may not be able to view the report immediately.

## Recall Options

Browse an offline report as you would typically browse a report.

Depending on your administrator setup, you can see different scenarios.

**Note:** To change your offline report browsing options, contact your system administrator.

### Scenario 1 – Off-line report recall is disabled

1. Attempt to browse an offline report.

An offline report can be browsed from the report list, favorite list, the subscription construction pane, and reports tab.

2. Note Warning Message.

You will receive a warning similar to the following:

Warning: Report is not available! Contact your administrator to restore it!

### Scenario 2 – Recall allowed

1. Attempt to browse an offline report.

An offline report can be browsed from the report list, favorite list, the subscription construction pane, and Reports tab.

2. Note Warning Message.

You will receive a warning similar to:

Warning: This report is currently off-line. Should this report be made available on-line? This may take up to 30 minutes.

3. Do *one* of the following:

- a. Click OK to recall the report.

If your recall request was accepted you will receive the following message:

Your request to retrieve this report on-line has been submitted.

It may take up to 30 minutes.

- b. Click the bread crumb link to return to the previous window.

The bread crumb links are found near the top left of the page, beneath your login name.

4. Continue to work as required.

Your recalled report appears in a report list search after it has been recalled. You must perform a new report list search to see the recalled report. It is not automatically added to the report list.

**Scenario 3 – An offline report viewing system is set up**

1. Attempt to browse an offline report.

An offline report can be browsed from the report list, favorite list, the subscription construction pane, and reports tab.

The report is displayed.

**More information:**

[Report Browsing Options](#) (see page 85)

[Bread Crumbs](#) (see page 88)





# Chapter 8: Report Actions

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This section contains the following topics:

[Find Text in a Report](#) (see page 113)

[Go To Page in a Report](#) (see page 114)

[Add a Report as a Browser Favorite](#) (see page 115)

[Print Reports](#) (see page 116)

[Send Reports by Email](#) (see page 121)

[Export Reports to Spreadsheets](#) (see page 124)

[Convert to PDF](#) (see page 132)

[Browse](#) (see page 133)

[Browse in New Window](#) (see page 133)

[View Report Information](#) (see page 134)

[Save](#) (see page 134)

[Update Report Comment](#) (see page 136)

[Upload Files](#) (see page 137)

## Find Text in a Report

Use the Find option to locate a particular string of text across various pages in a report.

**Follow these steps:**

1. Browse a report.
2. Move the cursor over the Edit menu in the report pane and click Find.
3. Enter the string that you want to find in the Report Find text box.
4. Select the Up or Down Direction: option to search backward or forward through the report.
5. Select Match Case to search for text that matches the case of the search string you entered. Leave this option clear if you want the search to ignore case.

6. Click Find to locate the text.
  - If the search finds the string, the first page that contains the target string displays and every occurrence of the target string in the displayed page range is highlighted.

For example, your report browser is configured to display five pages at a time, and you search for the string Date. If the first occurrence appears on page 20, pages 16-20 display, and the report scrolls to page 20 automatically.
  - If search does not find the string, the current page range displays again, and the message Search Value Not Found appears.
  - If the search reached the start or end of the report, a message such as *Search reached end of document* appears. You click *Find* to continue searching the report. The search loops to the beginning or the end of the report automatically, as necessary.
  - In large reports, your search can sometimes reach an admin set search page limit. You may see a message like *Searched 10000 Pages Click find to continue*. The search is not complete, but interrupted, because it is taking too long.
    - Click Find to continue searching document.
    - Click Cancel or enter a different search term to stop the search.
7. Click Find every time that you want to go to the next instance of the target string within the displayed page range.
8. Click Find again to activate the subsequent search, to display the next group of pages containing the searched item.

**More information:**

[How to View Reports](#) (see page 23)

[Report Browsing Options](#) (see page 85)

## Go To Page in a Report

You can scroll to a specific page of the report by entering a page number.

**Follow these steps:**

1. Browse a report.
2. Move the cursor over the Edit menu in the report pane and click Go To Page....
3. Enter the page number that you want to navigate to in the text box
4. (Optional) Select Keep Dialog Open to keep the Go To Page text box open for your use, after the page change.

