

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.

DataCycle MyVision Training

Introduction	4
Publishing and Execution of processes at MyVision Process execution at MyVision MyVision folders Publishing other file formats at MyVision	7
Process execution at MyVision	16
MyVision folders	20
Publishing other file formats at MyVision	23
Exercises	
On Demand Parameters	
Assigning On demand parameters to profile users	29
Use of user properties (On demand parameters) as filter's queries of task's in processes	32
Setup of reports within a MyVision folder	42
Exercises	47
Web environment	48
Add reports to MyFavorites folder Change of Password Jobs Logout	48
Change of Password	50
Jobs	51
Logout	51
Special features of MyVision environment	52
Special features of MyVision environment Macros in MyVision environment	52
Open generated report with Internet Explorer	54

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					
E 📄 All databases B 🖉 Northwind	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) Edit report	_	eer	Simple Simple	06/04/2008 15:24:03 04/04/2008 10:18:03
Queries	×	Delete report				
	6	Duplicate report				
	4 1	Paste report Ctrl+	c			
	7					
Cubes	1	Run report in test mode				
All the Cubes	ې ۲	View report results View scheduling				
	•					
Reports/ Processes		User privileges Assign report to project	_			
Commercial	+					
4-Evaluation Project						
Repository: 1 - C:\ARCHIV~1\APESOF~1\BBDD\Demo\dcd	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	ort 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	
Report format:	Generation Option	NOT published in
Excel		
Set report design		
Set results Open design		
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	٦
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.	
Ok Cancel	

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.

II.~~, 🕽		DataCycle	My Visio	on
Reports	Jobs	Configuration	Logout	User: MyVision - Project: Evaluation Project
				Reports and links in folder: [Commercia
倖 <u>Back</u>				
🚱 <u>My Favour</u>	<u>ites</u>			
📔 1. Week	ly 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،مم 🌢	Rep	ataCycle	My Visio	on	
Reports	Jobs	Configuration	Logout	User: MyVision - Project: Evaluation Project	
				Reports generated by process [545-1. We	ekly 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
• 🗉						
Datos g	enerales					ąχ
ID. Job: 4	910 1. Weekly Sales Re	eport				
Inicio:	30/11/2010 12:57:00	PC:		AUCON06		
Final:		Nº de registros	•			
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)				Ψ×
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
<u>Back</u>	ted by this pro			

