

Training

DataCycle MyVision

APESOFT

MyVision

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DataCycle y DataCycle Reporting son marcas registradas por APE Software Components S.L. Todas las marcas mencionadas en este manual pertenecen a sus respectivos propietarios.

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Chapter

Introduction

MyV ision is, the solution for publishing and execution of reports designed for DataCycle Reporting.

DataCycle MyVision is part of DataCycle suite, helping to decision making process for any company, any sector, working as web platform for DataCycle Reporting and DataCycle Scorecard.

DataCycle MyVision is a Web application, allowing visualization and reporting process execution, generated and configured with DataCycle Reporting



The main benefit of DataCycle MyVision and DataCycle Reporting compared with other vendors' solutions is, taking advantage of Excel reporting features empowered them with ApeSoft technology:

- Avoid license purchase by user.
- Exploit all features and probably the best application for visualization and data manipulation additionally installed in most PC's: Microsoft Excel.
- Eliminates the necessity of install and configure new software on client's PC, everything is centralized.

The main properties of DataCycle MyVision and DataCycle Reporting solution are:

- Dispatching engine of selected information.
- Integral process for report designing, planning, implementation, execution and tracking all in one application.
- Access to RDBM most used in all sectors (AS/400, Oracle, SQL Server, etc.)
- Environment managed and centralized.
- Delivery of customized reports and multi user dispatch from a unique designed template.
- Work Flow managed by alerts (mailing capability)
- Technical lay-out, project oriented

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- Intuitive look and feel environment and easy to use.
- Scalability and modular upgrading.
- User profile manager, granting access to users with technical knowledge for SQL and centralized queries, template designing or final users.
- Customized and secure web Login for process and reports of DataCycle Reporting.
- Easy to install and deploy.
- Users have direct access to data sources, easy and transparent way.
- No especial requirements in clients PCs only Internet Explorer and Microsoft Excel
- Enable an easy and compatible logon with Microsoft domains feature.
- Capability of integration with corporate intranets and web environments.

Chapter

Publishing and Execution of processes at MyVision

Let's publish an already developed report in DataCycle Reporting through MyVision.

All desired reports to be published at MyVision should be contained in a DCR folder. Any report placed in "All process and links" might not be seen at MyVision.

🖄 DataCycle Reporting - User: Demo User						
Project Report Tools View Help						
🗅 🌮 🖉 😠 🖓 🖌 🖓 🖉 🗸	' 🔑 🛞 🗢 🐻	🦸 🐴 🕂 🗂 📲 📇	2 🔊			
Evaluation Project	Start Page Expl	orer Recent Favorites				
Data sources	Search by ID					
All databases	Logical name I. Weekly Sal	Co New report	de	Owner er er	Type Simple Simple	Last modification 31/03/2008 16:55:32 06/04/2008 15:22:50
	3. Dynamic Sa 🌮	New report (Wizard)	_	eer	Simple Simple	06/04/2008 15:24:03 04/04/2008 10:18:03
Quedeo .	×	Delete report				
	6	Duplicate report				
	4 14	Cut report Ctrl+ Copy report Ctrl+ Paste report Ctrl+	x c v			
	7	Run report on this computer				
Cubes	1	Run report in test mode				
All the Cubes	م ۲	View report results View scheduling				
	•	View jobs				
Reports/ Processes		User privileges	_			
Commercial	+	Add to favorites				
4-Evaluation Project						
Pennelhany: 1 + C1/AB/CHTV+1/ADESOE+1/BEDD/Demolded	erro rodh					

Let's Click on "Set Results" option, then click on "Generation Options"



Let's tick option "Publish in MyVision"

Advanced generation in Excel
Disc storage management Delete generated report (xls,mdb) after executing all report task (including mailing) Publish in MyVision
Report compression Compress report (ZIP) Delete ZIP file once mailed Publish in MyVision
<u> </u>

Having saved changes, we will notice the label next to MyVision icon has changed from "NOT publish in" to "Publish in".

🕮 Report/Process - 1. Weekly Sales Report		
Report/Process Privileges		
日 🖓 🦿 🕕 🖌 😁 🗢 🗟 🗳 A 🐇		
1. Weekly Sales Report	Report results	
Definition Basic Information	Results Generate in: C:\program files\apesoft datacycle\Demo\Reports Greate destination folder during report execution (if not existing)	
Report information	Destination file (.xls) SalesDashboard.xls Den	
Simple Report	In case of a multiple report or if using parameters, you can intert fields and/or parameters in the path or report name to obtain multiple custom reports. Right click on the field, where you want to insert them.	to
Design and results Report format	Generation Options Published in Published in	

Once the publication in MyVision is ticked, we should assign user access privileges.

At the top command's bar, click on "User Privileges"

🕮 Report/Process - 1. Weekly Sales R		
Report/Process Privileges		
🔲 🔻 🔍 🖌 🛞 🗢 🗟 🥵 A		
1. Weekly Sales Report	Report results	
	Results Generate in:	C:\program files\apesoft datacycle\Demo\Reports
Basic Information		Create destination folder during report execution (if not existing)
Report information	Destination file (.xls)	SalesDashboard.xls
Report type	_	☑ Autofill extension
Simple Report	In case of a multiple repo obtain multiple custom re	xt or if using parameters, you can intert fields and/or parameters in the path or report name to ports. Right click on the field, where you want to insert them.
Design and results	۱	DC Lavisla
Report format:	Generation Uption	s NUT published in
Excel		
Set report design		
Set results		
File results		

At the User access right's screen, select a desired user and click on "Add" button.

User access rights 1. Weekly Sales Report				
Jsers PowerUser Users Developer Demo User Regional Management Sales Designer Designer IT user AGENT MyVision	<u>A</u> dd >> << <u>R</u> emove	Access granted	Execution	View results
		<	1111	

After click on "Add" will show a pop up screen, indicating user privileges for that specific process, here we can choose the follow options:

1) *All results.* The user will be able to see all results derived from the execution of the process with indecency of process owners or executers

2) Only user results. Users can only see processes and results created by them.

3) Results with properties visible for the user. Users can only see reports with visibility properties assigned through parameters in process configuration (This option will be explained later on).

For this example, let's tick on All Results.

User privileges for this process	×
Report execution	
☑ User can run this process	
View mode for results	
All results	
1 - All results. The user will be able to access results generated in all process executions.	
2 - Only user results. The user will be able to see only those results generated in its process executions.	
3 - Results with properties visible for the user. The user will be able to see results generated with properties matching with those properties visible for him.	
<u></u> ancel	

Users whom want to use MyVision as visualization and processing platform have to have Security Level: "**1** – Individual object access control".

This security level assigns different privileges on every object; additionally grant access to users above desired process has to have access rights on the database, folder and process in user configuration at DataCycle Reporting interface.

Let's login to MyVision web application. Users' access validation is through MyVision homepage, typing a valid username and password. The homepage address will depend of MyVision environment setup.



Once, our credentials have been granted, Click on desired project link to start working.

In case of having rights on a only single one process this step will be no longer needed, because MyVision will show the folder structure according to the privileges assigned in DataCycle Reporting to the user logged on. Furthermore, a folder named MyFavorites will be listed at the top.



The user will be able to explorer throughout folder structure with the proper rights; in this example the user "MyVision" only has rights on Commercial folder. Let's click on it to see the published report.



Here, we can see the Report that we have published previously in DataCycle Reporting.

11,~~		ataCycle	My Visio	on
Reports	Jobs	Configuration	Logout	User: MyVision - Project: Evaluation Project
				Reports and links in folder: [Commercial]
🗢 <u>Back</u>				
🖗 My Favouri	it <u>es</u>			
📕 1. Weekl	y Sales Report '			Results

Also we can see the generated reports clicking on Results link; we will notice there are not reports available because this process hasn't been processed yet.

ال،می 🌢		ataCycle	My Visio	on	
Reports	Jobs	Configuration	Logout	User: MyVision - Project: Evaluation Project	
				Reports generated by process [545-1. We	eekly Sales Report]

🗢 Back

There are no reports generated by this process.

