

Saving ReportMart3 Report Output via Citrix/Connect on a Mac

Step-by-Step Instructions to Save a Report Output as a PDF file:

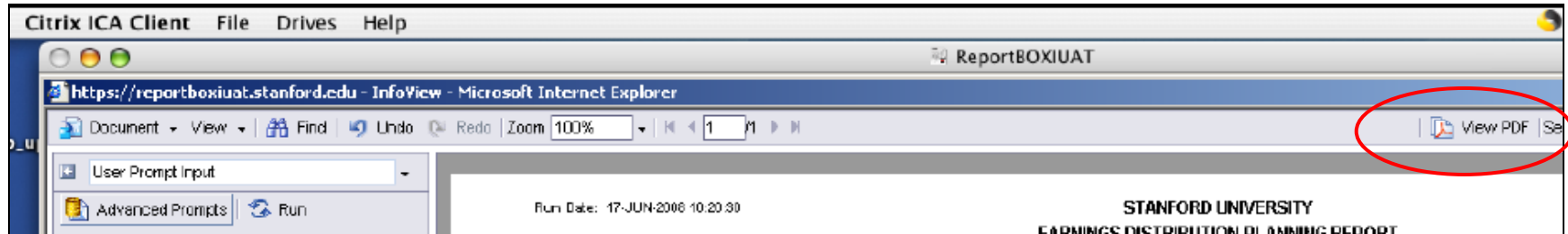
- 1 – Access ReportMart3 via Citrix (see Citrix Access Job Aid). Note that you are running Citrix ICA Client, which then launches an Internet Explorer session. Find and run a report as a PC User does. Select PDF view (standard for Desktop Intelligence reports). For Web Intelligence reports click on “View PDF”.
- 2 – From the PDF menu select the save icon.
- 3 – A Save dialogue box appears.
- 4 – Open the “Save in” pull down list and select “C\$ on ‘Client’(V:)”.
- 5 – Click “Allow” to approve access to your C drive (this dialogue box will only appear the first time you download anything during a ReportMart3 session).
- 6 – Select the desired folder (Desktop or other).
- 7 – Give the file a meaningful name and click “Open” to further define the save location.
- 8 – Drill do the selected folder, or to save at Desktop (as in this example) click “Save”.
- 9 – Click “Allow” to give write access to your ‘C’ drive to save the requested file (this dialogue box will only appear the first time you download anything during a ReportMart3 session).

Step-by-Step Instructions to Save a Report Output as an Excel file:

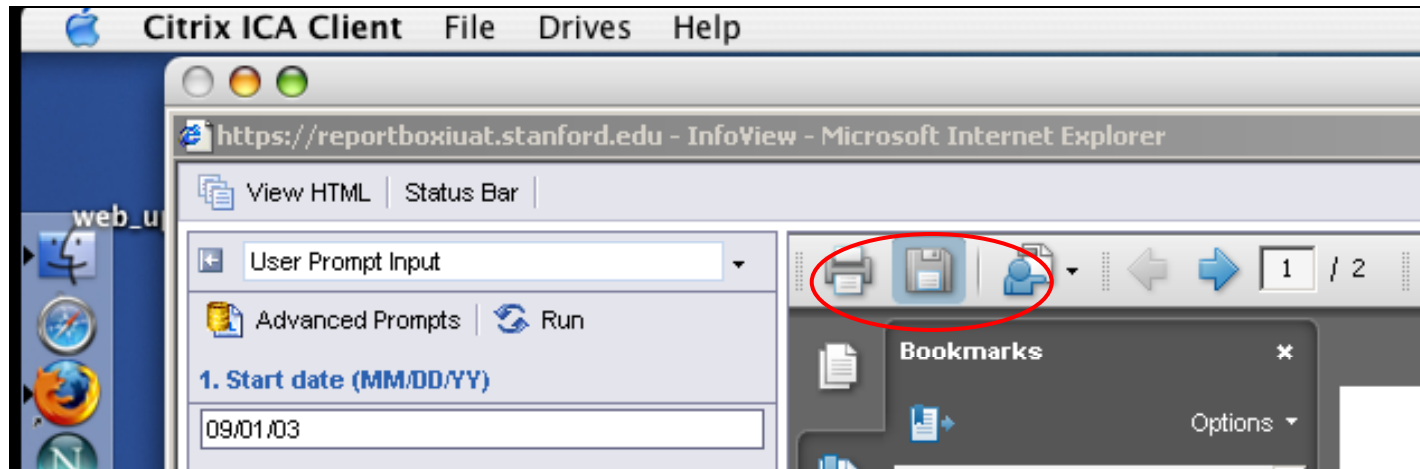
- 1 – After running the report, click on the Excel icon to begin the process to export to Excel
- 2 – Select “Save” when asked if you want to open or save the file.
- 3 – Click “Allow” to approve access to your C drive (this dialogue box will only appear the first time you download anything during a ReportMart3 session).
- 4 – Similar to saving a PDF, in the pull down “Save in” menu select “C\$ on ‘Client’(V:) and select Desktop (or desired folder) and click “Open”.
- 5 – Ensure file name is what you want and that the right folder has been selected and click “Save”.
- 6 – Click “Allow” to give write access to your ‘C’ drive to save the requested file (this dialogue box will only appear the first time you download anything during a ReportMart3 session).
- 7 – The spreadsheet is downloaded to the folder you indicated. In Download Complete dialogue box click “Open” to open it within iE, or click “Close”. You can then navigate to it independently and double click to open it.