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 Back Reports generated SalesDashbo Inicio Pegar G32 A Weekly Sa 3	ard.xls [7 CH ~ [3 Inserta Arial N K	ocess: 1 Kb] [30/11/2010 1 1 Kb] [30/11	ports generated b 12:57:41]	y process [Descarga (Descarga (Descarga (Descarga) (De	Aunque los archivos procedentes de Inte algunos archivos pueden llegar a dañar e el origen, no abra ni guarde este archivo SalesDashboard (1).x os Revisar Vista Pr	uardar Cancelar emet pueden ser útiles, el equipo. Si no confía en
Reports generated	ard.xls [7 CH ~ [3 Inserta Arial N K	ocess: 1 Kb] [30/11/2010 1 1 Kb] [30/11	12:57:41] 4 ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	C T	de archivos a abrir o guardar este archivo? Nombre: SalesDashboard.xls Tipo: Hoja de cálculo de Micros De: 192.168.0.182 Abrir Gui Aunque los archivos procedentes de Inte algunos archivos procedentes de Inte algunos archivos pueden llegar a dañar e el origen, no abra ni guarde este archivo SalesDashboard (1).xx ss Revisar Vista Pr algunos Ajustar texto algunos archivos pueden llegar a dañar e combinar y centrar •	As [Modo de compatibilidad] - M As [Modo de compatibilidad] - M
Reports generated	ard.xls [7 CH ~ [3 Inserta Arial N K	1 Kb] [30/11/2010 1 x b] [30/11/2010 1 x Diseño de pa x 10 x Fuente x ∫ k	ágina Fórmul A` A` ▼ A ▼	C C C C C C C C C C C C C C	a abrir o guardar este archivo? Nombre: SalesDashboard.xls Tipo: Hoja de cálculo de Micro: De: 192.168.0.182 Abrir Gua Aunque los archivos procedentes de Inte algunos archivos pueden llegar a dañar e el origen, no abra ni guarde este archivo SalesDashboard (1).x ps Revisar Vista Pr algunos archivos pueden llegar a cañar e congento abra ni guarde este archivo	As [Modo de compatibilidad] - M As [Modo de compatibilidad] - M
SalesDashbo	ard.xls [7 CH ~ [3 Inserta Arial N K	1 Kb] [30/11/2010 1 x b] [30/11/2010 1 x Diseño de pa x 10 x Fuente x ∫ k	ágina Fórmul A` A` ▼ A ▼	C C C C C C C C C C C C C C C C C C C	Nombre: SalesDashboard.xls Tipo: Hoja de cálculo de Micro: De: 192.168.0.182 Abrir Gui Aunque los archivos procedentes de Inte algunos archivos pueden llegar a dañar e el origen, no abra ni guarde este archivo SalesDashboard (1).x s Revisar Vista Pr Ajustar texto Combinar y centrar ~	uardar Cancelar emet pueden ser útles, el equipo. Si no corfía en o. ¿Cuál es el riesgo? ds [Modo de compatibilidad] - Marcorramador General Image: marcorramador
Pegar G32 A Weekly Sa	CH ~ (3 Inserta Arial N <i>K</i>	ar Diseño de pa $\mathbf{x} = 10$ $\mathbf{y} = 10$ Fuente $\mathbf{y} = 5\mathbf{x}$	ágina Fórmul A` A` ▼ A ▼	C → T as Date	Tipo: Hoja de cálculo de Micro: De: 192.168.0.182 Abrir Gua Aunque los archivos procedentes de inte algunos archivos pueden llegar a dañar el origen, no abra ni guarde este archivo SalesDashboard (1).x ss Revisar Vista Pr algunos revisar Vista Pr Combinar y centrar *	uardar Cancelar emet pueden ser útles, el equipo. Si no corfía en o. ¿Cuál es el riesgo? ds [Modo de compatibilidad] - Marcorramador General Image: marcorramador
Inicio Inicio Pegar SG32 A Weekly Sa	Inserta Arial N K	ar Diseño de pa	ágina Fórmul A^ A ▼ A ▼ = = ▼ E ≣	as Dato	es Revisar Vista Pr Ajustar texto Combinar y centrar *	General General General Formato condicion
Pegar v V rtapapeles V G32 A	· · · · · · · · · · · · · · · · · · ·	Fuente				condicion
G32		• (• fx			incución - j	Numero -
A						
Weekly Sa		В	С	D	E	F
_	les Re	eview				
	Week	Update	d	_		
-	49	30/11/2010 12:57:0			Grains/	Distribution by Product
llo	its Sold	31	18		; 100.	
	evenue:	547.24			Seat	ifood; Beverages
		Employee	Revenue %	of total	Produce; 141 105.269	1.623 133.899
TOP 3 Emp		Janet Leverling	100.525	18%	Mest/Poultry:	Condiments; 113.695
		Andrew Fuller	87.791	16%		113.095
		Nancy Davolio	81.898	15%		Confections;
					F	Dairy 177.099
TOP						251.331
TOP	roduct	Alice Mutton	35.482	6%		
TOP Orders						
	Date /11/2010	Order	Units R 40	evenue	Item Thüringer Rostbratwurst	Employee Andrew
	11/2010		40		Côte de Blaye	Margaret
21/	/11/2010	10711	120	\$3.936	Perth Pasties	Steven
	/11/2010		80		Vegie-spread	Anne
	/11/2010 /11/2010		60		Rössle Sauerkraut	Margaret
	/11/2010 /11/2010		90 48		Uncle Bob's Organic Dried Pears Tarte au sucre	s Laura Andrew
3 13/	11/2010	10701	40		Raclette Courdavault	Michael
28/	/11/2010		70		Alice Mutton	Andrew
0 22/	/11/2010	10335	48	\$2.035	Manjimup Dried Apples	Robert