Let's go back to DataCycle Reporting and execute Weekly Sales process to see the report generated in MyVision.

Job de	etails 4910					X
• 🗉	8					
Datos g	enerales					ąχ
ID. Job: 4	910 1. Weekly Sales Re	eport				
Inicio:	30/11/2010 12:57:00	PC:		AUCON06		
Final:	30/11/2010 12:57:42	Nº de registros	procesado:	s: 9		
Duración:	00:00:42	Estado de ejec	cución:	FINISHED OK		
Tarea a	ctual					Ψ×
12:57:42 -	Execution finished ok					~
						\sim
Informe	es generados y publicados	; (2)				ąх
Þ						
Fichero		Tipo	Tamaño	Fecha	Directorio	Carp
🗿 SalesB	yEmployee.htm	HTML	33 Kb	30/11/2010 12:5	C:\Archivos de programa\Apesoft DataCycle\Demo	
📧 SalesD	ashboard.xls	MS-EXCEL	71 Kb	30/11/2010 12:5	C:\Archivos de programa\Apesoft DataCycle\Demo	
<						>

If we go back to Results link in MyVision, will be able to see the Report generated.

eports	Jobs	Configuration	Logout	User: MyVision - Project: Evaluation Project
				Reports generated by process [545-1. Weekly Sales Rep
Dack				

To visualize the results, we have to click on the report name link, followed by a file's downloaded or redirect to an html page generated depending of the task configured in the result (Excel or Html).

Reports	R Jobs	eports & Dashboards everyw Configuration	here Logout	User: My	Vision - Project: Evaluation Project	
		Repo	orts generated	by process [545-1. Weekly Sales Report]	
Back				Descarga	de archivos	
leports generated	d by this p	rocess:		¿Desea	a abrir o guardar este archivo?	
웹 <u>SalesDashboard.xls</u> [71 Kb] [30/11/2010 12:57;41]					Nombre: SalesDashboard.xls Tipo: Hoja de cálculo de Microsoft De: 192.168.0.182 Abrir Guarda Aunque los anchivos procedentes de Interner algunos archivos pueden llegar a dañar el e el origen, no abra ni guarde este archivo. <u>/C</u>	Excel, 71,0 KB r Cancelar t pueden ser útiles, tujo. Si no confía en uál es el riesgo?
SalesDashboard (1).xls [Modo de compatibilidad] - Micros Inicio Insertar Diseño de página Fórmulas Datos Revisar Vista Programador Arial 10 A A = = = I A justar texto General -						
regar 🝼	N K	<u>s</u> - <u>·</u> ·			E Combinar y centrar 🔻 🚆	g v % 000 to we
ortapapeles 🖻		Fuente	G.	AI	ineación 🕞	Número 🕼
G32		$ f_x$				
A		В	C			
Weekly S	ales R		0	D	E	F
		eview	C	D	E	F
		eview		D	E	F
	Week	Updated		D	E	F Distribution by Product
-	Week 49	Updated 30/11/2010 12:57:01		D	E Grains/Cen	F Distribution by Product
U	Week 49 nits Sold	Updated 30/11/2010 12:57:01 318		D	E Grains/Can ; 100.72	F Distribution by Product
U	Week 49 nits Sold levenue:	Updated 30/11/2010 12:57:01 318 547.248		D	E Grains/Cen ; 100.72 Sesfoo Produce; 141.62	F Distribution by Product
UI	Week 49 nits Sold Revenue:	Updated 30/11/2010 12:57:01 318 547.248 Employee	Revenue	D % of total	E Grains/Cen ; 100.72 Sesfor 105.269	F Distribution by Product
UI F TOP 3 Em	Week 49 nits Sold Revenue:	Updated 30/11/2010 12:57:01 318 547.248 Employee Janet Leverling	Revenue 100.525	D % of total 18%	E Grains/Cen ; 100.72' Seafoor Produce; 141.62 Meat/Poulty; 178.189	F Distribution by Product
Ui F TOP 3 Em	Week 49 nits Sold Revenue: Iployees	Updated 30/11/2010 12:57:01 318 547.248 Employee Janet Leverling Andrew Fuller Nagar, Days Te	Revenue 100.525 87.791	D % of total 18% 16%	E Grains/Cen : 100.72 Produce: 105.269 Meat/Poulty: 178.189	F Distribution by Product
UI F	Week 49 nits Sold Revenue: 1ployees	Updated 30/11/2010 12:57:01 318 547.248 Employee Janet Leverling Andrew Fuller Nancy Davolio	Revenue 100.525 87.791 81.898	D % of total 18% 16% 15%	E Grains/Cen : 100.72 Seafoor Produce: 141.62 105.269 Meat/Poulty: 178.189	F Distribution by Product 3 Beverages 133.899 Condiments; 13.695 Confections;
UI F TOP 3 Em	Week 49 nits Sold Revenue:	Updated 30/11/2010 12:57:01 318 547.248 Employee Janet Leverling Andrew Fuller Nancy Davolio	Revenue 100.525 87.791 81.898	D % of total 18% 16%	E Grains/Cen : 100.72 Seafoor 105.269 Meat/Poutry: 178.189 D	F Distribution by Product t; Beverages 133.899 Condiments; 113.695 13.695 Lister 113.695 Confections; 177.099
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UI F TOP 3 Em	Week 49 nits Sold Revenue: 1ployees	Updated 30/11/2010 12:57:01 318 547.248 Employee Janet Leverling Andrew Fuller Nancy Davolio Alice Mutton	Revenue 100.525 87.791 81.898 35.482	D % of total 18% 16% 6%	E Grains/Cen : 100.72 Produce: 141.62 105.269 Meat/Poutry. 178.189 D Proc	E Distribution by Product Distribution by Product Beverages 133.899 Condiments; 113.695 Confections; 177.099
Un F TOP 3 Em TOP	Week 49 nits Sold Revenue: 1ployees	Updated 30/11/2010 12:57:01 318 547.248 Employee Janet Leverling Andrew Fuller Nancy Davolio Alice Mutton	Revenue 100.525 87.791 81.898 35.482	D % of total 18% 16% 15%	E Grains/Cer : 100.721 Produce; 141.62 Meat/Poutry; 178.189 D Proc 251	F Distribution by Product Beverages 133.899 Condiments: 113.695 Ucts: .331
Un F TOP 3 Em TOP TOP Orders	Week 49 nits Sold Revenue: 1ployees Product Date	Updated 30/11/2010 12:57:01 318 547.248 Employee Janet Leverling Andrew Fuller Nancy Davolio Alice Mutton Order	Revenue 100.525 87.791 81.898 35.482 Units	D % of total 18% 16% 15% 6% Revenue	E Grains/Cerr ; 100.72 Produce: 105.269 Mest/Poutry: 178.189 Dr Prod 251	F Distribution by Product di Beverages 133.899 Condiments: 113.695 133.1 Confections: 177.099
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Un F TOP 3 Em TOP TOP Orders	Week 49 nits Sold Revenue: 1 ployees 1 Product 3/11/2010 5/11/2010	Updated 30/11/2010 12:57:01 318 547.248 Employee Janet Leverling Andrew Fuller Nancy Davolio Alice Mutton Order 10691 10329	Revenue 100.525 87.791 81.898 35.482 Units 40 20	D % of total 18% 15% 6% Revenue \$4.952 \$4.216 \$4.216	E Grains/Cen : 100.72 Produce: 141.62 Meat/Poulty: 178.189 Di Proc 251 Item Thűringer Rostbratwurst Côte de Blaye	F Distribution by Product Beverages 133.899 Condiments; 13.095 Confections; 177.099 Employee Andrew Margaret
TOP 3 Em	Week 49 nits Sold Revenue: 10 10 10 10 10 10 11 12 10 10 11 11 12 10 10 11 11 12 10 10 11 11 12 10 10 11 11 12 10 10 11 11 10 10 10 10 10 10 10 10 10	Updated 30/11/2010 12:57:01 318 547.248 Employee Janet Leverling Andrew Fuller Nancy Davolio Alice Mutton Order 10691 10329 10711	Revenue 100.525 87.791 81.898 35.482 Units 40 20 20	D % of total 18% 16% 5% 6% Revenue \$4.952 \$4.216 \$3.936 \$3.936 \$3.930 \$3.930 \$3.930 \$3.930 \$3.930 \$4.952 \$3.930 \$4.952 \$3.930 \$4.952 \$4	E Grains/Cen : 100.72 Produce: 141.62 Meat/Poulty: 141.62 Produce: 141.62 Discrete State S	Employee Andrew Margaret Steven (13.695 Confections; 177.099
TOP 3 Em	Week 49 nits Sold Revenue: 10 10 10 10 11 11/2010 11/11/2010 11/11/2010	Updated 30/11/2010 12:57:01 318 547.248 Employee Janet Leverling Andrew Fuller Nancy Davolio Alice Mutton 0rder 10691 10329 10711 10324 10688	Revenue 100.525 87.791 81.898 35.482 Units 40 20 120 80 80 80 80 80 80 80 80 80 8	D % of total 18% 16% 15% 6% 84.952 \$4	E Grains/Cen : 100.72 Seafoor 105.269 Meat/Poutry: 178.189 Dr Produce: 178.189 Dr Produce: 251 Thüringer Rostbratwurst Côte de Blaye Perth Pasties Vegie-spread Possle Sauerkraut	Employee Andrew Margaret Steven Anne Marnaret
TOP 3 Em TOP 3 Em TOP 3 Em TOP 0rders	Week 49 nits Sold Revenue: 1ployees 1 Product 3/11/2010 3/11/2010 3/11/2010 3/11/2010	Updated 30/11/2010 12:57:01 318 547.248 Employee Janet Leverling Andrew Fuller Nancy Davolio Alice Mutton 0rder 10629 10711 10224 10688 10694	Revenue 100.525 87.791 81.898 35.482 Units 40 20 120 80 60 90	D % of total 18% 16% 15% 6% 84.952 54.952 54.216 53.936 52.808 \$2.736 \$2.700	E Grains/Can : 100.72 Produce: Sestoor 105.269 Meat/Poutry. 178.189 Dr. Proc 251 Em Thúringer Rostbratwurst Côte de Blaye Perth Pasties Vegie-spread Rössle Sauerkraut Uncle Bol's Orqanic Dried Pears	Employee Andrew Margaret Steven Anne Margaret Laura
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Process execution at MyVision

