Navicat

BI Viewer

Version 3 User Guide

PremiumSoft™
PremiumSoft CyberTech Ltd.

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Chapter 1 - Getting Started

About Navicat BI Viewer

Navicat BI Viewer is an easy-to-use tool for viewing BI workspace files. Featuring a user-friendly Graphical User Interface (GUI), it allows you to effortlessly navigate and explore workspaces designed using Navicat's BI feature or standalone Navicat BI. You can access local workspace files, as well as files securely stored in Navicat Cloud or Navicat On-Prem Server.

Key Benefits & Features

- **Flexible Sharing** - Share your workspace files with team members who do not have a full license of Navicat or Navicat BI, as long as they have Navicat BI Viewer installed.
- **Export Options** - Easily export your charts and multi-page dashboards to professional PDF documents or various image file formats.
- **Cross-Platform Compatibility** - Fully available across three major operating systems: Microsoft Windows, macOS, and Linux.

For further assistance, video tutorials, and technical support, please visit our official website at https://www.navicat.com.

Requirements

Supported Operating Systems

Platform	Supported Versions
Windows	Microsoft Windows 8, Windows 8.1, Windows 10, Windows 11, Server 2012, Server 2012 R2, Server 2016, Server 2019, Server 2022, Server 2025
macOS	macOS 14 Sonoma, macOS 15 Sequoia, macOS 26 Tahoe, macOS 14 Sonoma, macOS 27 Golden Gate
Linux	**Flatpak:** Flatpak supported distributions. **AppImage (x86_64):** Debian 10, Debian 11, Debian 12, Debian 13, Ubuntu 20.04, Ubuntu 22.04, Ubuntu 24.04, Ubuntu 26.04, Fedora 44, Linux Mint 20, Linux Mint 21, Linux Mint 22, Deepin 20, Deepin 23, Deepin 25, KylinOS Desktop 10, Pop!_OS 20.04, Pop!_OS 22.04 **AppImage (aarch64):** Debian 11, Debian 12, Debian 13, Ubuntu 22.04, Ubuntu 24.04, Ubuntu 26.04, Fedora 44, Linux Mint 20, Linux Mint 21, Linux Mint 22, Deepin 23, Deepin 25, KylinOS Desktop 10, Pop!_OS 20.04, Pop!_OS 22.04

Installation

Setting up Navicat BI Viewer on your system is a quick and straightforward process. Following a few simple steps will have your database management environment up and running in no time.

We strongly suggest that you shut down any opened applications. This will help ensure a smooth installation.

Installation for Download Version

1. Download Navicat BI Viewer Windows version.
2. Open the **.exe** file.
3. Click **Next** at the Welcome Screen.
4. Read the License Agreement. Accept it and click **Next**.
5. Accept the location of the program icons by clicking **Next**. If you wish to change the destination of the folder, click **Browse**.
6. Follow the remaining steps.

Migration / Upgrade

Migrate Navicat BI Viewer to New Computer

If you are moving to a new workstation, follow these steps:

1. Uninstall Navicat BI Viewer from the existing computer.
2. Re-install Navicat BI Viewer in the new computer.

Upgrade Navicat BI Viewer

If you want to upgrade an installed copy of Navicat BI Viewer to the latest release, please choose **Help** -> **Check For Updates** to start the Updater. It will automatically check your installed version. If there is a new version, simply follow the steps in the Updater to upgrade your Navicat BI Viewer. It will replace your previous Navicat BI Viewer and your current settings will remain unchanged.

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Note: For the License Agreement of Navicat Cloud service, please click here.

