



# Navicat BI Viewer

Version 2 User Guide



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# Chapter 1 - Introduction

## About Navicat BI Viewer

**Navicat BI Viewer** is an easy-to-use tool for viewing BI workspace files. With its friendly Graphical User Interface (GUI), Navicat BI Viewer allows you to navigate workspaces designed by Navicat's BI feature or Navicat BI. You can access local workspace files, or workspace files stored in Navicat Cloud or Navicat On-Prem Server.

Navicat BI Viewer allows you to share workspace files with someone who does not have Navicat and Navicat BI running on his computer but has Navicat BI Viewer installed. It highly increases the flexibility and convenience for viewing workspace files. It also gives you the ability to export dashboards to PDF files and other image file formats.

Navicat BI Viewer is available on three platforms - Microsoft Windows, macOS and Linux.

For details, visit our website: <https://www.navicat.com>

### System Requirements

#### Windows

- Microsoft Windows 7, Windows 8, Windows 8.1, Windows 10, Windows 11, Server 2012, Server 2016, Server 2019, Server 2022

#### macOS

- macOS 11 Big Sur, macOS 12 Monterey, macOS 13 Ventura, macOS 14 Sonoma

#### Linux

##### x86\_64

- Debian 10, Debian 11, Debian 12, Ubuntu 20.04, Ubuntu 22.04, Ubuntu 24.04, Fedora 38, Fedora 39, Fedora 40, Linux Mint 20, Linux Mint 21, Deepin 20, KylinOS Desktop 10

##### aarch64

- Debian 11, Debian 12, Ubuntu 22.04, Ubuntu 24.04, Fedora 38, Fedora 39, Fedora 40, Linux Mint 20, Linux Mint 21, KylinOS Desktop 10

## Installation

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.

### Installation for CD Version

1. Load the Navicat BI Viewer CD Installation disk into the CD-ROM drive.
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, click **Browse**.
6. Follow the remaining steps.

## Registration

When the trial period is finished, Navicat BI Viewer requires a license key or a subscription plan to continue using the features.

**Note:** Perpetual License and Subscription Plan cannot be used at the same Navicat BI Viewer. Before changing the registration method, you need to deactivate the license key or sign out your Navicat ID.

### Perpetual License

If you have purchased a perpetual license, you will receive a license key for activating Navicat BI Viewer.

In the **Perpetual License** section, paste your license key (16 digits) and click the **Activate** button. Navicat BI Viewer contacts our licensing server to activate the license key. If the activation process is successful, the license key details are displayed.

### Manual Activation

Manual activation is available when your computer does not have an internet connection. You will need another computer with an internet connection to complete this activation process.

1. If the online activation is failed, click **Manual Activation**.
2. Copy the Request Code in the **Copy the Request Code Here:** box.

3. Open web browser on a computer with an internet connection and then go to [https://customer.navicat.com/manual\\_activate.php](https://customer.navicat.com/manual_activate.php).
4. Paste/Enter the Request Code into the left box.
5. Click **Get Activation Code**.
6. Copy the generated Activation Code in the right box.
7. Go back to the computer where you are activating Navicat BI Viewer.
8. Paste the Activation Code into the **Paste the Activation Code Here:** box.
9. Click **Activate**.

## Subscription Plan

If you have subscribed a plan, you can sign in your Navicat ID to use Navicat BI Viewer during the subscription term.

**Note:** Navicat ID is the Email address that you used to subscribe the plan.

In the **Subscription** section, provide your **Navicat ID** and **Password**. After signed in, the subscription plan details are displayed.

Navicat BI Viewer contacts our licensing server once per hour to auto reload the plan by default. If you have updated your plan in the portal site, you can use the **Reload Plan** button to force reloading the new plan.

**Note:** Each Navicat ID can connect to only one Navicat BI Viewer. If you sign in your Navicat ID in another Navicat BI Viewer, you will be signed out from the current Navicat BI Viewer.

## Migration / Upgrade

### Migrate Navicat BI Viewer to a new computer

1. In Navicat BI Viewer, choose **Help** -> **Registration**.
2. [Perpetual License] Click **Deactivate** to online deactivate the license key.
3. [Subscription Plan] Click **Sign Out** to sign out your Navicat ID.
4. Uninstall Navicat BI Viewer from the existing computer.
5. 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.

Or, you can submit your registered email address on the [Customer Center](#) to download the latest version installer.