For a user can run a process execution in MyVision should be fulfill the next requirements:

1) The process has to be configured to be published in MyVision through DataCycle Reporting.

2) The user has to have rights above the Project, Database, query, folder and Process in DataCycle Reporting.

To meet the first condition, we have to edit the process in Data Cycle Reporting, click on MyVision link located in left hand side bottom and tick the option Executable in MyVision.



If a Process is executable in MyVision, DataCycle Reporting will add a code ("!<code>!") at the rear part of the file name, preventing overlapping at the file generation of processes execution.

To meet the condition # 2, we should edit the user privileges and check if the option is ticked "User can run this process" in DataCycle Reporting.

Report/Process Privileges	
🗟 🗢 😒 🗸 🕕 🖣 🖓 🔚	🦸 A 🔊
1. Weekly Sales Report	Task List
O Definition	Add task Add task Delete task Edit task Disable
Basic Information	INSERT DATA: Range (OrderData) - query [14249-Most sold Orders]
Report infor Image: Constraint of the second se	ss rights 1. Weekly Sales Report User privileges for this process suits Its its Iver can run this process its Iew mode for results its All results Image: Security of the se
Report tasks	<u>k</u>
Task list	Edit Qlose
Email	×
MyVision Show title of process in MyVision Executable in MyVision Generated report properties Set MyVision folder	8

At MyVision environment, we can see the link "Execute" is now available.

II a DataCycle My Vision Reports & Dashboards everywhere					
Reports	Jobs	Configuration	Logout	User: MyVision - Project: Evaluation Project	
				Reports and links in folder: [(ommercial]
倖 _{Back}					
🚱 <u>My Favour</u>	<u>ites</u>				
📕 1. Weekl	y Sales Report		Executi	<u>e Results</u>	

To execute the process we just have to click on "Execute", once pressed we will be transferred where all parameters are configured. For this example doesn't apply any parameter because we haven't configured them.

Finally we press the button Execute.

IL ~ DataCycle My Vision				
Reports	Jobs	Configuration	Logout	User: MyVision - Project: Evaluation Project
				Execution of report [545-1. Weekly Sales Repor
De Back				
Dack				
Description:				
/This see out do		un monto un l		
	es nuc nave pa	rameters)		
Execute				
1				

While the process is being executed, we can see the progress and also we have the option to cancel any process running, clicking on Cancel link.

Reports & Dashboards everywhere							
Reports	Jobs	Configu	ration	Logout	User: MyVision - Project: Eva	luation Project	
					Progress of job 4911 of p	rocess [545-1.	Weekly Sales Report]
◆ <u>Back</u> [<u>cancel</u>]						_	
Status: Running.			N. of red	cords: 8	User: 209-MyVision		
Begin: 30/11/2010	0 13:22:00		End:		Duration: 00:00:03		
			-				
Result: The rep	ort is running lable records:					-	
Available record	ds:	, v					

Once the process has been finalized we can see the final Result.

!! ,°~%		ataCycle ts & Dashboards everyw	My Visio	on	
Reports	Jobs	Configuration	Logout	User: MyVision - Project: Evaluation Project	
				Progress of job 4911 of process [545-1.	Weekly Sales Report]

🗢 <u>Back</u>

Status: Finished	N. of records: 9	User: 209-MyVision
Begin: 30/11/2010 13:22:00	End: 30/11/2010 13:22:40	Duration: 00:00:40

Result: The report execution has finished

Number of available files: 2

Available records:

SalesByEmployee.htm [34 Kb] [30/11/2010 13:22:36]

🕙 <u>SalesDashboard.xls [</u>71 Kb] [30/11/2010 13:22:39]

MyVision folders

At MyVision application we can create folders, additionally those created by DataCycle Reporting. These folders can be created directly from MyVision Folder Manager or dynamically during the execution of a process as we will see further up.

To create, edit, modify, change folder privileges or manage their content, use MyVision folder Manger option from Project menu.



Through this Manager, we can explore the folder structure of MyVision.

💁 MyVision folders			
i 🔁 🚘 📽 💷			
All folders	Report	Туре	Published
Commercial			
SalesHeport			
Users			
	4		
			Close

In gray color are represented all DataCycle Reporting folders which cannot be modified

On enabled folders we can do the following actions:

- Create a new folder.
- Edit a folder

i.

- Delete a folder
- Assign user privileges.

🖪 MyVision folders		
🖗 🚰 🙀 🕫 💷		
All folders		Report 2
🖻 🖳 📄 Commercial		
🖻 🔤 SalesReport		
L	New folder	
2	Edit folder	
\$	Delete folder	
ee	Rights	
	Related processes/rep	ports

At this point we can see how to give access right to existing user (users or groups with folders' rights)

🖪 MyVision folders			
🖗 🚰 😥 📽 💷			
All folders	Report	Туре	Published
Vser access rights Users Users PowerUser Users Developer Demo User Regional Management Designer Designer IT user	Access granted MyVision AGENT Sales ✓< Remove		
			· · · · · · · · · · · · · · · · · · ·

Publishing other file formats at MyVision

MyVision allows to publish several file formats not exclusive excel files, for instance HTML, PDF or PPT among others. Simply we just have to select the option "Publish in MyVision" at Set Results option of Process property. At this point, MyVision will be the platform to allow the visualization of these files; previously the file format exportation task should be configured in DataCycle Reporting.

 Attach pdf file to email ✓ Publish in MyVision 		
	<u>O</u> k	<u>C</u> ancel

In this example we have 3 different tasks of file exportation with the option Publish in MyVision published selected.