The following pages contain the steps with example screen shots.

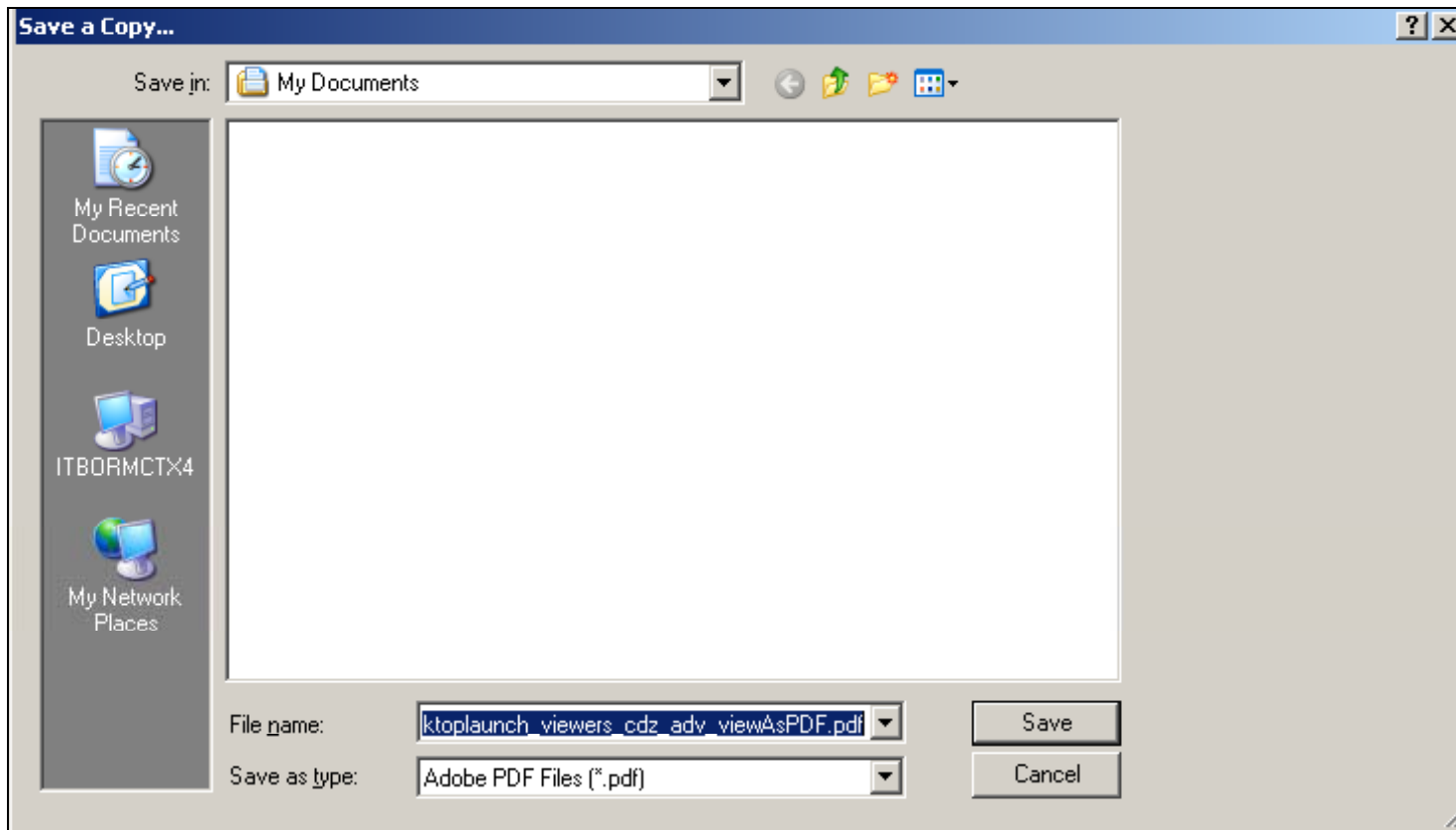
1 – Access ReportMart3 via Citrix (see Citrix Access Job Aid). Note that you are running Citrix ICA Client, which then launches an Internet Explorer session. Find and run a report as a PC User does. Select PDF view (standard for Desktop Intelligence reports). For Web Intelligence reports click on “View PDF”:



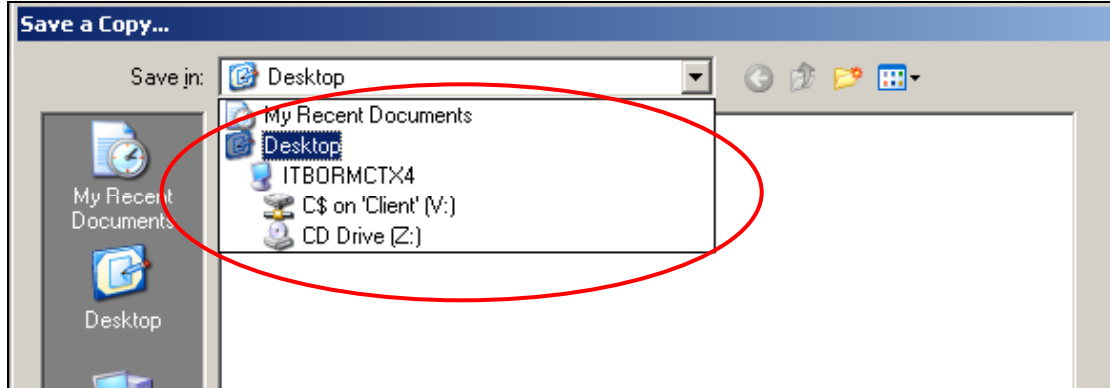
2 – From the PDF menu select the save icon:



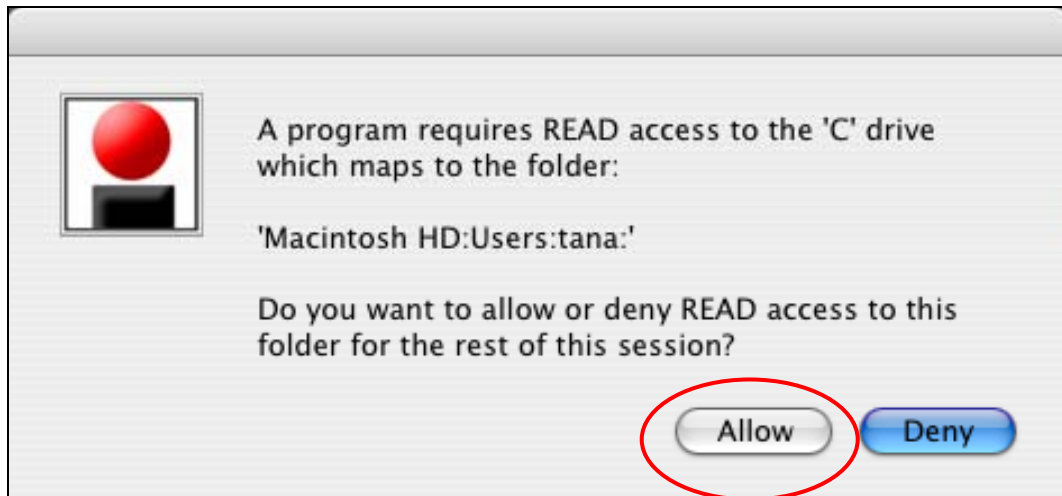
3 – A Save dialogue box appears:



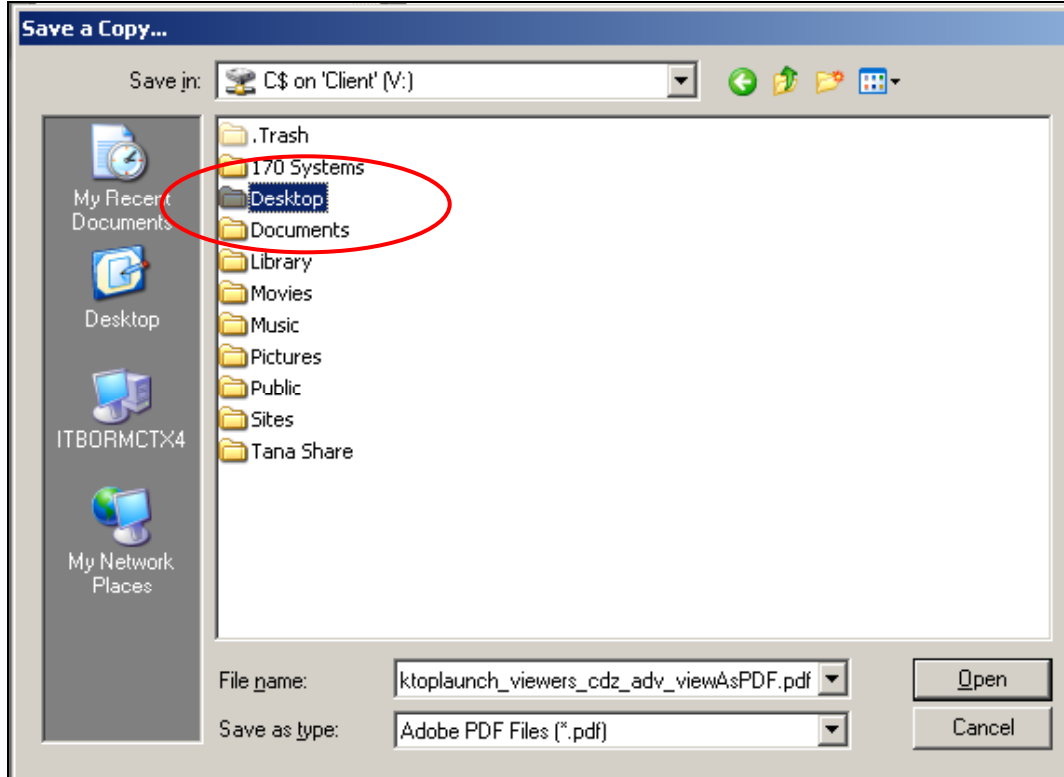
4 – Open the “Save in” pull down list and select “C\$ on ‘Client’(V:)”:



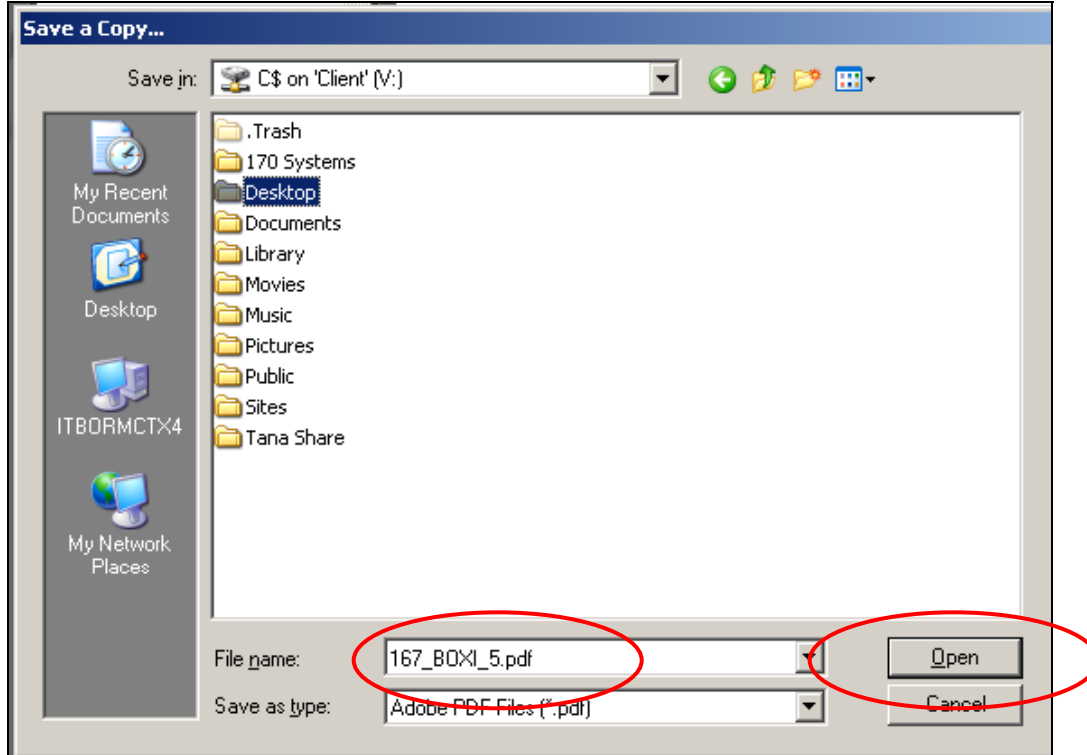
5 – Click “Allow” to approve access to your C drive (this dialogue box will only appear the first time you download anything during a ReportMart3 session):