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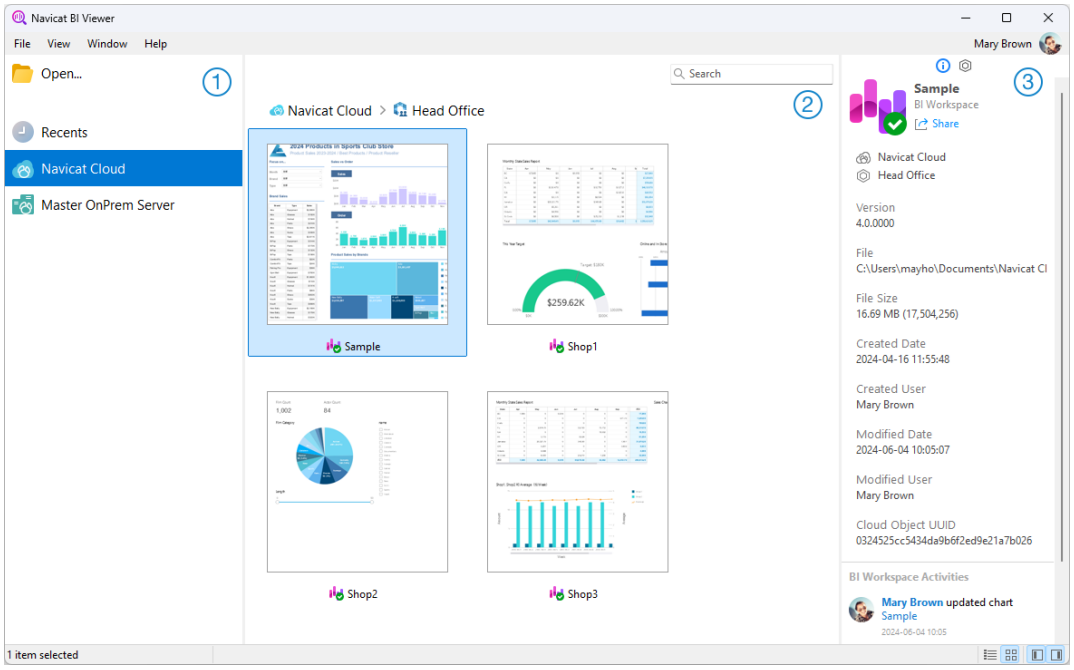
Chapter 2 - Main UI

This section details the layout, core components, and functional panes of both the Main Window and the Workspace Window within Navicat BI Viewer, helping you seamlessly navigate your business intelligence projects and track asset dependencies.

Main Window

The main interface is divided into three primary structural areas:



① Navigation Pane

The Navigation pane acts as your primary hub, allowing you to open local workspace files, quickly access recently opened workspaces, or retrieve files stored securely in Navicat Cloud or Navicat On-Prem Server. If the pane is hidden, choose **View** -> **Show Navigation Pane**.

② Content Pane

The Content pane displays all the available workspaces contained within your currently selected Navigation pane section. To change the view, click the **Detail** or **Icon** buttons.

③ Information Pane

The Information pane provides context-specific metadata divided into two dedicated sections.

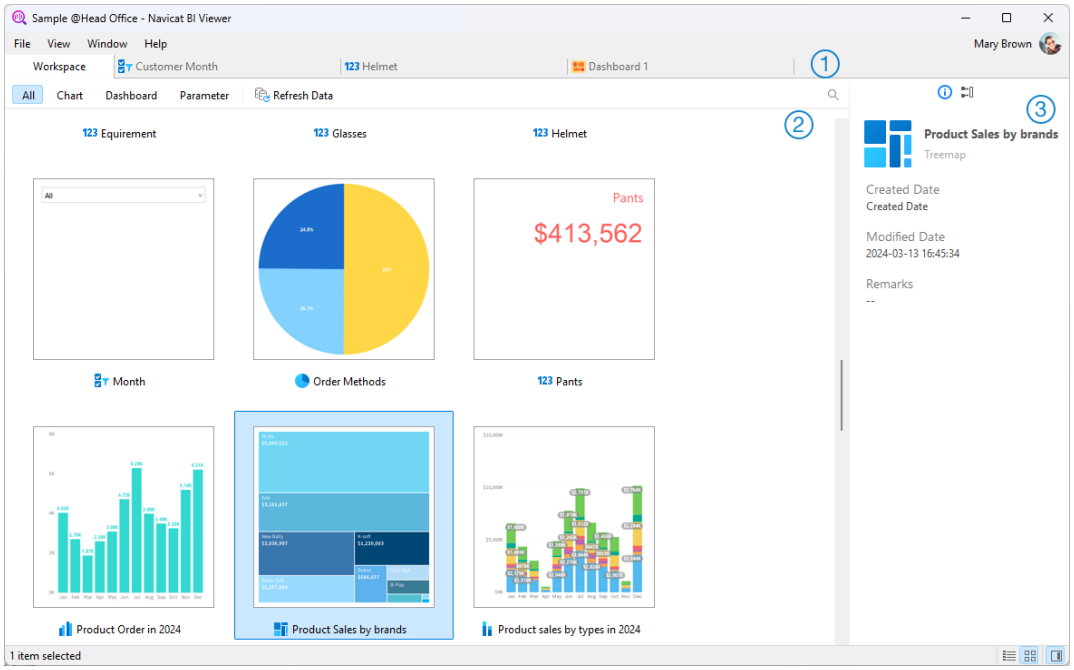
The **General** tab displays core information and properties regarding the active workspace or selected item.