5. Click Go.

If you selected a valid page, the requested page displays with its surrounding page range.

For example, your report browser is configured to display five pages at a time and you want to go to page 18. If you enter 18 in the Go to: field and click Go, pages 16-20 display, and the report scrolls to page 18 automatically.

**More information:**

[How to View Reports](#) (see page 23)

[Report Browsing Options](#) (see page 85)

## Add a Report as a Browser Favorite

You can access a report quickly and efficiently by adding it to your browser as a favorite.

**Note:** Unless noted otherwise, this topic uses the term *favorite* generically to refer to either a *favorite* in Internet Explorer or a *bookmark* in Firefox.

**Follow these steps:**

1. Open the report.
2. On the OM Web Viewer report menu bar, perform the action for your browser:
  - (Internet Explorer) Select Output, Favorite or Bookmark (Browser).  
The Add a Favorite dialog opens.
  - (Firefox) Click the Browser Favorite link.  
The New Bookmark dialog opens.
3. Specify a name for this favorite and save it in a new or existing folder.
4. (Firefox) Optionally, uncheck the "Load this bookmark in the sidebar" option to open the bookmark in a new tab instead of the sidebar.
5. Click Add.  
The dialog closes, and the report is saved as a favorite.

**More information:**

[Report Browsing Options](#) (see page 85)

## Print Reports

From your web browser, you can print text reports.

Two printing methods are:

- Print-friendly browser page
- Browser add-on

**Notes:**

- To make the Print Preview button visible in Internet Explorer (for the print-friendly browser page), enable the option that is named *Allow scripting of Microsoft web browser control*. For more information, see the Supported Browsers topic in the "Preparing for Installation" chapter in the Installation Guide.
- The browser add-on requires additional software. This occurs automatically when print or email is first attempted. You may be prompted to confirm the installation. Depending on your browser and/or internet settings, installation of the add-on could be blocked.

## Single Report Print Dialog

The single report print dialog appears when you print a single report. You can start this dialog from any of the Report or Favorites lists, and also from any of the Report browse sections.

To display the single Report print dialog, click the print icon, select the print menu option, or press Alt+P in one of the browse pages. You can also print a single report by selecting a report from the report or favorites list, and either using the action button or the toolbar.

**Note:** For detailed step-by-step instructions on how to start the single print dialog from a particular pane, see the instructions for that pane.

**Follow these steps:**

1. Start the print dialog.  
The Print Report Dialog opens.

2. Complete the dialog.
  - a. Complete the Page Range Section
  - b. Select Page Orientation (only for browser add-on)
  - c. Select Number of Copies (only for browser add-on)
  - d. Select Font Size
  - e. Select Fit to page option (only for browser add-on)
  - f. Select Advanced Print option (only for browser add-on)

**Note:** If you are printing more than one report, your dialog options are different.

3. Click Print to show the report in Print Friendly Page window.
4. Print Friendly Page window shows the selected report page content.
5. Click Print or Print Preview to print the report.

Your original report remains open while you use Print.

**Note:** When using Internet Explorer, in print preview, if the shrink-to-fit option does not work, consider using a small percentage zoom, such as 30 percent. This shrink-to-fit error is caused by an Internet Explorer issue, and is not under the control of CA OM Web Viewer.

**More information:**

[Print Dialog Options](#) (see page 119)

[Multiple Reports Print Dialog](#) (see page 117)

## Multiple Reports Print Dialog

The multiple report print dialog appears to print more than one report at the same time. You can only start this dialog from the Advanced Search Report list, the Favorites List, and the Cross-Report Indexes Report List.

**Note:** For detailed step-by-step instructions on how to start the multiple reports print dialog from a particular pane, see the instructions for that pane.

**Follow these steps:**

1. Start the print dialog.

The Print Report Dialog opens.

**Note:** To print more than one report at the same time, select the checkboxes of more than one report from one of the report or favorites lists, and then click the print icon in the toolbar.