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	
🔚 🖓 🧖 🕕 🗐 🧖 🏹 🔚	8 A 🔊
1. Weekly Sales Report	Task List
Definition	Add task Add task Edit task Disable Add
Basic Information	INSERT DATA: Range [OrderData] - query [14249-Most sold Orders]
Report infor	rights 1. Weekly Sales Report User privileges for this process Report execution Its I User can run this process I user results. The user will be able to access results generated in all process executions. I only user results. The user will be able to see only those results generated in its process executions. I only user results. The user will be able to see only those results generated in its process executions. I only user results. The user will be able to see results generated with properties visible for the user. The user will be able to see results generated with properties matching with those properties visible for him.
Report tasks	<u>Ok</u> <u>Cancel</u>
Task list	<u>E</u> dit <u>C</u> lose
C 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 & DataCycle My Vision Reports & Dashboards everywhere					
Reports	Jobs	Configuration	Logout	User: MyVision - Project: Evaluation Project	
				Reports and links in folder: [C	ommercial]
倖 _{Back}					
🚱 <u>Μγ Favour</u>	<u>ites</u>				
📕 1. Weekl	y Sales Report		Execut	<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.

Back			Execution of report [545-1. Weekly Sale
40			
ck			
ption:			
cription.			
nis report do	es not have pa	rameters)	
ecute			

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]
← Back [cancel]]]						_	
Status: Running.			N. of rec	cords: 8	User: 209-MyVision		
Begin: 30/11/2010 13:22:00		End:		Duration: 00:00:03			
			-				
Result: The rep	ort is running					-	
Number UI avai	iable records;	U.					
Available record	ds:						

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

11.°~~ 🌘	Repc	ataCycle	My Visi	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
E Commercial			
SalesReport			
Users			
	<		>
			(
			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
🖻 🖳 📄 Commercial		
🖻 🔤 SalesReport		
	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
Ver access rights Users	Access granted MyVision AGENT Sales Sales		
			· · · · · · · · · · · · · · · · · · ·

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 🖌 🧐 🔷 🕅 🖌 🗐	
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: Range [Pacam] - query [14256-Parameters] INSERT DATA: Range [ProductSales] - query [14259-Sales by Product Group] INSERT DATA: Range [TopProd] - query [14254-Most sold Product 0K]
Report type Simple Report	INSERT DATA: Range [TopEmplData] - query [14265-Top Salesmen] INSERT DATA: Range [DrderN] - query [14268-Nr of Drders] INSERT DATA: Range [EmplDetail] - query [14270-Detailed Sales by Employee] RUN MACR0: [Refresh]
	EXPORT HTML: in file (SalesByEmployee.htm) EXPORT PDF: in file (SalesBeport PDF.pdf)
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

	Jobs	Configuration	Logout	Henry Hall Being - Device the Evolution Device the
eports		Configuration	Loyout	User: MyVision - Project: Evaluation Project Reports generated by process [545-1. Weekly Sales Re
				inclusion of the second s
Back				
DACK				
ports genera	ted by this pro	cess:		
				+
	261.oot [0 Kb]	[0:00:00]		T .
🔤 <u>ppt 1!49</u> ;				
1.00			E.40.E0 1	4
1000		[34 Kb] [30/11/2010 1	5:49:50]	+

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 [Param])ATA: Range [Product)ATA: Range [TopProd)ATA: Range [TopEmp)ATA: Range [OrderNr)ATA: Range [EmpIDe)RD: [Refresh] HTML: in file [SalesBy]	xls to the PPT file ppt_1] s by Product Group I Product OK] Salesmen] ers]	
	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 commons 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	and DTS		
		<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.