The **Project** tab outlines current project members and logs recent team activities. Click **+** to add members to the project.

If the pane is hidden, choose **View** -> **Show Information Pane**.

Workspace Window

A workspace is the central environment where your custom dashboards and charts reside. It allows you to interact with and view multiple visual assets simultaneously through the following controls:



① Tab Bar

The Tab Bar tracks your active views, allowing you to switch seamlessly among various opened charts and dashboards.

② Content Pane

The Content pane displays all design assets stored within the workspace. It includes quick-filter categories (All, Data Source, Chart, Dashboard, Parameter) to instantly narrow down your asset list. To change the view, click the **Detail** or **Icon** button at the bottom of the window.

Detail View lists items in a structured text layout with extended metadata. You can click any column header to sort your assets by that specific attribute.

Icon View displays your items visually as a grid of thumbnail images.

③ Properties Pane

The Properties pane offers deeper dependency tracking and metadata for your assets.

The **General** tab displays core structural information for the workspace or selected item.

The **Using** tab shows the items that the selected item depends on.

The **Used By** tab shows the items that depend on the selected item.

If the pane is hidden, choose **View** -> **Show Properties**.

Chapter 3 - Collaboration

Navicat Cloud

Navicat Cloud is a cloud service provided by PremiumSoft for synchronizing connection settings, queries, aggregation pipelines, snippets, model workspaces, BI workspaces, virtual group information, as well as your personalized configuration profiles.

Navicat Cloud could not connect and access your databases. By which it means, it could only store your settings and files; your database passwords and data (e.g. tables, views, etc) will not be stored in Navicat Cloud.

Note: You can only sign in to one Navicat Cloud account in the software. PremiumSoft will keep all synchronized files strictly confidential, and all employees are prohibited from viewing/accessing content of files you may store in your Navicat Cloud account.

Create Navicat Cloud Account

1. At the top right, click **Manage Cloud**.
2. In the Manage Cloud window, select **Navicat Cloud**.
3. Click **Create Navicat ID**.
4. Enter the required information and click **Sign Up**. A verification email will send to your email address.
5. Click the link in the email to verify the new account.

Hint: You can sign in with the same Navicat ID you use for the Navicat Customer Center.

Sign In Navicat Cloud

1. At the top right, click **Manage Cloud**.
2. In the Manage Cloud window, select **Navicat Cloud**.
3. Enter your **Navicat ID** and **Password**.
4. Click **Sign In**.
5. If you enabled two-step verification in Navicat Cloud Portal, a code will be sent to your phone via your mobile app. Enter the received code to sign in.

Sign Out Navicat Cloud

1. Close all workspaces in Navicat Cloud.
2. At the top right, click your avatar.

3. In the Manage Cloud window, select **Navicat Cloud**.
4. Click **Sign Out**.

View Usage

1. At the top right, click your avatar.
2. In the Manage Cloud window, select **Navicat Cloud**.
3. Your usage and current plan will be shown.

Change Your Picture

1. At the top right, click your avatar.
2. In the Manage Cloud window, select **Navicat Cloud**.
3. Click your avatar.
4. Choose an image file.

Manage Your Account

You can change your password, enable Two-Step Verification, upgrade Cloud Plan, etc in Navicat Cloud Portal.

1. At the top right, click your avatar.
2. In the Manage Cloud window, select **Navicat Cloud**.
3. Click **Manage Account**.
4. A web browser will automatically open up to Navicat Cloud Portal.