2. Complete the dialog.

**Note:** You must print all pages when printing more than one report.

- a. Select Page Orientation (only for browser add-on)
  - b. Select Number of Copies (only for browser add-on)
  - c. Select Font Size
  - d. Select Fit to page option (only for browser add-on)
  - e. Select Advanced Print option (only for browser add-on)
3. Click Print to show the reports in Print Friendly Page window.
  4. Print Friendly Page window shows the selected report page content.
  5. Click Print or Print Preview to print the reports.

Your original report remains open while you use Print.

**Note:** When using Internet Explorer, in print preview, if the shrink-to-fit option does not work, consider using a small percentage zoom, such as 30 percent. This shrink-to-fit error is caused by an Internet Explorer issue, and is not under the control of CA OM Web Viewer.

**More information:**

[Print Dialog Options](#) (see page 119)

## Print Dialog Options

The Print Report dialog specifies how you want to print the report.

### Page Range

Specifies which pages you want to print. Enter the following information as required to set the page range.

**Default:** All.

#### All

Prints all the pages of the report.

#### Current Selected Pages:

Prints the currently selected pages. The page numbers of the report that are currently selected are displayed after this option.

**Default:** No Selection

**Note:** You choose the pages by selecting the page selection option at the top of each page.

#### Enter Page Selection:

Prints the pages that you entered. Displays the specified page numbers that you entered in the text box for print.

#### Examples:

- To print pages one through five, specify **1-5**.
- To print pages seven and nine, specify **7,9**.

The pages to be printed are set up.

### Page Orientation (only for browser add-on)

Specifies the orientation of the pages to be printed.

**Values:** Portrait or Landscape

### Number of Copies (only for browser add-on)

Specifies the number of copies to be printed.

**Default:** 1

**Font Size**

Specifies the font size to use for the pages to be printed.

**Additional Options: (only for browser add-on)**

(Optional) Provides the following additional printing criteria:

**Fit to Page**

Ensures that the page content to be printed fits the paper on the printer.

If the page content fits on the paper, the selected font size is used. If the page content does not fit on the paper, for example, a line of data is wider than the paper, a smaller font size is used automatically to help ensure that the data gets printed on the paper.

**Advanced Print**

Displays the Print dialog that lets you change the printer and its settings.

**Print**

Prints the report.

**Cancel**

Cancels the print command.



## Send Reports by Email

Users and administrators can email single or multiple reports to one or more recipients. The reports can be in text or binary formats. Emailing the reports is helpful when the recipients cannot access the reports themselves.

Two Email methods are:

- Web based email form (SMTP)
- Browser add-on

**Note:** The browser add-on requires additional software. This occurs automatically when print or email is first attempted. You can be prompted to confirm the installation. Depending on your browser and/or internet settings, installation of the add-on could be blocked.

### Follow these steps:

1. Identify the report or reports from one of the following sources:
  - [Reports tab](#) (see page 23)
  - [Advanced Search tab](#) (see page 9)
  - [Subscriptions tab](#) (see page 13)
2. Click the Email icon for the report or reports. For example:
  - On the Reports tab, open a report and click the Email icon above the report list.
  - On the Advanced Search and Subscription tabs, select the check box for each report and click the Email icon above the report list.
3. Review the fields on the email report dialog and the information.
4. Complete the fields on the dialog and click Email. When using the browser add-on, a message window from your installed email client is opened with the selected reports attached.

### Emailing Multiple Reports

When emailing multiple reports, you send all pages.

When you email multiple reports, the file type option applies only to mainframe text reports. For example, if you email two mainframe text reports and one XLS report, only the two mainframe text reports are converted to PDF format.

### Emailing Binary Reports

The binary reports are any reports that are not mainframe text reports, including reports in these formats:

- ASCII
- AFP
- Word
- Excel
- Unicode text

### Using SMTP

SMTP is an email protocol that lets you send emails directly from CA OM Web Viewer without using your desktop email application. If your administrator has configured your account to use SMTP and to display the following fields, they appear. If necessary, see your administrator for help completing these fields.

- User name and password for your account on the outgoing email server
- From (Reply Address)

You can optionally preset your email address using the Report Action settings on the Configuration tab.

### Using Browser Add-on

The browser add-on is additional software that is installed on your computer that enables CA OM Web Viewer to create a new message, with file attachments, using your desktop email application.

