



We are ready



Training

DataCycle MyVision

APESOFI

MyVision

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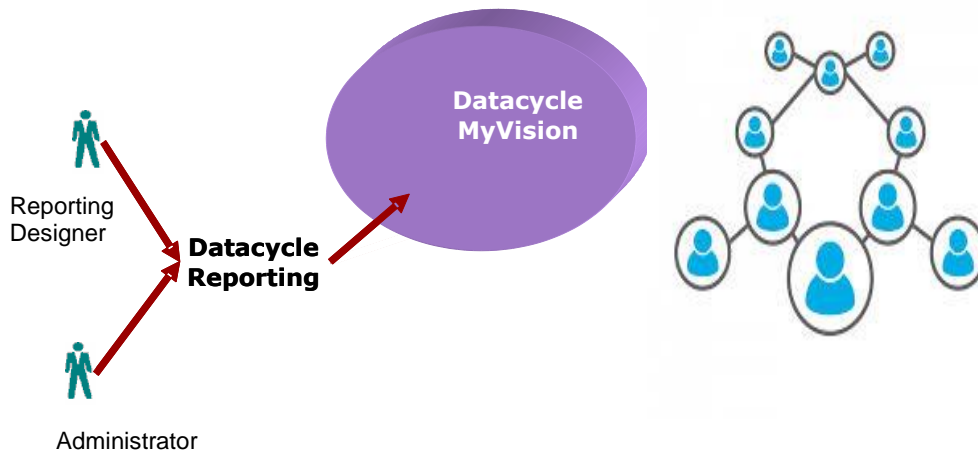
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Introduction

MyVision 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

- 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.

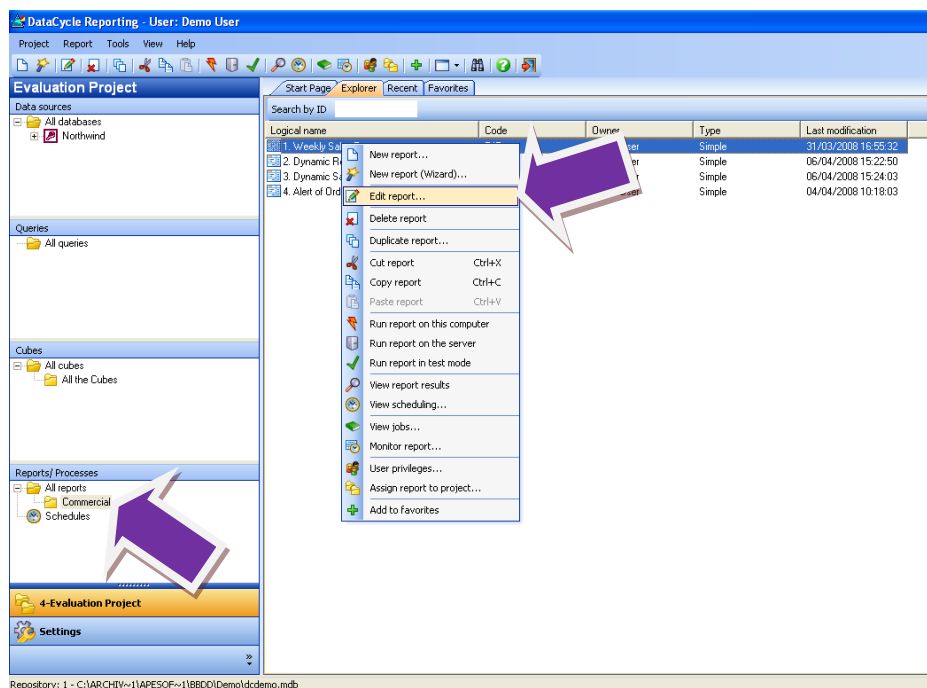
Publishing and Execution of processes at MyVision

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

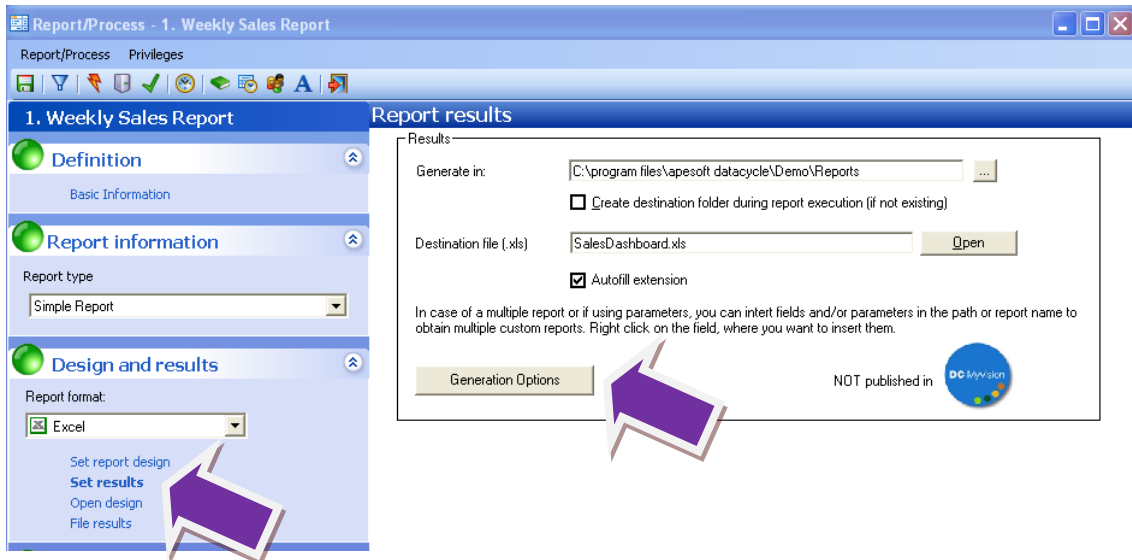


All desired reports to be published at MyVision should be contained in a DCR folder.

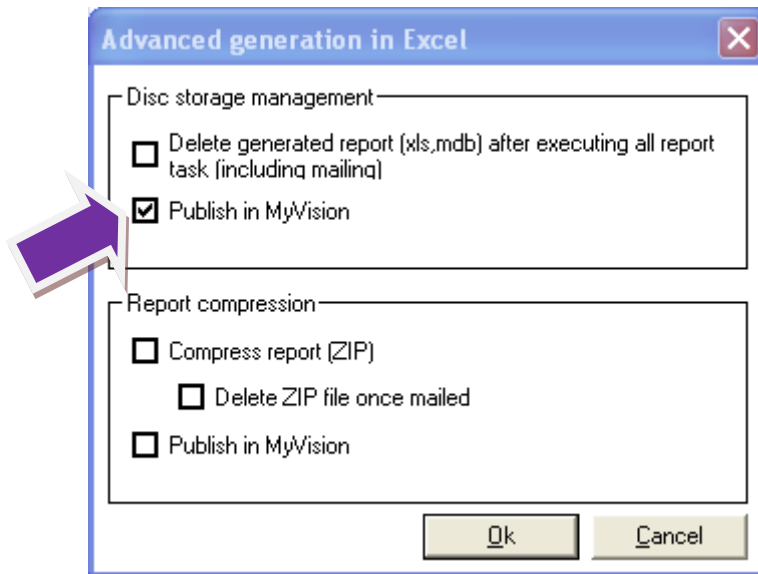
Any report placed in “All process and links” might not be seen at MyVision.



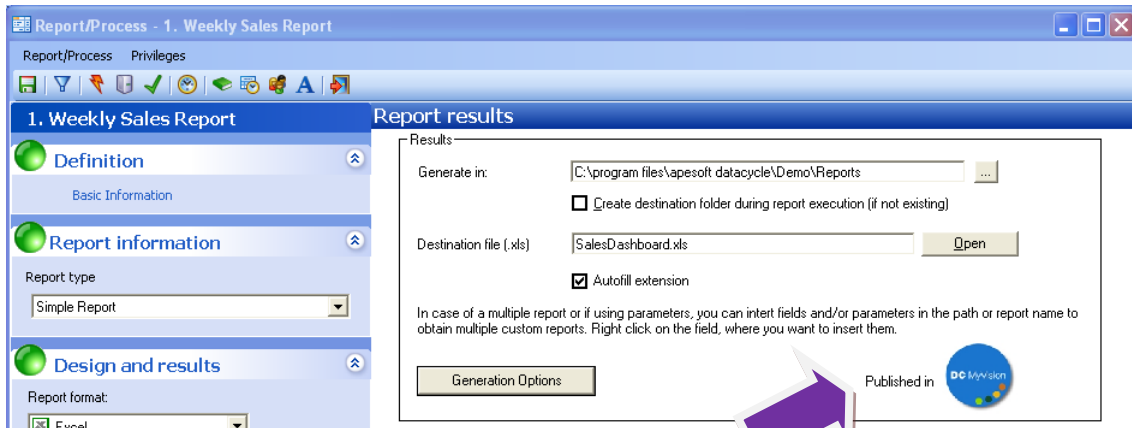
Let's Click on “Set Results” option, then click on “Generation Options”



Let's tick option "Publish in MyVision"

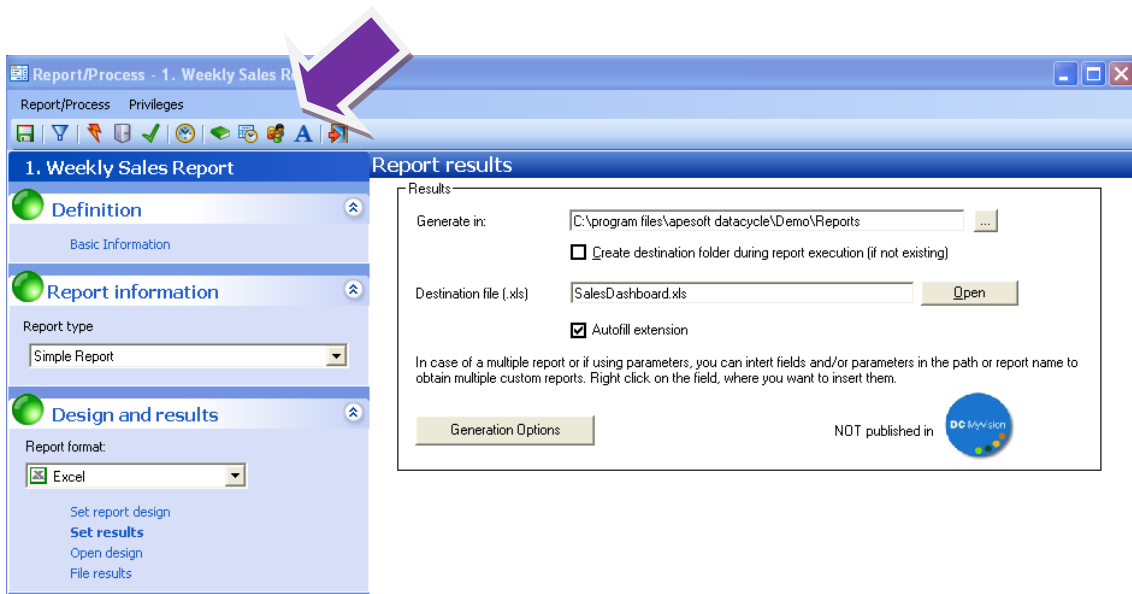


Having saved changes, we will notice the label next to MyVision icon has changed from "NOT publish in" to "Publish in".