🛤 Report/Process - 1. Weekly Sales Report	
Report/Process Privileges	
🕞 🕈 闪 🖌 🧐 🗢 🐼 🙀 A 🔊	
1. Weekly Sales Report	Task List
Definition	Add task Delete task Edit task Disable 🚮 🚰
Basic Information	INSERT DATA: Range [OrderData] - query [14249-Most sold Orders]
Report information	INSERT DATA: Hange [Param] - query [14265-Parameters] INSERT DATA: Range [ProductSales] - query [14265-Maet sold Product Group] INSERT DATA: Range [TopProd] - query [14262-Most sold Product DK]
Report type Simple Report	INSERT DATA: Hange [IopEmpiData] - query [14265-1 op Salesmen] INSERT DATA: Range [EndPN] - query [14268-Nr of Drders] INSERT DATA: Range [EmpiDetai] - query [14270-Detailed Sales by Employee] RIIN MACRD: (Berreh)
	EXPORT HTML: in file (SalesByEmployee.htm) EXPORT PDF: in file (SalesByEmployee.htm)
Design and results	EXPORT PPT: SalesDashboard.xls to the PPT file SalesDashboard.xls
Report format:	
Excel	
Set report design	

The different file formats are published as shown in next image.

Т

	Rep	ports & Dashboards everywh	I*IY VISIO	on	
Reports	Jobs	Configuration	Logout	User: MyVision - Project: Evaluation Project	
				Reports generated by process [545-1. Weekly S	ales Rej
Reports gener	ated by this pro)cess:		÷	
SalesByEmployee.htm [34 Kb] [30/11/2010 15:49:50]		4			
SalesByEmployee.htm [34 Kb] [30/11/2010 15:49:50] SalesDashboard.xls [71 Kb] [30/11/2010 15:49:52]					

Also is possible Publish an external document in MyVision, we can find a task in DataCycle Reporting that allows us publish any file.

In "Add Task" section we can see "Publish file in MyVision" task.

<u>A</u> dd tas	sk <u>D</u> elete ta	sk <u>E</u> dit task	<u>D</u> isable	
INSERT D INSERT D INSERT D INSERT D INSERT D INSERT D RUN MAC EXPORT F EXPORT F)ATA: Range [UrderD&)ATA: Range [Product)ATA: Range [Product)ATA: Range [TopProd)ATA: Range [TopEmp)ATA: Range [OrderNr)ATA: Range [EmpIDe)RO: [Refresh] HTML: in file [SalesByl PPT: SalesDashboard PDF: in file [SalesAnaly	ita] - query [14249-Most sc query [14256-Parameters] Sales] - query [14259-Sale I] - query [14262-Most sold IData] - query [14265-Top I - query [14268-Nr of Orde ail] - query [14270-Detailer Employee.htm] xls to the PPT file ppt_1 sis.pdf]	old Orders]] s by Product Group; J Product OK] Salesmen] ers] d Sales by Employe] :e]
	Task Type		×	
	Select the task you w	ant to create		
	Insert data into cell Execute macro Export HTML (Excel Export PDF Export PowerPoint Run Report/ Proces Execute program Script code Execute SQL comm Send email Add to Zip Refresh Olap cube Set parameter value: Execute SQL Server Publish file in MyVisit Conditional - If Conditional - Else Conditional - End if	XP and above) s and DTS n		
		<u>O</u> k	<u>C</u> ancel	

For this example we provide the file path and folder name.



After execute the process we will see published the selected file in MyVision.

Reports & Dashboards everywhere						
Reports	Jobs	Configuration	Logout	User: MyVision - Project: Evaluation Project		
	Progress of job 4931 of process [545-1. Weekly Sales Report]					

🔶 <u>Back</u>

Status: Finished	N. of records: 9	User: 209-MyVision
Begin: 30/11/2010 16:06:09	End: 30/11/2010 16:06:42	Duration: 00:00:34

Result: The report execution has finished

Number of available files: 2

Available records:

🔟 Commercial Agreements Policy.doc [5663 Kb] [02/06/2010 14:53:57]

🕙 <u>SalesDashboard.xls [</u>71 Kb] [30/11/2010 16:06:41]

Exercises.

Publishing a process already developed in DataCycle Reporting, giving visualization access to different users.

- Login to MyVision with those selected usernames, passwords and open the reports generated.
- Modify the process, assigning rights to selected users, allowing execute the process.
- Login as every user and execute the process, visualize the reports generated.

Chapter

On Demand Parameters

On demand parameters and attributes there are properties that enable us to customize user and reports configuration with variables for special treatment on data manipulation.

For instance, in an organization a parameter works as user characterizer and helps to indentify content of reports, like selling poles, regions, departments etc.



Selecting "User properties for this project" option from Project Menu.

Shown below the user form of User properties for this project

+ -		
Vame idUser	Type <general parameter=""></general>	Name [dUser Parameter type: <general parameter=""> Default value:</general>

Although exists different types of parameters, we will use default values. In case we have to define a new one, we can always click in "Edit types" button and create it.

Assigning On demand parameters to profile users.

The next step is, define the values will be assigned to on demand parameters at project level, when users values match with conditions requested in the query.

Let's edit the user profile.

😼 User - Nancy Davolio	
User Groups Privileges	
🔲 🚱 🥞 🏠 😑 🔁 🏈 📁 🖽	8 🔊
Nancy Davolio	Basic information
🔴 Basic information 🔹 🙁	User name: Nancy Davolio
Edit user basic data	Login: NDavolio
Privileges 🔹	Password:
User granted functions Security model and objects privileges	Email: Nancy@northwind.com Telephone: (206) 555-9482
privileges	Internal ID: 1
Properties 🔹	Days saved in the History list: 0
Edit property values View properties	Show help window while creating objects
non proportion	Observations:

Click on "Edit property values" link followed by selecting the project what we want to assign a specific value.

For instance, we will use the user "Nacy Davolio" and will assign "1" as value and "IdUser" as parameter name,

🔓 User - Nancy Davolio		
User Groups Privileges		
🗏 🚱 🥰 🍄 🤒 🖼 🗐	87 🔊	
Nancy Davolio	User properties	
Basic information 🔹	Filter by project: Evaluation Project	
Edit user basic data	Parameter Value	
Privileges 🔹		
User granted functions Security model and objects privileges		
Properties Edit property values View properties		
	Change	

We can change any time the value clicking on Change... button.

Parameter valuesfrom userNancy Davol	io
Please insert values for each parameter:	
[IdUser]:	
1	
	Ok Canad
I	

Also we can access to review properties by clicking at the same link name; here we can see all values.

Clicking on View properties, shows the values assigned to user parameter, filtering the information selected in queries for a specific task, for instance, if a query has configured the parameter IdUser, with a value different of 1, this specific user won't be able to the see the report generated and Published in MyVision.



Typically, the values assigned for every user they might match with values utilized in queries, in this example, user "Steven Buchanan" which is Sales manager; he will be able to see all reports which the parameters are within "1,2,3,4,5,6,7,8,9,10" all these values were assigned to every sales representative, that means Mr. Steven Buchanan will be able to see all reports of every sales man.

😼 User - Steven Buchanan						
User Groups Privileges						
🕞 🚱 🥞 🏤 😏 🍃 🧾	등 😪 📽 隆 🕒 🗟 😧 📁 💷 😵 🔊					
Steven Buchanan	View data					
Basic information	Filter by project:	Evaluation Project				
Edit user basic data	Parameter	Value				
Privileges &	IdUser	1,2,3,4,5,6,7,8,9,10				
privileges						
Properties *						
Edit property values View properties						

Use of user properties (On demand parameters) as filter's queries of task's within a processes.

The user properties are helpful when the information should be filter by specific parameters, used at process tasks of "Insert Data"

Simple Report option.

Let's use the user propertied IdUser, created in previous steps, to generate a report filter by on demand parameters.

