Enterprise Reporting Solution

Report Viewer Guide

Product Version 6.2

Last Updated 5/23/2019

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Introduction

Argos is a powerful reporting solution designed for everyone from novice users to the most seasoned technical experts. For ease of use, Argos users are divided into three distinct types:

DataBlock Designers: Argos "power users" who create DataBlocks.

Report Writers: Intermediate users who use DataBlocks to build a variety of reports.

Report Viewers: Casual users who are able to run reports and save and distribute the output in a variety of useful formats.

Each user type has a corresponding guide associated with it. This guide is intended for Report Viewers. Regardless of your level of expertise, Evisions recommends that you become familiar with this guide before moving on to more advanced features.

Once you have completed this guide, you should be able to:

- Launch and log in to Argos
- Navigate the menus and Explorer View
- Run a variety of reports and save the output
- Know where to find additional help

These guides are designed to illustrate the features of the product. Additional information regarding specific features can be found by accessing the help system built into Argos. From within Argos, you can use the Help button or press the F1 key to launch the help.

Evisions Support Site

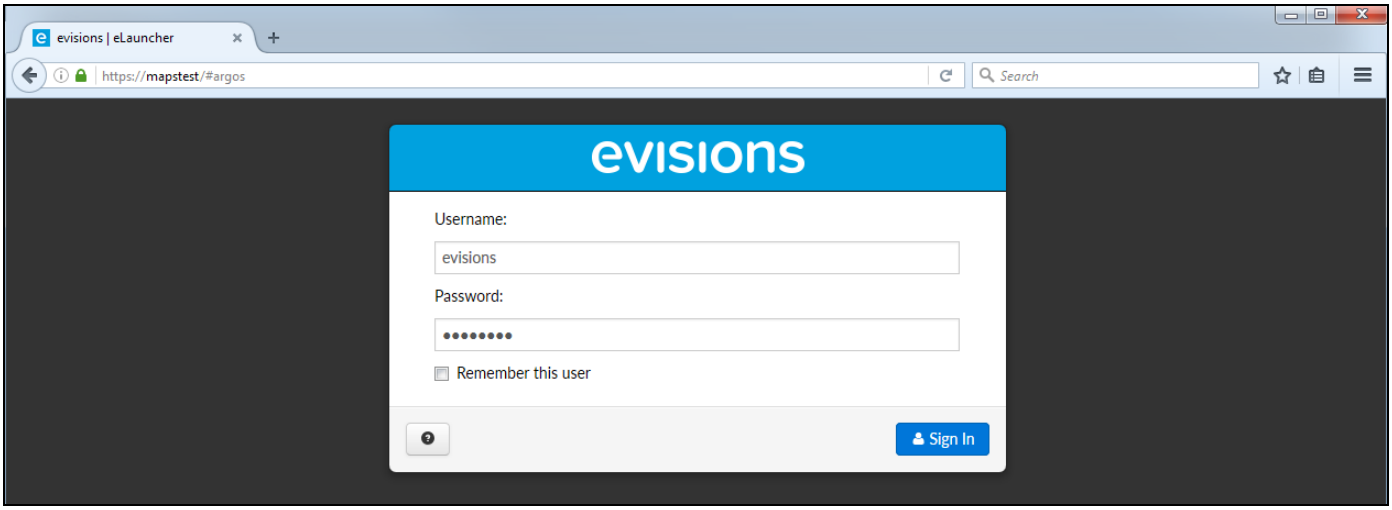
The easiest way to get to the Evisions support site is to access it through Argos. Under the Help menu is a link to the Support page. A link to the Support page also exists on the Argos toolbar. The Support page contains links to the Knowledge Base, documentation, andHelpDesk.

Evisions can also provide more in-depth and even customized training via our Professional Services department. Visit the Consulting Services page on the Evisions web site at http://www.evisions.com/Services/Overview.aspx.

Logging In

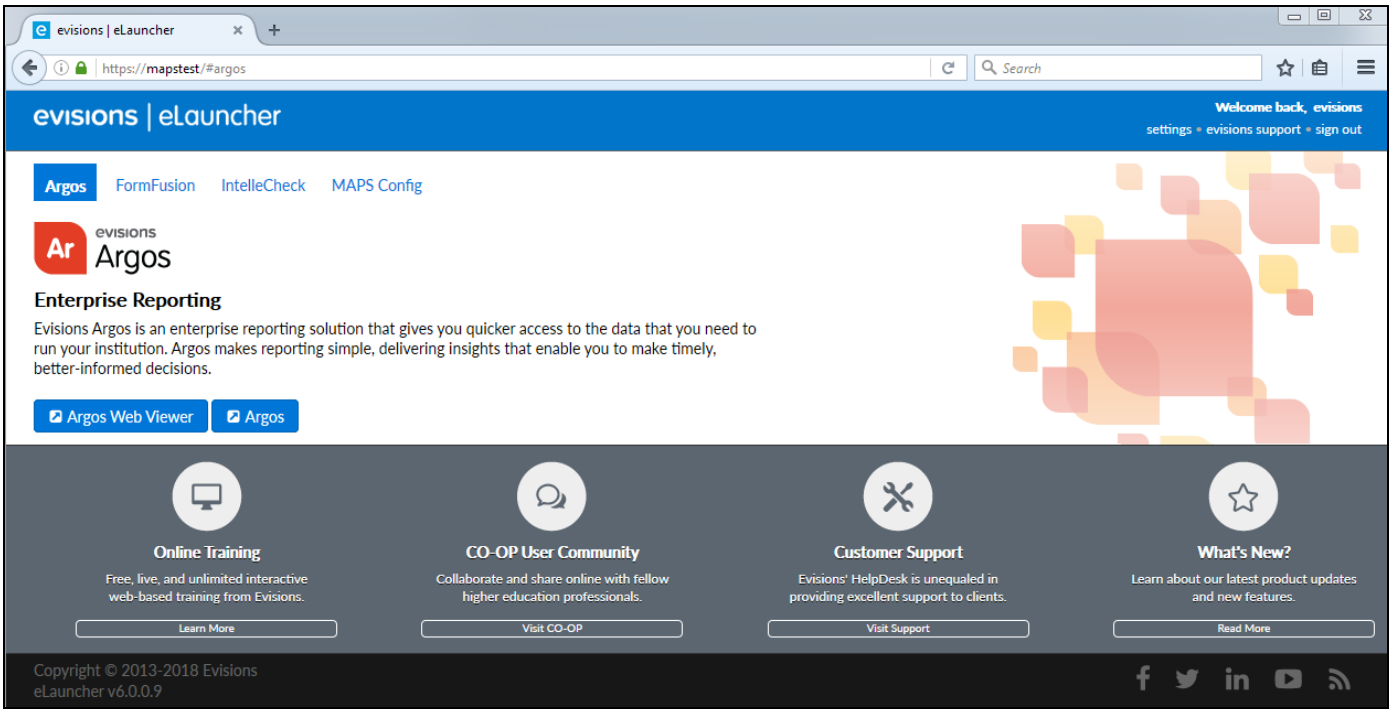
Logging In to the eLauncher

In your web browser, navigate to the URL provided by your MAPS administrator. Depending on whether this url begins with HTTP or HTTPS, you may be prompted to log in at this time. For HTTPS, enter the username and password provided by your MAPS administrator (or your LDAP or CAS credentials if MAPS has been configured to use single sign-on).



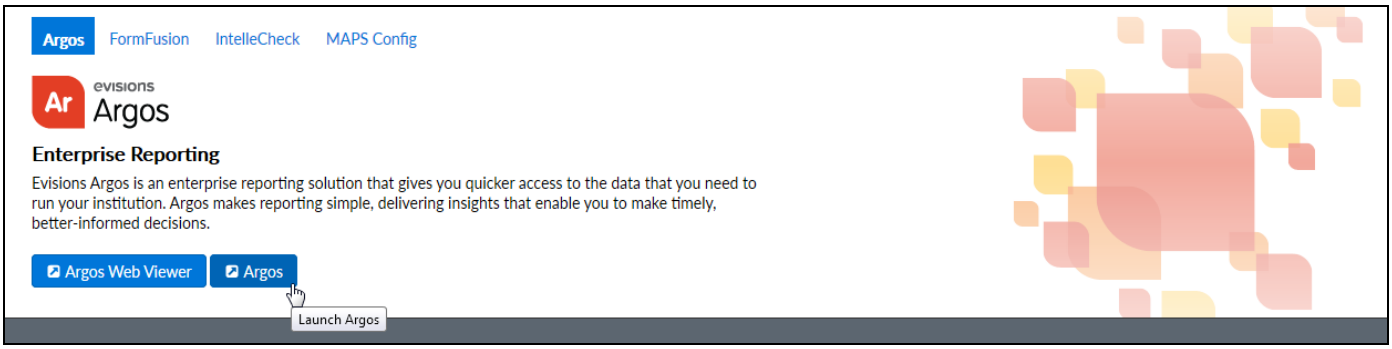
If desired, check the **Remember this user box**. Then, click **Sign In**.

The MAPS eLauncher provides a single location from which you can launch any of the MAPS applications, access online training and support resources, or see the new features in the latest releases.



Launching Application Clients

To launch an application client, navigate to the product you wish to use and then click the launch button for that product.

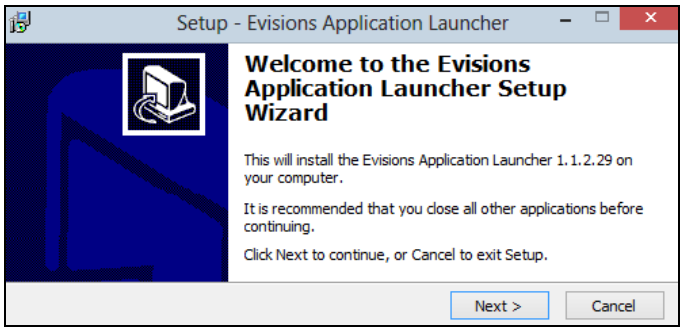


If this is your first time logging in on this computer, you will be prompted to install the **Evisions Application Launcher** (EAL). Follow the prompts on your screen to continue.

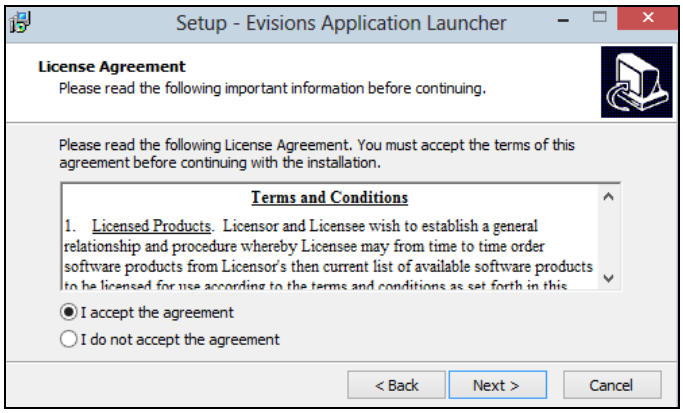
Note: If you do not have permission to install applications on your machine, you may need to consult with your IT department for assistance.

Installing the Evisions Application Launcher

Click the link to download the **setup.exe** file. When it has finished downloading, double-click on it to run the installer



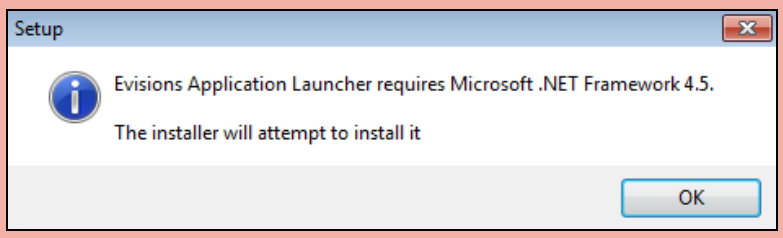
Follow the prompts on the screen. Click Next to continue.



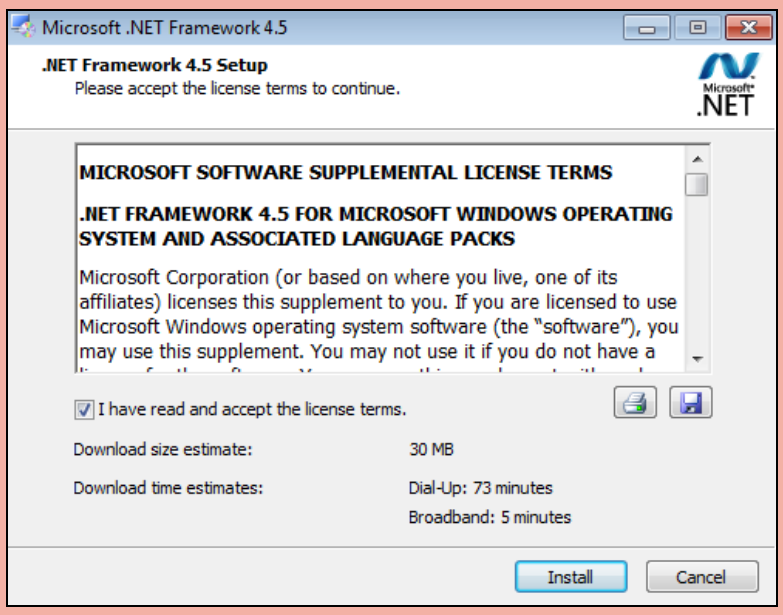
Review and accept the license agreement, then click Next.

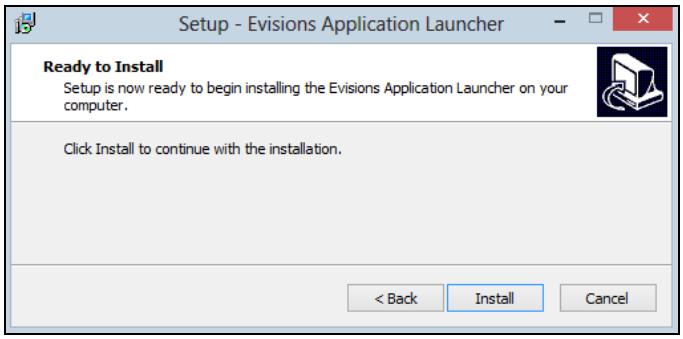
Microsoft .NET Framework is Required

If your machine does not have the Microsoft .NET framework already installed, you will be prompted to install it as part of the EAL setup.



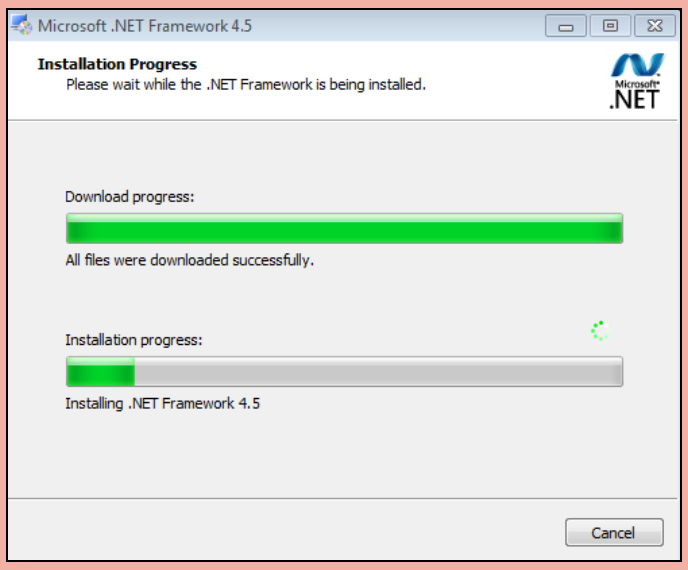
Review and accept the license agreement, then click Install to proceed.