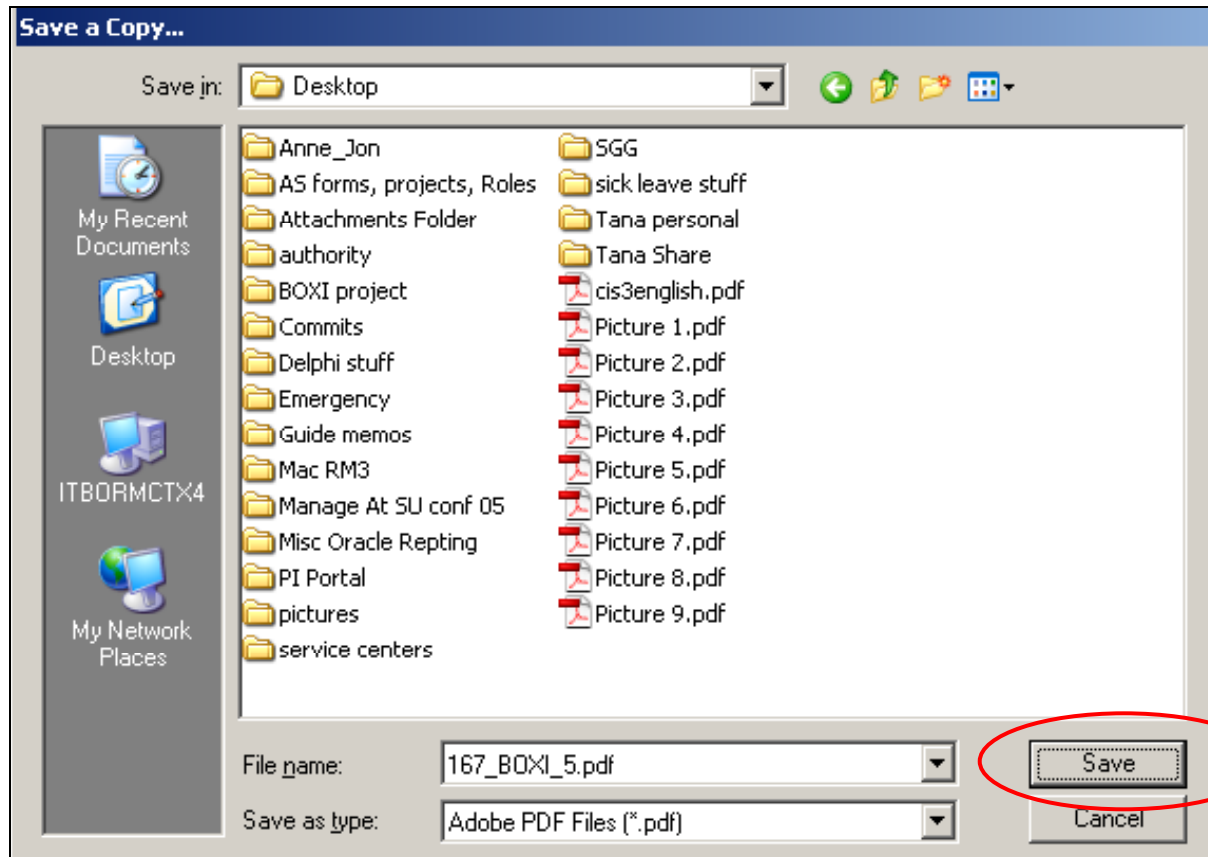
6 – Select the desired folder (Desktop or other):



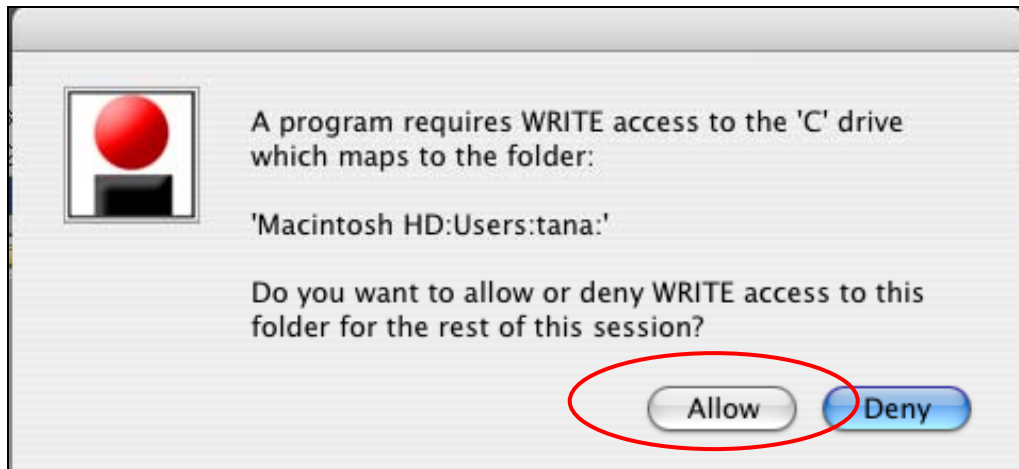
7 – Give the file a meaningful name and click “Open” to further define the save location:



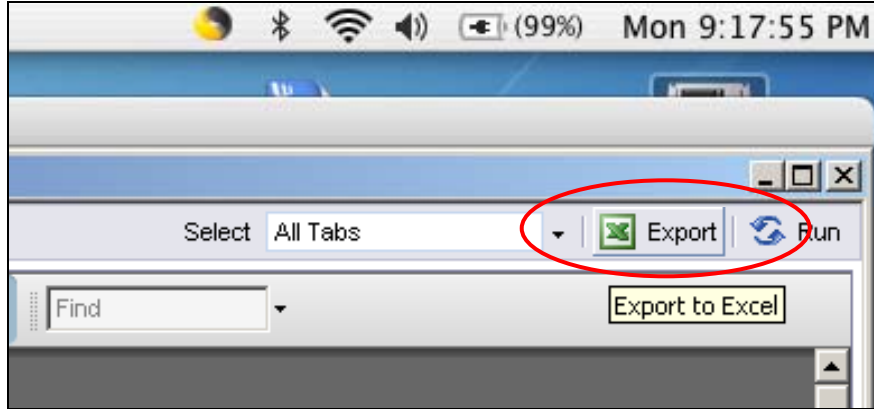
8 – Drill do the selected folder, or to save at Desktop (as in this example) click “Save”:



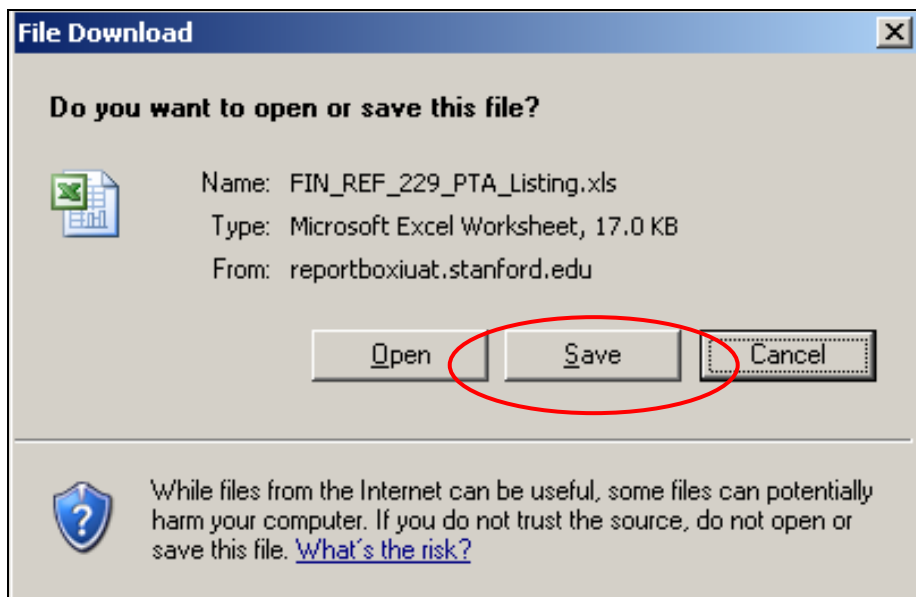
9 – Click “Allow” to give write access to your ‘C’ drive to save the requested file (this dialogue box will only appear the first time you download anything during a ReportMart3 session):



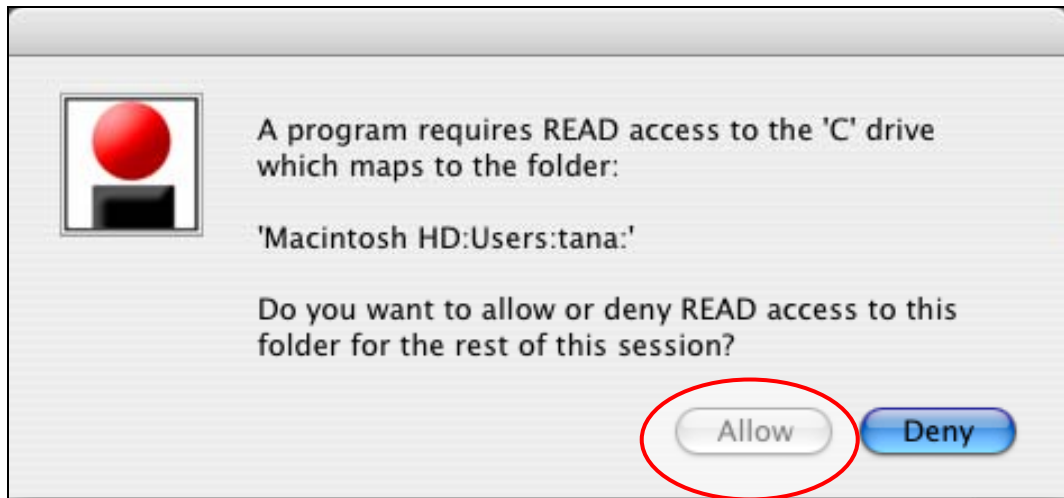
1 – After running the report, click on the Excel icon to begin the process to export to Excel:



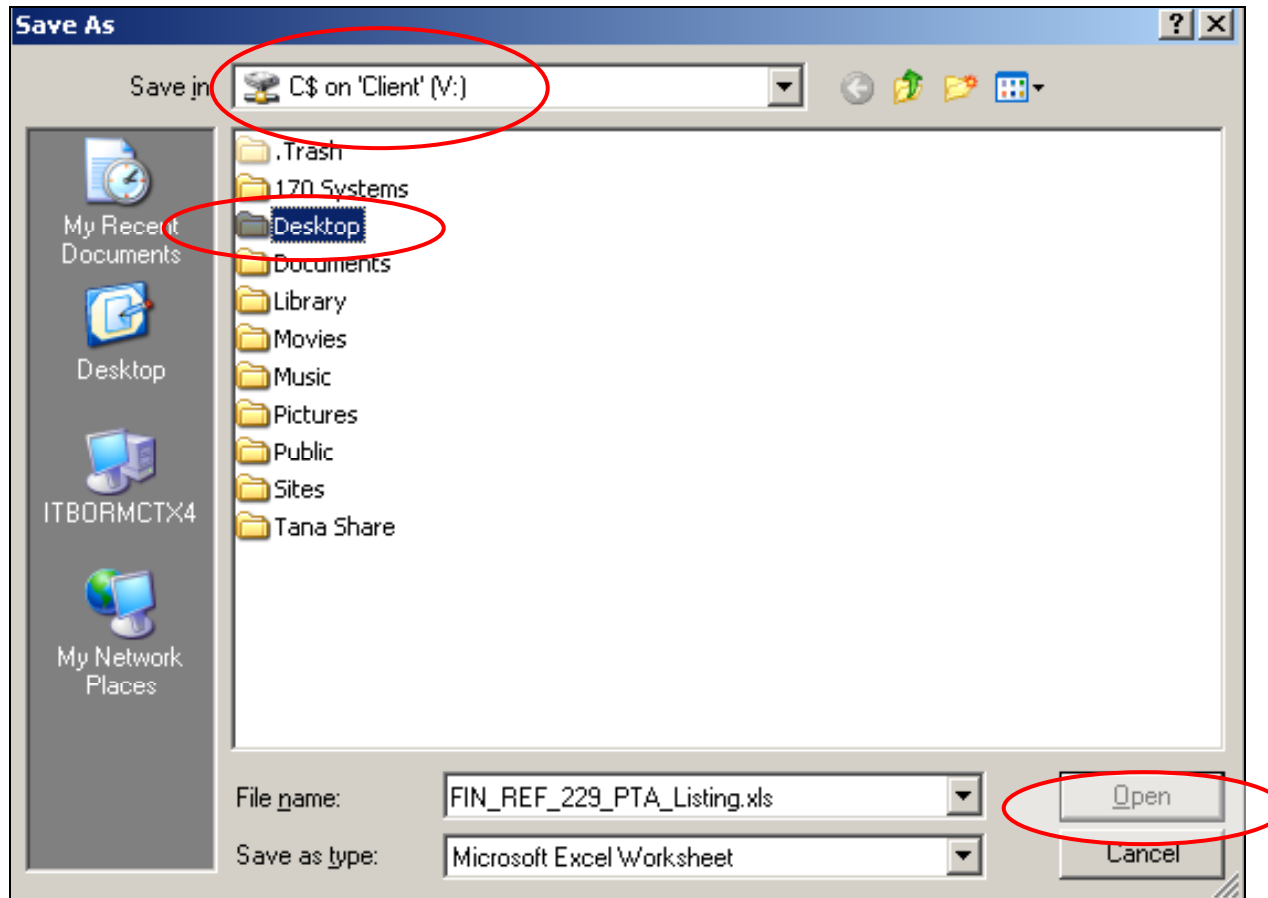
2 – Select “Save” when asked if you want to open or save the file:



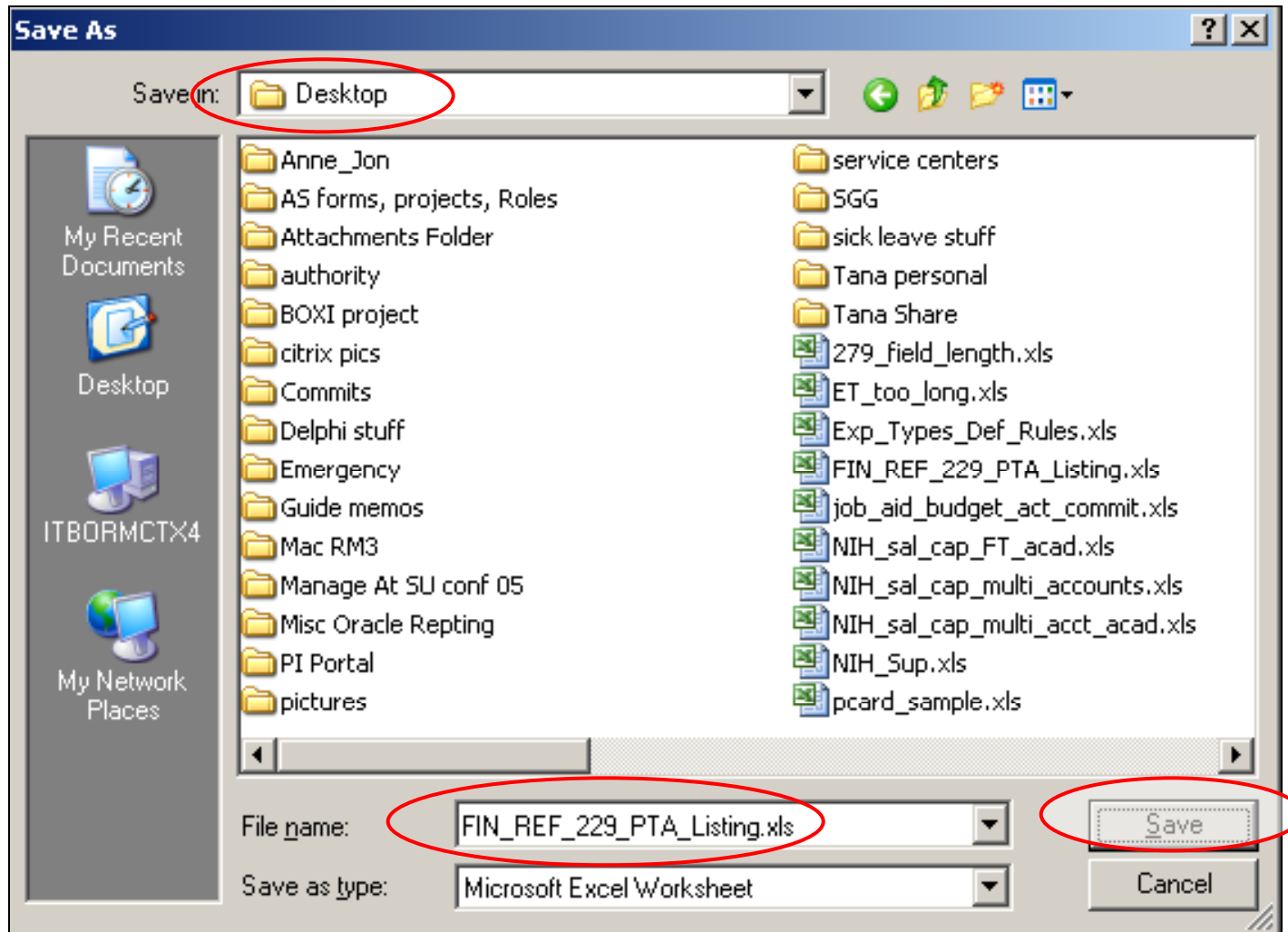
3 – Click “Allow” to approve access to your C drive (this dialogue box will only appear the first time you download anything during a ReportMart3 session):



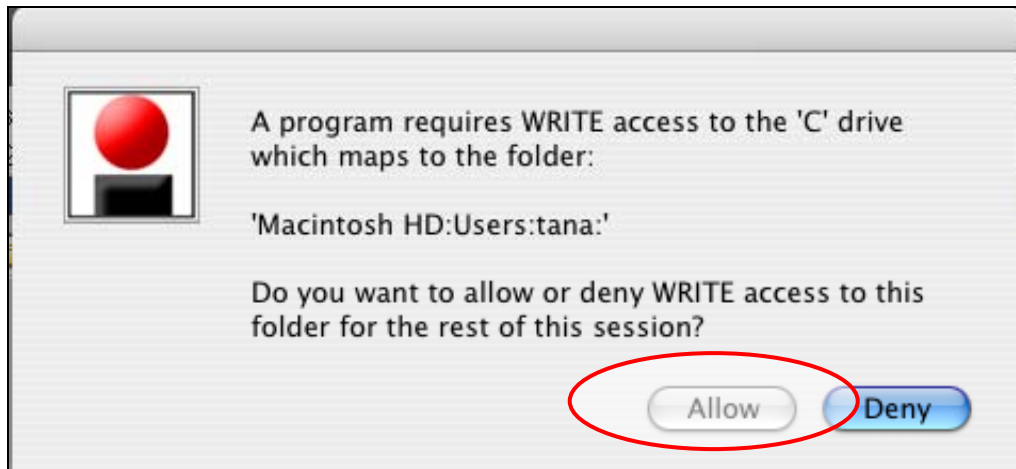
4 – Similar to saving a PDF, in the pull down “Save in” menu select “C\$ on ‘Client’(V:) and select Desktop (or desired folder) and click “Open”:



5 – Ensure file name is what you want and that the right folder has been selected and click “Save”:



6 – Click “Allow” to give write access to your ‘C’ drive to save the requested file (this dialogue box will only appear the first time you download anything during a ReportMart3 session):



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