On-Prem Server

Navicat On-Prem Server is an on-premise solution that provides you with the option to host a cloud environment for storing Navicat objects (connection settings, queries, aggregation pipelines, snippets, model workspaces, BI workspaces, virtual group information, as well as your personalized configuration profiles) internally at your location.

Before you can add an On-Prem Server, you must first set up Navicat On-Prem Server in your environment.

Note: You can add multiple On-Prem Server in the software.

Add New On-Prem Server

1. At the top right, click **Manage Cloud**.
2. In the Manage Cloud window, click **+ New On-Prem Server** -> **New On-Prem Server**.

3. Enter your On-Prem Server login information.

Option	Description
Host	The host name or IP address of your On-Prem Server.
Port	The port number of your On-Prem Server.
Verify Server Certificate	Enable this option to verify the server certificates.
Enable Push Synchronization	Navicat BI Viewer receives a silent push notification whenever its files stored in your On-Prem Server changes.

4. Click **OK**.

Add New On-Prem Server with URI

1. At the top right, click **Manage Cloud**.
2. In the Manage Cloud window, click **+ New On-Prem Server** -> **New On-Prem Server with URI**.
3. Paste your On-Prem Server URI.
4. Click **OK**.

Note: The URI can be copied from your On-Prem Server portal site.

Sign In On-Prem Server

1. At the top right, click **Manage Cloud**.
2. In the Manage Cloud window, select the On-Prem Server.
3. Enter your **Username** and **Password**.
4. Click **Sign In**.
5. If you enabled two-step verification, a code will be sent to you via the verification method you have selected. Enter the received code to sign in.

Sign Out On-Prem Server

1. Close all workspaces in your On-Prem Server.
2. At the top right, click your avatar.
3. In the Manage Cloud window, select the On-Prem Server.
4. Click **Sign Out**.

Edit On-Prem Server

1. Close all workspaces in your On-Prem Server.

2. At the top right, click your avatar.
3. In the Manage Cloud window, select the On-Prem Server.
4. Click **Sign Out**.
5. Right-click your server and select **Edit On-Prem Server**.
6. Edit the On-Prem Server information.
7. Sign in your server.

Rename On-Prem Server

1. Close all workspaces in your On-Prem Server.
2. At the top right, click your avatar.
3. In the Manage Cloud window, select the On-Prem Server.
4. Click **Sign Out**.
5. Right-click your server and select **Rename**.
6. Enter the name to describe your On-Prem Server.
7. Sign in your server.

Remove On-Prem Server

1. Close all workspaces in your On-Prem Server.
2. At the top right, click your avatar.
3. In the Manage Cloud window, select the On-Prem Server.
4. Click **Sign Out**.
5. Right-click your server and select **Remove On-Prem Server**.
6. Click **Delete**.

View Usage

1. At the top right, click your avatar.
2. In the Manage Cloud window, select the On-Prem Server.
3. Your usage will be shown.

Change Your Picture

1. At the top right, click your avatar.
2. In the Manage Cloud window, select the On-Prem Server.
3. Click your avatar.
4. Choose an image file.

Manage Your Account

You can change your password, enable Two-Step Verification, etc in your On-Prem Server web portal.

1. At the top right, click your avatar.
2. In the Manage Cloud window, select the On-Prem Server.
3. Click **Manage Account**.
4. A web browser will automatically open up to your On-Prem Server web portal.

Push & Cache Management

Push Synchronization

Push Synchronization keeps your local client instantly updated by receiving silent notifications whenever the synchronized files are modified.

Enable Push Synchronization

1. At the top right, click your avatar.
2. In the Manage Cloud window, right-click Navicat Cloud or your On-Prem Server.
3. Turn on **Enable Push Synchronization**.

Disable Push Synchronization

1. At the top right, click your avatar.
2. In the Manage Cloud window, right-click Navicat Cloud or your On-Prem Server.
3. Turn off **Enable Push Synchronization**.

Cache and Local Copies

When you logged into Navicat Cloud or your On-Prem Server, Navicat BI Viewer saves the cloud object files and some information in the local computer. The cache and local copies use to make sure your changes are saved in the cloud.