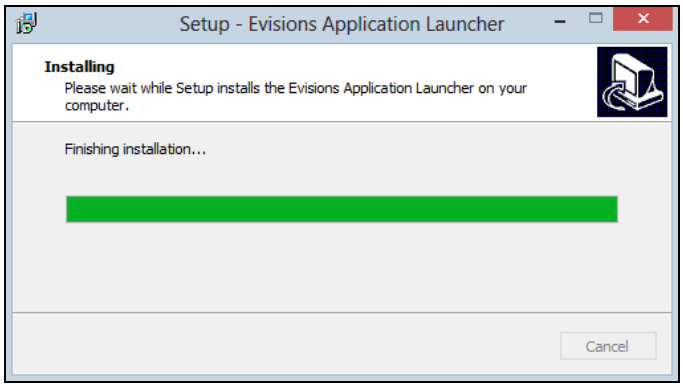




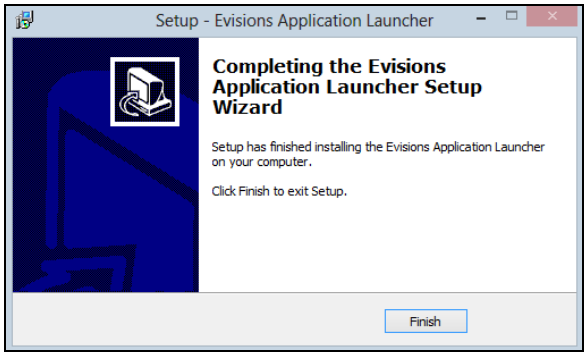
Click Install to continue.

If you are installing the Microsoft .NET Framework at the same time, it will install alongside the Evisions Application Launcher.

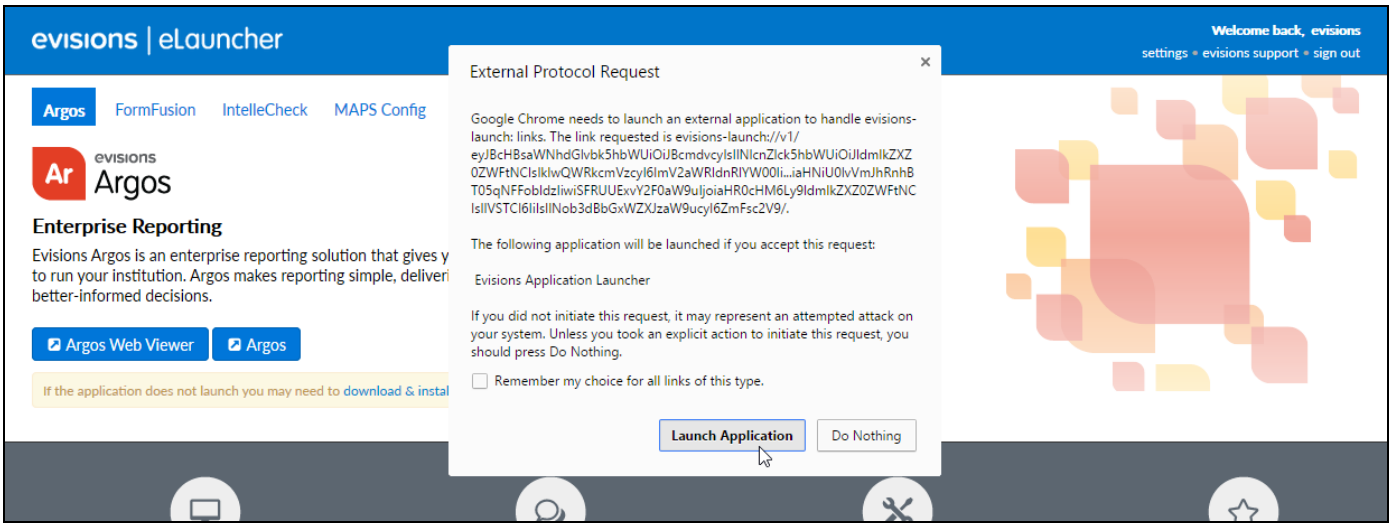




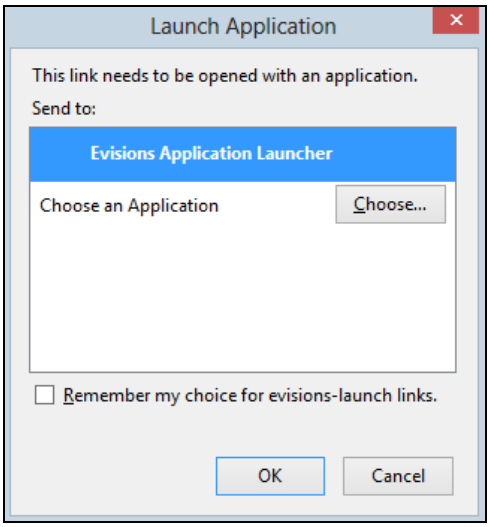
Once the installation is complete, click Finish to close the installer.

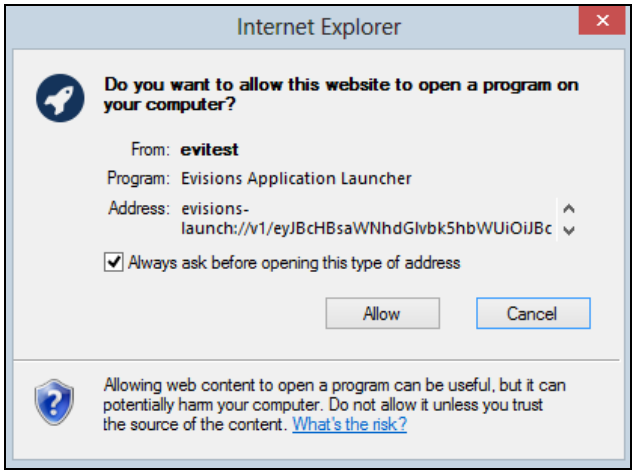


When the EAL is installed, when you launch an application you may see a prompt informing you that the browser is trying to run an external program, and asking whether you wish to proceed.



The prompt looks slightly different in different browsers:

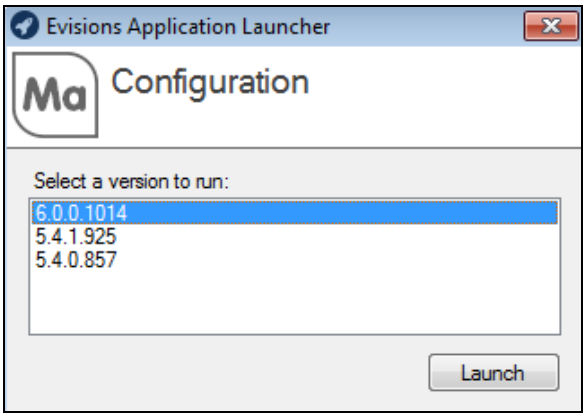




If you do not wish to see this prompt every time you launch a MAPS application, check or uncheck the box as desired. Then, click the button to allow the launcher to run.

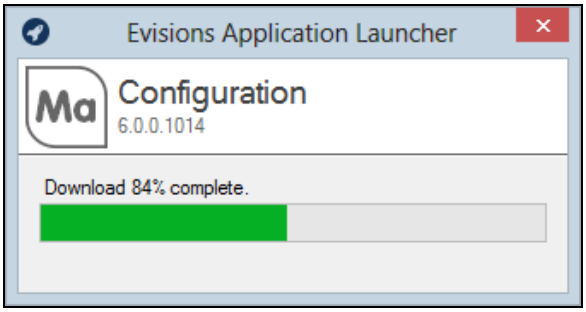
Providing you have the latest version of the application installed, and there is only one version available on the server, the application will then launch.

If there are multiple versions of the application available, you will see a prompt asking you to choose a version to run.



Select the desired version, then click **Launch**.

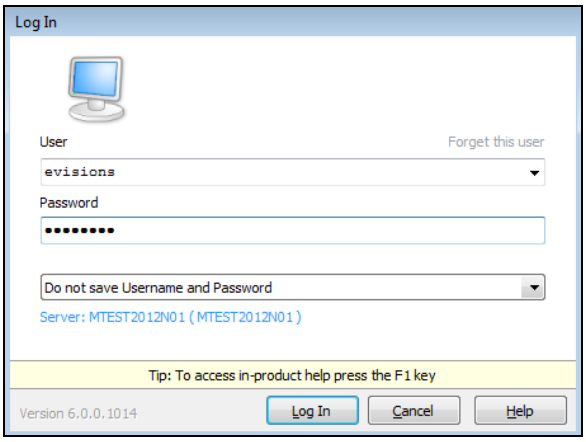
If the application or application version you selected is not already installed on your computer, it will download now.



When finished, the application will launch.

Logging In to the Application Clients

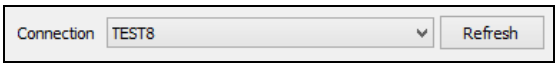
This is the main login screen for all of the MAPS applications. It may look slightly different depending on which application you are logging in to. If you do not use the HTTPS version of the eLauncher to log in, you will be prompted to enter your username and password here to proceed to the application. MAPS administrators will always be prompted to log in to the Configuration tool, even if they have already logged in to the eLauncher. Similarly, IntelleCheck users must log in each time they access a different area of IntelleCheck, for added security when processing payments.



There are several options you can configure to meet your needs:

- **Forget this user** - removes this user from the list of saved usernames in the dropdown list.
- **Do not save username and password** - do not save either the username or the password that you enter.
- **Save username** - adds this user to the list of saved usernames in the dropdown list.
- **Save username and password (if allowed by server)** - saves the password for this username, if password saving is enabled in MAPS. **Note:** for security reasons, you cannot save passwords when logging in to the Configuration tool.
- **Server** - Click on the server name for additional options to change the server you are logging in to or the port number for that server.

IntelleCheck users have an additional option to select the database connection prior to login:



The available connections depend on your user's permission settings in MAPS. If you do not see the connection you want to use, enter your username and password above and then click **Refresh**. Your MAPS administrator can provide further assistance with data connection permissions.

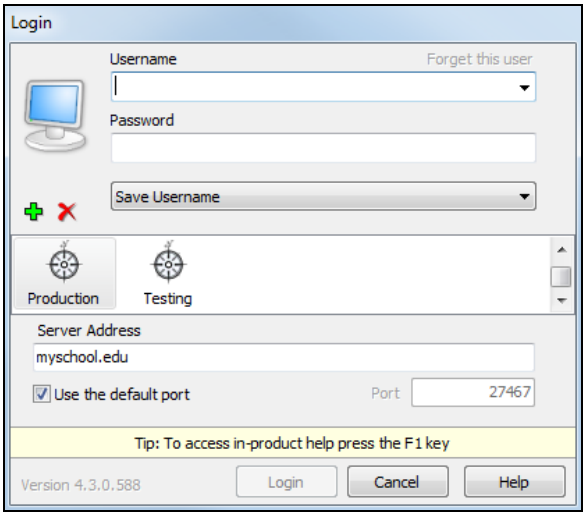
Once you have entered all information, click the **Log In** button to launch the application. You should consult your MAPS administrator if you aren't sure what your username and password are.

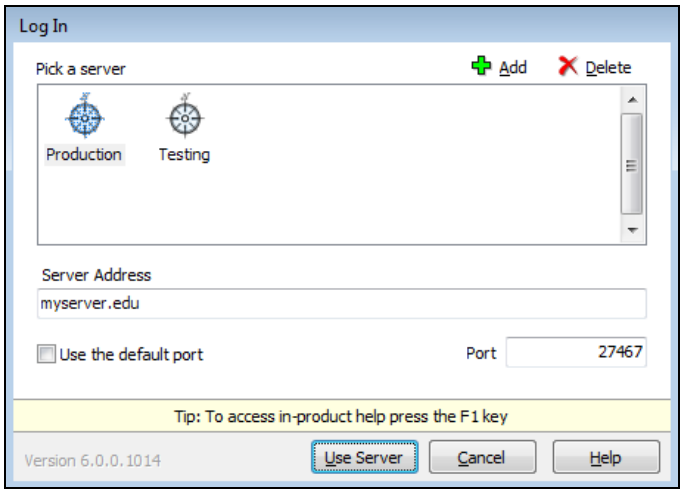
Failed Login Attempts

Depending on your institution's password policy, users who enter an incorrect password may be disabled after a certain number of failed login attempts. Unless your MAPS administrator has specified otherwise, you will be able to try again after 1 hour. If your account does not reactivate, please contact your MAPS administrator.

Server Selection

The Servers section looks slightly different depending on the product and version you are running:





- **Green "+" sign / Add button** - allows you to add a server to the list of available servers.
- **Red "X" / Delete button** - deletes the selected server.
- **Server Address** - enter the name/address of the server.
- **Use the default port** - check this box to use the default port for the application (27467).
- **Port** - if your MAPS administrator has instructed you to do so, you can uncheck the default port and type in the port number your administrator gave you.

Note: If you cannot log in, it may be due to local or network firewall settings. While it is not commonly required, you may need to configure your firewall to allow access on the selected port.

Navigation

Argos has been designed with an intelligent interface that knows your user type and configures menus and buttons to show only those actions permitted.

Menus across the top allow you to take simple actions such as logging in to the product, finding items in the Explorer, customizing your Argos toolbars and changing your password. You can also access the integrated Help system or visit the Evisions web site that has many helpful resources available. The most common actions are replicated as buttons just beneath the menus.

At the very bottom of the screen, the status bar tells you what server you are logged in to, your username and user type.

Between the top and bottom toolbars is the Argos work area. The work area is broken into two halves. The left half contains the Navigation area while the right half contains the Action area.

Action Area

The right hand side of the screen will have buttons for any actions you can take on a selected object. The buttons that show will depend on the type of object you select in the Navigation area.

Navigation Area

This area contains the objects that you can perform actions on. There are three different views you can use for the Navigation area by clicking the desired tab (Explorer or Shortcuts). Each of these views is described below.

Explorer view

The Explorer is the default view for the Navigation area, in which a simple menu of available folders and objects is displayed. Argos objects that can be found in the Explorer include:

Icon	Explorer Object	Description
	**Folders**	Contains objects, including other folders.
	**DataBlocks**	The “parent” object for one or more reports.
	**Dashboards**	Display-only reports for quick reference.
	**System Created Dashboard**	The dashboard that is automatically created by Argos for every new DataBlock. The system dashboard is always called "Dashboard" and cannot be renamed or deleted.
	**User Created Dashboard**	This dashboard is created by users. Dashboards can be used to view information quickly without having to run a report.
	**CSV Report**	A comma-separated values report.
	**Banded Report**	A fully-formatted report.
	**Extract Report**	A text report that meets pre-defined specifications.
	**Delimited Extract Report**	An extract report that uses a user defined delimiter (tab, commas, and spaces are common delimiters).
	**Fixed Width Extract Report**	An extract report the width of each field is defined by the user.
	**XML Extract Report**	An extract report whose output is an XML file.

Icon	Explorer Object	Description
	Private Report (Banded)	A report that only appears for the report creator and the administrator. The eye icon on top of the regular report icon indicates that it is a private report.
	Schedule	Reports may be scheduled to run automatically.
	Trash Bin	Contains items deleted from the Explorer Tree.

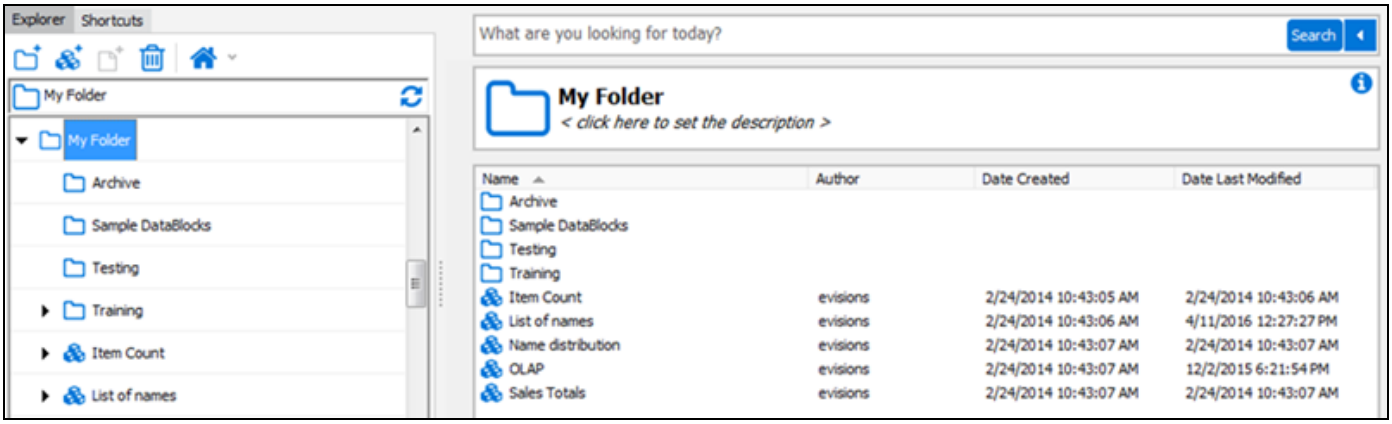
Note: Report Viewers do not have privileges to add, modify, or delete objects within the Explorer tree.