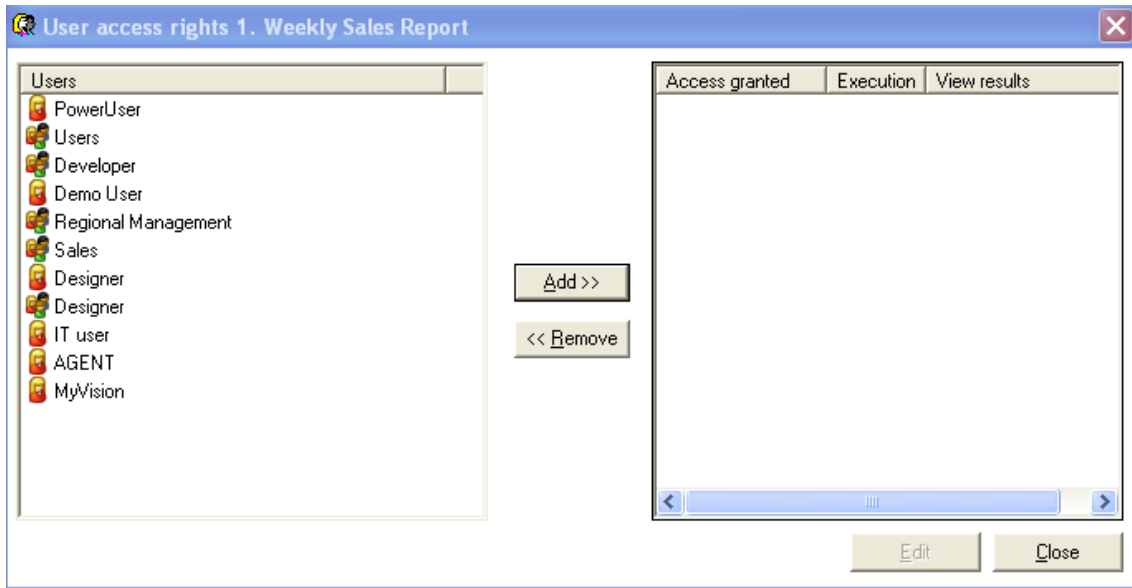


Once the publication in MyVision is ticked, we should assign user access privileges.

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



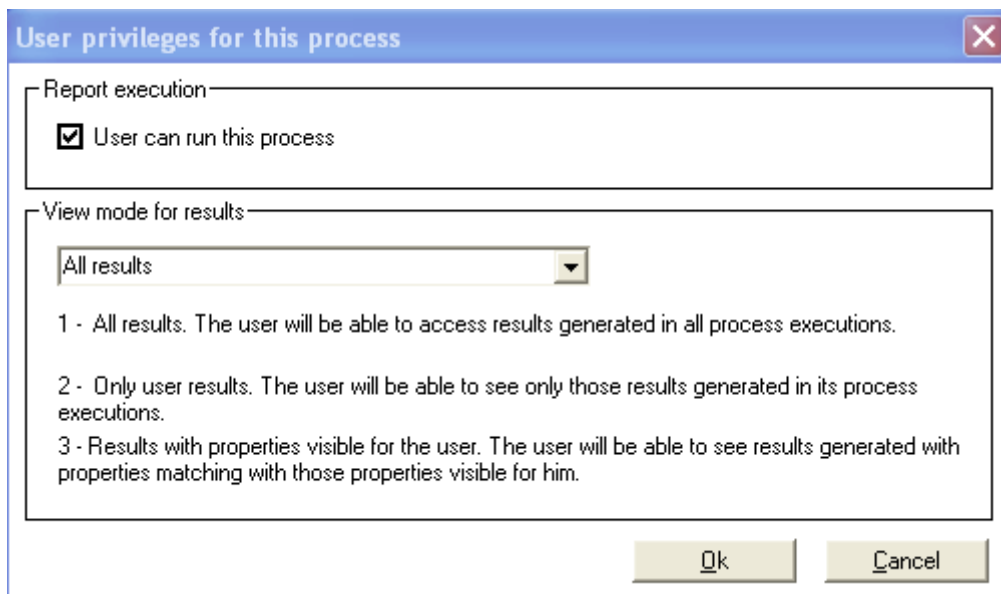
At the User access right's screen, select a desired user and click on "Add" button.



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 indency 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**.

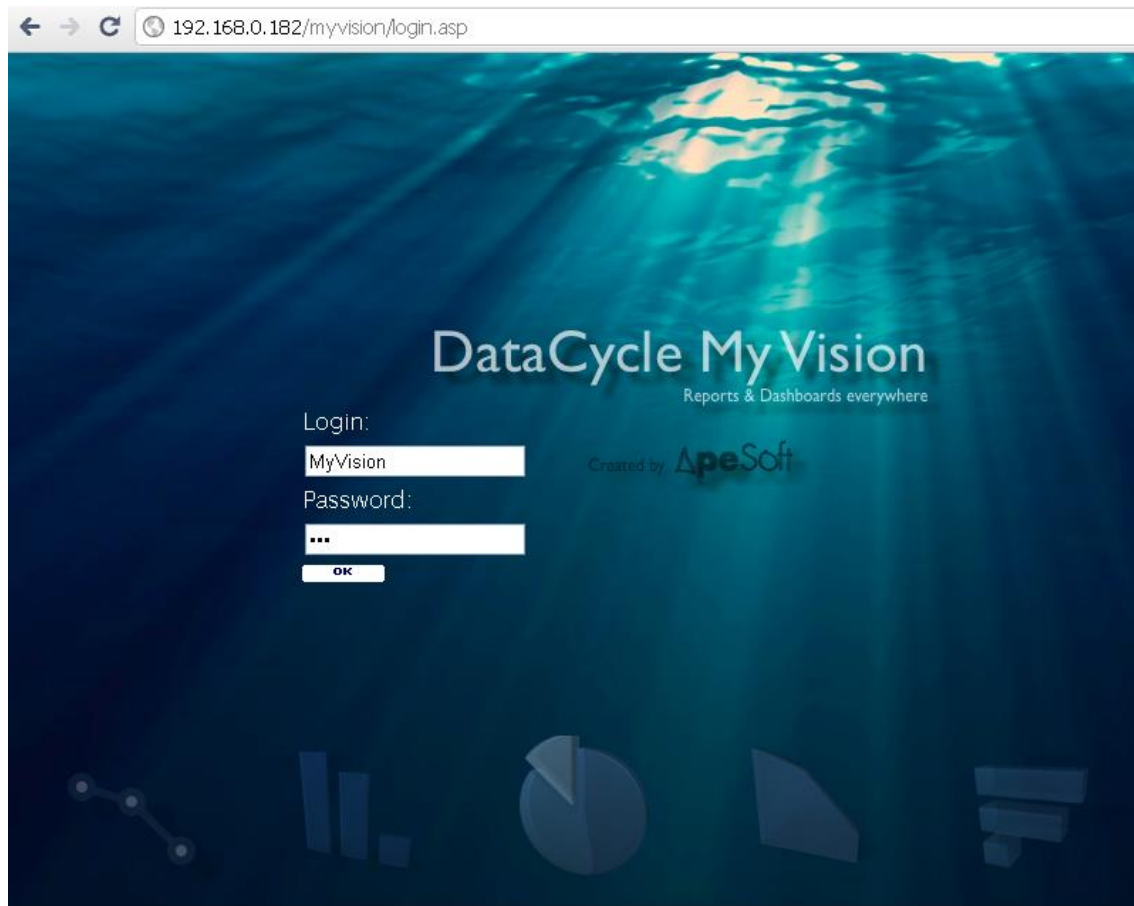




Users whom want to use MyVision as visualization and processing platform have to have Security Level: “**1 – Individual object access control**”.

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.

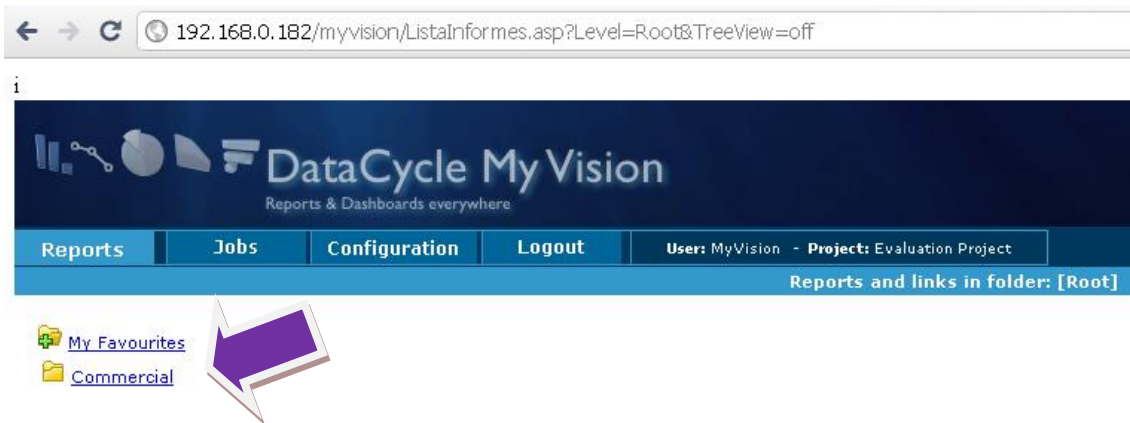


Once, our credentials have been granted, Click on desired project link to start working.

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 explore 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.



[← Back](#)

[My Favourites](#)

[1. Weekly Sales Report](#)



[Results](#)

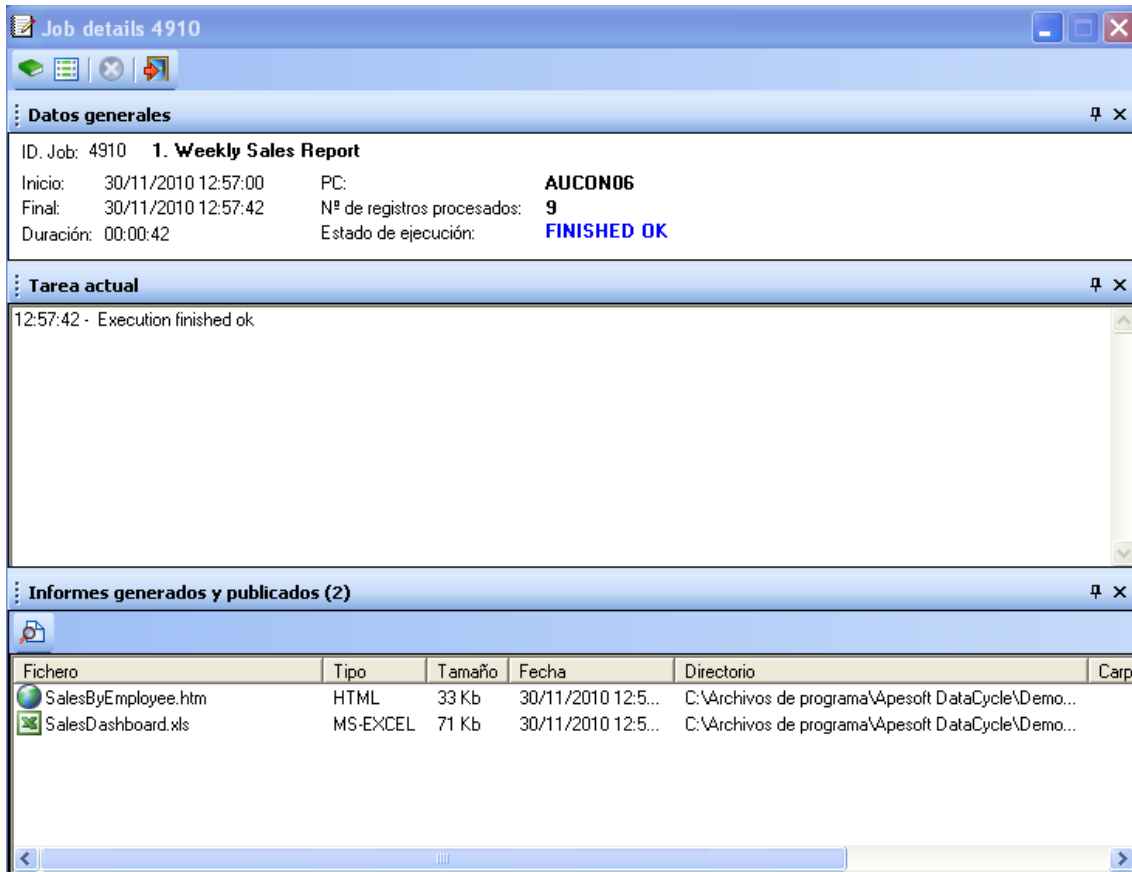
Also we can see the generated reports clicking on Results link; we will notice there are not reports available because this process hasn't been processed yet.