Editing the existing process, let's edit "Insert Data" task and clicking in filters tab, adding a new one. Let's select IdEmployee field equal to value field and we will right click and select "Insert Parameter".

After this, we will see a filter pop up screen then we will select "User context" tab and select the parameter "IdUser".

When the process is generated, it will take automatically the on demand parameter configured specifically to user who is running the process, filtering the information inserted into report processed.

📰 Report/Process - 3. Dynamic Sales	Report by Employee
Report/Process Privileges	
3. Dynamic Sales Report by Er	nployee Task List
Def Report range	×
B Step 1 of 3 Select the query to retrieve the data you want to insert: Multiple Iteration I ○ User Peport fo S Exce S S O P	Select query Northwind]: 14227 - Detailed Order Lines by Employee Parameters [Employee]=@PAR[EmployeeID] All fields 10 Description Physical name OrdCod Drameter values OrderMonth Please insert values for each parameter: OrderMonth User science on the user running the process or query: Name Description EXEC_USER_F_ID User running the process or query EXEC_USER_
T <u>Dk</u> <u>Cancel</u>	×
Mullision	Dk Cancel

After this step, we will define the results parameter clicking on "Set Results" link and just before the dot file extension; we will right click and select insert parameters.

Choosing the third tab, named User context, we will select EXEC_USER_FULLNAME with the purpose of personalized the result indicating, the data inserted in this report will contain only data filter with the name shown at the file name.



Going to MyVision Properties on the left hand side bottom



Let's click on add Property, select "IdUser" parameter and move to Assigned properties.

We will see the IdUser in Parameters columns and let's double click to Assign values, at the bottom part will right click and insert the IdUser at User context tab.

Finally our configuration will look as the follow image.

🖬 Report/Process - 3. Dynamic Sales Report b	y Employee
Report/Process Privileges	
🖪 🔻 🕄 🗸 🔗 🖌 🛃	
Definition Section	Generated report properties
Basic Information	Add Property Edit Values Delete property
Report information	Parameter Values
Report type Multiple Report	IdUser @PAR(IdUser)
Iteration type Iteration query User group 	

At this point, click on "users" button to assign privileges whom have access to this report, after select users we will see "User privileges for this process" screen, here let's select "Only user results"

User privileges for this process	×
Report execution	٦
User can run this process	
View mode for results	ר
Only user results	
1 - All results. The user will be able to access results generated in all process executions.	
2 - Only user results. The user will be able to see only those results generated in its process executions.	
3 - Results with properties visible for the user. The user will be able to see results generated with properties matching with those properties visible for him.	
<u> </u>	

At MyVision environment when user Nancy logged in and run the process, we will see, the data is filtered by IdUser parameter value.

1.000		ataCycle •ts & Dashboards everywl	My Visic	on
Reports	Jobs	Configuration	Logout	User: Nancy Davolio - Project: Evaluation Project
			Progr	ess of job 4932 of process [7564-3. Dynamic Sales Report by Employee]
🗢 Back				

Status: Finished	N. of records: 345	User: 210-Nancy Davolio
Begin: 30/11/2010 17:47:33	End: 30/11/2010 17:48:09	Duration: 00:00:36

Result: The report execution has finished

Number of available files: 3

Available records:

Martin SalesAnalysis Nancy Davolio.xls [124 Kb] [30/11/2010 17:47:44]

G) 🖬 🤊 -	· (* - 🙊 -	¥ 🗄 😭	1 🖓 📑	2 🖸 🗘	Ŧ		Sal	esAnalys	is_Nancy Da	avolio!4	1932!.xls [N	1odo de co	mpatibilida	ad] - Micr	osoft E	ccel			-	= x
6	Inicio	Insertar	Diseño o	le página	Fórmulas	Datos	Revisar	Vista	Programa	dor										🥑 –	σx
		Arial	- 10	• A •	= = =	87-	Ajustar	texto	Genera	il	•	1				*		Σ -	Ż	ñ	
	* 🝼	NKS	•	🔅 - A -	8 8 8		Combin	ar y centrar *		% 000 %8	→ 0 → 0	Formato condicional *	Como tabla	Estilos de celda *	Insertar	Eliminar	Formato	2-	y filtrar *	Buscar y seleccionar	-
Por	apapeles 😼		Fuente	G		Aline	ación	6	N	lúmero	G		Estilos			Celdas			Modi	ficar	
	G30	- (• .	fx																	*
	A	E		С	D		E	F		G		Н			J		К		L	M	-
1	Dynam	ic Sale	s Anal	ysis																	
2	CUSTOM	IER CATE	GORY	COUNTRY																	
3								1													
6	Country	(Todas)	-		Customer	(To	das) 💌														=
8	Employee	Nancy	J.		Floudet	1(10	Jd5/	1													
9																					
10		Year	💌 Da	ata																	
11	Catogony	19 Villaite Se	35 Jon Br	wonuo Saloa	1996 Unite Salas	Pou	onuo Salao	1994 Unite Seler	- Pou	onuo Salon	lotal	Units Sales	Total Reve	nue Sales							
13	Meat/Poultr	v 24	9 \$	7.155.80	244	S S	7.955.57	51	S Kev	1.234.70		544	S	16.346.07							
14	Beverages	52	6 \$	13.464,25	819	s	26.457,75	262	s	8.910,00		1607	\$	48.832,00							
15	Confections	69	1 S	16.421,78	481	\$	8.004,36	161	S	5.917,40		1333	\$	30.343,54							
16	Dairy Produ	cts 88	4 \$	21.694,50	428	\$	10.385,10	213	S	5.933,20		1525	\$	38.012,80							
17	Grains/Cere	als 31	4 S	6.759,75	102	\$	2.347,00	6	S	67,20		422	\$	9.173,95							
18	Produce	25	2 5	9.120,60	231	3	11.166,45	9	5	167,40		492	5	20.454,45							
20	Condimente	28	। ३ २ ९	5 630 35	205	э s	5 641 50	219	ç	2 762 00		651	3 . S	24.947,05							
21	Total genera	al 38	30 S	91.013.33	2898	Š	81.898.38	1084	Š	29.232.00	-	7812	\$ 2	02.143.71	1						
22															1						
23																					
24																					
25																					
26																					
28																					
29																					
30																					
31																					-
i di	► N Defi	inition 🖌 Da	taDetail	Dynamic Re	port / 🕲 /							14									•
List	o ግ															E C		100%	0		÷ (+)

If we login as Steve in my MyVision, we will see, he is allowed to run and visualize reports of all sales representatives.

Reports	Jobs	Configuration	Logout	User: Steven Buchanan - Project:	Evaluation Project
			Pro	gress of job 4935 of process [756	54-3. Dynamic Sales Repo
倖 Back					
Status: Finished		N. of records:	L	Jser: 214-Steven Buchanan	
Begin: 01/12/201(0 12:57:54	End: 01/12/2010 12	:58:30	Duration: 00:00:36	
		has finished			
Result: The rep	ort execution I				
Result: The rep Number of avai	ort execution I lable files: 3				
Result: The rep Number of avai	ort execution I lable files: 3				
Result: The rep Number of avai Available record	ort execution lable files: 3 ds:				
Result: The rep Number of avai Available record SalesAnalysis	ort execution able files: 3 ds: <u>Nancy.Davolic</u>) <u>.xls [</u> 66 Kb] [01/12/20:	10 12:58:04]		

Multiple Process option

Multiple Processes has the intention to generate the process based in iterations of values returned by parameters. For this example we will use the group of users "Sales". Generating a sales report filter by each user's information contained into the group.

Let's use the same process used on previous example but using "User group" option



We will click in add group option, select Sales group and then ok button.

3.5 Dynamic Sales Report b Definition	y Empl 🌥 Evalua	dd group
Basic Information Report information Report type		No user group selected
Multiple Report teration type Iteration query User group		Name
Design and results Report format:	Proper	aties and uses
Set report design Set results Open design Published file results		Ok Cancel
Report tasks (2)	*	

After this, we will edit Insert data task of the Task list at filter tab, let's edit the IdEmployee filter and right click in value field to Insert Parameters.