Are my reports secure? You may be wondering about the security of reports in Argos. Each object can be assigned to groups or individuals as needed. Unauthorized users would not be able to see objects they lack permissions for. It is even possible to have security all the way down to individual fields in a CSV or Banded report.

Is my data secure? All data transmitted from the server to Argos is "point-to-point" encrypted, meaning that anyone other than the intended user would see only gibberish. Once a report is created, care should be taken with resulting file(s) to ensure data security.

Some objects can be flagged as private. Private objects will not show up in the Explorer for users other than the creator and the administrator. These objects will have the "private eye" icon like the sample private Banded report icon on the list above.

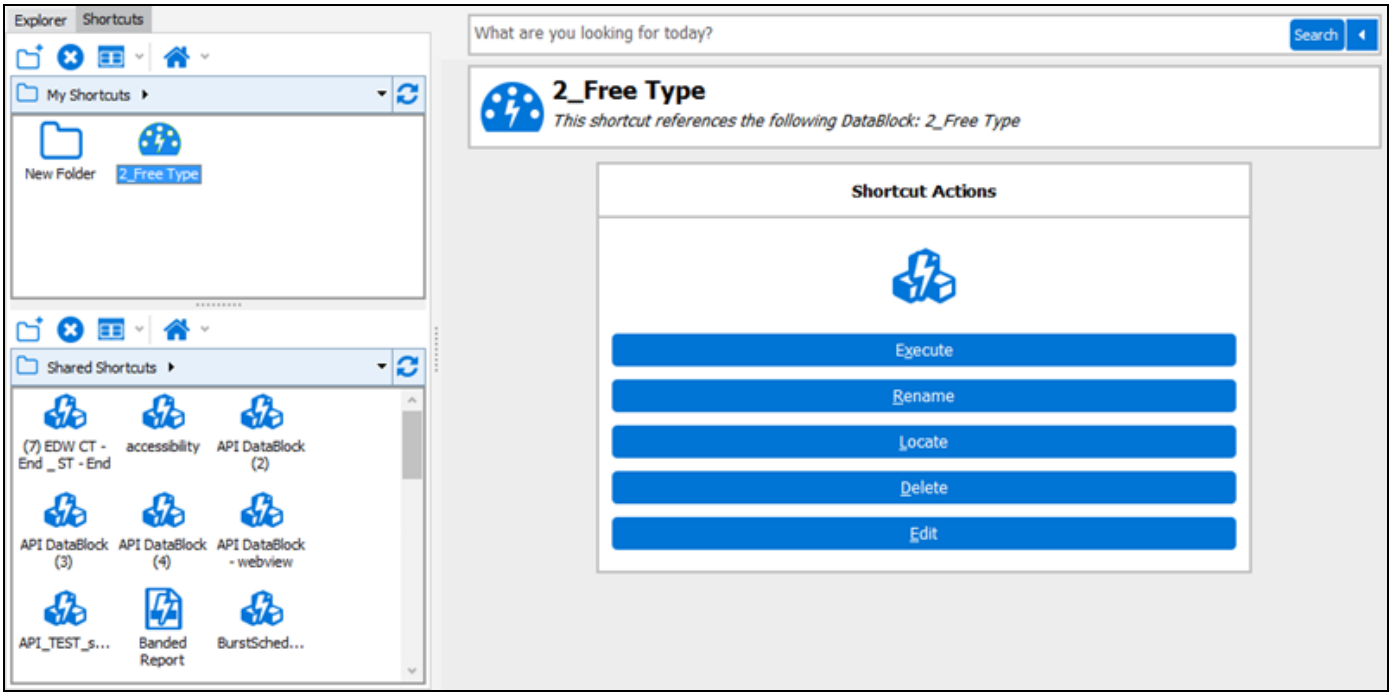
Within the Explorer tree, reports always reside beneath a DataBlock parent. A DataBlock can have many "child" reports. Any object that has child objects will have a "+" next to it. Simply click the "+" to expand the object to view its children.



Shortcuts View

If you use a DataBlock or report frequently, you can right-click on it and choose "Add to Shortcuts". Adding objects to the Shortcuts makes it easier to find what you need. Click on the **Shortcuts** tab to view shortcuts.

This view can be very convenient as it shows only your available shortcuts. You can even rename a shortcut to something other than the original name. To find the original object in the Explorer view, right-click a shortcut and choose "Locate" (see figure on the right). Deleting or renaming a shortcut has no effect on the original object.



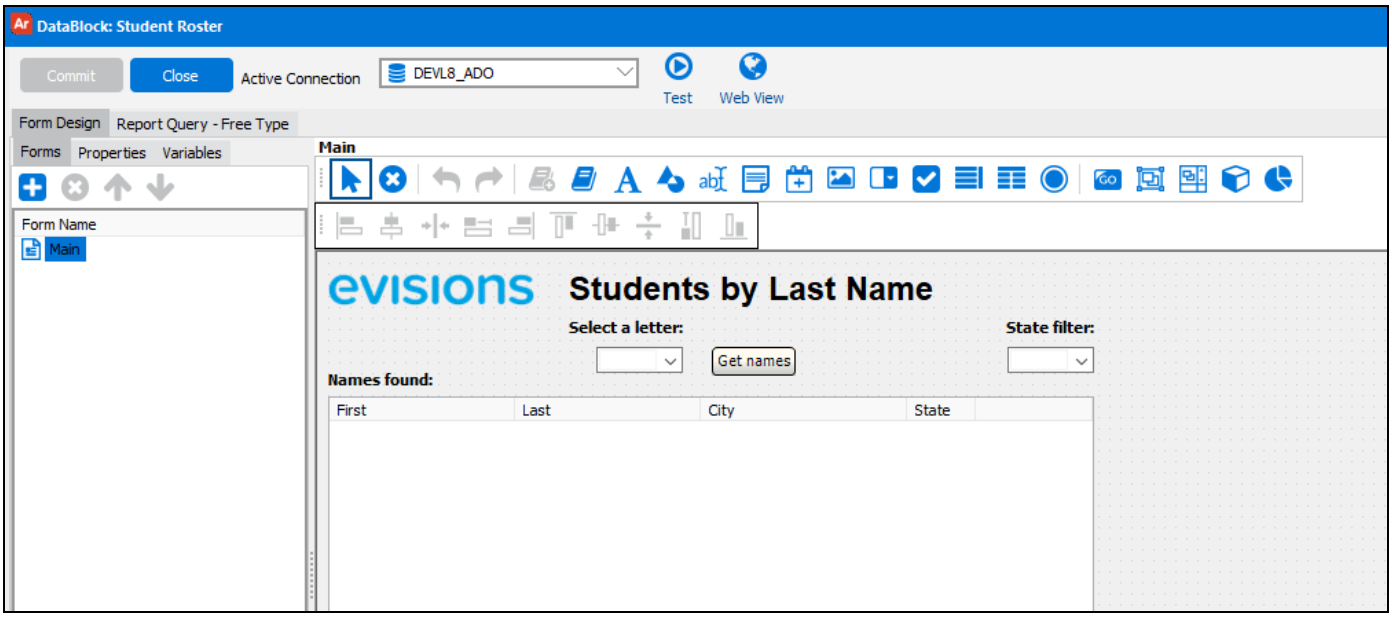
DataBlocks

Whether you are a DataBlock Designer, Report Writer, or Report Viewer, it can be helpful to have an understanding of the components of the DataBlock and of the relationship between DataBlocks and the various report types.

The DataBlock is the foundation from which all reports are created. DataBlocks are comprised of one or more **forms** used to construct the DataBlock's **dashboard**, and a **report query**, which builds the dataset used for writing reports.

Forms

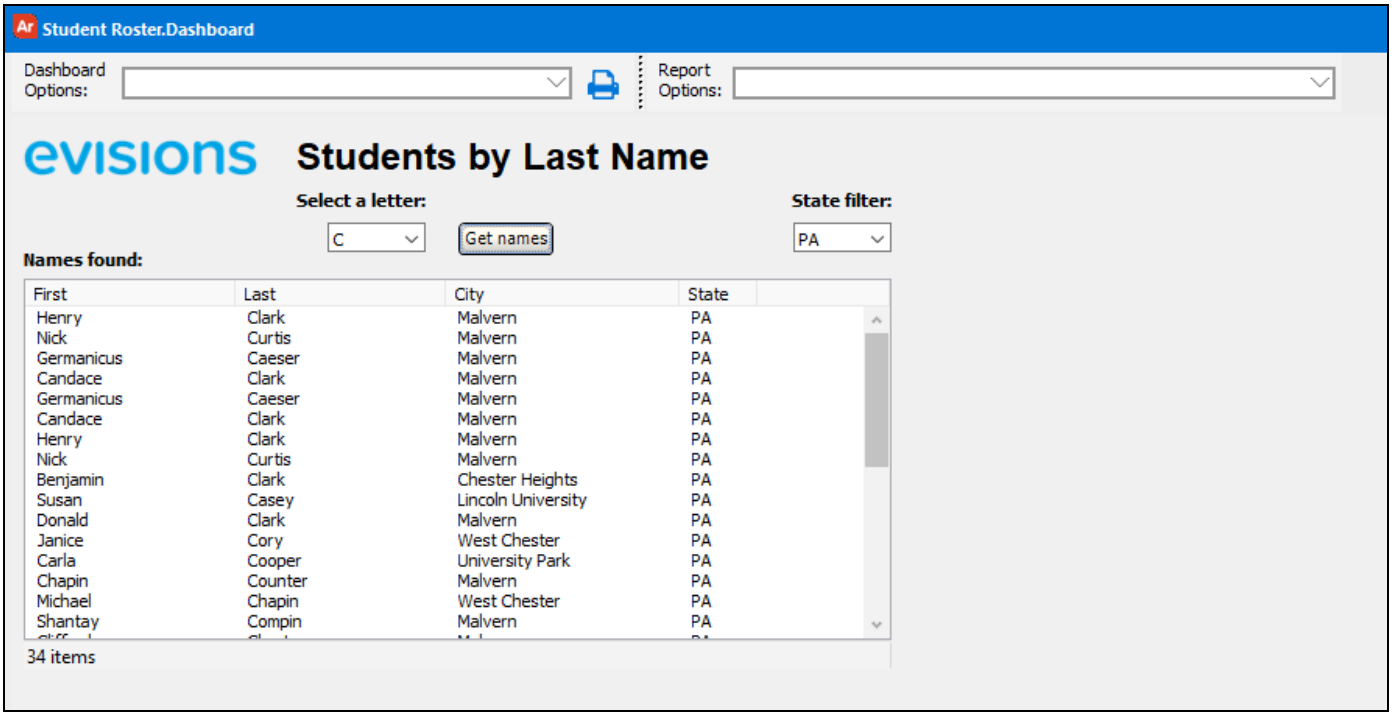
Forms are created on the **Form Design** tab of the DataBlock. When a DataBlock is first created, the first form is created for you automatically. You can use this form to design the dashboard that users see when running the DataBlock or one of its reports.



Forms can contain many different types of objects, such as list boxes, dropdowns, radio buttons, charts, and more. The majority of these objects can be configured to pull information from the database automatically using a SQL query.

Dashboards

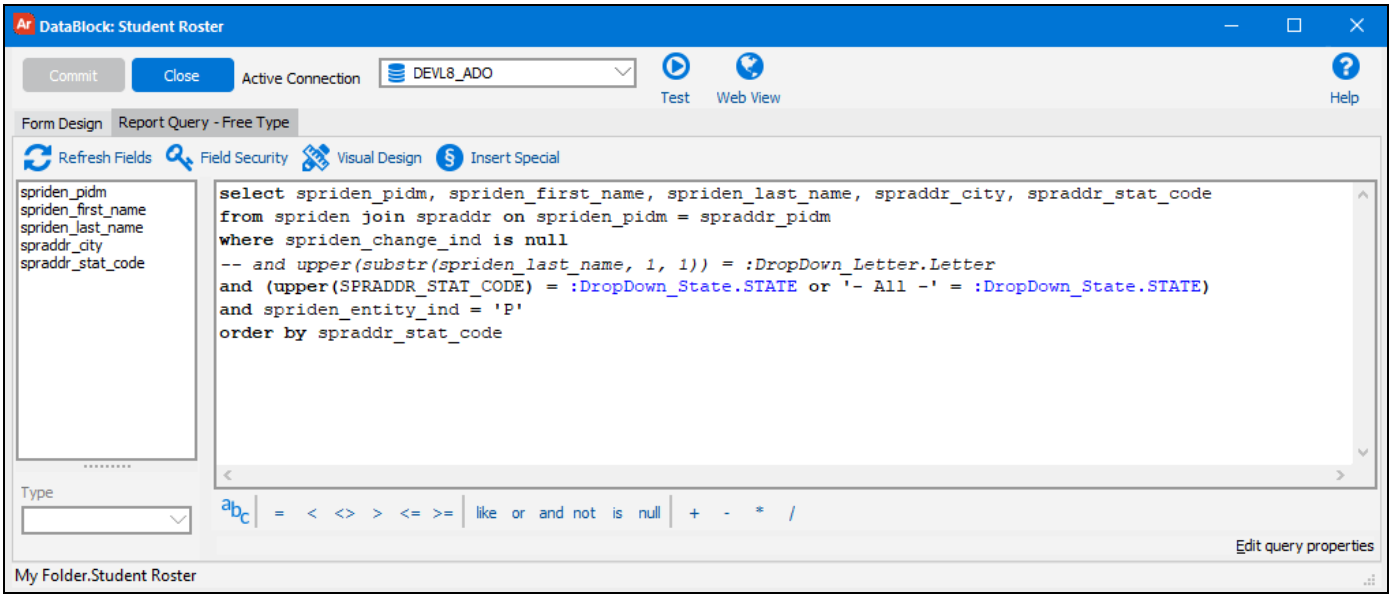
Dashboards can be used to display information for the user, or may be used as parameter entry forms to customize the information shown on the dashboard or in the reports. Dashboards may have multiple forms, allowing users to switch between them to view different information.