## SMTP Email Dialog

SMTP is an email protocol that lets you send emails directly from CA OM Web Viewer without using your desktop email application. SMTP email is available based on permissions from your administrator.

Each email dialog has an SMTP version. SMTP email dialogs match the standard email dialogs except, they have some options that the standard dialogs do not have. For example, other than the additional SMTP options, sending multiple reports by email would have all the options that are listed for the standard multiple report email dialog.

All the SMTP versions of the email dialogs are started in the same manner and same places as the standard email dialogs.

**Note:** For detailed step-by-step instructions on how to start the email dialogs from a particular pane, see the instructions for each pane.

Depending on how your administrator set-up CA OM Web Viewer SMTP Email, you may not be required to fill in the SMTP user name and password for your account on the outgoing email server. If they are not required, the respective text boxes are not displayed.

**Follow these steps:**

1. Start the Email Report dialog.

The Email Report dialog opens.

**Note:** You must send all pages when sending a binary report by email.

2. Complete the standard section of the email dialog.
3. Enter your SMTP user name for your account on the outgoing email server.
4. Enter your SMTP password for your account on the outgoing email server.
5. Type in your reply email address in the From text box.

This is the return address for your outgoing emails. Usually, you would use your office email, but, you can set the reply address to a different email account. Replies are forwarded to this email address.

**Note:** Regardless of the address you define here, the email is logged as coming from your account on CA OM Web Viewer.

6. Select Use Default to use your default information for the previous three steps.

**Note:** You can select this option only if you have configured your default SMTP options on the configuration tab.

7. Enter the required fields and a message, as you would for sending an email.
8. Click Email to send the report or reports by email.

Your original report remains open while you use Email. Click Cancel on the Email Report window to return to your report.

**More information:**

[Email Dialog Options](#) (see page 124)

## Email Dialog Options

The Email Report dialog specifies the criteria you want to apply to the report that you are sending by email.

The options vary based on the email dialog that you currently use.

## Export Reports to Spreadsheets

You can export mainframe text reports to a spreadsheet format and view those reports using applications such as Microsoft Excel.

The export dialog can be run from any report or favorite list, and any mainframe text browse page.

**Note:** The export functionality is available only for mainframe text reports.

### Follow these steps:

1. Open the Export Dialog by selecting or browsing a mainframe text report, and then clicking the export button on the toolbar in that pane.

**Note:** For detailed step-by-step instructions on starting the export dialog from a particular pane, see the documentation for that pane.

2. Complete the dialog.
3. Click Export.

The report is exported to a spreadsheet. You can either open or save the exported report.

The original pane from which you started the export remains open while you use Export. Click Cancel on the Export Report window to return to your report.

## The Export Report - Webpage Dialog

The Export Report dialog specifies the criteria you can apply to the report you are exporting to a spreadsheet program.

## Set Up the Export Options

You can choose one of the following export methods, and then specify the additional options.

Export Method:

Export method determines how your report data is split into columns. Additionally, your second step in the wizard can be either the Setup Column Widths or Setup Column Delimiters, depending on your choice. The following options are available:

- Fixed Width
- Delimited

By default, Fixed Width is selected.

Fixed width splits the report into columns of certain sizes. For example, you might have a column that is 20 characters wide, and another column which is 35 characters wide.

The Delimited option splits the report into columns using a special character to determine where the column break must be applied. For example, your report has several columns separated by commas, like in a .csv (comma separated values) file, then you could split the report into columns based on the comma character.

Proceed to the next step to actually set up the columns.

You can set up the following additional options for both export methods, as required:

### **Include only lines containing**

Displays only lines that have the specified string. For example, if you select this check box and specify data set, only lines that have the word data set are included in the spreadsheet (all other lines are excluded).

**Note:** Only the exact string is matched and selected for export.

In the above example, only lines containing the string data set are selected for export; lines containing either data or set are not matched and not selected for export.

### **Exclude lines containing**

Excludes lines that have the specified string. For example, if you select this check box and specify page, every line that has the word page is excluded and all other lines are included in the spreadsheet.