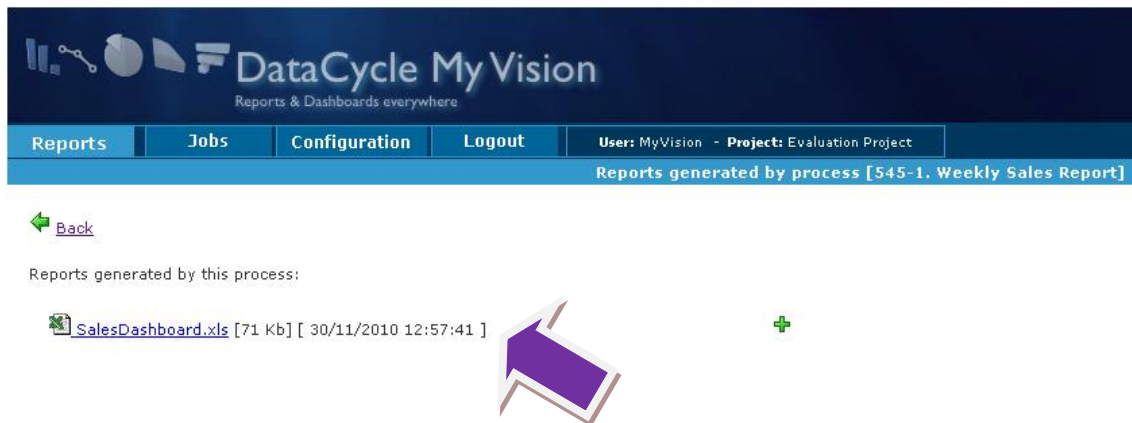
[← Back](#)

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.



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



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).

[Back](#)

Reports generated by this process:

[SalesDashboard.xls](#) [71 Kb] [30/11/2010 12:57:41]

Descarga de archivos

¿Desea abrir o guardar este archivo?

Nombre: SalesDashboard.xls
Tipo: Hoja de cálculo de Microsoft Excel, 71,0 KB
De: 192.168.0.182

Abrir Guardar Cancelar

Aunque los archivos procedentes de Internet pueden ser útiles, algunos archivos pueden llegar a dañar el equipo. Si no confía en el origen, no abra ni guarde este archivo. [¿Cuál es el riesgo?](#)

SalesDashboard (1).xls [Modo de compatibilidad] - Microsoft Excel

Inicio | Insertar | Diseño de página | Fórmulas | Datos | Revisar | Vista | Programador

Portapapeles | Fuente | Alineación | Número

G32

Weekly Sales Review					
Week	Updated				
49	30/11/2010	12:57:01			
Units Sold	318				
Revenue:	547.248				
Employee	Revenue	% of total			
TOP 3 Employees	Janet Leverling	100.525	18%		
	Andrew Fuller	87.791	16%		
	Nancy Davolio	81.898	15%		
TOP Product	Alice Mutton	35.482	6%		
TOP 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	Veggie-spread	Anne
01/11/2010	10688	60	\$2.736	Rössle 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

Distribution by Product

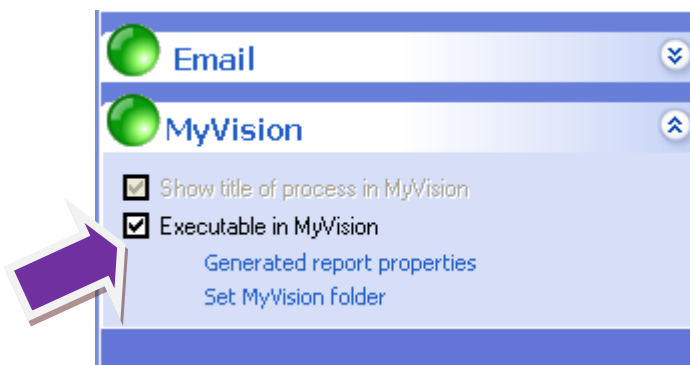
Product Category	Revenue
Grains/Cereals	100.727
Seafood	141.623
Beverages	133.899
Condiments	113.695
Confections	177.099
Dairy Products	251.331
Meat/Poultry	179.189
Produce	105.269

Process execution at MyVision

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

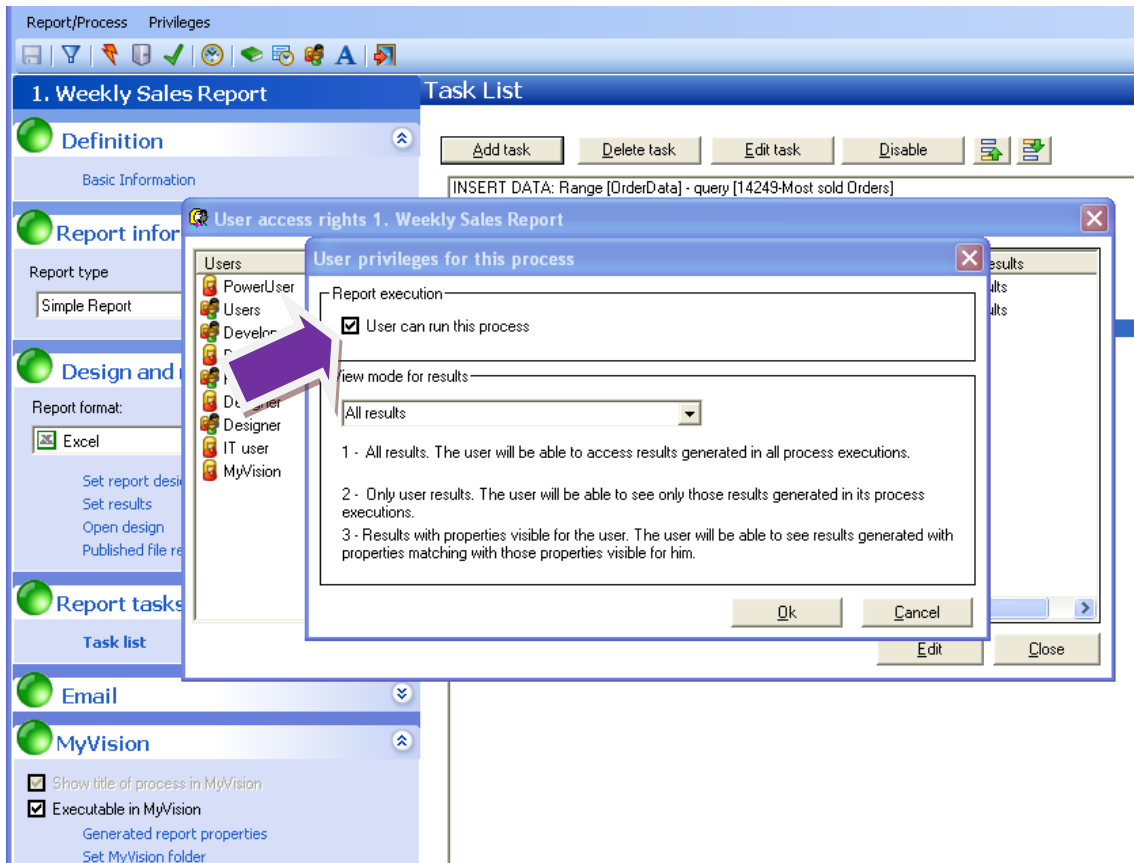
- 1) The process has to be configured to be published in MyVision through DataCycle Reporting.
- 2) The user has to have rights above the Project, Database, query, folder and Process in DataCycle Reporting.

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 (“!`!”) 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.



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



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.

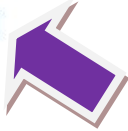
Finally we press the button Execute.



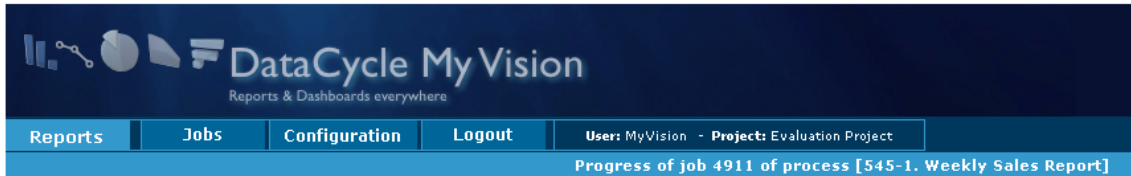
[← Back](#)

Description:

(This report does not have parameters)



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.



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[\[cancel \]](#)

Status: Running...	N. of records: 8	User: 209-MyVision
Begin: 30/11/2010 13:22:00	End:	Duration: 00:00:03

Result: [The report is running ...](#)

Number of available records:

Available records:



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

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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]

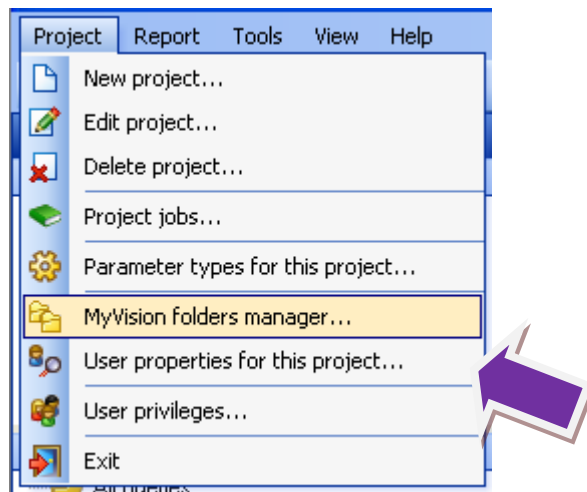
 [SalesDashboard.xls](#) [71 Kb] [30/11/2010 13:22:39]



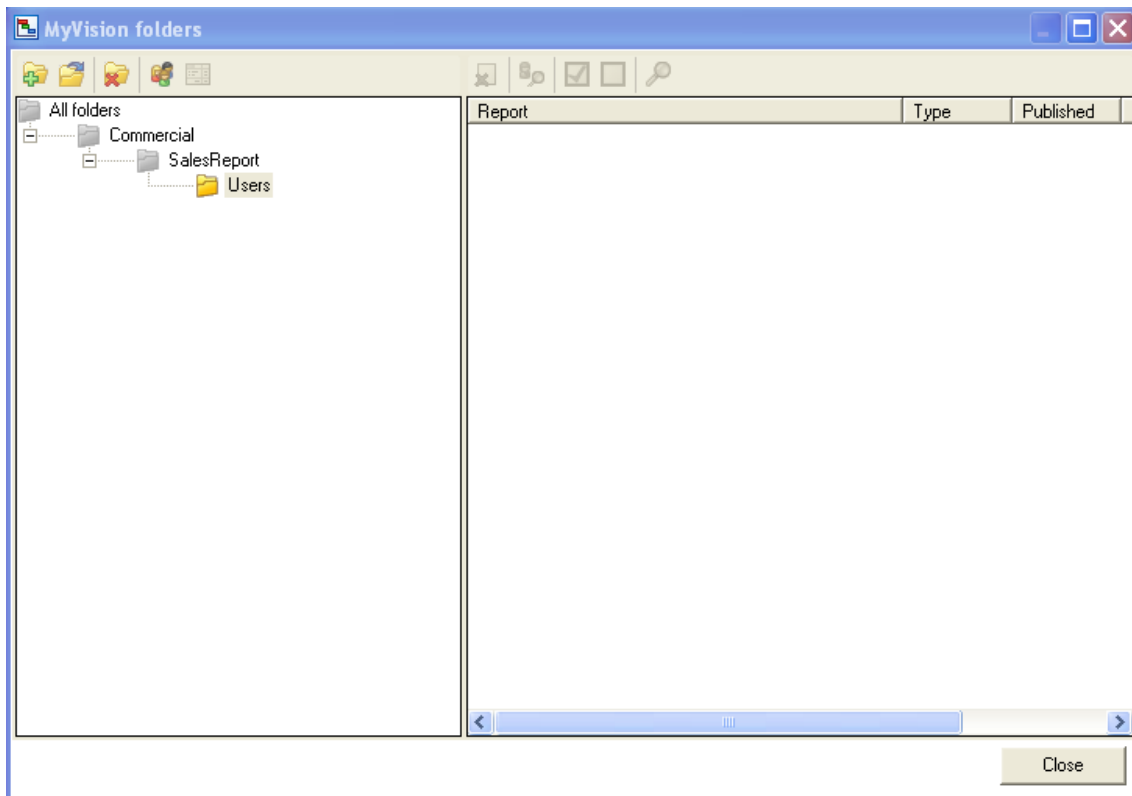
MyVision folders

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.