II and DataCycle My Vision 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:



🕙 <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

+ -		
Name 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				
🔲 🔯 🖗 🔒 🔁 😂 🗁 🖾 🏈 🤧				
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		
🗏 🚱 🥰 🍄 🦳 🕄 📰	Ø 🎝	
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]:	
۵	
	<u> </u>
	<u>Ok</u> <u>C</u> ancel
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					
🔚 🚱 🥰 🔁 😑 🔁 🤪 📁 💷 🞯 🔊					
Steven Buchanan	View data				
Basic information	Filter by project:	Evaluation Project			
Edit user basic data	Parameter	Value			
Privileges Security model and objects	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
Del Report range	×
B Step 1 of 3 Select the query to retrieve the data you want to insert: Report to literation I literation I literation I literation I Si literation I	Select query [Employee]=@PAR[EmployeeID] All fields 10 Description Physical name OrdCod Description ProductName Parameter values OrdCod Description Please insert values for each parameter: Description OrdCod Please insert values for each parameter: Order/For Parameters Environ Parameters Vints Customers Co Customers Co Request at execution Evaluation fields' User context Customers Co Request will have values depending on the user running the process or query: Name Description EXEC_USER_FID User name executing report or query EXEC_USER_FIN User email address executing report or query EXEC_USER_FIN User email address executing report or query EXEC_USER_FIN User email address executing report or query
T <u>Qk</u> <u>Cancel</u>	×
MyVision	<u>Dk</u> <u>Cancel</u>

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	K					
Report execution	٦					
User can run this process						
View mode for results	7					
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.
II.°~ ()		ataCycle *5 & Dashboards everywl	My Visio	on
Reports	Jobs	Configuration	Logout	User: Nancy Davolio - Project: Evaluation Project
			Progr	ress of job 4932 of process [7564-3. Dynamic Sales Report by Employee]
🖨 Back				

	User: 210-Nancy Davolio
Begin: 30/11/2010 17:47:33 End: 30/11/2010 17:48:09	9 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]

					00 mm d*	0									10						
6				1 🖓 🗘								!4932!.xls [N	lodo de co				xcel				
	Inicio	Insertar	Diseño o	le página	Fórmulas	Datos	Revisar	Vista	Programa	dor											X
		Arial	* 10	* A* A*	= =	■ ≫~-	📑 Ajustar	texto	Genera	al l	*	4 5			-	1		Σ -	Ż	a de la companya de l	
P		N K S	•	🕭 - A -			Combin	nar y centrar 👻	9 -	% 000 %	0 00 0 0 0 0	Formato condicional	Dar formate	Estilos de		Eliminar	Formato		Ordenar	Buscar y seleccionar *	
Porta	apapeles 🖻		Fuente	6		Aline	ación	6	1	Número	6	condicional	Estilos	* ceida *		Celdas		5 1	Modifi		
	G30	- (f _x					<u> </u>						· · · · · ·			^			×
	A	E	3	С	D		E	F		G		Н		I	J		К		L	М	-
	Dynami	o Salo	e Anal	veie																	
1	Dynanni	c Sale	s Anai	ysis																	
2	CUSTOME	R CATE	GORY	COUNTRY																	
3																					
	Country Month	(Todas) (Todas)	* *		Custome Product		das) 🔹														=
	ziontn Employee	(Todas) Nancy	- X		Product](10	das) 🗈														
9	Linployee																				
10		Year	▼ Da	ata	199	0		1994			T .	l Units Sales	T D								
11 12	Category	19 ▼ Units Sa		evenue Sale			venue Sales	Units Sales	Rev	enue Sale		I Units Sales	Total Reve	inue Sales							
	Meat/Poultry	24					7.955,57	51	\$	1.234,70		544	\$	16.346,07							
	Beverages	52					26.457,75		S	8.910,00		1607		48.832,00							
	Confections	69					8.004,36		S	5.917,40		1333		30.343,54							
	Dairy Product						10.385,10		S	5.933,20		1525		38.012,80							
	Grains/Cereal Produce	ls 31 25					2.347,00		S S	67,20 167,40		422 492	\$ \$	9.173,95 20.454,45							
	Seafood	63					9.940.65		s	4.240.10		1238		20.454,45							
	Condiments	28							š	2.762,00		651		14.033,85							
	Total general	38		91.013,3			81.898,38			29.232,00		7812		02.143,71							
22																					
23																					
24																					
25																					
26																					
27 28																					
29																					
30																					
31																					
31																					
- 00	▶ ► Defini	ition / Da	taDetail	Dynamic R	eport 🧖	/			_		_				ш		_				► I