Then, in User group context tab we will find IdUser_USERGROUP

Report/Process Privileges	
3.5 Dynamic Sales Repo	rt hy Emplo Task List
Det Report range	
B. Step 1 of 3	Select query III at 2017 Data at Order Lines to E-store
Rep to insert:	Condition Description
Report ty Multiple	Field: Operator Value EmployeeID equal User USERGROUPI
	Parameters
	Bequet
O Det	Retrie cocess evaluation query:
Report fo	Name Description ID_USEr User identifier of the group NAME Name of the user of the group
S	LOGIN Access login to the user of the group MAIL email address of the user of the group Disable
si o	INTERNALID DNI of the user of the group Internal DNI of the user of the group IdJser USERGROUP
	<u>V</u> iew data
Rep	
	Qpen design Qk Cancel
	×

Changing the definition name for each report generated, click in Set Results, replacing the IdUser parameter, right clicking to insert the new parameters and we will select **NAME** from user group context to assign the name of each sales representative into the final file name.

Parameters	
81	
Request at execution I	Jser group context
Retrieved fields from the pro	cess evaluation query:
Name	Description
ID_USER	User identifier of the group
NAME	Name of the user of the group
LUGIN	Access login to the user of the group
PHONE	Telephone of the user of the group
INTERNALID	DNI of the user of the group
IdUser_USERGROUP	
	Oh Correct

The next step is, edit MyVision options clicking in Generated Report properties, then click in "Add Property" and add IdUser_USERGROUP

🕮 Report/Process - 3. Dynamic Sales Report by	by Employee
Report/Process Privileges	
🗛 🗚 😻 🖘 😒 🖌 🕕 🖷	
Uefinition 🏾 🗳	Generated report properties
Basic Information	Add Property Edit Values Delete property
Report information	Parameter Values
Report type Multiple Report	IdUser @PAR(IdUser_USERGROUP)
Iteration type O Iteration query O User group	

Finally we will assign visualization rights to Sales group.

sers		^		Access granted	Execution	View results
PowerUser				🥰 Sales	Yes	All results
Users				🔒 Steven Buchanan	Yes	All results
Developer						
Demo User						
🖗 Regional Management						
Designer						
🖁 Designer		=	Add >>			
IT user			_			
AGENT			<< <u>R</u> emove			
Nancy Davolio						
Andrew Fuller						
Janet Leverling						
Margaret Peacock		-				
Michael Suyama						
🖥 Robert King	•	~		<		

When this processes has been executed, will generate a report per each group member and every report will be filter with every parameter value assign by user.

Informes generados y publicados	(9)				ą	×
₽						
Fichero	Tipo	Tamaño	Fecha	Directorio	С	^
📧 SalesAnalysis_Nancy Davolio!4926	MS-EXCEL	413 Kb	01/12/2010 19:1	C:\Archivos de programa\Apesoft DataCycle\Demo		
📧 SalesAnalysis_Andrew Fuller!4926!	MS-EXCEL	413 Kb	01/12/2010 19:2	C:\Archivos de programa\Apesoft DataCycle\Demo		
📧 SalesAnalysis_Janet Leverling!4926	MS-EXCEL	413 Kb	01/12/2010 19:2	C:\Archivos de programa\Apesoft DataCycle\Demo		
📧 SalesAnalysis_Margaret Peacock!4	MS-EXCEL	413 Kb	01/12/2010 19:2	C:\Archivos de programa\Apesoft DataCycle\Demo		-
📧 SalesAnalysis_Steven Buchanan!4	MS-EXCEL	413 Kb	01/12/2010 19:2	C:\Archivos de programa\Apesoft DataCycle\Demo		
📧 SalesAnalysis_Michael Suyama!492	MS-EXCEL	413 Kb	01/12/2010 19:2	C:\Archivos de programa\Apesoft DataCycle\Demo		×
<					>	

When Sale representatives log in to MyVision will have access to their own report.

	obs	Configuration	Logout	User: Nancy Davolio -	Pr. Er Eval	ation Project		
			Pro	gress of job 4931 of pro	cess 14564	-3. Dynami	: Sales R	Report
🖨 Back								
· <u>Buck</u>								
atus: Finished		N. of records: 2155	;	User: 209-Nancy Davolic				
gin: 01/12/2010 19:2:	3:38	End: 01/12/2010 19	9:23:48	Duration: 00:00:10				
				1				
e e ulto The verse et e u		finished.						
kesuit: The report exe	oution has	misned						
Number of available fi	les: 1							
Available records:								
Available records: <u>SalesAnalysis Nancy</u>	Davolio.xls	[412 Kb] [0 12/20	10 19:23:47]				
Available records: <u>SalesAnalysis Nancy</u>	<u>Davolio.xl</u> s	[412 Kb] [0, 12/20)10 19:23:47	1				
Available records: <u>SalesAnalysis Nancy</u>	<u>Davolio.xl</u>	<u>:[</u> 412 кb] [0 <u>-</u> 12/20)10 19:23:47]				
Available records: SalesAnalysis Nancy	Davolio.xls	:[412 Kb] [01 12/20)10 19:23:47]				
Available records: SalesAnalysis Nancy	Davolio.xls	1412 κb] [0τ. 12/20 taCycle Μ)10 19:23:47 1y Visio	on				
Available records: SalesAnalysis Nancy	Davolio.xls Da Reports	taCycle N & Dashboards everywhere	10 19:23:47	on				
Available records: SalesAnalysis Nancy	Davolio.xls Da Reports	taCycle M & Dashboards everywhere Configuration)10 19:23:47 1y Visio Logout] ON User: Michael Suyama -	Project Eval	ation Project		
Available records: SalesAnalysis Nancy Reports	Davolio.xls Da Da Reports Dbs	taCycle M & Dashboards everywhere Configuration	10 19:23:47 1y Visio Logout Prog] ON User: Michael Suyama - press of job 4933 of proc	Project Evals	ation Project . Dynamic S	Gales Rej	port by
Available records: SalesAnalysis Nancy Reports	Davolio.xl Da Da Reports Dbs	taCycle M & Dashboards everywhere Configuration	10 19:23:47] ON User: Michael Suyama - gress of job 4933 of proc	Project Evaluess [7564-3	ation Project . Dynamic §	ales Rep	port by
Available records: SalesAnalysis Nancy Reports J Back	Davolio.xl Da Da Reports	E [412 Kb] [01 12/20 taCycle N & Dashboards everywhere Configuration	110 19:23:47 1y Visio Logout Prog] ON User: Michael Suyama - press of job 4933 of proc	Project Eval ess [7564-3	ation Project . Dynamic S	ales Rep	port by
Available records: SalesAnalysis Nancy Reports J Back	Davolio.xl: Da Reports obs	taCycle N & Dashboards everywhere Configuration	010 19:23:47] ON User: Michael Suyama - press of job 4933 of proc	Project Eval ess [7564-3	ation Project . Dynamic S	Gales Rej	port by
Available records: SalesAnalysis Nancy Reports Back atus: Finished	Davolio.xl: Da Reports bbs	taCycle M & Dashboards everywhere Configuration	010 19:23:47 1y Visio Logout Prog] ON User: Michael Suyama - press of job 4933 of proc	Project Evalu	ation Project . Dynamic \$	ales Rej	port by
vailable records: :alesAnalysis Nancy :eports J Back us: Finished n: 01/12/2010 19:22	Davolio.xl Da Reports bbs	E [412 Kb] [D: 12/20 taCycle N & Dashboards everywhere Configuration	010 19:23:47] ON User: Michael Suyama - press of job 4933 of proc User: 214-Michael Suyama	Project Evalu	ation Project . Dynamic S	ales Rej	port by

Additionally if user Marc login we will see, he is able to see all reports generated.