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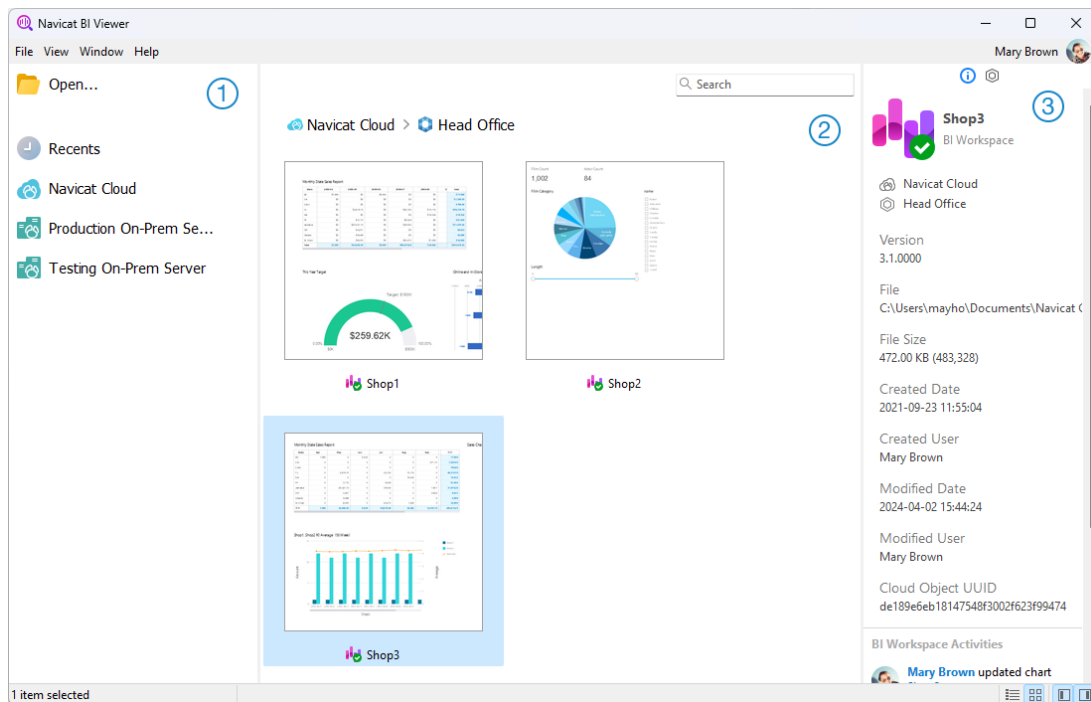
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# Chapter 2 - User Interface



## Main Window



### ① Navigation Pane


The Navigation pane allows you to open local workspace files, recently opened workspace files, or workspace files in Navicat Cloud / On-Prem Server. If the Navigation pane is hidden, choose **View -> Show Navigation Pane** from the menu bar.

### ② Content Pane

The Content pane contains the workspaces that are in the selected section of Navigation pane. To change the view, click the  **Detail** or  **Icon** buttons.

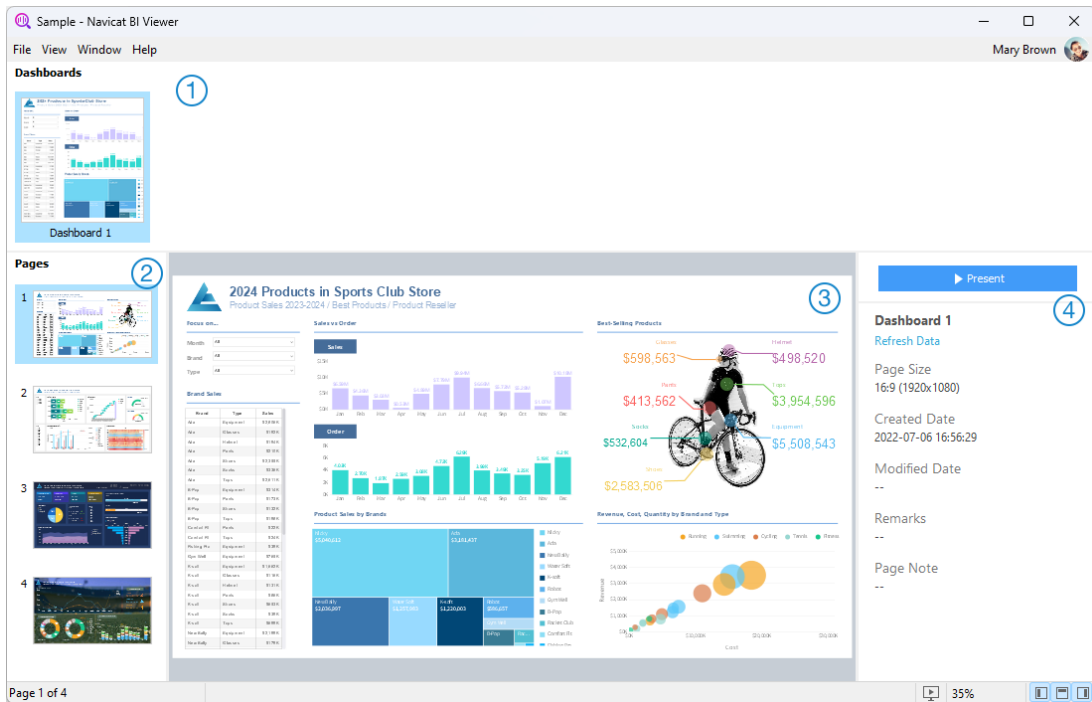
### ③ Information Pane

The  **General** tab shows the general information of the workspace or the selected item.