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 - Proje	ct: Evaluation Project	
			Pro	ogress of job 4935 of process [7564-3. Dynamic Sales	s Report
🗢 <u>Back</u>						
Status: Finished		N. of records:		User: 214-Steven Buchanan		
Begin: 01/12/201	0 12:57:54	End: 01/12/2010 12	2:58:30	Duration: 00:00:36		
		I				
Result: The rep	ort execution	has finished				
Number of avai	ilable files: 3					
Number of avai Available record	ds:					
Number of avai Available recon i SalesAnalysis	ds: Nancy.Davolic	9. <u>xls [</u> 66 Kb] [01/12/20 . <u>xls [</u> 66 Kb] [01/12/20				

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		dd group
Basic Information Report information Report type		No user group selected
Multiple Report teration type O Iteration query O User group		Name Sales
Design and results Report format:	Proper	erties
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 Report b	
O Def Report range	X
B. Step 1 of 3 Select the query to Quer	ry filter
Rep retrieve the data y	Condition Description
Report ty Fiel	er Conditions: eld: Operator Value mployeeID vequal v User_USERGROUP)
Iteration	irrameters
O Iterati O User	Request User group context Executor context Execution context
	rocess evaluation query:
Report fo	Name Description ID_USE User identifier of the group NAME Name of the user of the group
	LOGIN Access login to the user of the group MAIL email address of the user of the group Disable
	PHONE Telephone of the user of the group INTERNALID DNI of the user of the group IdJese_USERGROUP
P	<u>V</u> iew data
Rep	
	Qpen design
MyVision	*

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	
Request at execution	User group context Centext Execution context
Retrieved fields from the pr	ocess evaluation query:
Name	Description
ID_USER	User identifier of the group
NAME	Name of the user of the group
LOGIN	Access login to the user of the group
MAIL PHONE	email address of the user of the group Telephone of the user of the group
INTERNALID	DNI of the user of the group
IdUser_USERGROUP	
-	
,	
	<u>Ok</u>

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
P 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)				
Fichero	Tipo	Tamaño	Fecha	Directorio	C 🔨
📧 SalesAnalysis_Nancy Davolio!4926	MS-EXCEL	413 КЬ	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 КЬ	01/12/2010 19:2	C:\Archivos de programa\Apesoft DataCycle\Demo	
📧 SalesAnalysis_Margaret Peacock!4	MS-EXCEL	413 КЬ	01/12/2010 19:2	C:\Archivos de programa\Apesoft DataCycle\Demo	
📧 SalesAnalysis_Steven Buchanan!4	MS-EXCEL	413 КЬ	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.