Clear Cache and Local Copies

1. At the top right, click your avatar.
2. In the Manage Cloud window, select Navicat Cloud or your On-Prem Server.
3. Click **Sign Out**.
4. Right-click Navicat Cloud or your On-Prem Server and select **Clear Cache and Local Copies**.
5. Click **Clear**.

Open Containing Folder

1. In the main window, select Navicat Cloud or your On-Prem Server.
2. Open your project.
3. Right-click anywhere in the project and select **Open Containing Folder**.

Work With Projects

A project is a way to structure and organize Navicat objects. You can put related objects in one project, and then share the project with other accounts for collaboration if necessary.

Create New Projects

1. In the main window, select **Navicat Cloud** or your On-Prem Server.
2. Click **+ New Project**.
3. Enter the name of the new project.
4. Click **OK**.

Manage Existing Projects

To rename a project

1. In the main window, right-click the project and select **Rename**.
2. Enter a new project name.

Note: Only the project owner and the members with the *Can Manage & Edit* right can rename the project.

To delete a project

1. In the main window, right-click the project and select **Delete Project**.
2. Click **Delete**.

Note: Only the project owner can delete the project.

Note: Before you delete the project, you must remove all objects in the project.

1. **To quit a project**
2. In the main window, right-click the project and select **Quit Project**.
3. Click **Quit**.

Add Members

1. In the main window, right-click the project and select **Manage Members**.
2. Click **Add Members**.
3. [Navicat Cloud] Enter the member's Navicat ID and press ENTER.
4. [On-Prem Server] Check the boxes of the users that you want to add.
5. Select the member right.
6. Click **Add**.

Member Rights	Privileges
Can Manage & Edit	Read Objects, Write Objects, Manage Members and Rename Projects
Can Edit	Read Objects and Write Objects
Can View	Read Objects

Manage Existing Members

To edit the right of a member

1. In the main window, right-click the project and select **Manage Members**.
2. Use the drop-down list next to the member to change the right.
3. Click **Apply**.

To remove a member from a project

1. In the main window, right-click the project and select **Manage Members**.
2. Click the **X** icon next to the member.
3. Click **Apply**.

Chapter 4 - Workspace Handling

Open Workspace

There is not necessary to establish server connections to view your workspace file if the data sources are set to the archive mode. However, please bear in mind that all data sources in the archive mode will not contain the most up-to-date data.

Hint: You can clear all saved passwords and file connection paths in a workspace by choosing **File** -> **Clear All Cached Passwords/File Connection Paths for This Workspace**.

Open Local Workspace File

If you have been provided with a workspace file (.nbi), you are allowed to view its dashboards.

1. In the menu bar, choose **File** -> **Open** -> **Workspace**.
2. Browse your workspace file.
3. Enter the passwords for connecting the servers set in the data sources.

Open Workspace in Navicat Cloud

If you have logged in Navicat Cloud, you can open the workspace files that are synchronized to your Navicat ID.

1. In the main window, select Navicat Cloud in the Navigation pane.
2. Open a project.
3. Open your workspace file.
4. Enter the passwords for connecting the servers set in the data sources.

Open Workspace in On-Prem Server

If you have added and logged in your On-Prem Server, you can open the workspace files that are synchronized to your user account.

1. In the main window, select your On-Prem Server in the Navigation pane.
2. Open a project.
3. Open your workspace file.
4. Enter the passwords for connecting the servers set in the data sources.

Present Chart / Dashboard

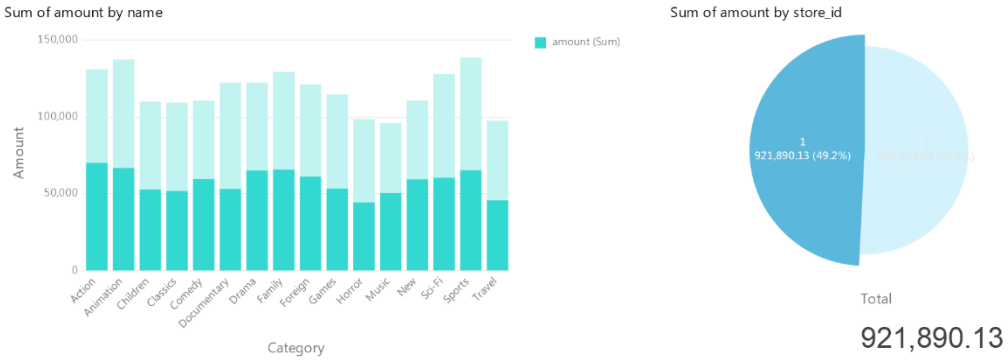
You can present charts and dashboards using the whole screen. The title bar, Pages pane and Properties pane will be hidden while in this mode. To open a chart or a dashboard in present view, click or **Present** in the Properties pane.