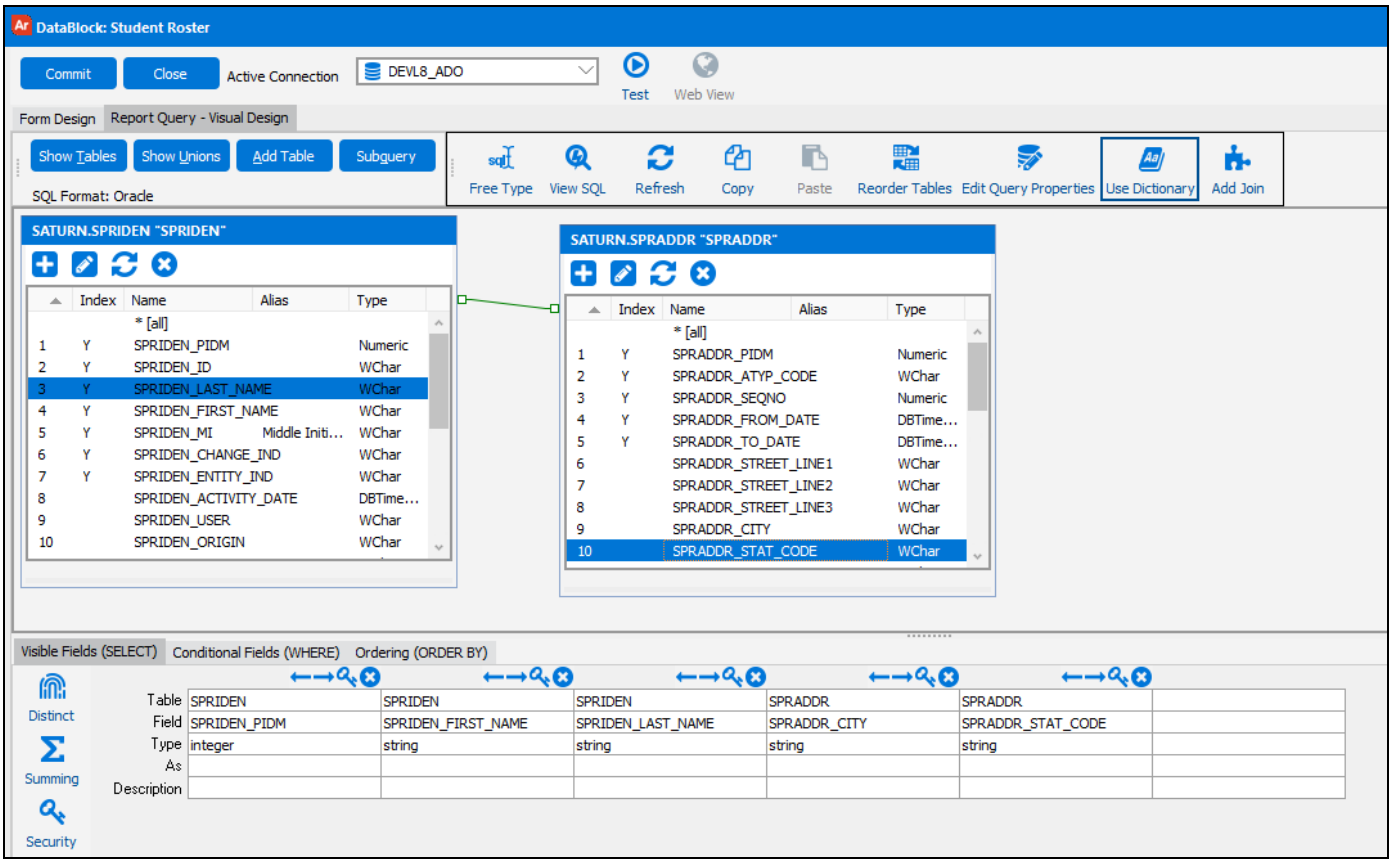


In this example, the dashboard waits for the user to enter a letter of the alphabet. After clicking the Get names button, a list of students whose last names begin with that letter is shown. Users can also filter the list by state, if they choose to select a state in the dropdown.

Report Queries

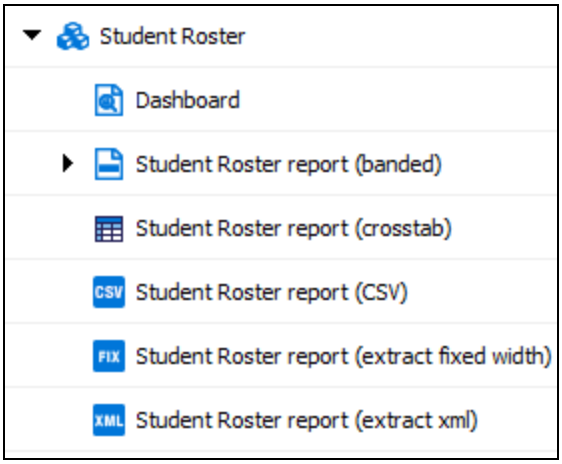
The Report Query tab in the DataBlock is where you design the SQL query that pulls the data that Report Writers will use to construct their reports. You can enter the query as free type SQL, or use the Visual Design tool to drag and drop the information you want and construct the SQL automatically.





Report Tree

Dashboards and reports are children of DataBlocks in the report tree. All DataBlocks have a default dashboard, and Report Writers can create any number of reports.



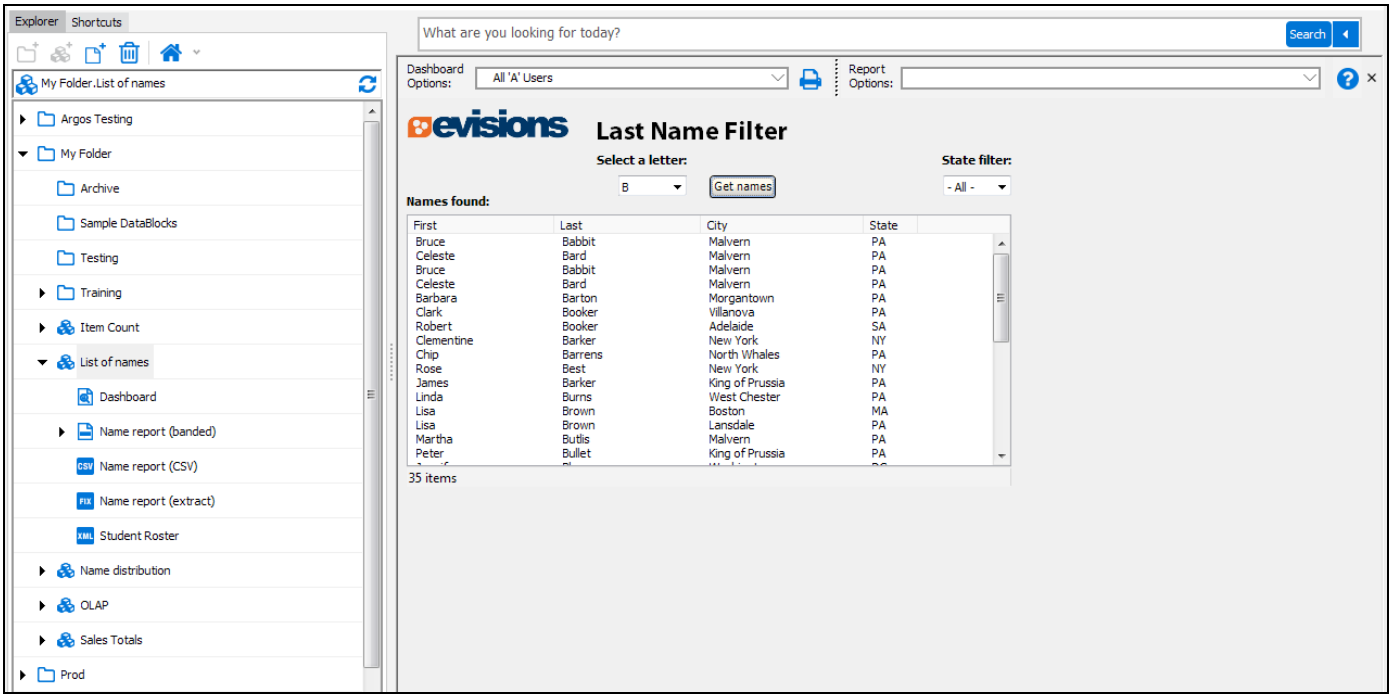
All reports underneath a DataBlock use the same data that comes from its report query. The difference between the report types (banded, CSV, extract, or crosstab) is in how the data from the report query is displayed.

Dashboards

All DataBlocks have at least one **dashboard** which is created on the Form Design pane in the DataBlock. The dashboard is used to gather any input parameters that are needed when you run a report. Dashboards can also display results on the screen, if the DataBlock designer configured it to do so.

Dashboards are a good choice when you need to access information quickly, but do not need to save results as you might when running a report. A good example is a situation where you want to view sales results for the organization. The dashboard could display a sales summary by region for each quarter. It may have additional "drill down" functionality on the dashboard, such as the monthly sales results for each salesperson. The results display on the screen immediately.

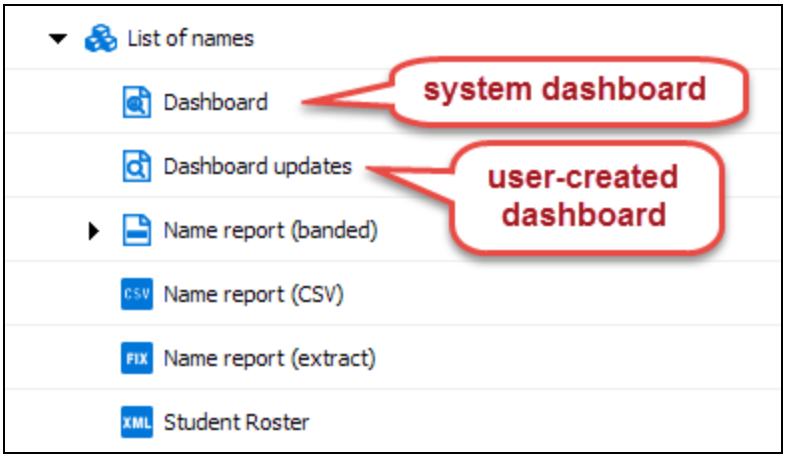
In order to save and share data with other users, you can run a report to generate a PDF of the same data, based on the information and options entered into the dashboard. In this case, you can run a banded report from the dashboard, and then send this PDF to the desired recipient.



In the screenshot above, the dashboard on the right executes when launching the "List of names" DataBlock. This dashboard is the default (system) dashboard for this DataBlock. You can run any of the reports associated with this DataBlock by selecting the appropriate report in the **Report Options** drop down at the top of the dashboard. The report will include names beginning with the same letter you selected on the dashboard.

Default Dashboard

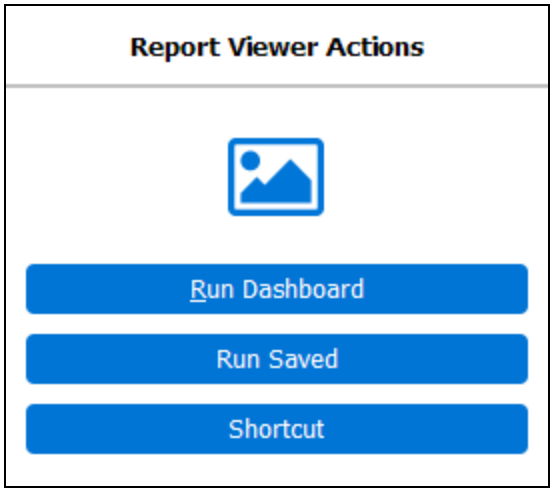
When a DataBlock is created, Argos also creates a default (system) dashboard, which is shown with a small padlock. The system dashboard is named "Dashboard" and cannot be renamed or deleted. DataBlock Designers may create additional dashboards by right-clicking on the DataBlock and selecting **New** -> **Report or Dashboard**.



Running a Dashboard

You may run a dashboard by any of the following methods:

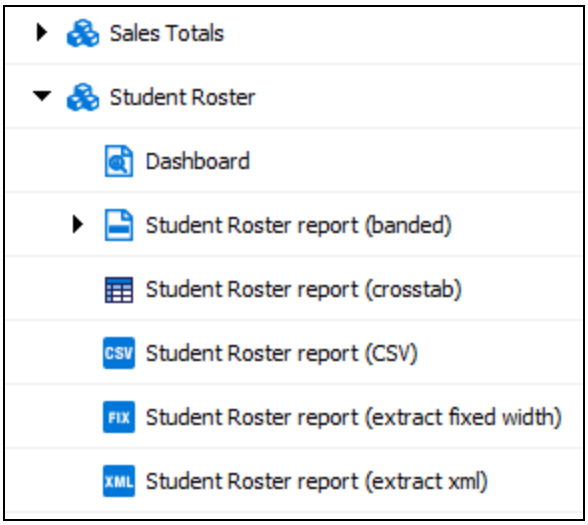
1. Click on the **Run Dashboard** button when the dashboard is selected.



2. Right-click on the dashboard icon and select **Run Dashboard** from the menu.
3. Double-click on the dashboard.
4. Right-click on the DataBlock and select **Run Dashboard** from the menu to run the default dashboard for that DataBlock.

Reports

Argos reports provide different views of the information retrieved by the DataBlock. Reports use the data from the report query in the DataBlock as their starting point, which may be combined with additional user-provided information from the dashboard. Reports are shown underneath the DataBlock they belong to in the Explorer Tree.



There are four different types of reports that can be created in Argos: CSV, banded, extract, and crosstab.

CSV Reports

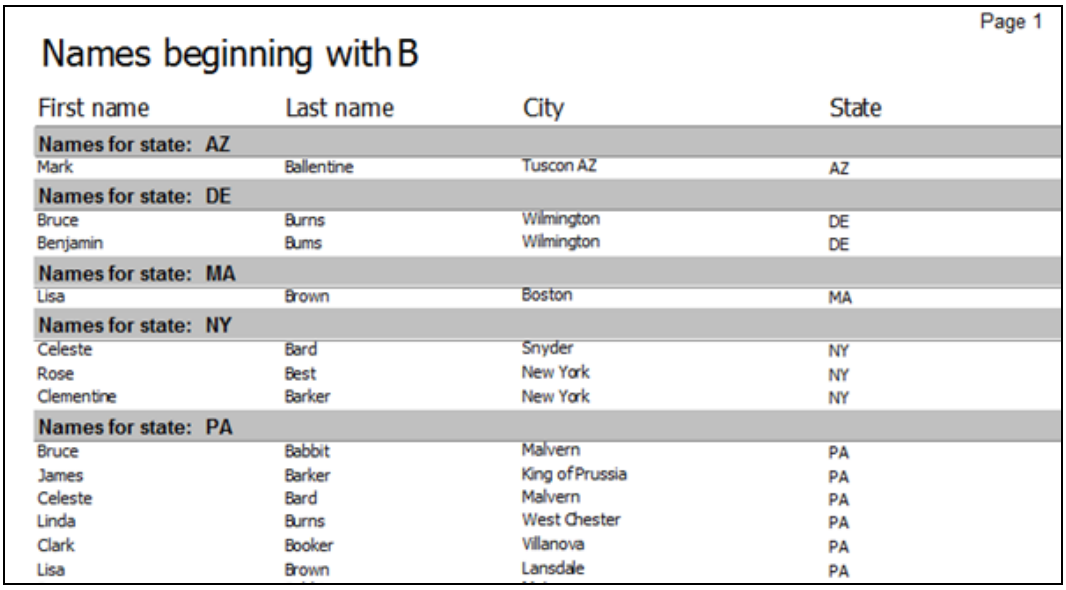
A Comma Separated Value (CSV) report is the simplest of the Argos report types. A comma-delimited file is a text file that separates the desired columns with a comma or other specified delimiter. This type of report is especially useful when obtaining data to be used in spreadsheet software such as Microsoft Excel. It is also useful when creating files used by third party applications.

```
"SPRIDEN_FIRST_NAME","SPRIDEN_LAST_NAME","SPRADDR_CITY","SPRADDR_STAT_CODE"
Bruce,Babbit,Malvern,PA
Celeste,Bard,Malvern,PA
Bruce,Babbit,Malvern,PA
Celeste,Bard,Malvern,PA
Barbara,Barton,Morgantown,PA
Clark,Booker,Villanova,PA
Robert,Booker,Adelaide,SA
Clementine,Barker,"New York",NY
Chip,Barrens,"North Whales",PA
Rose,Best,"New York",NY
James,Barker,"King of Prussia",PA
```

Banded Reports

Banded reports are fully-formatted PDF reports that give the report writer complete control over the location and appearance of the information in the report. The term "banded" comes from the fact that the report is organized into logical bands (groups) of data. For example, a *title* band may contain the title of the report, report date and logo. A *page header* band could hold the page number. Similarly, the report data is organized into *group* bands, *detail* bands, and other logical groupings.

Banded reports may include custom fonts, rich text, charts, images, and other information. They can be used to create mailing labels, letters, and many other output formats that can be printed or emailed directly to recipients.