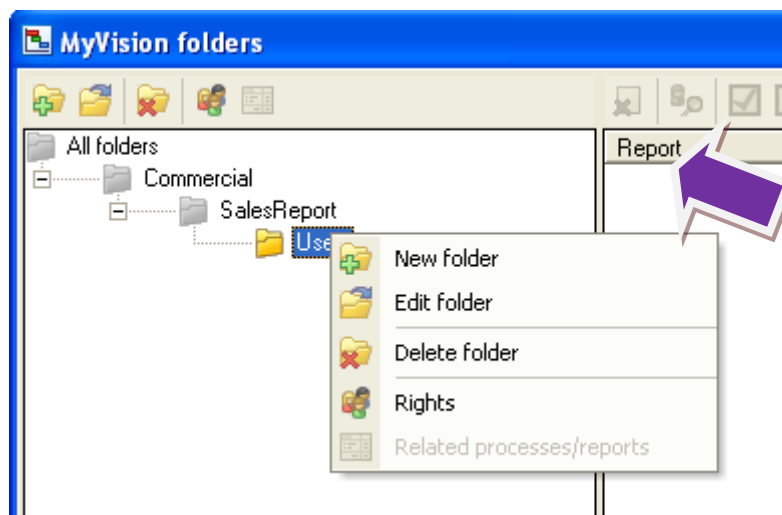
Through this Manager, we can explore the folder structure of MyVision.



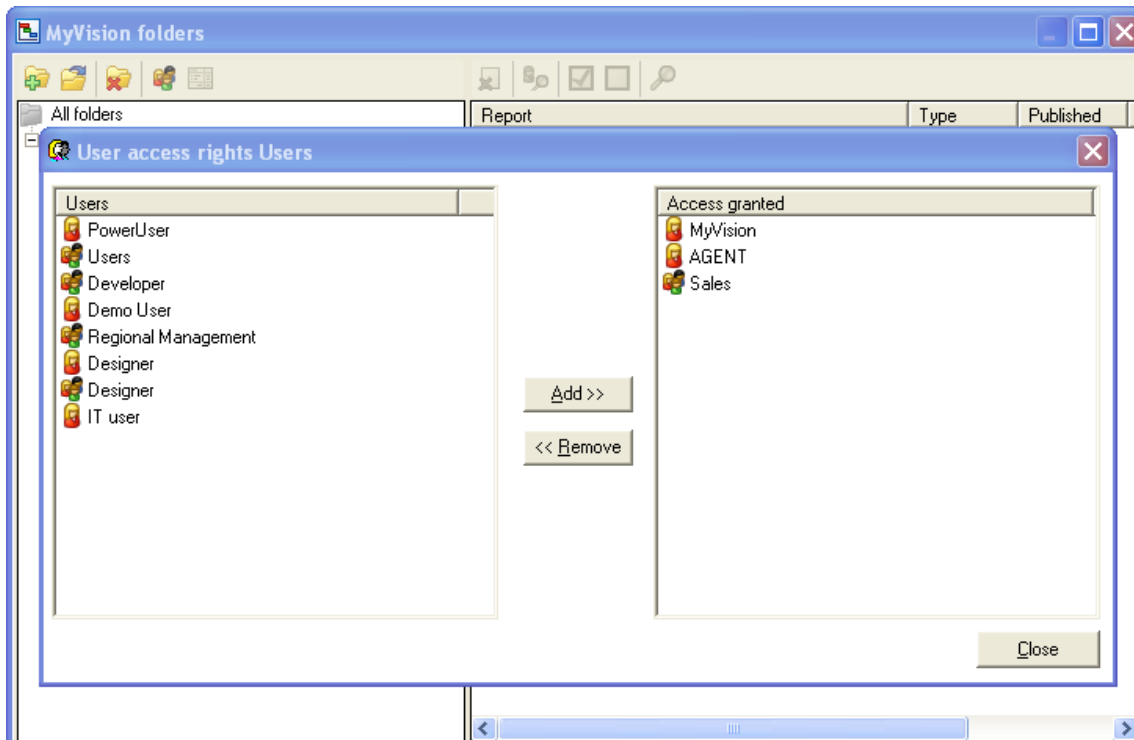
In gray color are represented all DataCycle Reporting folders which cannot be modified

On enabled folders we can do the following actions:

- Create a new folder.
- Edit a folder
- Delete a folder
- Assign user privileges.

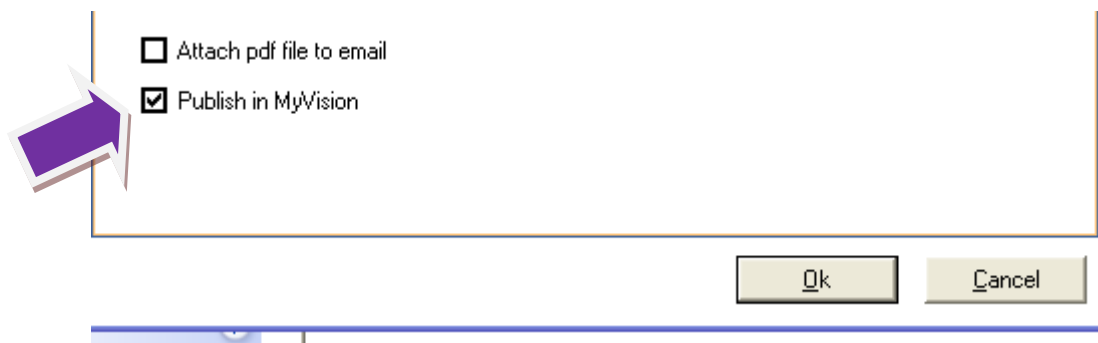


At this point we can see how to give access right to existing user (users or groups with folders' rights)

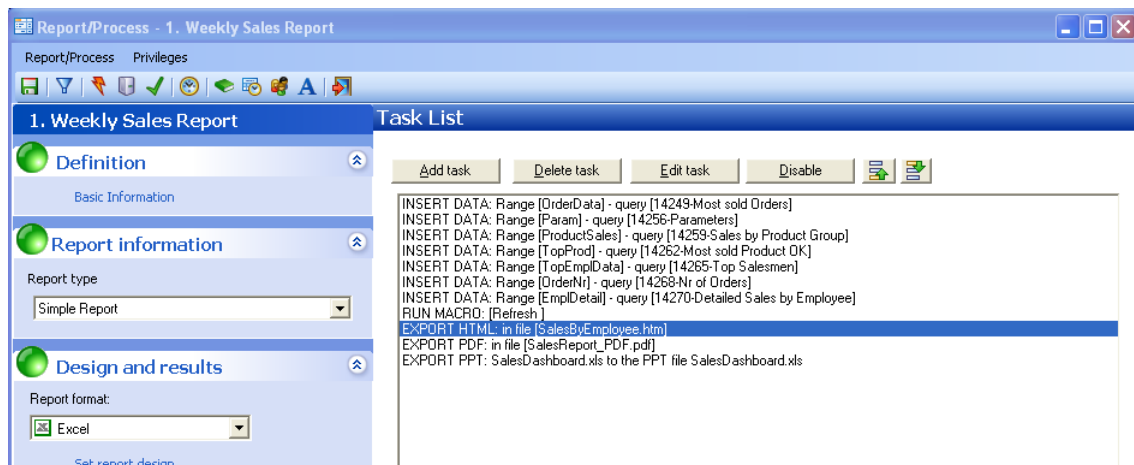


Publishing other file formats at MyVision

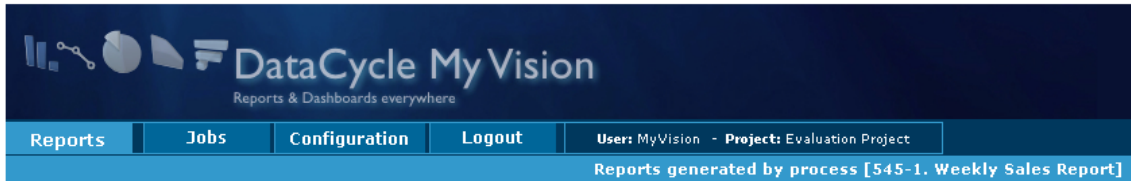
MyVision allows to publish several file formats not exclusive excel files, for instance HTML, PDF or PPT among others. Simply we just have to select the option “Publish in MyVision” at Set Results option of Process property. At this point, MyVision will be the platform to allow the visualization of these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



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



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




DataCycle My Vision
Reports & Dashboards everywhere




Reports | Jobs | Configuration | Logout | User: MyVision - Project: Evaluation Project

Reports generated by process [545-1. Weekly Sales Report]

[← Back](#)



Reports generated by this process:



 ppt_1149261.ppt [0 Kb] [0:00:00]	+
 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.

INSERT DATA: Range [OrderData] - query [14249-Most sold Orders]
 INSERT DATA: Range [Param] - query [14256-Parameters]
 INSERT DATA: Range [ProductSales] - query [14259-Sales by Product Group]
 INSERT DATA: Range [TopProd] - query [14262-Most sold Product OK]
 INSERT DATA: Range [TopEmplData] - query [14265-Top Salesmen]
 INSERT DATA: Range [OrderNr] - query [14268-Nr of Orders]
 INSERT DATA: Range [EmplDetail] - query [14270-Detailed Sales by Employee]
 RUN MACRO: [Refresh]
 EXPORT HTML: in file [SalesByEmployee.htm]
 EXPORT PPT: SalesDashboard.xls to the PPT file ppt_1
 EXPORT PDF: in file [SalesAnalysis.pdf]

Task Type ✕

Select the task you want to create

- Insert data into cell
- Execute macro
- Export HTML (Excel XP and above)
- Export PDF
- Export PowerPoint
- Run Report/ Process
- Execute program
- Script code
- Execute SQL command
- Send email
- Add to Zip
- Refresh Olap cube
- Link Olap cube
- Set parameter values
- Execute SQL Server DTS
- Publish file in MyVision
- Conditional - If
- Conditional - Else
- Conditional - End if

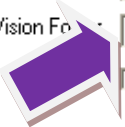

For this example we provide the file path and folder name.

Publish file ✕

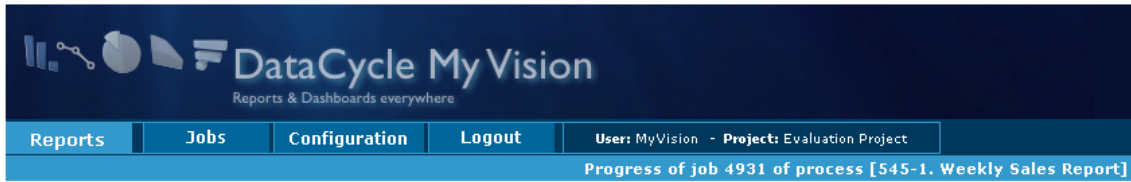
File:

MyVision Fo:

Create destination folder (if it does not exist)

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



The screenshot shows the DataCycle My Vision interface. At the top, there is a navigation bar with tabs for Reports, Jobs, Configuration, and Logout. The user is logged in as 'MyVision' and the project is 'Evaluation Project'. A progress bar indicates the progress of job 4931 of process [545-1. Weekly Sales Report].

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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

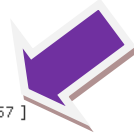
Result: [The report execution has finished](#)

Number of available files: 2

Available records:

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

 [SalesDashboard.xls](#) [71 Kb] [30/11/2010 16:06:41]



Exercises.