The  **Project** tab shows the project members and the project activities done by the members. Click **+** to add members to the project.

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

# Workspace Window



## ① Dashboard List Pane

The Dashboard List pane shows all dashboards in the workspace. Click on the dashboard to open it. If the Dashboard List pane is hidden, choose **View -> Show Dashboard List** from the menu bar.

## ② Pages Pane

The Pages pane shows thumbnail images of each page in the dashboard. If the Pages pane is hidden, choose **View -> Show Pages** from the menu bar.

## ③ Dashboard Pane

The Dashboard pane shows the selected dashboard page. You can hover over a data point on a chart to view the tooltip.

## ④ Properties Pane

The Properties pane shows the detailed information of the dashboard. If the Properties pane is hidden, choose **View -> Show Properties** from the menu bar.

# Chapter 3 - Collaboration

## About Collaboration

Navicat BI Viewer allows you to synchronize connections, BI workspaces and virtual groups from Navicat BI, other Navicat family members, different machines and different platforms. You can use Navicat Cloud to host the files. Or, if you have installed our another product, Navicat On-Prem Server, in your environment, you can hosts everything in-house.

Our collaboration feature allows you to give your teammates access to your projects when they log into their accounts. That way, you and your teammates can work on the same project without revealing your username and password. You can even choose to restrict the type of access your teammates have to your project.

## Manage Cloud

### Navicat Cloud

**Navicat Cloud** is a cloud service provided by PremiumSoft for synchronizing connections, queries, aggregation pipelines, snippets, model workspaces, BI workspaces and virtual groups.

Navicat Cloud could not connect and access your databases. By which it means, it could only store your connection settings, queries, aggregation pipelines, snippets, model workspaces, BI workspaces and virtual groups; your database passwords and data (e.g. tables, views, etc) will not be stored to 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. In the menu bar, choose **File** -> **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. In the menu bar, choose **File** -> **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 and virtual groups) 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. In the menu bar, choose **File -> 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. In the menu bar, choose **File -> 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. In the menu bar, choose **File -> 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 Synchronization

Push Synchronization enables Navicat BI Viewer to receive a silent push notification whenever the files stored in Navicat Cloud or On-Prem Server changes.

### 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**.

## Projects

### 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.

### To quit a project

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

## Manage Members

### 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.

### 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.

**Hint:** You can clear all saved passwords in a workspace by choosing **File -> Clear All Passwords in Workspace**.

### 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.

**Hint:** You can clear all saved passwords in a workspace by choosing **File -> Clear All Passwords in Workspace**.


### 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.

**Hint:** You can clear all saved passwords in a workspace by choosing **File -> Clear All Passwords in Workspace**.

# Present Dashboard

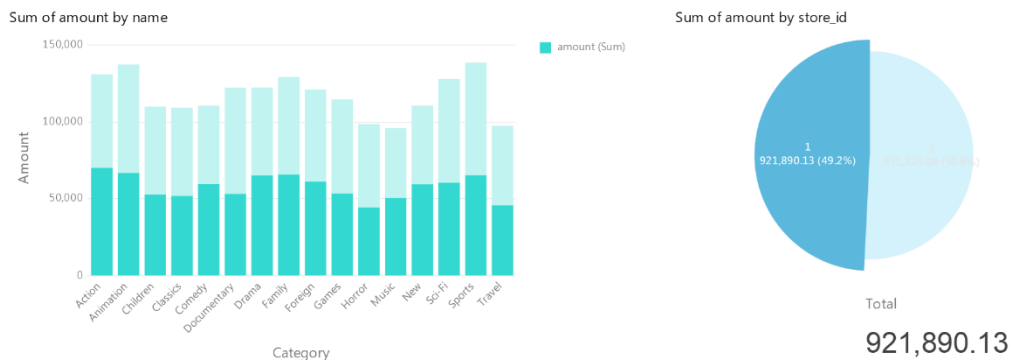
You can present the dashboard using the whole screen. The title bar, Dashboards pane, Pages pane and Properties pane will be hidden while in this mode. To open a dashboard in present view, click  or **Present** in the Properties pane.