Page 1

Names beginning with B

First name	Last name	City	State
Names for state: AZ			
Mark	Ballentine	Tuscon AZ	AZ
Names for state: DE			
Bruce	Burns	Wilmington	DE
Benjamin	Bums	Wilmington	DE
Names for state: MA			
Lisa	Brown	Boston	MA
Names for state: NY			
Celeste	Bard	Snyder	NY
Rose	Best	New York	NY
Clementine	Barker	New York	NY
Names for state: PA			
Bruce	Babbit	Malvern	PA
James	Barker	King of Prussia	PA
Celeste	Bard	Malvern	PA
Linda	Burns	West Chester	PA
Clark	Booker	Villanova	PA
Lisa	Brown	Lansdale	PA

Extract Reports

An extract report is designed to create output files that meet pre-defined specifications. This feature is especially useful for creating delimited output that is more complex than a simple comma-separated file, for creating a fixed-width file in which each field is precisely positioned on a given line, or for creating an XML file. This could include files that you might upload to a government agency, clearinghouse, or service bureau.

Extract reports are somewhat similar in design to a banded report. They are comprised of several *sections*, which behave like the bands in a banded report. There are two important differences, however:

- Extract reports are not divided into pages. They are designed to create an output file, not printed output.
- Extract reports can loop through multiple datasets. In contrast, a banded report can only process each record in a dataset once.

```
 1  Mark        Ballentine    Tuscon AZ          AZ
 2  Jennifer    Bloom         Washington         DC
 3  Bruce       Burns         Wilmington         DE
 4  Benjamin    Bums          Wilmington         DE
 5  Lisa        Brown         Boston             MA
 6  Christine   Bushar        Duluth             MN
 7  Celeste     Bard          Snyder             NY
 8  Rose        Best          New York           NY
 9  Clementine  Barker        New York           NY
10  Bruce       Babbit        Malvern            PA
11  James       Barker        King of Prussia    PA
12  Celeste     Bard          Malvern            PA
```

Crosstab Reports

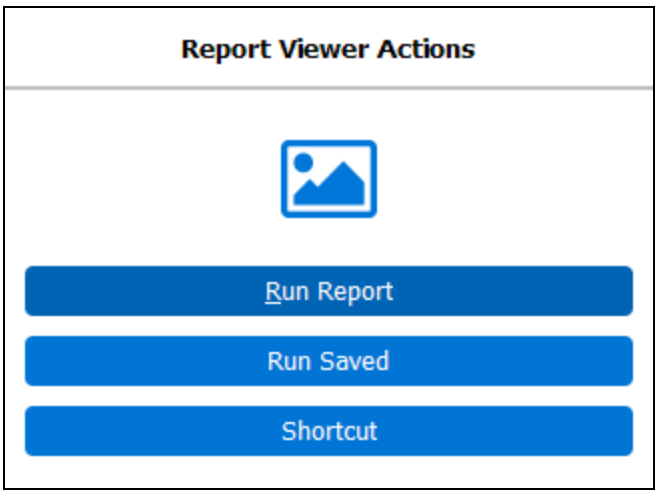
Crosstab reports provide a simple way to relate two or more data attributes in table format. In addition to specifying the rows and columns for the report, you can also apply basic formatting such as headers, text, and colors.

Product Name	Product Sales by Region and Sales Rep												
	Northeast			South			Southeast		Southwest				Grand Total
	Mendez	Tinoco	Total	Patterson	Pham	Total	Washington	Total	Alden	Farris	Kline	Total	
Microsoft Visio	249	4731	4980	1245	498	1743	2490	2490			45318	45318	55527
Norton Internet Security	280	1440	1720	4080		4080	480	480	120	80	4240	4440	11200
QuickBooks Pro		796	796	13731	398	14129	1791	1791			33631	33631	54526
Samsung T260 HD 25.5" Widescreen LCD Monitor	399	3192	3591	6783		6783	2793	2793	399		1995	2394	28329
Sony NW230 G/B Notebook		26486	26486	2337		2337	2337	2337	3895		142557	146452	184623
Grand Total	5412	218511	223923	431023	12870	443893	157225	157225	24168	10748	1913572	1948488	2964413

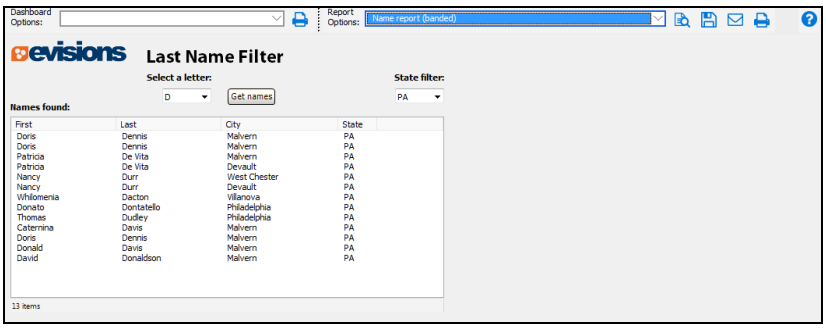
Running Dashboards and Reports

You can run a report (CSV, banded, extract, or crosstab) or dashboard using any of the following methods:

- Click the **Run Report/Run Dashboard** button under **Report Viewer actions**.
- Right click on the report and select **Run Report/Run Dashboard**.
- Double click on the report or dashboard.
- Run the dashboard associated with the DataBlock, and then choose the report from the dashboard menu.
- You can view a report that was previously executed and saved by clicking **Run Saved**.



Running a report opens the default dashboard for that report, which is the screen that allows you to input any parameters needed to generate the report. The dashboard may also display information and results, depending on how it is configured.



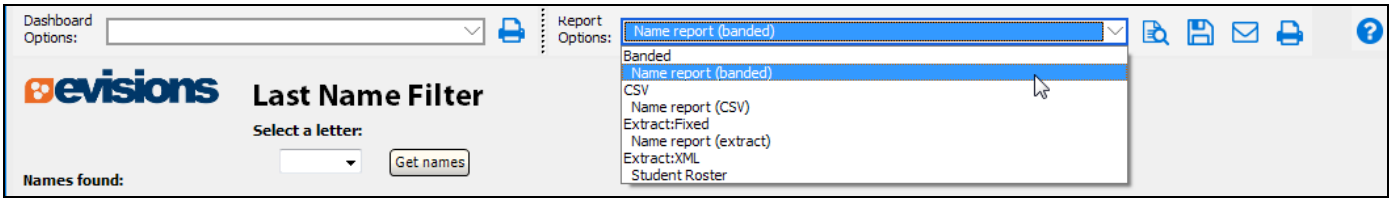
The toolbar at the top of the dashboard allows you to:

- Save, load, and manage dashboard settings for parameter entry.
- Print the dashboard form.
- Select a report to run. You may choose any report associated with this DataBlock.
- Preview the report (banded reports).
- Save the report to disk (banded, CSV, and extract reports).
- Email the report (banded, CSV, and extract reports).
- Print the report (banded).

Icon	Description
	Report preview (Banded)
	Save report (Banded, CSV, Extract)
	Create and email report (Banded, CSV, Extract)
	Save the report and open it with an associated application (CSV, Extract)
	Print the report (Banded) - select the printer icon in the Report Options area
	Print the image of the form (All report types) - select the printer icon in the Dashboard Options area

Selecting the Report to Execute

If this DataBlock has any child reports, they are listed in the **Report Options** drop down. Select the report you wish to execute, and then click the **Preview**, **Save**, **Email**, or **Print** button.

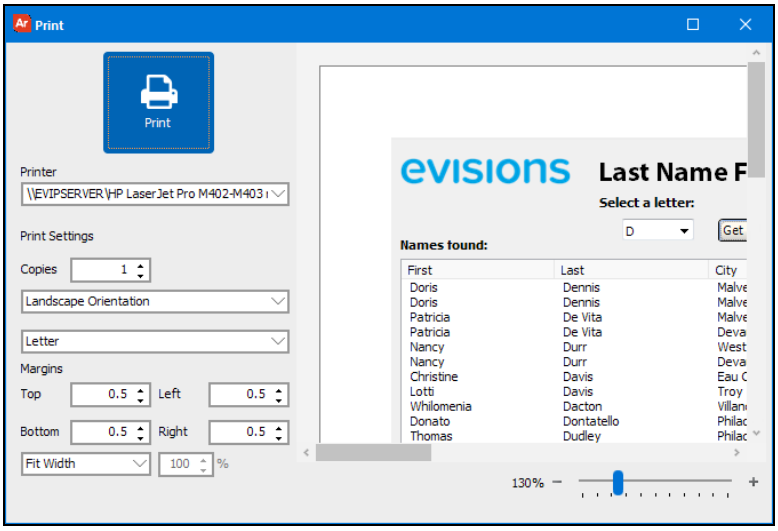


If you are using a very low screen resolution, you may not be able to see all of the Report Options drop down or the icons to the right. If this happens, you can click and drag the divider between the Dashboard Options and the Report Options to move the Report Options to where you can see them. On very small displays, an arrow button appears to allow you to scroll the toolbar.

Print Options

When **Print Form** (the print icon in the Dashboard Options area) is selected, the Print dialog below is displayed.

The print options are self-explanatory. The sliding percentage at the lower right zooms the image on the screen but is not considered in the printed output. The **Fit Width** drop down provides choices to either fit the image or scale it on the **printed output** .



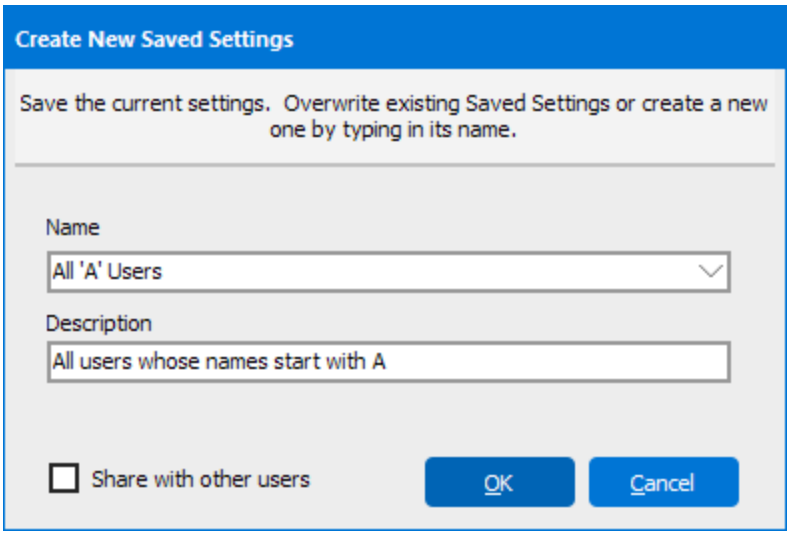
PDF and Excel Options

When saving a report as a PDF or Excel file (.xls), there are various settings you can configure for the output file. Refer to the Argos help for descriptions of the available options.

Saved Dashboard Settings

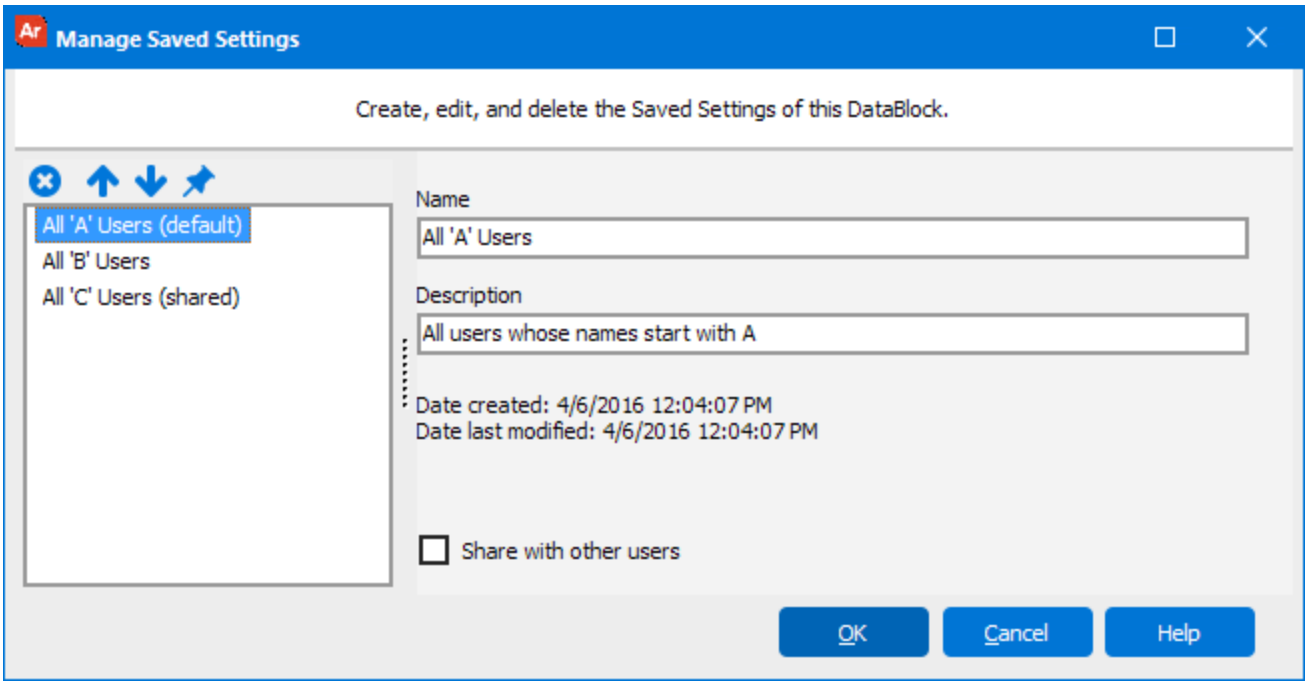
The **Dashboard Options** dropdown on the left of the toolbar allows you to save the parameters and settings used to run the report, and to load previously-saved settings.

Select **Save Current Settings** to launch the dialog box below, where you can specify a name for this set of parameters. You can also enter a longer description for the setting, which will appear when editing the setting in the future.

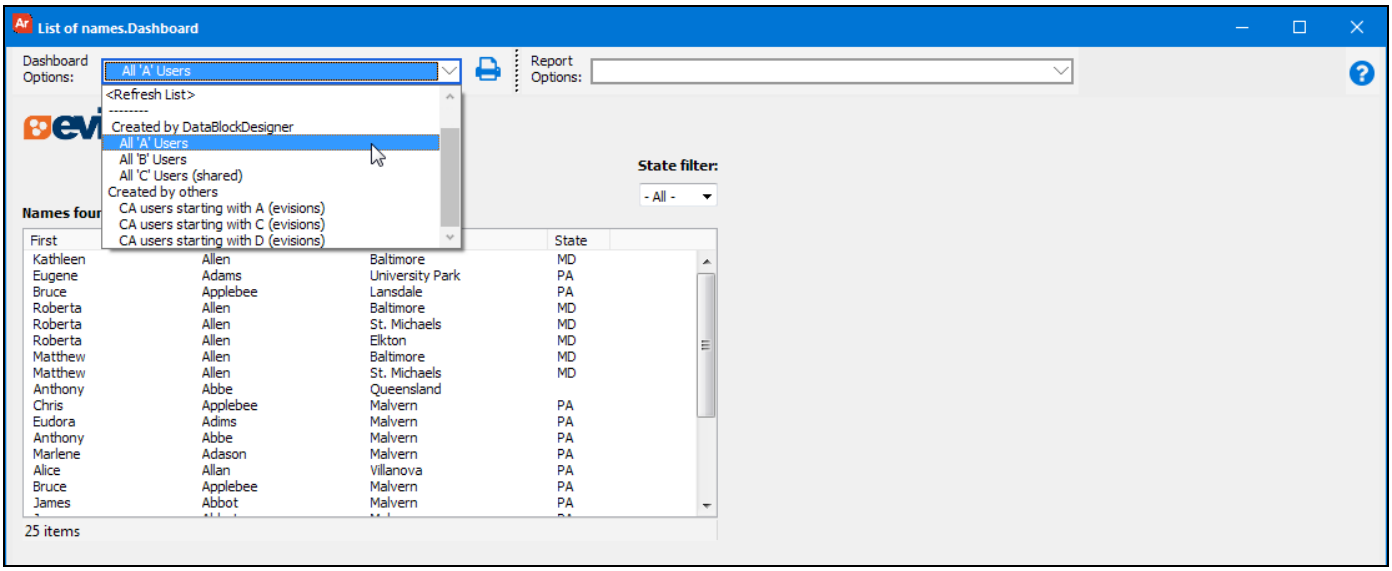


If desired, check the box to **Share with other users**. If you choose to share a saved setting, anyone who runs this dashboard will be able to load your saved parameter set. This is especially helpful when many users need to perform the same common task in a particular dashboard.