### **Exclude blank lines**

Excludes blank rows (lines with no data) from the output spreadsheet.

**Exclude Lines from the top of each page**

Excludes the number of specified lines from the top of each page. For example, if you select this check box and chose 5, then five lines from the top of each page of the report is excluded from the export.

**Default:** 0

**Exclude Lines from the bottom of each page**

Excludes the number of specified lines from the bottom of each page. For example, if you select this check box and chose 5, then five lines from the bottom of each page of the report is excluded from the export.

**Default:** 0

The additional options are set up.

## Set Up Column Widths Pane

The Fixed Width export method specifies the character position where you want to break the report into columns. The exported output aligns the report fields in columns you set.

To see the Setup Column Width Pane you must select the Fixed Width option for Export Method in the first step of the wizard, Export Options.

You can set up the width of the columns of the report you want to export, based on your requirements. For example, you may require lesser column width for the name and more column width for the description and so on.

To set up column widths, click Setup Column Widths button in the Export Dialog.

**Note:** If the second step is listed as Setup Column Delimiters, you must go back to step 1, Export Options, and choose Fixed Width as your Export Method.

Follow the instructions to set up the column widths:

- To CREATE a column, click at the desired position.
- To DELETE a column, click on the existing column arrow.
- To MOVE a column, click and drag on the existing arrow.

**Note:** The first character highlighted by a column break indicator will be the first character in the new column.

The Fixed Width export method column widths are set up. Go to the next step in the wizard, [Set Up the Column Details](#) (see page 128), to continue the export process.

## Set Up Column Delimiters Pane

The Delimited export method specifies the character that you want to use to break the report into columns. A new column break is placed in the data at each delimiter. The delimiters can be comma, tab, or space and so on.

For example, if you have the text, “Sample 1, Sample 2, Sample 3” on a line, a comma delimiter would break the text into three cells or columns in your spreadsheet as, “Sample 1”, “Sample 2” and “Sample 3”..

**Note:**

- To see the Setup Column Delimiter Pane, you must select the Delimited option for Export Method in the first step, Export Options.
- You can select more than one delimiter to break the report fields into columns.

Complete the following information, if your selection is Delimited:

**Setup Column Delimiters**

Creates columns based on the following options:

**Tab**

Creates the columns in report data based on tab separated values.

**Comma**

Creates the columns in report data based on comma-separated values.

**Space**

Creates the columns in report data based on space separated values.

**Semicolon**

Creates the columns in report data based on semicolon separated values.

**Other String**

Creates the columns in report data based on the specified delimiter character in the field provided.

**Treat consecutive delimiters as single column break**

Treats consecutive delimiters as one. For example, if you select Space Delimited and select this check box, five consecutive spaces do not create five column breaks, but rather one column break.

The Delimited export method is set up. Go to the next step in the wizard, [Set Up the Column Details](#) (see page 128), to continue the export process.

## Set Up the Column Details

You can use this page to set up details for all the columns of the spreadsheet that you generate from the report you want to export. For example, you can specify the number of columns, create column headers, and include names for headers, and so on.

### Follow these steps:

1. Click Setup Column Details in the Export Dialog.
2. Complete the following information in the Column Details page:

#### Current Column

Indicates which column properties are changed by you.

#### Column Name

Specifies the column name entered. This column name is used as a column header in the exported report.

**Note:** This field is enabled only if you choose to create column headers.

#### Create Column Headers

You can choose whether to add a column header to each column. This option creates a column header for each column of your spreadsheet.

When selected, this option displays the column header and enables column name text box.

Proceed to enter the Column Data Format options to display data in the required format. The options selected in the Column Data Format sections apply to the column indicated by the current column drop-down list. By default, General is selected.

#### General

Displays the entered data. Data of any type is valid.

#### Text

Specifies all data in this column must be formatted as text within the spreadsheet.



**Date**

Specifies the data in this column must be formatted in the date format.

For the date format export to work, you must indicate the format of the date column.

**Input Format**

Displays the current date in the format you have selected.

**Date Format**

Select the format that is the closest match to the date format used in your report.

**Note:** The date format does not have to be an exact match.

**Date Locale**

Select the locale that is the closest match to the data that is used in your current report.