DataCycle N ision rte & Das User: Steven Buchanan - Pro Jobs Configuration Logout Reports aluation Project Progress of job 4925 of process [7564-3. Dynamic Sales Report by Emplo 🗢 <u>Back</u> Status: Finished N. of records: 2155 User: 213-Steven Buchanan egin: 01/12/2010 19:17:11 End: 01/12/2010 19:18:32 Duration: 00:01:20 Result: The report execution has finished

Number of available files: 9

Available records:

SalesAnalysis Nancy Davolio.xls [412 Kb] [01/12/2010 19:17:21]

🕙 <u>SalesAnalγsis_Andrew Fuller.xls [</u>412 Kb] [01/12/2010 19:17:31]

🕙 <u>SalesAnalysis_Janet Leverling.xls [</u>412 Kb] [01/12/2010 19:17:41]

SalesAnalysis Margaret Peacock.xls [412 Kb] [01/12/2010 19:17:51]

X SalesAnalysis Steven Buchanan.xls [412 Kb] [01/12/2010 19:18:01]

🕙 <u>SalesAnalysis_Michael Suyama.xls [</u>412 Kb] [01/12/2010 19:18:09]

🕙 <u>SalesAnalysis_Robert King.xls [</u>412 Kb] [01/12/2010 19:18:17]

 SalesAnalysis Laura Callahan.xls [412 Kb] [01/12/2010 19:18:24]

 8] <u>SalesAnalγsis Anne Dodsworth.xls [</u>412 Kb] [01/12/2010 19:18:31]

Setup of reports within a MyVision folder.

Through "Set MyVision folder" option of MyVision section in a process, we can specify a virtual folder for generated reports in MyVision environment.

Using the previous example, let's change the destination path at MyVision, clicking on Set MyVision folder option.



Here we have the follow options:

1) Leaving the folder name space blank: Reports will be created at folder defined in results at process configuration.

2) Select a folder: Reports will be created at MyVision folder and will be accessible from Results links at specific folder at MyVision.

3) Folder name with parameters: This option is equivalent as Results in DatCycle Reporting (Windows folder) also can use parameters from a process report, in this case in running time will be created dynamically the folder desired.

By purpose of this example we will use the third option, using user group context parameter.

Selecting user folder and right clicking in folder name to add the parameter Name as shows in the follow image.

🕮 Report/Process - 3. Dynamic Sales Rep	t by Employee	
Report/Process Privileges		
🔚 🝸 ≹ 🕕 🖌 🛞 🗢 🗟 🥰 🗛	3	
Uefinition	Define logic folder structure	
Basic Information	Results	
Report information	MyVision Folder: Commercial\SalesRerports\Users\@PAR(NAME)	

With this option selected, all reports will be generated into correspondent folder according to every user.

Activating the check box: Create destination folder during report execution (if not existing)

Also is possible define user and folder rights from Folder Manager of MyVision during execution time.

This feature is useful when virtual folders are created dynamically (doesn't exists before process execution and is created during its execution)

We can choose from these different options.

- 1) Inheriting parent folder rights: When folders are created, automatically the same rights are assigned from the upper folder.
- 2) Selecting a user from an iteration group: Selectable option only when is a multiple personalized report by user group.
- 3) Selecting a user with execution rights: When folder is automatically created, access privilege is assign to report executor user.
- 4) Selecting users: When a folder is automatically created, selected users are assign with access rights and users can be added or removed through "Add" and "Remove" buttons.

By purpose of this exercise, we will use the second option giving every iteration user and additionally to Steve whom is not Sales representative but will have access right to all folders due he is Sales Manager.

the indicated folder do nese rights, if the folder	es not exist it will crea already exists these r	ate when the proces ights will be added ti	s is executed with o the present rights.
Inherit rights from par	ent folder		Caralla
User from iteration gr	oup		present rights
Report Executor			
Rights to the followin	g users		
Add users	Remove users	Edit user	
😼 Steven Buchana	า		

After process execution in MyVision, every user will have access their respective folders including all sales reports.

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Reports	Jobs	Configuration	Logout	User: Nancy Davolio - Pi t: Evaluation Project Reports and links in folder: [Users]
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My Favourit	empty.)			
11,~~, 🌢	Repc	ataCycle rrts & Dashboards everywl	My Visic	on
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Reports Reports Reports Back Reports	Jobs	ataCycle orts & Dashboards everywd Configuration	My Visic Logout	D User: Nancy Davolio - Project: Evaluation Project Reports and links in folder: [Nancy Davolio]

User Marc (Sales Manager) has access to all folders.

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Reports	Jobs	Configuration	Logout	User: Steven Buchanan	Pect: Evaluation Project
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Andrew Ful Anne Dods Janet Leve Laura Calls Margaret P Michael Su Nancy Dav Robert Kin Steven Bus (This folder is s	ller :worth rling ahan teacock yama rolio g chanan empty.)				
اا,~ 🌢	Repo	ataCycle rts & Dashboards everyw	My Visic	on	
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¢ _{Back}				Reports and	folder: [Andrew Fuller]
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🕙 <u>SalesAnaly</u>	s <mark>is Andrew Full</mark> e	r <mark>.xls</mark> [412 Kb] [02/1	2/2010 9:41:02]		4

Exercises

Create a new user context parameter, SalesCountry. Assign to users from sales group visibility and values, User Marc will be assigned visibility values of all sales representatives.

Duplicate process used in data filter through context parameters using a new context parameter named SalesCountry, from MyVision execute it with different users.

Duplicate process used in multiple report option examples, using a new context parameter named SalesCountry, Schedule the process execution and log in with different users checking up results obtained.

Chapter

Web environment

How we have already seen to login to MyVision and surfing among different folders, how to run report execution and visualize them. Let's see what's still left in MyVision.

Add reports to MyFavorites folder

A user can add a report published in MyFavorites as a shortcut accessing it later on.



To get it, we should click on \clubsuit located at the left hand side after this, click again on \clubsuit at the right hand side of file name.

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Reports	Report	ts & Dashboards everywl	Logout	User: Janet Leverling - Project: Evaluation Project Reports and links in folder: [Janet Leverling]
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🕙 <u>SalesAnalys</u>	is Janet Leverlii	n <mark>g.xls</mark> [412 Kb] [02/:	12/2010 9:41:10]	*
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11.~~ 🌢	Repo	ataCycle	My Visic	on
Reports	Jobs	Configuration	Logout	User: Janet Leverling - Project: Evaluation Project
				Informe: SalesAnalysis_Janet Leverling.xls
Dack				

The report has been added to the favourites folder

Once we added the report, it will be accessible from MyFavorites folder.

اا. مى 🌢	Rep	DataCycle Norts & Dashboards everyw	My Visio	on
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Back				Reports and links in folder: [My I
SalesAnaly:	sis Janet Lever	<u>ling.xls</u> [412 Kb] [02/	/12/2010 9:41:10	1 –

The same process is used to remove a report from MyFavorites folder, clicking on \neg located on the right hand side of file name and details.

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eports	Jobs	Configuration	Logout	User: Janet Leverling - Project: Evaluation Project
				Reports and links in folder: [My Favourit
SalesAnalys	is Janet Lever	ing.xls [412 Kb] [02/ DataCycle	12/2010 9:41:10 My Visi	on
	Jobs	Configuration	Logout	Ilser: lanet leverling - Project: Evaluation Project
eports	5005	configuration		and a state of the

The report has been removed from favourites reports list.

Change of Password

MyVision allows password administration by users, clicking on Configuration button, typing current password followed by typing twice the new password and finally clicking in Change password button.

اا ۵۰ 🌢			y Visio	on
Reports	Jobs	Configuration	Logout	User: Janet Leverling - Project: Evaluation Project
Current	password:			
New	password:			
Confirm new	password:			
		Change password		
		,		

Jobs

On Jobs tab, we can see the progress of every processes running.



Logout

Exists 2 ways of exit MyVision application, clicking on Logout tab or simply closing the web server.