Select **Manage Settings** to edit, delete, or reorder the saved settings that you created. You can also use the pin icon to specify a saved setting as the *default*, which will load this setting immediately when the dashboard opens.


Manage Saved Settings
Create, edit, and delete the Saved Settings of this DataBlock.
All 'A' Users (default)
All 'B' Users
All 'C' Users (shared)
Name
All 'A' Users
Description
All users whose names start with A
Date created: 4/6/2016 12:04:07 PM
Date last modified: 4/6/2016 12:04:07 PM
Share with other users
OK
Cancel
Help

To load a previously-saved setting that you or another user created, select it in the list.



The dashboard will update to reflect the parameters specified in the saved setting.

The **<Refresh List>** menu option updates the list of saved dashboard settings to see if other users have shared additional saved settings since you launched the dashboard. Otherwise, you will see any changes automatically the next time you open the dashboard.

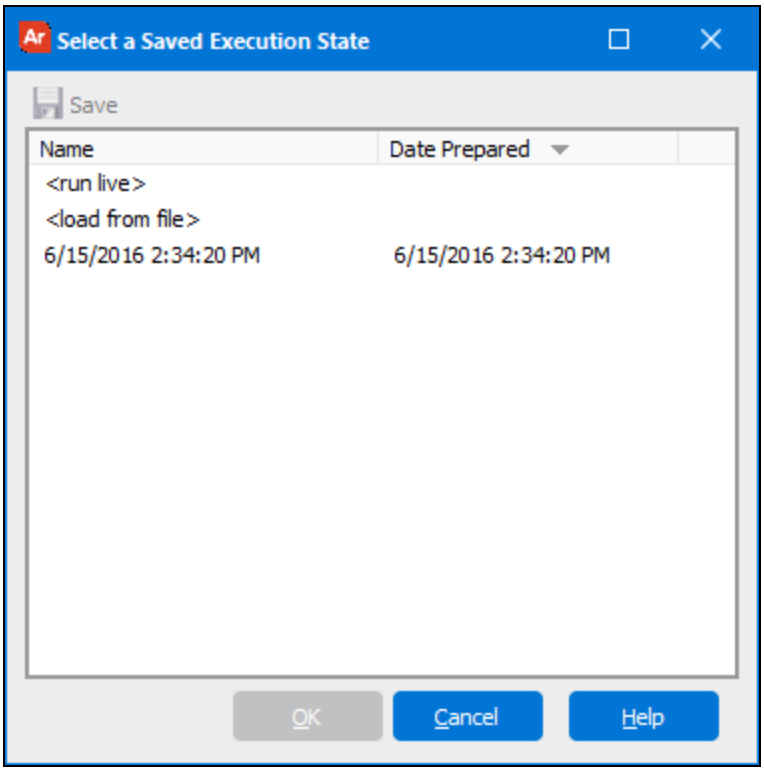
If you have created a custom ordering in the Manage Saved Settings dialog, you will also see an option to **<Clear Custom Display Order>**. Selecting this option returns your saved settings to their default order. Note that if you have a custom ordering in place, any new saved settings will be added to the bottom of the appropriate section instead of appearing in alphabetical order.

Saved Execution States

Scheduled reports or dashboards can be configured to create a saved execution state, which saves the data that was on the dashboard at the time the schedule was run. The saved data includes the values of form variables and any OLAP cube data. It does **not** include the results of report queries, which run live every time you run a report.

Saved execution states are useful in cases where you have queries or OLAP cubes that take a long time to run, and you do not need up-to-the-minute data. The report or dashboard can be scheduled to run overnight so that it will be ready the following day. Users who do not want to wait for the data to load can then opt to run the saved execution state instead of running it live.

If a saved execution state has been created for the report or dashboard you are running, you will see the following dialog when you launch it:



Select the saved execution state you wish to run, then click **OK**.

Note: The saved execution states that appear when running a DataBlock are those associated with the DataBlock's default dashboard. Depending on how the schedule was created, saved execution states may be associated with the DataBlock and its default dashboard, and/or with any of the reports or additional dashboards under the DataBlock. You should check with the creator of the DataBlock if you are not sure where a particular saved state is located.

Creating Saved Execution States

Only DataBlock Designers and Administrators have the ability to create saved execution states. The saved state is created by adding the **save execution state** task to a schedule. Each time the schedule runs, it creates the saved execution state and stores it on the server where MAPS is installed. Users who run the report or dashboard will then see the saved execution state(s) that are associated with it.

Changes to the DataBlock

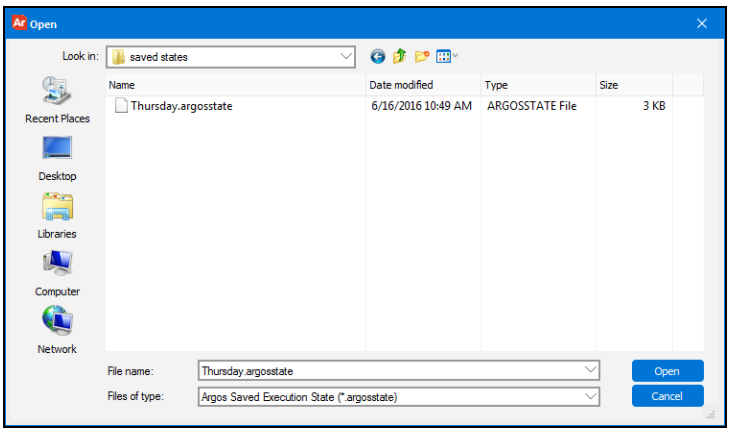
If certain types of changes are made to the DataBlock, you may need to recreate your saved states. This could occur if an object was renamed or deleted, or other information required to recreate the saved state is missing. For example, if the dashboard has a default saved OLAP setting which is later deleted, this could result in the OLAP cube being unable to load the data. In these situations, simply recreate the desired state of the dashboard, and save the execution state again.

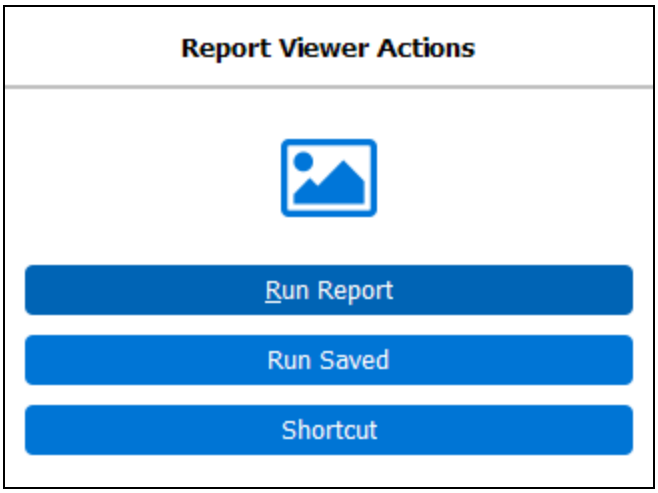
Live Mode

You may choose to run the report live if the DataBlock Designer has enabled running in live mode. Running in live mode uses current data from the database, instead of a saved execution state.

Load From File

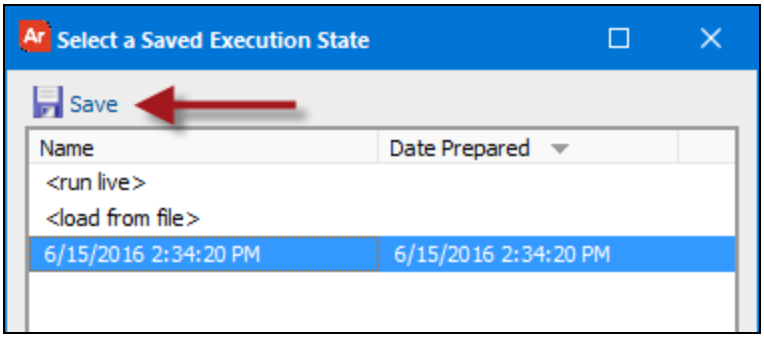
Saved execution states are stored on the server where MAPS is installed. You can also save existing saved execution states to a local file, with an .argosstate extension. If you have a saved .argosstate file, you can load the saved execution state by selecting <load from file> and browsing to the file. This is the same as selecting **Run Saved** from the Report Viewer Actions menu.





Save Run State

To store a saved execution state on your local PC, click **Save** after selecting a saved state.



Executing Reports from a Shortcut

Shortcuts are useful for users who run the same reports on a regular basis. Rather than navigating through the Explorer tree to find the report you need to run, create a shortcut for easy access. It is very similar to creating a shortcut in Windows.

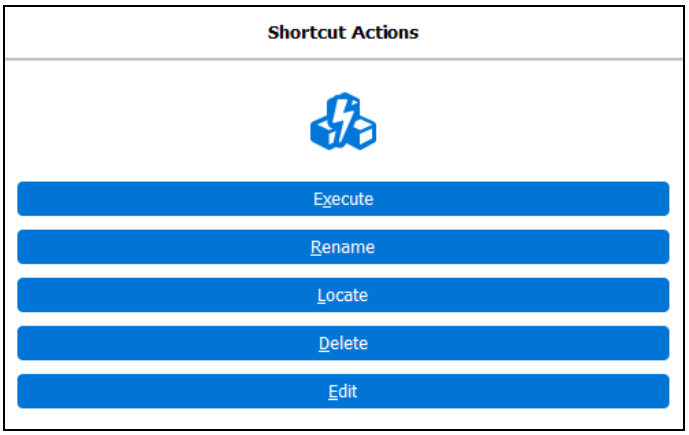
To add a shortcut to a report, right-click on the report in the Explorer Tree and select **Add To Shortcut**.

Alternatively, select the report and click the Shortcut button in the right pane of the Explorer tree.

A prompt to choose if the report will be shared or accessible only to you will pop up. Selecting **My Shortcut** makes the shortcut to the report viewable only to the user who created it, and selecting **Shared** allows everyone to use it. Only DataBlock Designers and Administrators can create shared shortcuts.

Report Options

Click the shortcut to see the available options:



- Execute - run the report that is referenced by the shortcut.
- Rename - change the name of the shortcut.
- Locate - show the target of the shortcut within the Explorer Tree.
- Delete - delete the selected shortcut.

Note: You cannot view a saved execution state from a shortcut.

OLAP Cubes

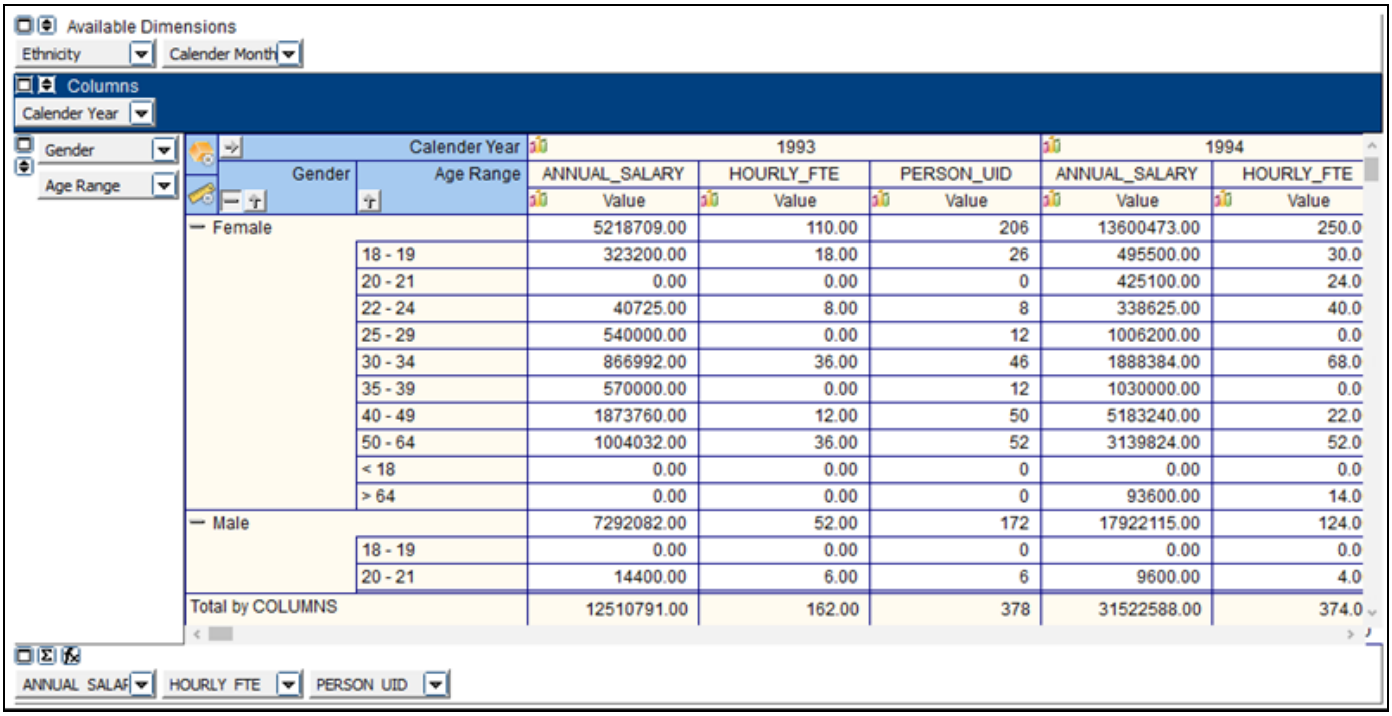
Dashboards can be designed to include OLAP cubes. OLAP cubes are data structures which can be manipulated by the report viewer to produce a wide variety of views of data. The following describes OLAP and how the report viewer can work with OLAP cubes.

Overview

OLAP (Online Analytical Processing) is a specific way to represent statistical data for executives, specialists and analysts. It is designed to aid in decision-making and better information understanding. The main idea is to answer the user's questions, arising at the work time, on-the-fly, quickly. A popular definition is "A million spreadsheets in a box." The key to OLAP is its ability to allow the end user to configure different views of the same data.

An OLAP system allows user to get into details and generalize, filter, sort and regroup data at the time of analysis. Intermediate and final totals are recalculated instantly.

The user is presented data in an electronic spreadsheet format. By moving rows and columns or clicking them, the user makes the system perform calculations and show data in different aspects. Thus, the user can produce many reports out of a single dataset on their own, without any assistance from IT specialists.



Calender Year		1993			1994	
Gender	Age Range	ANNUAL_SALARY	HOURLY_FTE	PERSON_UID	ANNUAL_SALARY	HOURLY_FTE
		Value	Value	Value	Value	Value
Female		5218709.00	110.00	206	13600473.00	250.0
	18 - 19	323200.00	18.00	26	495500.00	30.0
	20 - 21	0.00	0.00	0	425100.00	24.0
	22 - 24	40725.00	8.00	8	338625.00	40.0
	25 - 29	540000.00	0.00	12	1006200.00	0.0
	30 - 34	866992.00	36.00	46	1888384.00	68.0
	35 - 39	570000.00	0.00	12	1030000.00	0.0
	40 - 49	1873760.00	12.00	50	5183240.00	22.0
	50 - 64	1004032.00	36.00	52	3139824.00	52.0
	< 18	0.00	0.00	0	0.00	0.0
	> 64	0.00	0.00	0	93600.00	14.0
Male		7292082.00	52.00	172	17922115.00	124.0
	18 - 19	0.00	0.00	0	0.00	0.0
	20 - 21	14400.00	6.00	6	9600.00	4.0
Total by COLUMNS		12510791.00	162.00	378	31522588.00	374.0

OLAP breaks data into two groups: facts (numbers, also called measures) and dimensions (descriptions). Facts (**Measures**) are aggregated in a given slice by some algorithm while the user defines grouping and aggregation depth by using **Dimensions**.