**Note:**

The data in this column of your report may not display exactly like the date format that you selected. However, you must select a format that closely matches the date format of your report.

To verify whether the date format entered is correct or not, click Check, under the Check columns. The Check button checks if any dates are not in the correct format or not close enough to the correct format.

**Number**

Specifies that the column must be treated as numerical data. You can also specify the number of decimal places to be displaced in the spreadsheet.

**Note:** To verify whether the data entered in this column is correct or not, click Check, under the Check columns, for incorrect date formats.

**Skip**

Ignores the column. This column is not exported to the spreadsheet.

The column details are set up. Continue to the next step Set Up the Page Range that you want to export.

## Set Up the Page Range

To specify which pages you want to export, you must set the page range.

**Follow these steps:**

1. Click Page Range in the Export Dialog.

2. Complete the following information in the Page Range webpage.

**All**

Exports all the pages of the report.

**Default:** All

**Currently Selected Pages**

Exports the pages selected from the browse pane.

The report pages selected by you are listed after this option button.

**Default:** No Selection

**Enter Page Selection**

Exports the specified pages entered in the text box.

**Examples:**

- To print pages one through five, specify 1-5
- To print pages seven and nine, specify 7,9

The pages to be exported to a spreadsheet are set up.

**More information:**

[Page Selection and Report Sections](#) (see page 44)

## Export Dialog Buttons

### Rule Management Buttons

Rule Management in CA OM Web Viewer lets you save export rules for later use and save time. Rather than reset all the attributes listed above, load an export rule to automatically recall previous settings.

A collection of the options previously described is called a *Rule*.

- Rules are limited to a single report. A rule for one report cannot be used for a different report.
- Rules can either be a rule you saved for this report or public type rule someone else saved for this report.
- Rules are saved, previously, specific to the selected report.

You can use the following processes and manipulate a Rule, in the Export Dialog:

#### **Load Rule**

Load a previously saved Rule.

##### **Follow these steps:**

1. Click Load Rule.

A dialog opens, where you can load available rules with your settings.

2. Click the option button next to the rule name, to select a rule.
3. Click Select.

The rule and the rule settings are loaded and displayed in the export dialog.

#### **Save Rule**

Saves the rule with your current settings.

##### **Follow these steps:**

1. Click Save Rule.

2. Select Save or Save As.

Save uses the current name and description of the rule. The Save As option lets you save a new rule, and lets you set up a new rule name and new rule description.

**Note:** The Save option is enabled only if you are editing a rule that you saved previously and loaded using the load rule button.

3. (For Save As option) Enter Rule Name.

**Note:** With the save option, you are not allowed to change this field.

4. (For Save As option) Enter Rule Description.

Displays the description of the rule entered.

**Note:** With the save option, you are not allowed to change this field.

5. (For Save As option) Enter Public or Private.

Provides options if you want to keep your rule public or private. Public rules can be used by others.

**Note:** With the save option, you are not allowed to change this field.

6. Click Save to save the rule.

### Delete Rules

You can delete rules previously saved by you.

**Note:** System Administrators can delete rules created by others.

**Follow these steps:**

1. Click Delete Rule.  
The delete rule dialog appears.
2. Select a rule to delete by selecting the option button next to that rule.
3. Click Delete to delete the rule.

## Other Export Dialog Buttons

### Reset

This button resets the export dialog back to the default start values.

### Cancel

This button closes the Export Report dialog.

## Convert to PDF

### Email and Save

When saving a report or sending it by email, text reports can automatically be converted to PDF reports. Depending on the purpose of this Role, you may want to convert all saved and emailed reports to PDF, or leave them as text. Additionally, you can leave that option up to the user, to decide when they save or send by email.

**Follow these steps:**

1. Select the Properties Tab.
2. Find the *Report Actions* section.
3. Select the Report Action you want to update (Email and Save Only).
4. Select one of the following:
  - Keep As Text
  - Convert To PDF
  - User Choice (Text or PDF)

## AFP Reports

AFP reports can be automatically converted to PDF format in CA OM Web Viewer.