Reports J	obs	Configuration	Logout	User: Nancy Davolio	Pi Er Evalua	tion Project	
			Pro	ogress of job 4931 of pr	ocess 1564-). Dynamic (ales Repor
Eack							
<u></u>							
tus: Finished		N. of records: 215	55	User: 209-Nancy Davolio			
jin: 01/12/2010 19:2	3:38	End: 01/12/2010 1	19:23:48	Duration: 00:00:10			
sult: The report exi	ecution has f	nished					
Number of available f	les: 1						
Available records:							
SalesAnalysis Nancy	Davolio.xls	[412 КЬ] [Оъ 12/2	2010 19:23:47	1			
SalesAnalysis Nancy	<u>Davolio.xls</u>	[412 Kb] [0 12/2	2010 19:23:47]			
SalesAnalysis Nancy	P Dat		My Visi				
1. ° ~ () ()	P Dat Reports 8	aCycle N	My Visi		Project Evalua	ion Project	
~)	P Dat Reports 8	aCycle N	My Visi re	on			es Report I
Reports J	P Dat Reports 8	aCycle N	My Visi re	ON User: Michael Suyama			es Report I
Reports J	P Dat Reports 8	aCycle N	My Visi re	ON User: Michael Suyama			es Report I
an a a a a a a a a a a a a a a a a a a	P Dat Reports 8	aCycle N	My Visi re	ON User: Michael Suyama			es Report l
Reports	P Dat Reports 8	aCycle N	My Visi togout Prod	ON User: Michael Suyama			es Report l
eports J Back	Dat Reports 8	aCycle N Dashboards everywhe configuration	My Visi Logout Prod	ON User: Michael Suyama - gress of job 4933 of proc User: 214-Michael Suyama			es Report l
teports	Dat Reports 8	aCycle N Dashboards everywhee	My Visi Logout Prod	ON User: Michael Suyama - gress of job 4933 of proc			es Report I
eports J Back Is: Finished	Dat Reports 8 obs 6	a Cycle N Dashboards everywhee configuration	My Visi Logout Prod	ON User: Michael Suyama - gress of job 4933 of proc User: 214-Michael Suyama			es Report l
eports	Dat Reports 8 obs 6	a Cycle N Dashboards everywhee configuration	My Visi Logout Prod	ON User: Michael Suyama - gress of job 4933 of proc User: 214-Michael Suyama			es Report I
eports J Back us: Finished n: 01/12/2010 19:20	Dat Reports 8 obs 0 3:05 E	a Cycle N Dashboards everywhee configuration	My Visi Logout Prod	ON User: Michael Suyama - gress of job 4933 of proc User: 214-Michael Suyama			es Report

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	rt by Employee	
Report/Process Privileges		
A 🐉 🗟 🗢 😒 🖌 🕕 🍠 I 🖌 🗐		
Uetinition	🔪 🛆 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			
Inherit rights from pa	rent folder		See the
User from iteration gr	oup		present rights
Report Executor			
Rights to the following	ig users		
Add users	Remove users	Edit user	
🧧 Steven Buchana	n		

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

II. °~ \$		ataCycle orts & Dashboards everyw	My Visi	on
Reports	Jobs	Configuration	Logout	User: Nancy Davolio - Pi tt: Evaluation Project Reports and links in folder: [Users]
🗢 <u>Back</u>				
My Favourit				
1,~~, 🌢	Repc	ataCycle rrts & Dashboards everyw	My Visic	on
Reports	Dobs	ataCycle orts & Dashboards everyw Configuration	My Visic _{here}	DD User: Nancy Davolio - Project: Evaluation Project
	Керс	orts & Dashboards everyw	here	
Reports	Jobs	orts & Dashboards everyw	here	User: Nancy Davolio - Project: Evaluation Project
Reports	Jobs	orts & Dashboards everyw	Logout	User: Nancy Davolio - Project: Evaluation Project Reports and links in folder: [Nancy Davolio]

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

1.~~	Repo	ataCycle rts & Dashboards everyw	MyVisic	n	
Reports	Jobs	Configuration	Logout	User: Steven Buchanan	Pect: Evaluation Project
₽ <u>Back</u>				Report	s in folder: [Users]
📴 <u>My Favouri</u>	ites				
Andrew Ful Anne Dods Janet Leve Laura Calls Margaret P Michael Su Nancy Dav Robert Kin Steven Bus (This folder is s	worth rling ahan eacock yama yama g g chanan				
اا,~ 🌢	Repo	ataCycle rts & Dashboards everyw	My Visic	on	
Reports	Jobs	Configuration	Logout	User: Steven Buchanan	
¢ _{Back}				Reports and	folder: [Andrew Fuller]
🖗 <u>My Favouri</u>	ites				
🕙 <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.

اا.مر	Repo	ataCycle	My Visic	on
Reports	Jobs	Configuration	Logout	User: Janet Leverling - Project: Evaluation Project
				Reports and links in folder: [Janet Leverling]
◆ <u>Back</u>				
🖗 <u>My Favourit</u>	es.			1
🔊 <u>SalesAnalys</u>	is Janet Leverli	<u>ng.xls</u> [412 Kb] [02/:	12/2010 9:41:10]	
ال مر ا	Repo	ataCycle	My Visic	on
Reports	Jobs	Configuration	Logout	User: Janet Leverling - Project: Evaluation Project
				Informe: SalesAnalysis_Janet Leverling.xls
🖨 Back				

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
Reports	Jobs	Configuration	Logout	User: Janet Leverling - Project: Evaluation Project
Back				Reports and links in folder: [My l
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.