Tip: There are numerous resources available on the Web that discuss the underlying technology for OLAP cubes.

Measures

Measures are the numbers in the OLAP spreadsheet or cube. They can also be referred to as Facts. The Measures are displayed in the cells of the cube. Measures are stored in what are called Fact Tables.

Fact tables typically contain the following types of fields:

- Key fields to join the Fact table to Dimension tables.
- Measure fields containing numeric values.

Dimensions

Fields by which data records are grouped are called **Dimensions**. Dimensions can contain values of various types: strings, dates, numbers, and so on. A dimension lists members, all of which are perceived by the user to be similar types of data. A dimension is the answer to "How do you want to see your data." For example, a Time dimension might include members for years, quarters, months, and weeks. A Sales dimension could include product names, sales territories, and names of salespersons. When running the cube, the end user can select to group the data by any or all the defined dimensions.

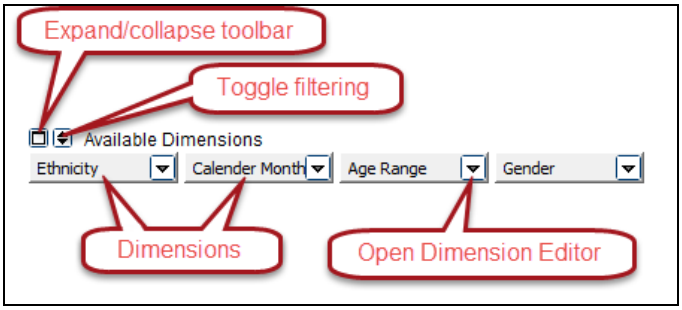
Dimensions have levels that allow for drilling down. For example, if looking at sales figures per quarter, you could drill down to get more information as to the makeup of the sales (such as products sold monthly in each region by each salesperson.

Dimensions can be pulled from the Fact Table but typically are stored in Dimension Tables. Dimension tables have the following types of fields:

- Key fields, used to join the dimension tables to the fact table (star schema).
- Level name fields, used to store the member names for the levels. For example, the Time dimension table could have a field called Month, which would have values such as January, February, March, etc.
- Level Order Key fields, used to store integer values used to order the members of the levels (if necessary). For example, the Time dimension table could have a field called Month Order Key, which could have a value of 1 for January, 2 for February, 3 for March, etc.
- Member Property fields, used to store the member property information. A Time dimension could have a field called Day Count, which would store the number of days for each month.

Dimension Toolbar

The dimension toolbar allows you to arrange and edit the dimensions of the cube.



Expand/Collapse Toolbar

This button allows you to collapse the dimension toolbar to have more room for the data.

Filtering

Click the **filter** button to filter on a specific value of this dimension.

Dimension Items

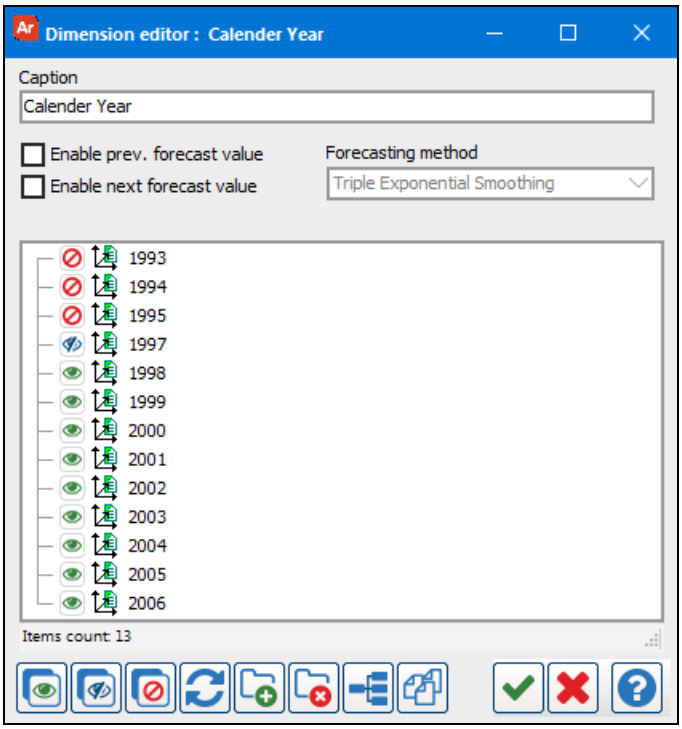
The dimensions you see here are the *available* dimensions; that is, dimensions not yet added to a row or column. You can drag and drop dimensions between the available dimensions area and the row and column areas.

The order of the items on the dimension toolbar has no significance. The order is determined by the order they were added by the designer. The user can also rearrange by dragging them to the dimension rows or dimension columns.

You can rename a dimension by editing its label in the dimension editor.

Dimension Editor

To open the Dimension Editor, click the down arrow to the right of a dimension.



Checkbox Colors: The check boxes shown in the figure to the left can be set to green, blue, or red.

The colors indicate the following:

- Green indicates that the dimension value is included in the calculations and the value appears in the cube.
- Blue indicates that the dimension value is included in the calculations, but the value does not appear in the cube.
- Red indicates that the dimension value is not included in the calculations and the value does not appear in the cube.

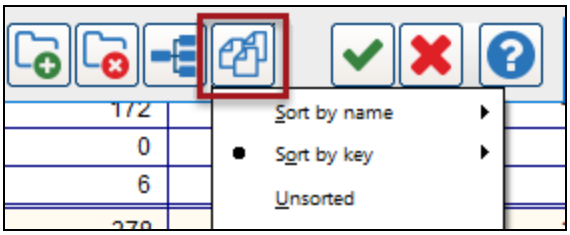
The Dimension Editor allows the user running the report to 'override' or change some of the default settings defined by the creator of the DataBlock. You can also apply filters and sorting to the dimension.

Filtering

By default, all values are included. Click the green check mark next to an item to change it to *invisible* (blue X). Invisible values do not appear in the cube, but are still included in any totals or counts. Click the value again to set it to *filtered* (red X). Filtered values do not appear in the cube, and are also not included in totals or counts. Click the value again to restore it to the included state.

Sorting

To change the sort order for a dimension, click the **sort** icon on the toolbar. Available options include sorting alphanumerically or by key value.

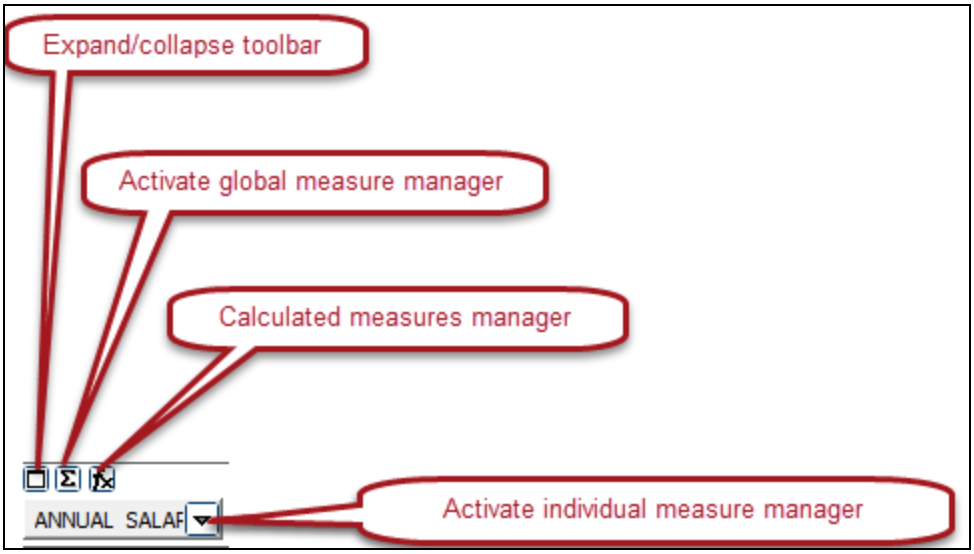


Hierarchy Groups

Click on the **+ folder** icon to add a **hierarchy group** to which you can drag and drop values in the dimension editor. The purpose of a hierarchy group is to group similar items together. For example, you may want an "East" and "West" region for city values.

Measures Toolbar

The measure toolbar allows the end user to modify the default settings for the added measures.

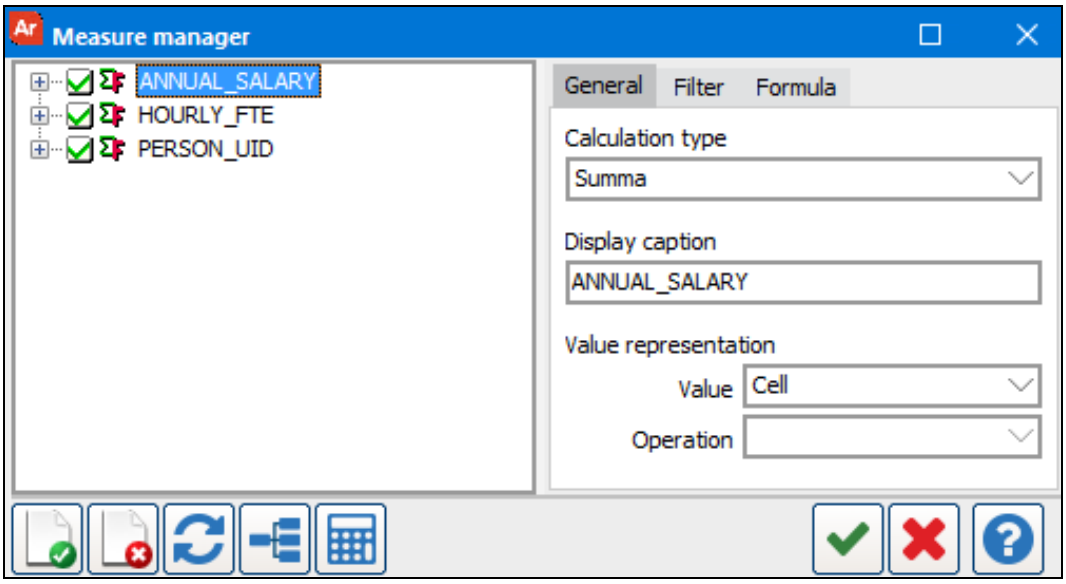


Expand/Collapse Toolbar

You can collapse the measure toolbar in order to have a bigger display area. The button acts as a toggle.

Activate Global Measure Manager

To activate the global measure manager click the global message manager icon shown in the above figure.



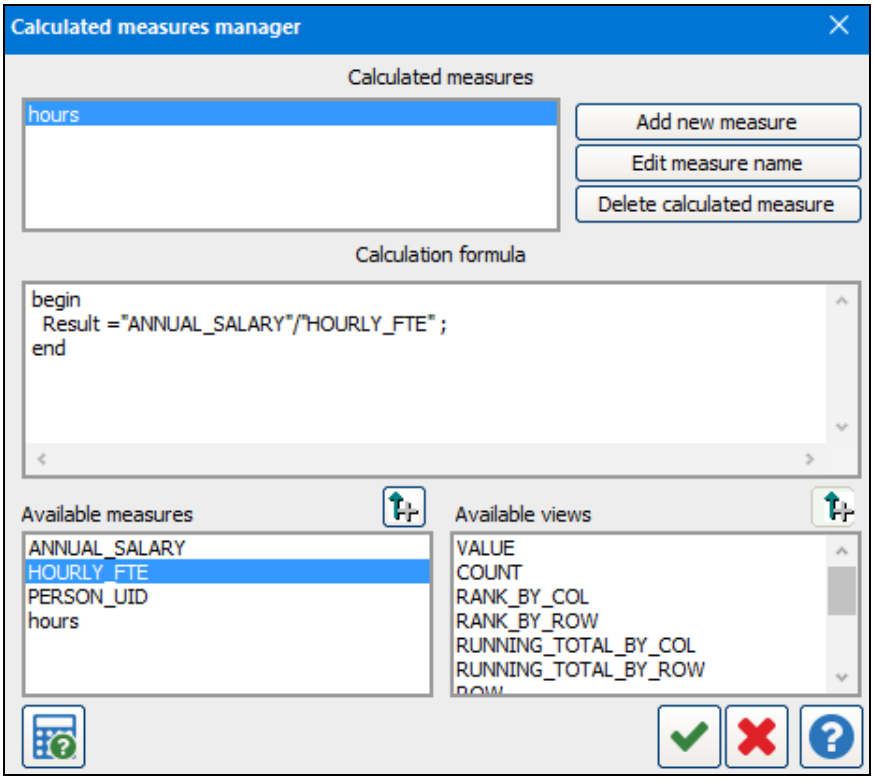
The measure manager is used to easily set the attributes of each measure item. Among the attributes you can set are the visibility of each measure, the displayed measure value and the filtered valued. On the example, to display the unit price measure, click on the red x to change to a green check mark.

When a measure item is not displayed on the measures toolbar, use the global measure manager to set its state to visible again.

You can also add a new calculated measure by using the calculator icon on the bottom toolbar. This will bring up the same form as the 'Activate Calculated Measures Manager' button.

Calculated Measures Manager

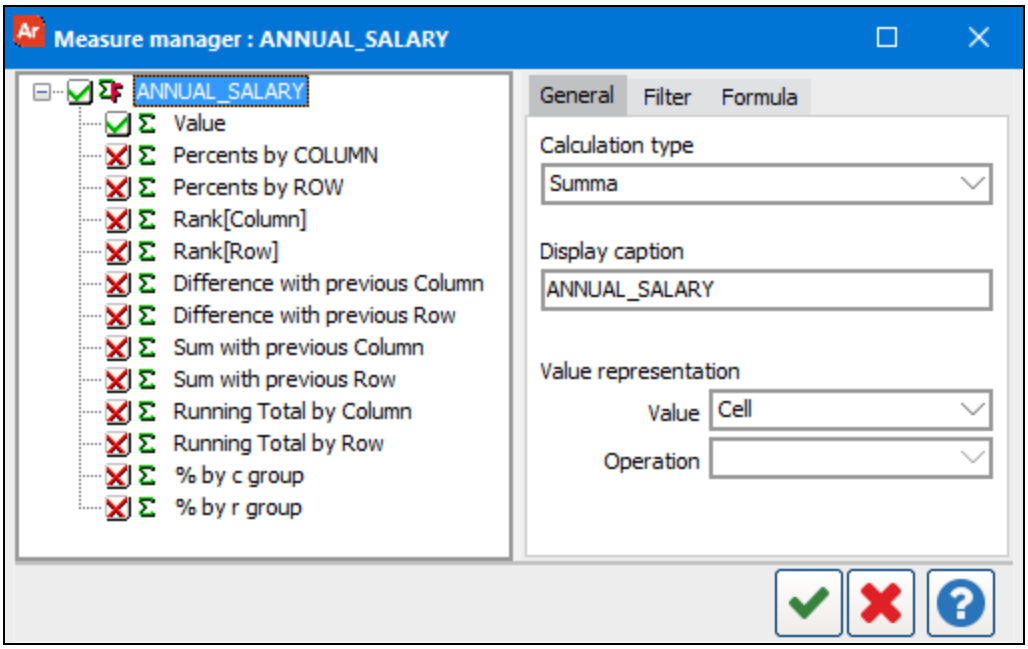
In this example a new measure was added to divide ANNUAL_SALARY by HOURLY_FTE to find the number of hours worked.



The calculated measures manager dialog box is used to add additional measures. The value of these calculated measures may use the values of the defined measures, much like how calculated fields are used in a database table.