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

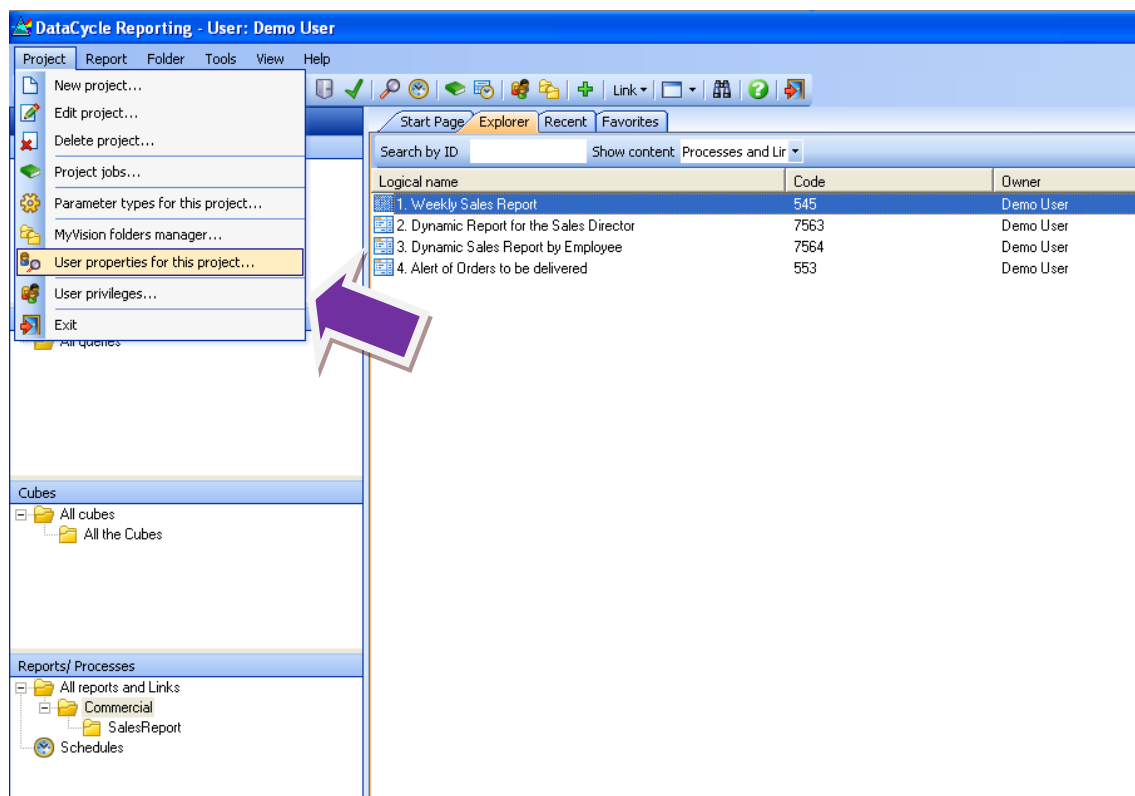
- Login to MyVision with those selected usernames, passwords and open the reports generated.
- Modify the process, assigning rights to selected users, allowing execute the process.
- Login as every user and execute the process, visualize the reports generated.

On Demand Parameters

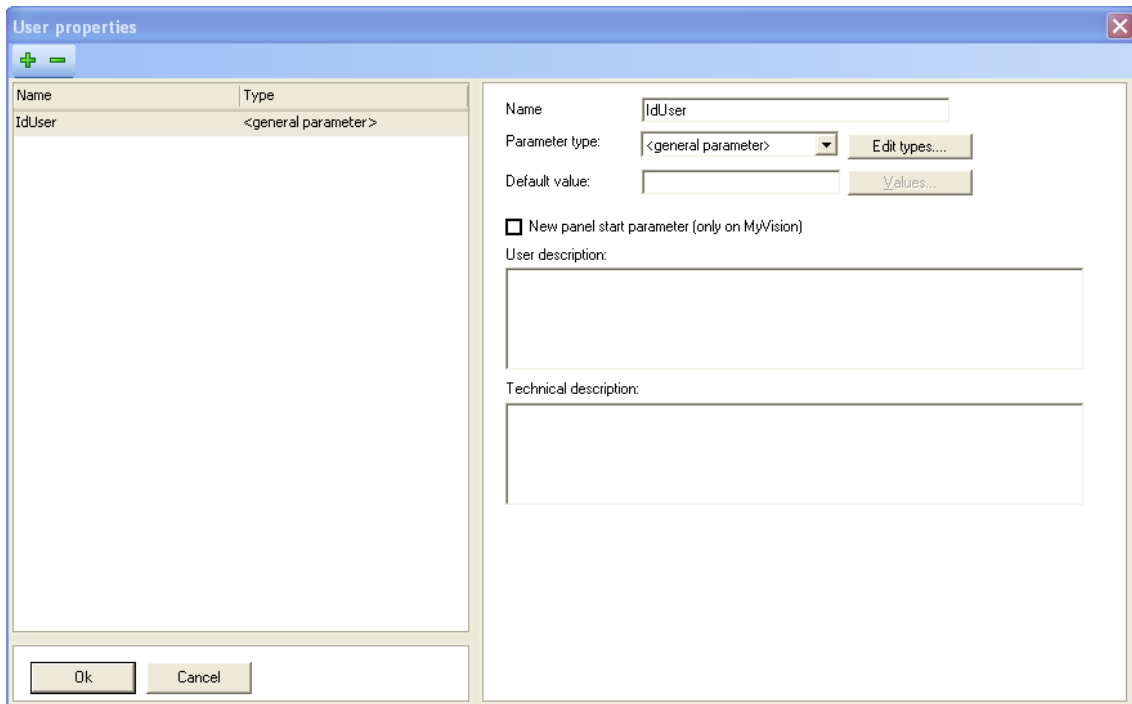
On demand parameters and attributes there are properties that enable us to customize user and reports configuration with variables for special treatment on data manipulation.

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

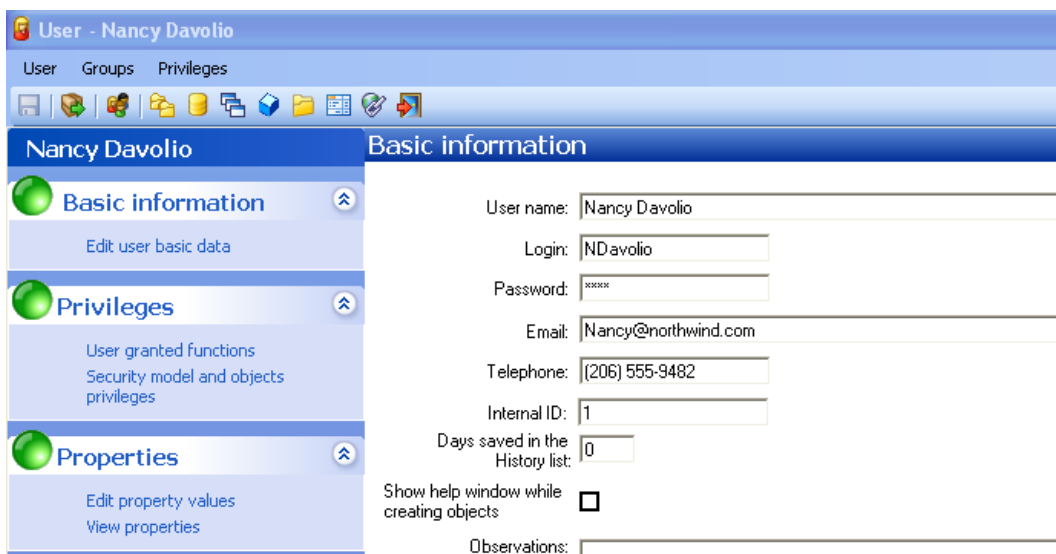


Although exists different types of parameters, we will use default values. In case we have to define a new one, we can always click in “Edit types” button and create it.

Assigning On demand parameters to profile users.

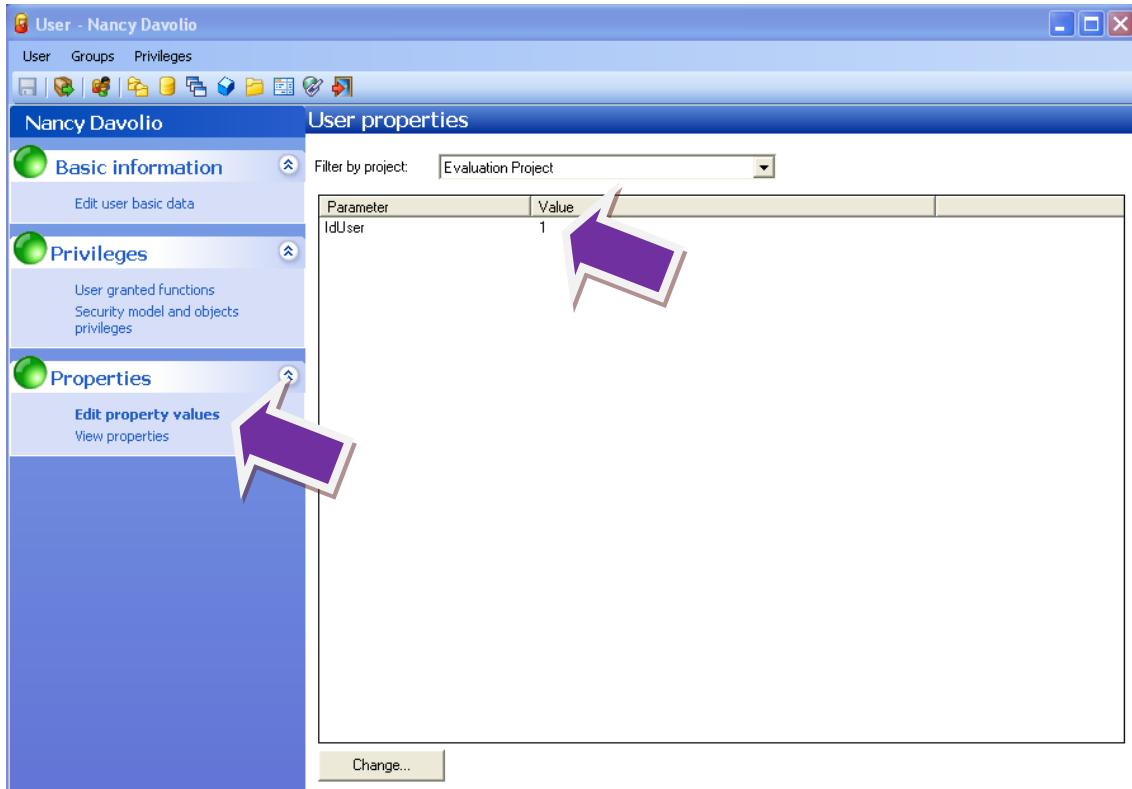
The next step is, define the values will be assigned to on demand parameters at project level, when users values match with conditions requested in the query.

Let's edit the user profile.

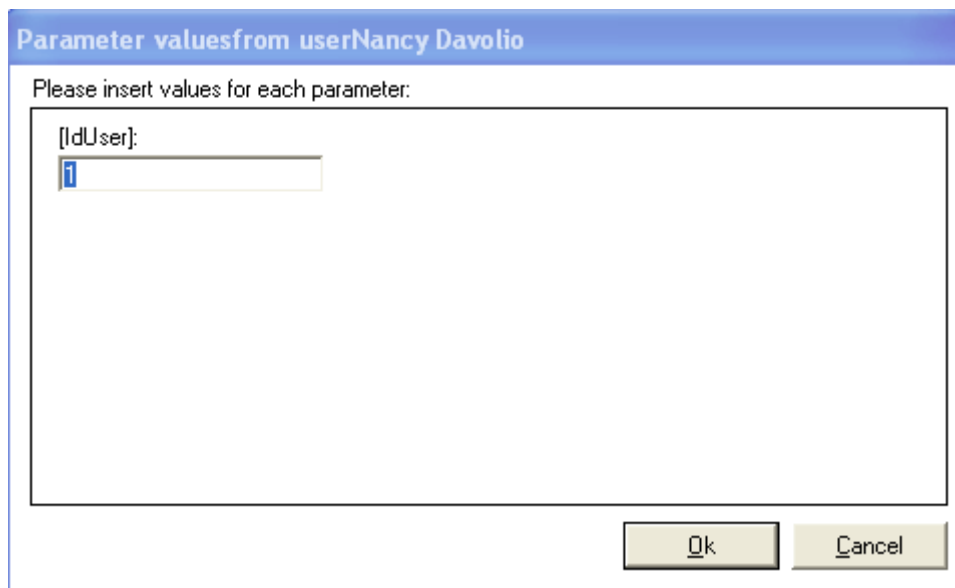


Click on “Edit property values” link followed by selecting the project what we want to assign a specific value.