°~~ 🏷	Repo	ataCycle	My Visic	n
eports	Jobs	Configuration	Logout	User: Janet Leverling - Project: Evaluation Project
				Reports and links in folder: [My Favourit
		ing.xls [412 Kb] [02/1 DataCycle	My Visio	
	7-1	Configuration	Logout	User: Janet Leverling - Project: Evaluation Project
eports	Jobs	coninguiation		discussion et cerenning introject. Evaluation Project

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.

ports	Jobs	Configuration	Logout	User: Janet Leverling - Project: Evaluation Project
Current	password:			
New	password:			
Confirm new	password:			—
	c			
		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>	0.0504			

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.

🚰 Microsoft Visual Bas	ic - pAna	ilisisVenta	MV.xls						
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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.

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algun	ivos procedentes de internet pueden ser útiles, pueden liegra stafiar el equipo. Si no confía en n a guada este achivo: <u>¿Cuál es el inseco?</u>	

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

		M	leekly Sal	es Review	
Week	Updated				
49				Grains/Cere	Distribution by Product
Units Sold	318			; 100.727	
Revenue:				Seafood	
Revenuer	011.210			Produce; 141.62 105.269	3 Beverages 133.899
	Employee	Revenue	% of total		
TOP 3 Employees	Janet Leverling	100.525	18%	Meat/Poultry; 178.189	Condiments; 113.695
	Andrew Fuller	87.791	16%	1/0.105	113.090
	Nancy Davolio	81.898	15%		
				Print and a second s	Confections; airy 177.099
				Prod	
				251	
TOP Product	Alice Mutton	35.482	6%		
Orders					
Date	Order	Units	Revenue	Item	Employee
03/11/2010	10691	40	\$4.952	Thüringer Rostbratwurst	Andrew
15/11/2010		20		Côte de Blaye	Margaret
21/11/2010		120		Perth Pasties	Steven
08/11/2010	10324	80		Vegie-spread	Anne
01/11/2010		60		Rössle Sauerkraut	Margaret
06/11/2010		90		Uncle Bob's Organic Dried Pears	Laura
03/11/2010		48		Tarte au sucre	Andrew
13/11/2010		42		Raclette Courdavault	Michael
28/11/2010		70		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.

		W	eekiý Sal	es Review				
Week	Upda	ted						
49	30/11/2010 12:57	7:01			ins/Cereals	Distribution by	y Product	
					100.727			
Units Sold	547	18			Seafood; 141.623	Beverages 133.899		
Revenue:	547.	248		Produce;				
	Employee	Revenue	% of total	105.269		133.8	55	
OP 3 Employees		100.525	18%	Meat/Poultry:		The supervised in the local division of the	Condiments;	
	Andrew Fuller	87.791	16%	178.189			113.695	
	Nancy Davolio	81.898	15%				,	
		Archivo en uso				2 🛛	fections; 7.099	
		ATCHIVO CH USO					7.099	
		SalesDashboard.xls	está bloqueac	lo para modificarlo		Sólo lectura		
TOP Product	Alice Mutton	por 'Administrador'.						
						Notificar		
Orders				ura' o haga clic en 'Notificar' p				
	Order	deje de estar en uso		una notificación cuando el do	tumento	Cancelar		
03/11/2010	10691	acje de estar en ast						
15/11/2010		20		Côte de Blaye		largaret		
21/11/2010		120		Perth Pasties		Steven		
08/11/2010		80		Vegie-spread		Anne		
01/11/2010		60		Rössle Sauerkraut		largaret		
06/11/2010		90		Uncle Bob's Organic Dried P		aura		
03/11/2010		48		Tarte au sucre Raclette Courdavault		Andrew Aichael		
13/11/2010 28/11/2010		42		Alice Mutton		Aichael Andrew		
	10335	48		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.