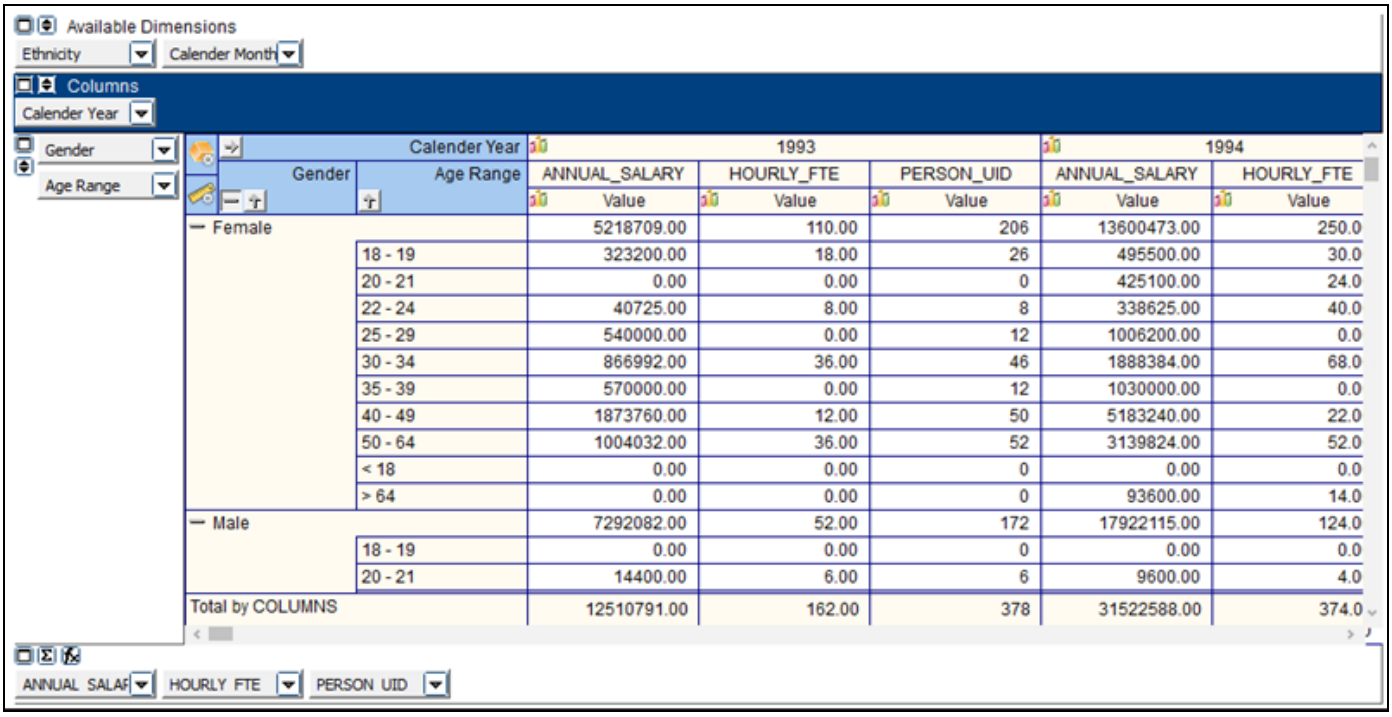
Activate Individual Measure Manager

The individual measure manager is used to set the attributes of the selected measure. It is identical to the global measure manager, except that you can only set the attributes of the selected measure. To activate the individual Measure manager, click on the down arrow of the measure of interest.



Sample OLAP Cube

In the following example, the gender and age range dimensions were dragged into the Dimension Row Toolbar; the calendar year dimension was dragged into the Dimension Column Toolbar.



Calender Year		1993			1994	
Gender	Age Range	ANNUAL_SALARY	HOURLY_FTE	PERSON_UID	ANNUAL_SALARY	HOURLY_FTE
		Value	Value	Value	Value	Value
Female		5218709.00	110.00	206	13600473.00	250.0
	18 - 19	323200.00	18.00	26	495500.00	30.0
	20 - 21	0.00	0.00	0	425100.00	24.0
	22 - 24	40725.00	8.00	8	338625.00	40.0
	25 - 29	540000.00	0.00	12	1006200.00	0.0
	30 - 34	866992.00	36.00	46	1888384.00	68.0
	35 - 39	570000.00	0.00	12	1030000.00	0.0
	40 - 49	1873760.00	12.00	50	5183240.00	22.0
	50 - 64	1004032.00	36.00	52	3139824.00	52.0
	< 18	0.00	0.00	0	0.00	0.0
	> 64	0.00	0.00	0	93600.00	14.0
Male		7292082.00	52.00	172	17922115.00	124.0
	18 - 19	0.00	0.00	0	0.00	0.0
	20 - 21	14400.00	6.00	6	9600.00	4.0
Total by COLUMNS		12510791.00	162.00	378	31522588.00	374.0

The user has complete control over what is displayed and how it is displayed. Experiment by moving dimensions into rows or columns in order to produce the desired report format.

Right-clicking anywhere within the cube will bring up a menu which allows you to export the cube to your installed spreadsheet application and automatically launch it.

Charts

In the above cube, note the chart icon on the Column Dimensions. If you click, the user will have access to different charts. In this example the chart icon was clicked in the Annual_Salary column.

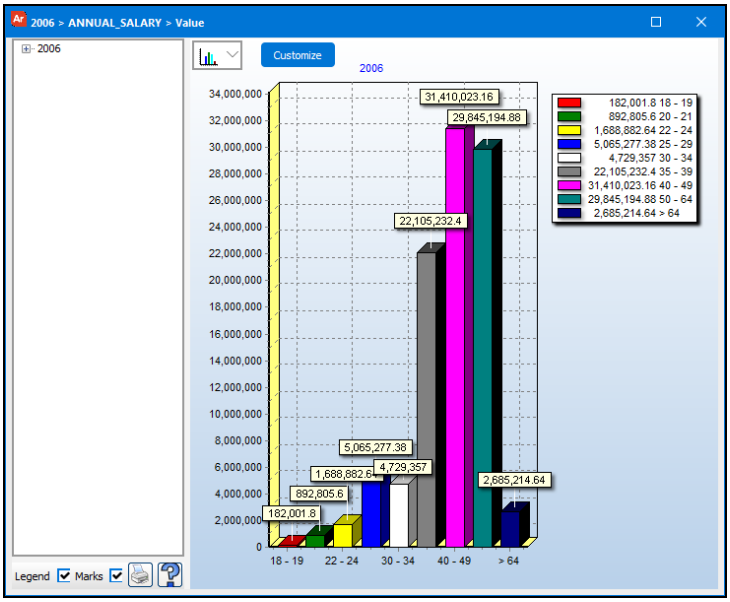
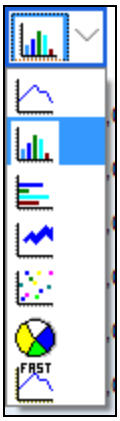
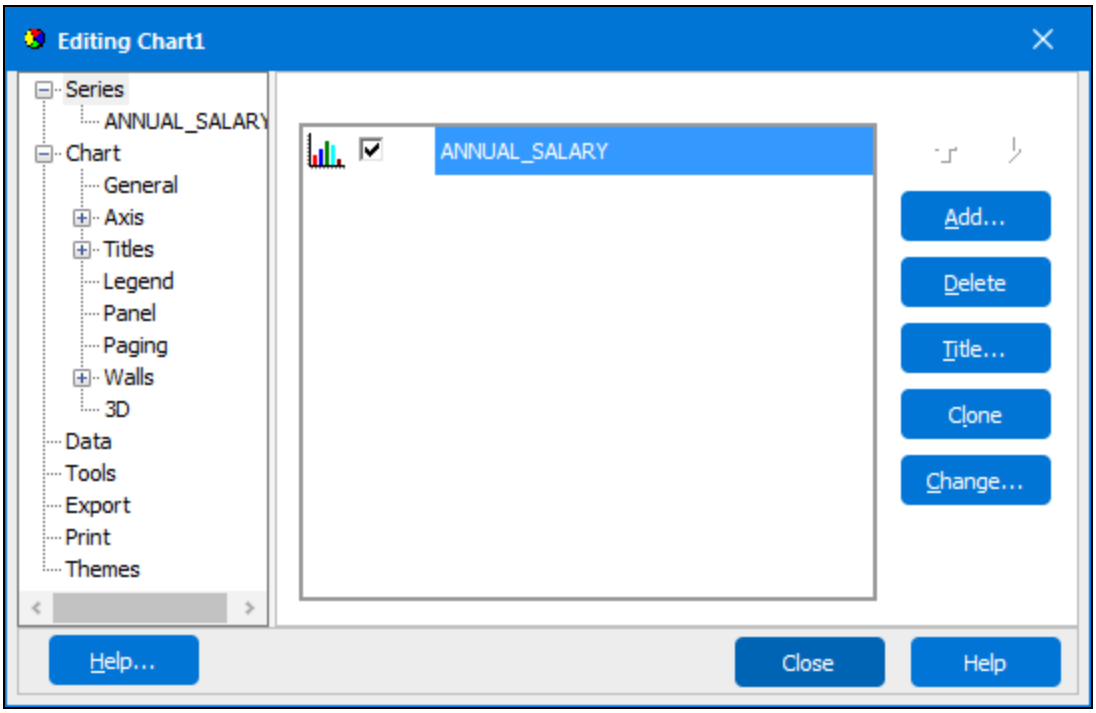


Chart Options

The end user can change the style of the chart by clicking the drop down list displayed above the chart.



The user has seven predefined styles to select. In addition, other properties of the chart can be modified by clicking the 'customize' button. This brings up the same interface as found in the Band Editor:



Here you can customize such as colors, axis labels, tick marks, plot colors, legend appearance, and chart title.

Argos Support Resources

Evisions provides several sources of support for Argos users, including in-product Help and user guides; live and recorded training; and a support website with many useful resources.

In-Product Help

The Argos Help serves as a reference guide for every feature in Argos. You can access Help by pressing the **F1** key, clicking the **Help** button in a dialog box, or by selecting **Help** from the Argos toolbar. The Help contains a table of contents, an index, and a search feature.

The Argos Web Viewer Help is separate from the main Argos Help, and is accessible from the Help menu in the Web Viewer. There is also a section in the main Argos help pertaining to Web Viewer settings in the Argos client.

User Guides

The Argos Help includes three user guides. Each guide contains step-by-step instructions for common and advanced tasks performed by that user type, and provides an excellent mechanism for getting started with Argos.

- Argos Report Viewer Guide
- Argos Report Writer Guide
- Argos DataBlock Designer Guide

Training

Evisions provides free, live online training for all products. Visit the Training page to register for a session, or watch recorded training sessions at your convenience.

Additional Resources

The Support page contains links to additional support resources:

- Argos Installation - Installation and upgrade information.
- Release Documentation - Release guides and release notes for all current and previous versions of Argos.
- Knowledge Base - Answers to common questions.
- HelpDesk - Technical support.
- CO-OP Share - Pre-built DataBlocks, data dictionaries, and other resources.
- Forums - Collaborate with other Argos users.

Getting Help

For information on using the software, please refer to the in-product Help, which contains detailed information on all aspects of the product.

If you are having problems with the installation or configuration, you can search our support site, which includes a knowledge base of common issues. If you are unable to find the solution, submit a HelpDesk request with a detailed explanation of the problem you are experiencing.

Please do not hesitate to contact the Evisions HelpDesk if any questions or problems arise. We are here to help you and want to ensure your success.

If you find that areas of this documentation could benefit from additional detail or clarification, please let us know. We are constantly trying to improve the installation process to make it as easy as possible.

Glossary

A

Argos
Evisions' software for building and deploying reports and dashboards across the enterprise.

B

Banded Report
Banded reports are fully-formatted PDF reports that give the report writer complete control over the location and appearance of the information in the report.

C

Child Band
A child band is a band in a banded report that is attached to another report band (its parent) and will always be printed below it.

Column Header Band
A column header band is a band in a banded report that contains column headers for the detail bands in your reports. The column headers will be positioned above the corresponding fields in the detail band just below it.

CSV Report
A "Comma Separated Value" file is generated by the report, which can then be viewed in spreadsheet software such as Microsoft Excel.

CSV Report Delimiters
A "Comma Separated Value" file is generated by the report, which can then be viewed in spreadsheet software such as Microsoft Excel.

D

Dashboard
A "screen-only" view of the DataBlock form, which can be used to enter parameters and/or display information and results.

DataBlock
DataBlocks are the foundation of Argos. They contain user input forms and queries to retrieve information from one or more data sources. Reports in Argos have a DataBlock as their "parent" and each DataBlock can contain multiple reports.

Detail Band
The detail band in a banded report contains the information pulled from the database fields that are placed in the band by the user designing the report.

Dimensions
Fields by which data records are grouped in an OLAP cube.

E

Explorer Tree
The Explorer Tree is a tree view of all folders, DataBlocks, dashboards, and reports in Argos. Parent objects in the tree can be expanded to reveal their child objects, or collapsed to hide their children.

Extract Report

Creates output files that meet pre-defined specifications. This feature is especially useful for creating delimited output that is more complex than a simple comma-separated file (CSV), for creating a fixed-width file in which each field is precisely positioned on a given line, or for creating an XML file. This could include files that you might upload to a government agency, clearinghouse, or service bureau.

F

Form

Forms in Argos obtain input selections from users and contain queries to filter the results. Forms are created on the system dashboard and can be saved as dashboards for that DataBlock.

FormFusion

Evisions' solution for enhancing documents and managing their distribution via email, imaging software, print, or other electronic methods. You can turn plain text input into a graphical layout with images, fonts, and color, with the data rearranged to suit your needs. FormFusion lets you retrieve additional data not in your input file from a database, and print it on the form along with the rest of the information.

G

Group Bands(Group Header/Footer)

The Group Band is a header and footer band that separates the Banded Report into sections. The band will group details by a field specified by the report writer. For example, you may want a banded report on employee salaries, with the report separated by department.

I

IntelleCheck

Evisions' payment processing solution – includes accounts payable, payroll, and refund checks; direct deposit advices; and electronic refunds.

L

Loop Band

A Loop Band is a band in a banded report that prints after each detail row and will print as many times as indicated in the Print Count property.

M

MAPS

MAPS (Multiple Application Platform Server) is the server that delivers the Argos software to users. Once Argos is installed, users connect to MAPS, which fetches data and performs other tasks for them.

Measure Manager

Used to easily set the attributes of each measure, the displayed measure value and then the filtered valued.

Measures

The numbers or values in the OLAP or cube. They are also referred to as facts.

O

OLAP cube

An OLAP (OnLine Analytical Processing) cube is an object that can be placed on a dashboard to present data in multiple dimensions that can be arranged by the person viewing the report. The DataBlock designer defines the dimensions that report viewers can use to sort

the data at run time. The designer also defines what is being measured. The report viewer can arrange the dimensions any way they need to (e.g. sales by region, sales by year, sales by employee) and view a quick graph of the data.

P

Page Footer Band

The page footer band in a Banded Report prints at the bottom of every page. This will typically include items such as the page count, document title, and report date.

Page Header Band

The page header band in a banded report prints at the top of every page. Like the page footer band, the page header typically includes information such as the page count, document title, and report date.

Q

Query

The query obtains data from the database. In Argos, you can either write your own queries, or you can use the Build Query dialog to build the query. Queries are written in SQL.

S

Shortcut

A Shortcut is a reference to a DataBlock or Report. It can be shared (so all users can see it) or private (My Shortcuts) so only the creator can see it. Click the Shortcuts tab to switch to the Shortcuts view.

Styles

Styles are created within the Library of Objects Manager located under the Main Argos Interface under the Tools menu. Use of styles allows you to customize colors and fonts.

Sub-detail Band

Sub-detail Bands are special detail bands that allow additional details to be added to each record in the detail band. Sub-detail bands print immediately after the detail band. Use sub-detail bands when you need to loop through more than one dataset to get all the data you need.

Summary Band

The summary band in a banded report will always print at the bottom of the last page of a report. The summary band contains summary information about the report; for instance, the number of employees, or the sum of sales would be items that appear in a summary band.

T

Title Band

The title band in a banded report contains the title of the report.