For instance, we will use the user “Nancy Davolio” and will assign “1” as value and “IdUser” as parameter name,

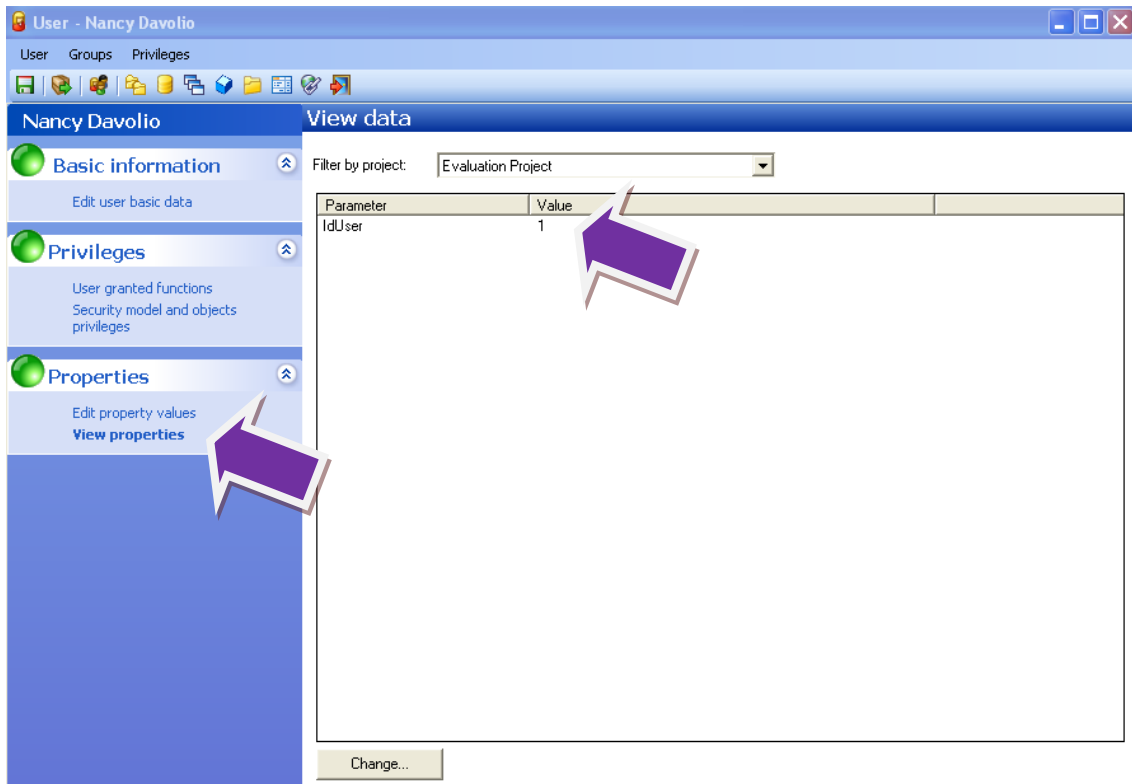


We can change any time the value clicking on Change... button.

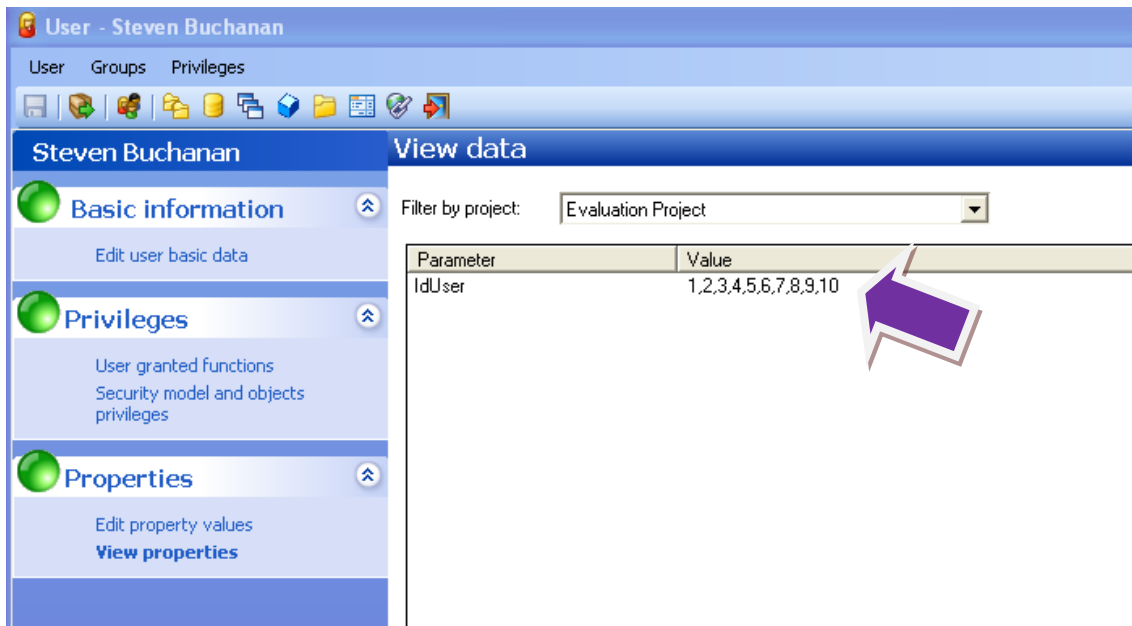


Also we can access to review properties by clicking at the same link name; here we can see all values.

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 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.



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"*

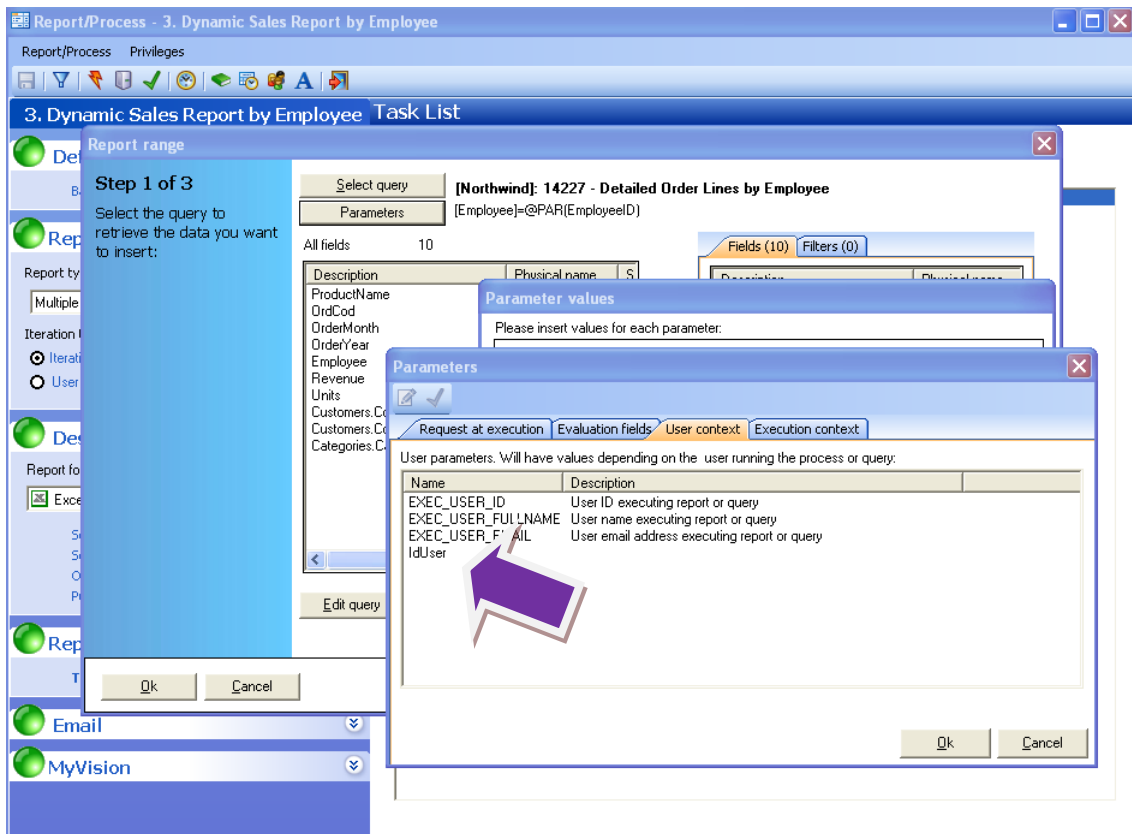
Simple Report option.

Let's use the user property 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".

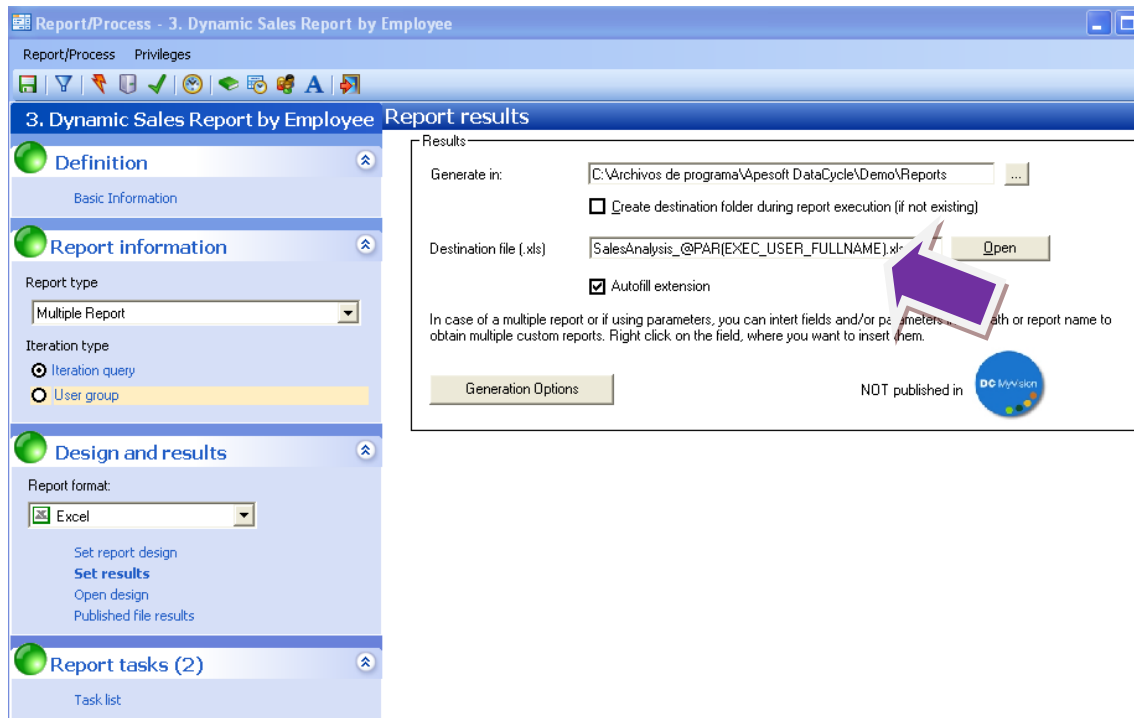
After this, we will see a filter pop up screen then we will select "User context" tab and select the parameter "IdUser".

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.



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.