In previous versions of CA OM Web Viewer, users had to choose the option to convert AFP to PDF when browsing a report. Now you must configure CA OM Web Viewer to determine whether an AFP report is to be kept in AFP format or converted to PDF format.

No action is required when browsing, to convert an AFP report to PDF format. Browse an AFP report as you would browse any report.

**More information:**

[Browse AFP Report](#) (see page 105)

## Browse

You can browse a report from the Report List in your current window.

**Follow these steps:**

1. Select Browse from the Action drop-down list, against the report in the Report List.  
The report opens in the current window, with the action items available from the menu.
2. Click Report List to return to the Report List Page.

## Browse in New Window

You can browse a report from the Report List in a new window.


**Follow these steps:**

1. Select Browse from the Action drop-down list, against the report in the Report List.  
The report opens in a new window, with the action items available from the menu.  
The Report List page remains open.
2. Click Close to close the report.

## View Report Information

You can view the report information for a report from the Report List.

**Follow these steps:**

1. Select or browse a report, then click the Report Information icon .

The report information is displayed with the following attributes and their values of that report:

- Report ID
- Generation
- Sequence
- Creation Date
- Creation Time
- Job Name
- Job ID
- Description
- Lines
- Pages
- Comments
- Source
- Type

2. Click Close to close the Report Information.

## Save

You can save mainframe or binary reports and use them offline.

---

## Mainframe Text Reports

You can save a mainframe text report from the Report List.

**Follow these steps:**

1. Open the Save dialog.

The save dialog can be started from any report list or report browse pane except the Reports tab.

For detailed step-by-step instructions on how to start the save dialog from a particular pane, see the instructions for that pane.

A dialog opens with the following options:

- Page Range
- File Type

2. Complete the following information in the Page Range option.

**All**

Saves all the pages of the report.

**Default:** All

**Current Selected Pages:**

Saves the selected page numbers of the report.

**Default:** No Selection

**Note:** You choose the pages by selecting the page selection option at the top of each page.

**Enter Page Selection**

Saves the specified pages entered in the text box.

**Examples:**

- To save pages one through five, specify 1-5
- To save pages seven and nine, specify 7,9

3. Select the File Type.

If PDF is selected, complete the following PDF Options:

**Font Size**

Specifies the font size to use pages to be printed.

**Page Orientation**

Specifies the orientation of the pages to be printed.

**Values:** Portrait or Landscape

**Print Green Bar Background**

Clear this option if you do not require the Print Green Bar Background.

4. Click Ok.

The download starts and you can open or save the file.

## Binary Reports

You can save a binary report from the Report List.

**Follow these steps:**

1. Select Save from the Action drop-down list, against the report in the Report List.  
The binary download starts and you can open or save the file.
2. Click Cancel to cancel saving the report and return to the Report List page.

## Update Report Comment

**Note:** This feature is available only for CA View repository.

You can add or update a comment for a report from the Report List or the cross-report index-value match list.



**Follow these steps:**

1. Select Update Comment from the Action drop-down list, against the report in the Report List.

A dialog opens with the following options:

- Report ID
- Report Comment
- Report Info:

**Note:** Only the Report Comment text box is available for editing.

2. Enter or update your comment and click Ok.

The comment is added to the report.

**More information:**

[Using the Report List](#) (see page 31)

## Upload Files

You can upload reports, with a maximum file size up to 10MB, to Mainframe and view them under the Report List.

**Note:** You can upload files to the mainframe only to select repositories. For more information, contact your Administrator.

**Follow these steps:**

1. Click the Advanced Search Tab.
2. Click the link of the Repository you want to upload files to (left side pane).
3. Click File Upload from the Report List pane (upper-right corner of pane).

A new page appears.

4. Click Browse and select a file for upload to mainframe.
5. Select the file type from the following options:

- Text
- Non Text

**Default:** Text

6. Enter a Report ID per your naming standards.

**Note:** Your upload can be rejected or the uploaded file may not appear in your Report List, if you do not provide a Report ID per your naming standards.

7. (Optional) Enter a Job Name.
8. (Optional) Enter a Description for the job.
9. Click Submit.

A confirmation message *Your file was successfully uploaded to the mainframe* is displayed.

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