Use the arrow keys to navigate between pages.

To exit present view, press the ESC key and the workspace window will be returned to its previous state.

Chart Interaction

If chart interaction is turned on, you can select a data point on one of the charts and all the other charts on the dashboard page that contain the same data will change based on your selection.



If the dashboard contains a control chart, you can filter the data series of all charts by using the control.

Sort Chart

In presentation mode, you can organize your data in a chart with one click. You can sort data series by a value.

1. Hover over a chart until you see the icon in the upper-right corner.
2. Click the icon to sort on a different value and select the sorting order.

Use Parameter

If you assigned a parameter, BI will automatically render a functional control during presentation mode. You can then dynamically adjust the value of that specific measure on during presentation.

To change the parameter value:

1. In presentation mode, right-click the page and select **Modify Parameter Value**.
2. Select your desired parameter from the list.
3. Change the value manually.

Hint: If you assigned a numeric range rule to your parameter, you can dynamically adjust the value of that specific measure by dragging the interactive slider.

Print & Export

Navicat BI Viewer provides straightforward options to directly print physical copies of your dashboard pages or export them into versatile digital formats for reports and presentations.

Print Dashboard

To send your dashboard pages directly to a physical printer:

1. Choose **File** -> **Print**.
2. Configure your specific printing preferences in the pop-up window that appears.

Export Dashboard to File

To save your dashboard pages as a digital document or image:

1. Choose **File** -> **Export To**.
2. Select your desired file format to create a PDF, PNG, SVG, or JPG file of your dashboard pages.

Chapter 5 - Other Advanced Tools

Share via URI

Navicat BI Viewer allows you share a workspace with your teammates by the URI of the workspace. Navicat users can use the generated URI to access the workspace.

Obtain URI

You can obtain the URI of a workspace in the General tab of the Information pane. Simply click **Share** and copy the URI in the popup window. You can enable **Hide host info** to remove the connection host parameter in the URI.

Open Object via URI

1. In the main window, choose **File** -> **Open with Navicat URI**.
2. Paste the URI.
3. Click **OK**.
4. Change the connection mapping by clicking **Other Options** if necessary.

Option	Description
Mapped Connection	Automatically map the connection in the URI to the connection with the most similar information in Navicat.
Existing Connection	Choose an existing connection in Navicat.
New Connection	Create a new connection in Navicat.

5. Open the object.

Theme & Search Preferences

Navicat BI Viewer includes UI personalization tools and built-in search filters to help you customize your workspace and locate specific assets quickly.

Dark Theme

In Dark Theme, Navicat BI Viewer uses a darker color palette for all windows, views, menus, and controls.

To change your theme, choose **File** -> **Options** -> **General**. Then, select **Dark**.

Search Filter

Navicat BI Viewer provides search filters to help you quickly locate specific objects or items:

- Using the Search Box - Click and enter your search string in the **Search** text box to filter and display matching objects or items.

Chapter 6 - Configurations

Navicat BI Viewer provides a comprehensive Options window to customize the user interface, optimize database performance, configure file locations, and manage external environment integrations.

To open the Options window, choose **File** -> **Options** from the menu bar.

General

These settings govern core workspace behaviors, interface themes, hierarchical navigation layouts, and protective confirmation dialogs to streamline your daily workflow.

Option	Description
General	
Theme	Choose between using your OS system theme or a dedicated Dark theme.
Check for updates on startup	Allow Navicat BI Viewer to automatically ping update servers on launch to check for newer version releases.
Usage Data	
Share Usage Data	Allow Navicat BI Viewer to securely transmit anonymous usage analytics from your device to assist developers with stability and feature improvements. Click the **Usage Data** button to inspect exactly what telemetry data is shared.