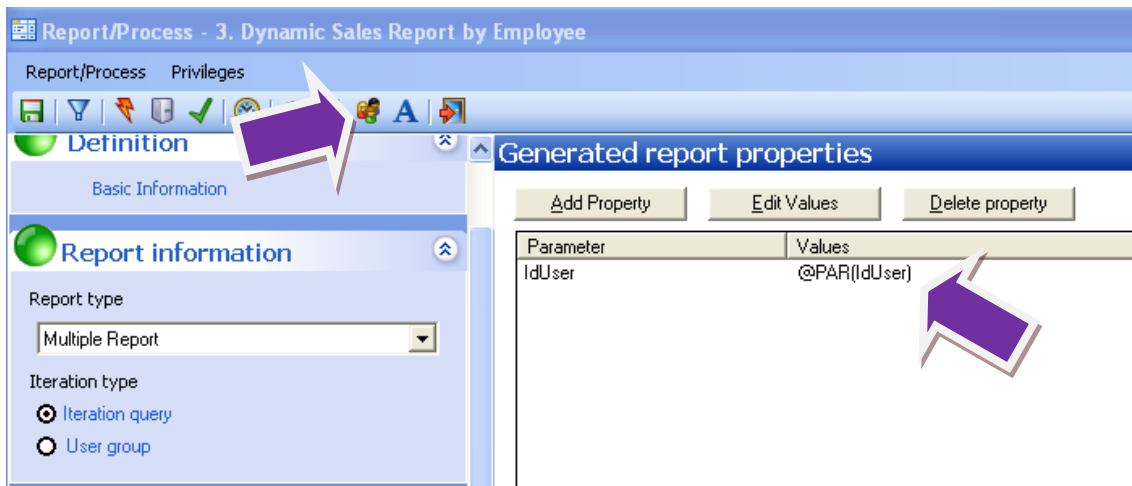
Going to MyVision Properties on the left hand side bottom



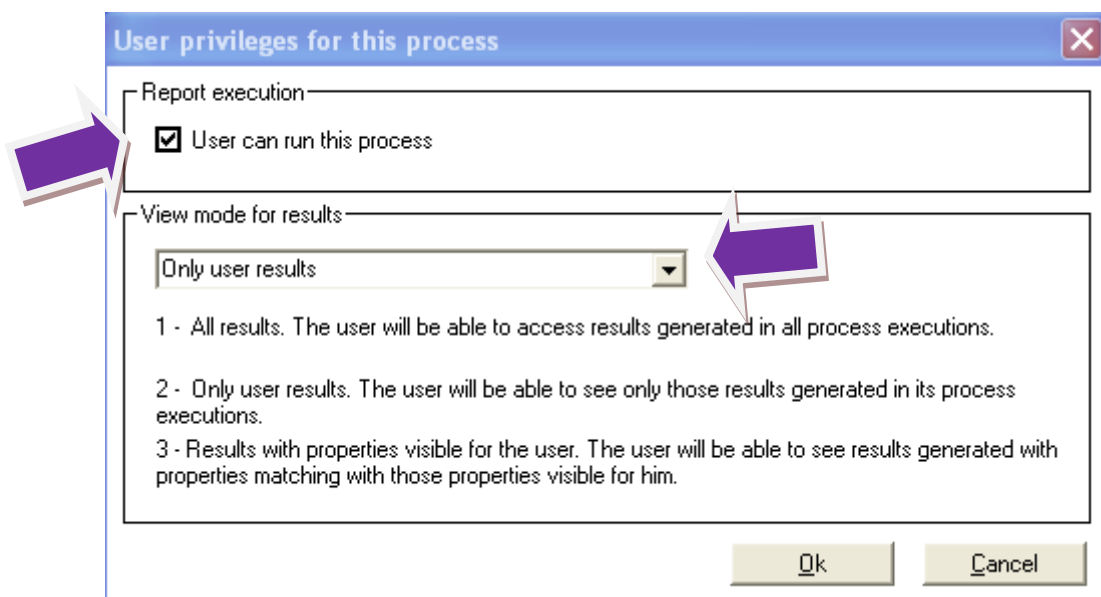
Let's click on add Property, select "IdUser" parameter and move to Assigned properties.

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.

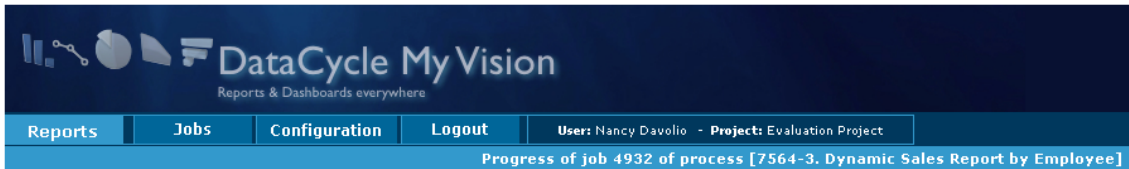
Finally our configuration will look as the follow image.



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**”



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



[Reports](#) | [Jobs](#) | [Configuration](#) | [Logout](#) | User: Nancy Davolio - Project: Evaluation Project
 Progress of job 4932 of process [7564-3. Dynamic Sales Report by Employee]

[← Back](#)

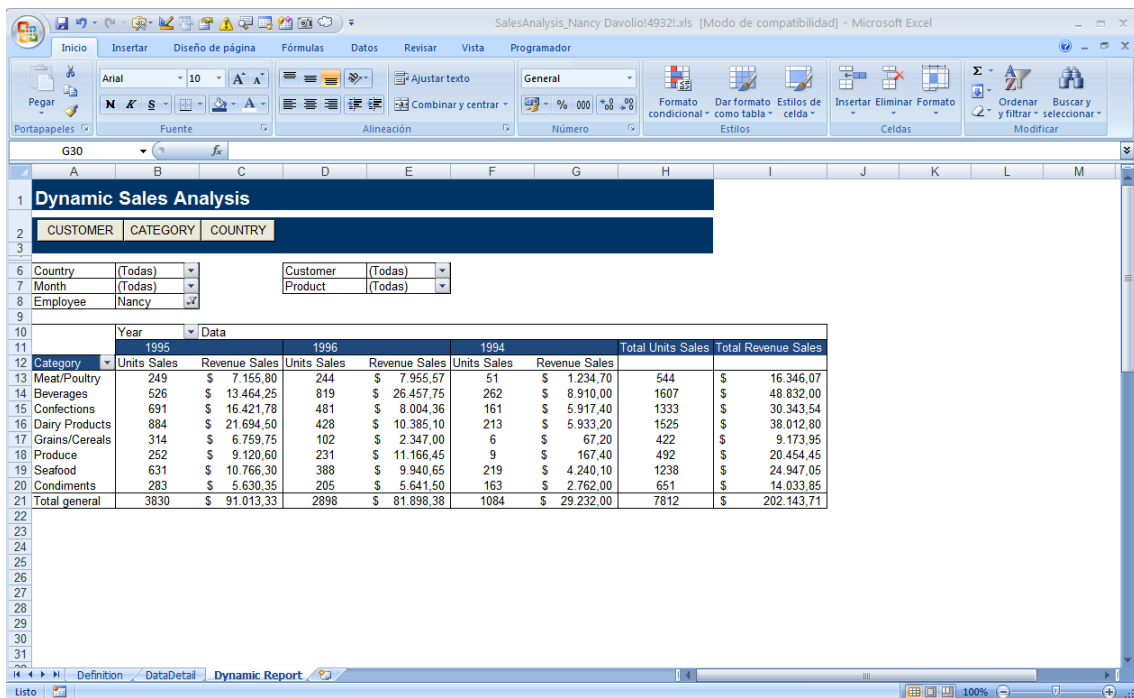
Status: Finished	N. of records: 345	User: 210-Nancy Davolio
Begin: 30/11/2010 17:47:33	End: 30/11/2010 17:48:09	Duration: 00:00:36

Result: **The report execution has finished**

Number of available files: 3

Available records:

 [SalesAnalysis_Nancy_Davolio.xls](#) [124 Kb] [30/11/2010 17:47:44]



Dynamic Sales Analysis								
CUSTOMER		CATEGORY		COUNTRY				
Country	(Todas)	Customer	(Todas)					
Month	(Todas)	Product	(Todas)					
Employee	Nancy							
Year	Data							
	1995	1996	1994	Total Units Sales	Total Revenue Sales			
Category	Units Sales	Revenue Sales	Units Sales	Revenue Sales	Units Sales	Revenue Sales	Total Units Sales	Total Revenue Sales
Meat/Poultry	249	\$ 7.155,80	244	\$ 7.955,57	51	\$ 1.234,70	544	\$ 16.346,07
Beverages	526	\$ 13.464,25	819	\$ 26.457,75	262	\$ 8.910,00	1607	\$ 48.832,00
Confections	691	\$ 16.421,78	481	\$ 8.004,36	161	\$ 5.917,40	1333	\$ 30.343,54
Dairy Products	884	\$ 21.694,50	428	\$ 10.385,10	213	\$ 5.933,20	1525	\$ 38.012,80
Grains/Cereals	314	\$ 6.759,75	102	\$ 2.347,00	6	\$ 67,20	422	\$ 9.173,95
Produce	252	\$ 9.120,60	231	\$ 11.166,45	9	\$ 167,40	492	\$ 20.454,45
Seafood	631	\$ 10.766,30	388	\$ 9.940,65	219	\$ 4.240,10	1238	\$ 24.947,05
Condiments	283	\$ 5.630,35	205	\$ 5.641,50	163	\$ 2.762,00	651	\$ 14.033,85
Total general	3830	\$ 91.013,33	2898	\$ 81.898,38	1084	\$ 29.232,00	7812	\$ 202.143,71

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

[← Back](#)

Status: Finished	N. of records:	User: 214-Steven Buchanan
Begin: 01/12/2010 12:57:54	End: 01/12/2010 12:58:30	Duration: 00:00:36

Result: [The report execution has finished](#)

Number of available files: 3

Available records:

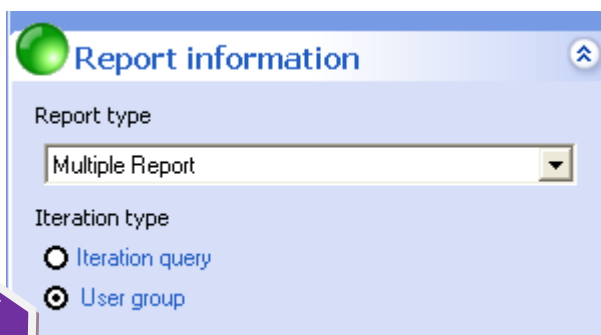
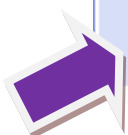
-  [SalesAnalysis_Nancy.Davolio.xls](#) [66 Kb] [01/12/2010 12:58:04]
-  [SalesAnalysis_Andrew.Fuller.xls](#) [66 Kb] [01/12/2010 12:58:17]
-  [SalesAnalysis_Janet.Leverling.xls](#) [66 Kb] [01/12/2010 12:58:29]