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 the Present 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.

# Print & Export Dashboard

## Print to a printer

Choose **File -> Print** to send your dashboard pages directly to the printer. You can set the printer option in the pop-up window.

## Export to a file

Choose **File -> Export To** and choose the file format to create a PDF, PNG, SVG or JPG file of your dashboard pages.



# Chapter 5 - Other Advanced Tools

## Useful Features

Navicat BI Viewer provides variety of tools that improve user experience when working on workspaces.

- [Search Filter](#)
- [Dark Theme](#)

## Focus Mode

**Focus** is a feature that helps you reduce distractions and set boundaries. It removes everything from the screen except the form you are working and enters the full screen mode.

When you want to concentrate on a specific activity, you can turn it on by simply choosing **View -> Focus Mode**.

To exit Focus Mode, you can simply choose **View -> Focus Mode**.

## Share via URI

Navicat BI Viewer allows you share a workspace with your teammates by the URL 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.

## Search Filter

Navicat BI Viewer provides search filters for searching your objects in the main window and tree structures.

In the main window, enter a search string in the  **Search** text box.

In the tree structures, click on the tree to focus and enter a search string directly.

You can remove the filter by deleting the search string.

## Dark Theme

In Dark Theme, Navicat BI Viewer uses a darker color palette for all windows, views, menus, and controls. It works on all supported versions of Windows.

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

# Chapter 6 - Configurations

## Options Settings

Navicat BI Viewer provides several options for customizing its user interface and performance.

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

## General

### General

#### Theme

Choose to use the theme of your Windows OS or a Dark theme.

**Hint:** Restart Navicat BI Viewer to take effect.

#### Check for updates on startup

Check this option to allow Navicat BI Viewer checks for new version when it starts.

### Usage Data

#### Share Usage Data

Check this option to let your device sends us information about how you use Navicat BI Viewer to help us improve it. You can view the information being shared by clicking the **Usage Data** button.

## File Locations

### Logs Location

Navicat BI Viewer provides number of [log files](#) to keep track on the actions have been performed in Navicat BI Viewer and they are located in the Logs Location path.

### Profiles Location

The internal files of Navicat BI Viewer are located in the Profiles Location path.

## Connectivity

### General

#### Verify server certificate against CA

Enable this option to verify that the server certificate against the list of trusted CA.

## Proxy

Enable the **Use proxy** option to configure Navicat BI Viewer to use proxy in order to make its network connections.

### Proxy Type

Specify the type of your proxy server: HTTP or SOCKS5.

### Host

The host name of your proxy server.

### Port

The port number of your proxy server.

### User Name / Password

If your proxy server requires authentication, you can enter a username and a password.

## Connectivity Diagnosis

Click **Test Connectivity** to test the network connectivity between the web service and your machine.

# Environment

## OCI Environment

### OCI library (oci.dll)

Specify the location of the OCI library (oci.dll) for Oracle connection. By default, it is set to the bundled one in Navicat BI Viewer installation folder.

**Hint:** Restart Navicat BI Viewer to take effect.

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. You can also download Oracle Instant Client through -

### [Oracle Instant Client](#)

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.

# Advanced

## Enable diagnostic logging

Generate a log file in [Logs Location](#) to assist with tracking down any problems in Navicat BI Viewer.

**Hint:** Restart Navicat BI Viewer to take effect.

### **Register on "Open with" List**

Register Navicat BI Viewer program to the "Open with" list in Windows.

### **Register Navicat URI Protocol**

Register Navicat URI protocol in Windows. When clicking a Navicat URI link, Navicat BI Viewer opens and adds the corresponding Navicat On-Prem Server using the parameters in the URI.

# Chapter 7 - Hot Keys

## BI Viewer Hot Keys

Keys	Action
F5	Present Dashboard
CTRL+P	Print Dashboard
CTRL+R	Refresh Data
F11	Focus Mode
CTRL+U	Open with Navicat URI
CTRL+TAB	Next Window

# Chapter 8 - Trace Logs

## Log Files

Navicat BI Viewer provides number of log files to keep track on the actions have been performed in Navicat BI Viewer and they are located in the **logs** directory, e.g. C:\Users\Guest\Documents\Navicat BI Viewer\logs\. You are allowed to change the log files location under [Options](#).

File	Description
history.log	Store the statements or scripts of all operations executed over databases and database objects in Navicat BI Viewer. <b>Note:</b> This log will be overwritten while Navicat BI Viewer is being restarted.
navicat.log	Store information to assist with tracking down any problems in Navicat BI Viewer. You can enable this log in <a href="#">Options</a> . <b>Note:</b> This log will be overwritten while Navicat BI Viewer is being restarted.