11.~~ 🌢		DataCycle orts & Dashboards everywh	My Vi	$\mathbf{\hat{>}}$
Reports	Jobs	Configuration	Logout	User: Janet Leverling - Project: Evaluation Project
				Reports and links in folder: [Root]
🚰 <u>My Favourit</u> 🗀 <u>Commercia</u>	<u>tes</u> al			

Chapter

Special features of MyVision environment

Macros in MyVision environment

In concurrent users environments as MyVision, is very important realize at designing time, macros execution. For that purpose those reports with executable macros at the generation process might cause some problems if processes are executed by more than one user at the same time.

If we know this situation may occur at any time, we have to install a special template added to MyVision environment.

Templates offered with MyVision are:

Office 2007

- pMVPlantilla_base.xlsm
- pMVAsistenteTabDyn.xlsm

Office 97-2003

- pMVPlantilla_base.xls
- pMVAsistenteTabDyn.xls

These templates execute macros in user terminals avoiding parallel executions on host machine, solving the concurrence problem.

Let's see an example how we can create a report with pivot table needing a macro execution named "CrearMetacubo" to generate the report.

Starting with process creation, we will name it as Sales analysis MV and then click in Create/Use a design from an existing one.



At the bottom of wizard form we will indicate the location, optionally, you can choose, **Create/Use a design from existing one** and we select **pMVAsistenteTabDyn.xls** for Excel 97-2003 or **pMVAsistenteTabDyn.xlsm** for Excel 2007.

Report design wizard	\mathbf{X}
Configure the design vou want to apply to the report. You can create a new Design, use an existing one, or create a new Design from an existing one	Would you like to create a new design? • <u>C</u> reate a new template design • <u>Select an existing template design</u> Create a new template design Select the folder where the new design will be created C:\Archivos de programa\Apesoft DataCycle\Demo\Templates Enter the name of the design file to be created
	pSalesAnalysisMV.xlsm Image: Autofill externing Optionally, you can choose a template to create a new report design: Image: C:\ARCHIV~1\APESOF~1\Demo\Templates\pMVAsistenteTabDyn.xlsm C:\ARCHIV~1\APESOF~1\Demo\Templates\pMVAsistenteTabDyn.xlsm Image: Mext >> << Previous

Next with the process configuration as we already know, no affecting task of Macro execution, instead of this, let's open the template with Visual Basic editor (Alt + F11). Editing "ThisWorkbook" object, right clicking we choose edit code.

着 Microsoft Visual Basic 🛛	- pAnálisisVentas	MV.xls						
<u>Archivo E</u> dición <u>V</u> er <u>I</u>	insertar <u>F</u> ormato	<u>D</u> epuración	Ejecu <u>t</u> ar	<u>H</u> erramientas	<u>C</u> omplementos	Ve <u>n</u> tana	Ay <u>u</u> da	
i 🗙 🚾 - 🔒 i X 🗈 🛍	A 9 C >	u 🖬 🔟	😻 😭	😽 📯 🛛 💽 📕			Ŧ	
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VBAProject (pAnálisis Wicrosoft Excel Objet Wicrosoft Exc	Wentas MV.xls)							
- 🚜 MetaCubo	Propiedades de \ In <u>s</u> ertar	/BAProject ▶						

Add the macro name wished to execute, in this case "CrearMetacubo"



Whiter Macros has parameters, they has to be with quotations and followed by comas.

Open generated report with Internet Explorer

In MyVision environment, using Internet Explorer let's click in the generated report, we will have "Open" or "Save" options.

v With http://192.168.0.182/myvision/listalnformes.asp?Level=Folder&idCa	rpetaPadre=14428&NombreCarpetaPadre=Nancy Davolio	👻 💀 😽 🗙 🚼 Google	
voritos 🛛 👍 🔊 Más complementos 🔻 🔊 New Issues 👻			
onectando		🟠 👻 🖾 👻 🖶 👻 Página 👻 Seguridad	🔹 Herramientas 🕶 🌘
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Back My Favourites	Descarga de archivos CDesea abrir o guardar este archivo? Nombre: SalesAnalysis, Nancy, Davollo.xts Tpo: Hoja de cálculo de Microsoft Excel, 412 XB		
SalesAnalvsis Nancy Davolio.xds [412 Kb] [02/12/2010 9;55:02]	De: 192.168.0.182 Abr Guardar Cancelar		
	Angue la serviva procederate de Internat pueden ser úlles, aluma serviva pueden legar a dúre a leguios. Sin o confa e en el orgen, no abra ni guarde este archivo. <u>¿Cuál es el respo?</u>		

If we select "open", then file will be opened without problems.

	Weekly Sales Review						
Week	Updated						
49	30/11/2010 12:57:01			Grains/Cerea	Distribution by Product		
Units Sold	318			; 100.727			
Revenue	547.248			Seafood; Produce: 141.622	Beverages		
	Employee	Devenue	% of total	105.269	133.899		
TOP 3 Employees	lanet Leverling	100 525	18%	Mest/Poultry:	Condiments;		
Tor a Employees	Andrew Fuller	87,791	16%	178.189	113.695		
	Nancy Davolio	81.898	15%				
					Confections;		
				Produ	Y 177.099 cts;		
				251.3			
TOP Product	Alice Mutton	35.482	6%				
OP Orders							
Date	Order	Units	Revenue	Item	Employee		
03/11/2010	10691	40	\$4.952	Thüringer Rostbratwurst	Andrew		
15/11/2010	10329	20	\$4.216	Côte de Blaye	Margaret		
21/11/2010	10711	120	\$3.936	Perth Pasties	Steven		
08/11/2010	10324	80	\$2.808	Vegie-spread	Anne		
01/11/2010	10688	60	\$2.736	Rossle Sauerkraut	Margaret		
00/11/2010	10094	90	\$2.700	Tarte au eucre	Laura		
13/11/2010	10701	40	\$2.300	Raclette Courdavault	Michael		
28/11/2010	10339	70	\$2,184	Alice Mutton	Andrew		
22/11/2010	10335	48	\$2.035	Manjimup Dried Apples	Robert		

But if we try run any macro and we click any of both buttons configured for this report we will get an error.

Weekly Sales Review						
Week	Updat	ed				
49	30/11/2010 12:57	:01		Carina/Car	Distribution by P	roduct
				; 100.727	35	
Units Sold	3	18		0(
Revenue:	547.2	48		Produce; 141.62	Beverages	
	Employee	Devenue	% of total	105.269	133.899	
TOP 3 Employees	lanet Leverling	400.525	12%	Meat/Poultry:	Co	ndiments;
TOP 3 Employees	Andrew Fuller	87 791	16%	178.189		113.695
	Nancy Davolio	81 898	15%			
					fec	tions;
		Archivo en uso			7.0	199
	5.		alecDashboard yls está bloqueado para modificarlo			
TOP Product	Alice Mutton	Jaiost/asi ibuai a. Ais	esta bioqueau	o para modificano	Solo lectura	
		por 'Administrador'.				
		Abra el documento	como "Sólo lecti	ira' o baga clic en 'Notificar' para abri	, <u>N</u> otificar	
OP Orders		una copia de sólo le	ctura y recibir i	una notificación cuando el documento		
Date	Order	deje de estar en us	o		Cancelar	
03/11/2010	10691		64.040	Oâte de Disus	Manager	
24/44/2010	10329	20	\$4.210	Cote de blaye	Stewar	
21/11/2010	10711	120	\$3.930	Venie epreed	Anne	
01/11/2010	10688	60	\$2,000	Pössle Sauerkraut	Margaret	
06/11/2010	10694	90	\$2,700	Uncle Bob's Organic Dried Pears	Laura	
03/11/2010	10691	48	\$2,366	Tarte au sucre	Andrew	
13/11/2010	10701	42	\$2,310	Raclette Courdavault	Michael	
28/11/2010	10339	70	\$2.184	Alice Mutton	Andrew	
22/11/2010	10335	48	\$2.035	Manjimup Dried Apples	Robert	

This error occurs because Internet Explorer opens the report in a temporal way. If after this we save the template, the error doesn't reproduce it. If we want avoid this error happens, we have to use the template files mentioned before.