File Locations

Manage where Navicat BI Viewer stores vital background and internal files on your local machine.

Option	Description
Profile/Data Location	Define the folder for storing background files, logs, and custom profiles.

If you want to configure individual folder locations for logs and profiles, you can enable **Manually configure individual folder locations** to unlock the following settings:

Option	Description
Logs Location	Define the system output folder where Navicat BI Viewer writes performance logs and application diagnostics.
Profiles Location	Define the folder for storing internal files.

Connectivity

The Connectivity settings allow you to secure your connections, configure proxy routing, and test network stability.

Option	Description
General	

Verify server certificate against CA	Activate strict security verification requirements demanding remote server certificates pass validation checks against your machine's trusted Certificate Authority (CA) registry list.
Proxy	
Use proxy	Route network requests through an internal proxy infrastructure.
Proxy Type	Select your communication layer protocol type (HTTP or SOCKS5).
Host	Enter the IP address or designated network domain name of your proxy server.
Port	Enter the active connection port monitored by your proxy server.
User Name / Password	Enter your network account credentials if your proxy endpoint enforces access authentication checks.
Connectivity Diagnosis	
Test Connectivity	Perform a real-time network diagnosis to check live communication stability between the active web services and your machine.

Environment

The Environment settings let you map runtime libraries to support specific database connections.

Option	Description
OCI Environment	
OCI library (oci.dll)	Specify the location of the Oracle Call Interface runtime library (oci.dll). By default, Navicat BI Viewer automatically targets its built-in bundled oci container library. Oracle Instant Client is the simplest way to deploy a full Oracle Client application built with OCI, OCCI, JDBC-OCI, or ODBC drivers. It provides the necessary Oracle Client libraries in a small set of files. Download the appropriate Instant Client packages for your platform and the CPU. All installations REQUIRE the Basic or Basic Lite package. Unzip the packages and set the path points to it.

Logging

Logging preferences help you track operational history and troubleshoot application issues by writing data directly to your local machine.

Option	Description
Enable history logging	Store the statements or scripts of all operations executed over databases and database objects inside your designated Logs location. You can set the maximum number of files to keep and the file size of each file.
Enable diagnostic logging	Generate diagnostic execution scripts directly inside your designated Logs location to trace underlying errors and

	troubleshoot runtime application issues. You can set the maximum number of files to keep and the file size of each file.
Open Containing Folder / Export Logs	Open the physical directory on your local machine where log files are stored, or export your active log files into a compressed file.

Advanced

The Advanced settings control core application behavior within your host operating system.

Option	Description
Register on "Open with" List	Automate OS shell registration tasks to permanently append Navicat BI Viewer to the native Windows file menu "Open with" app recommendation matrix.
Register Navicat URI Protocol	Bind the Navicat URI network communication protocol handler across the Windows environment. Once registered, clicking a structured navicat:// web hyperlink pattern will automatically launch your local Navicat BI Viewer program and parse the parameters to link with target object automatically.

Chapter 7 - Hot Keys

Here is the comprehensive guide to Navicat BI Viewer's keyboard shortcuts, broken down by functional areas so you can find exactly what you need to keep clicking to a minimum.

Common

Keys	Action
CTRL+TAB	Next Window
CTRL+,	Open Options Window

Workspace

Keys	Action
F5	Present Dashboard
CTRL+P	Print Dashboard
CTRL+R	Refresh Data

Chapter 8 - Log Files

Navicat BI Viewer maintains several log files to keep track of the actions and operations performed within the software. By default, these files are located in your logs directory (for example, C:\Users\Guest\Documents\Navicat BI Viewer\logs\), though you can customize this destination path in Options.

Available Log Files

File	Description
history.log	Store the statements or scripts of all operations executed over databases and database objects in Navicat BI Viewer. **Note:** You can enable this log and set the maximum number of files to keep and the file size in Options.
navicat.log	Store information to assist with tracking down any problems in Navicat BI Viewer. **Note:** You can enable this log and set the maximum number of files to keep and the file size in Options.