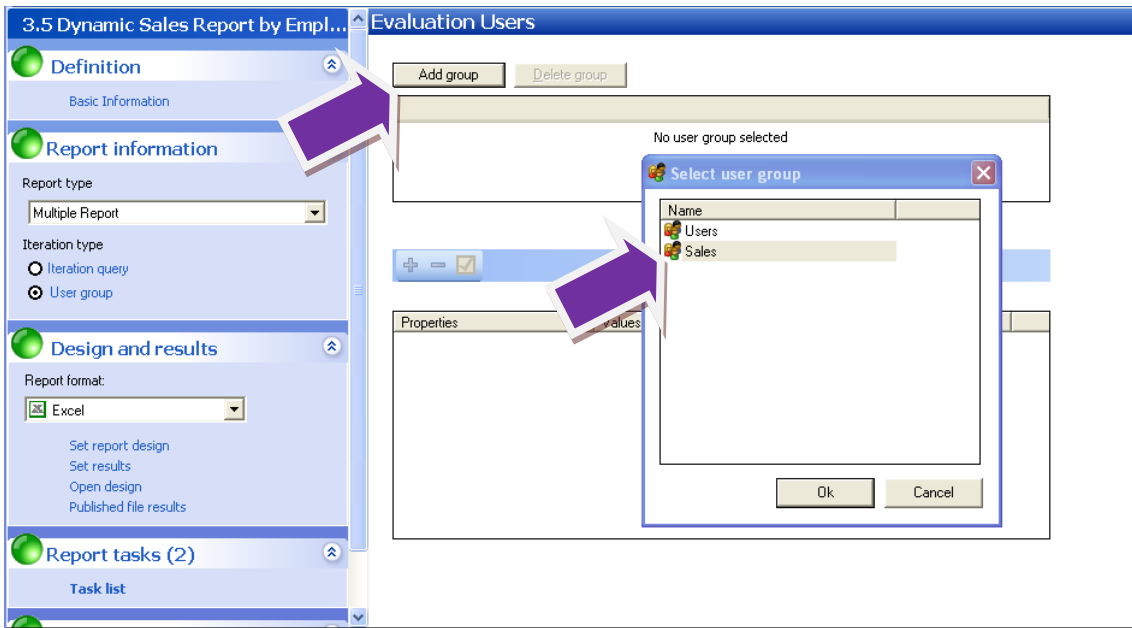
Multiple Process option

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

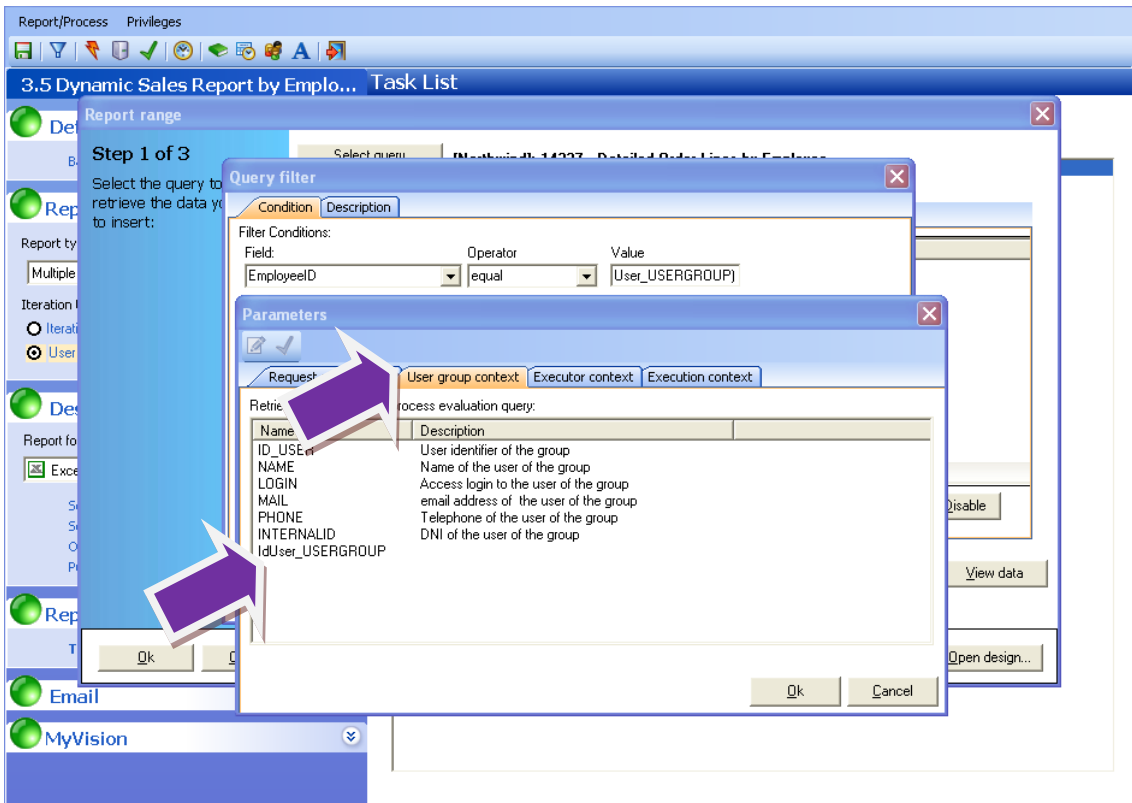



We will click in add group option, select Sales group and then ok button.

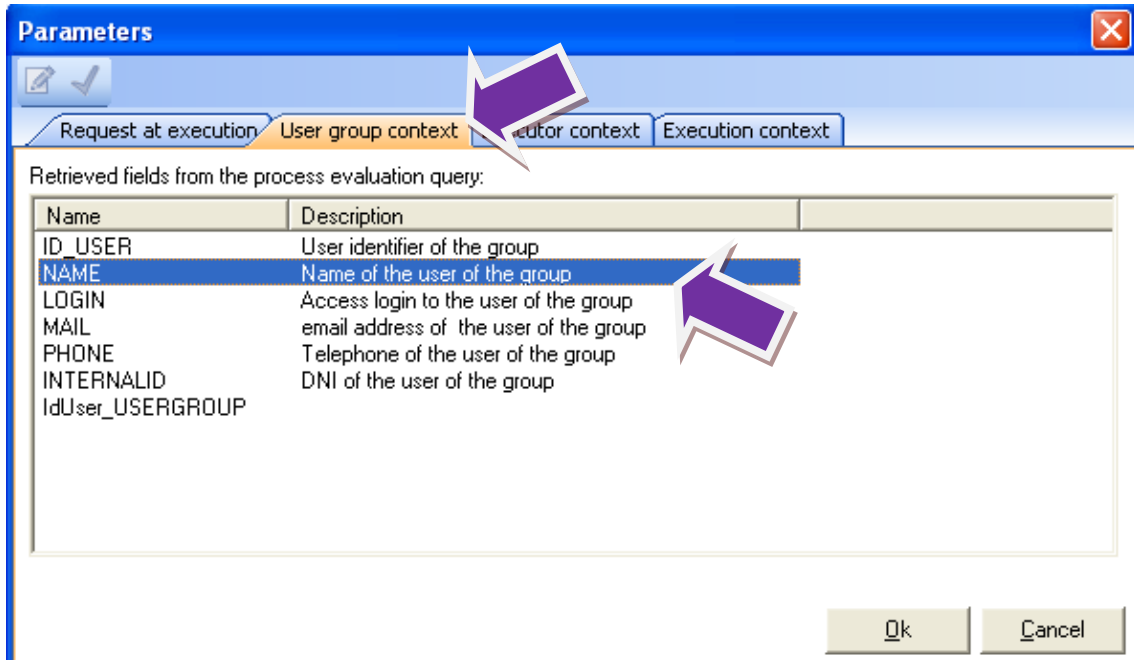


After this, we will edit Insert data task of the Task list at filter tab, let's edit the IdEmployee filter and right click in value field to Insert Parameters.

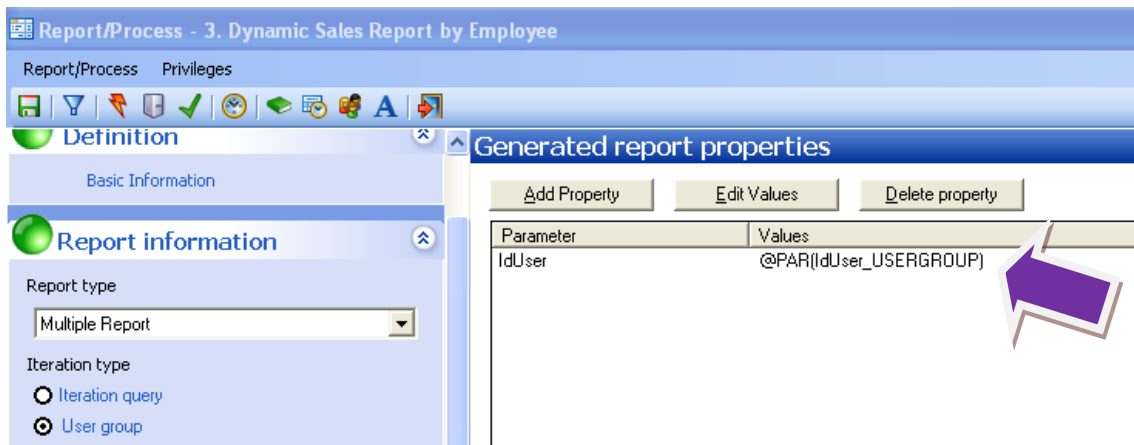
Then, in User group context tab we will find IdUser_USERGROUP



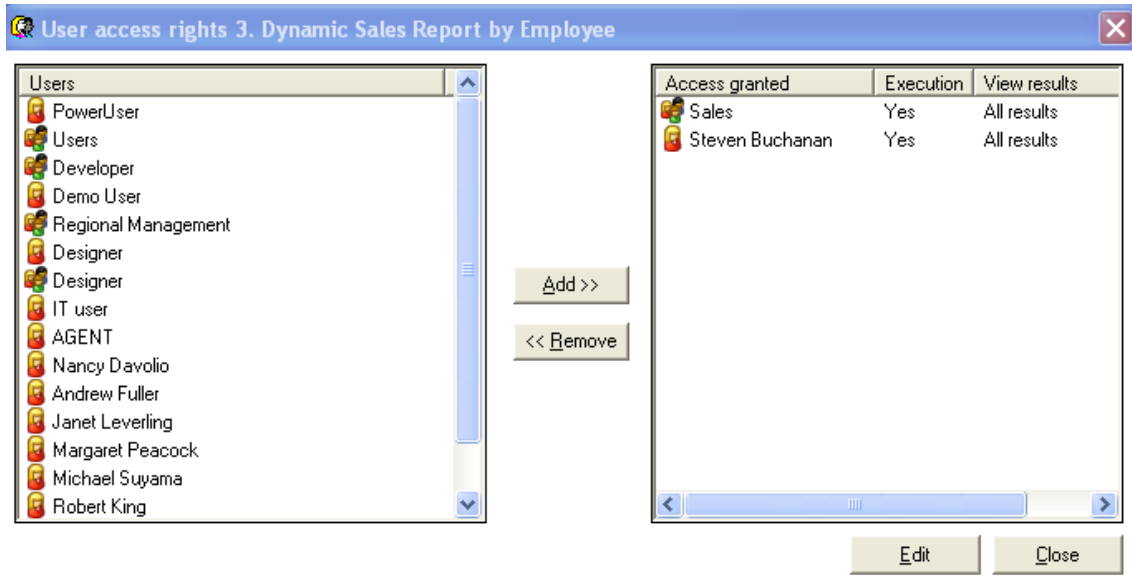
Changing the definition name for each report generated, click in Set Results, replacing the IdUser parameter, right clicking to insert the new parameters and we will select **NAME** from user group context to assign the name of each sales representative into the final file name.



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



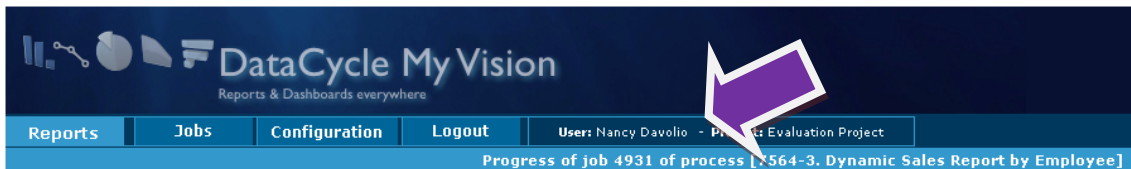
Finally we will assign visualization rights to Sales group.



When this process has been executed, it will generate a report for each group member and every report will be filtered with every parameter value assigned by user.



When sales representatives log in to MyVision, they will have access to their own reports.



[Reports](#) | [Jobs](#) | [Configuration](#) | [Logout](#) | User: Nancy Davolio - Project: Evaluation Project

[Back](#)

Status: Finished	N. of records: 2155	User: 209-Nancy Davolio
Begin: 01/12/2010 19:23:38	End: 01/12/2010 19:23:48	Duration: 00:00:10

Result: **The report execution has finished**

Number of available files: 1

Available records:

 [SalesAnalysis_Nancy_Davolio.xls](#) [412 Kb] [01/12/2010 19:23:47]



[Reports](#) | [Jobs](#) | [Configuration](#) | [Logout](#) | User: Michael Suyama - Project: Evaluation Project

[Back](#)

Status: Finished	N. of records: 2155	User: 214-Michael Suyama
Begin: 01/12/2010 19:26:05	End: 01/12/2010 19:26:12	Duration: 00:00:08

Result: **The report execution has finished**

Number of available files: 1

Available records:

 [SalesAnalysis_Michael_Suyama.xls](#) [412 Kb] [01/12/2010 19:26:12]

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

[← Back](#)

Status: Finished	N. of records: 2155	User: 213-Steven Buchanan
Begin: 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

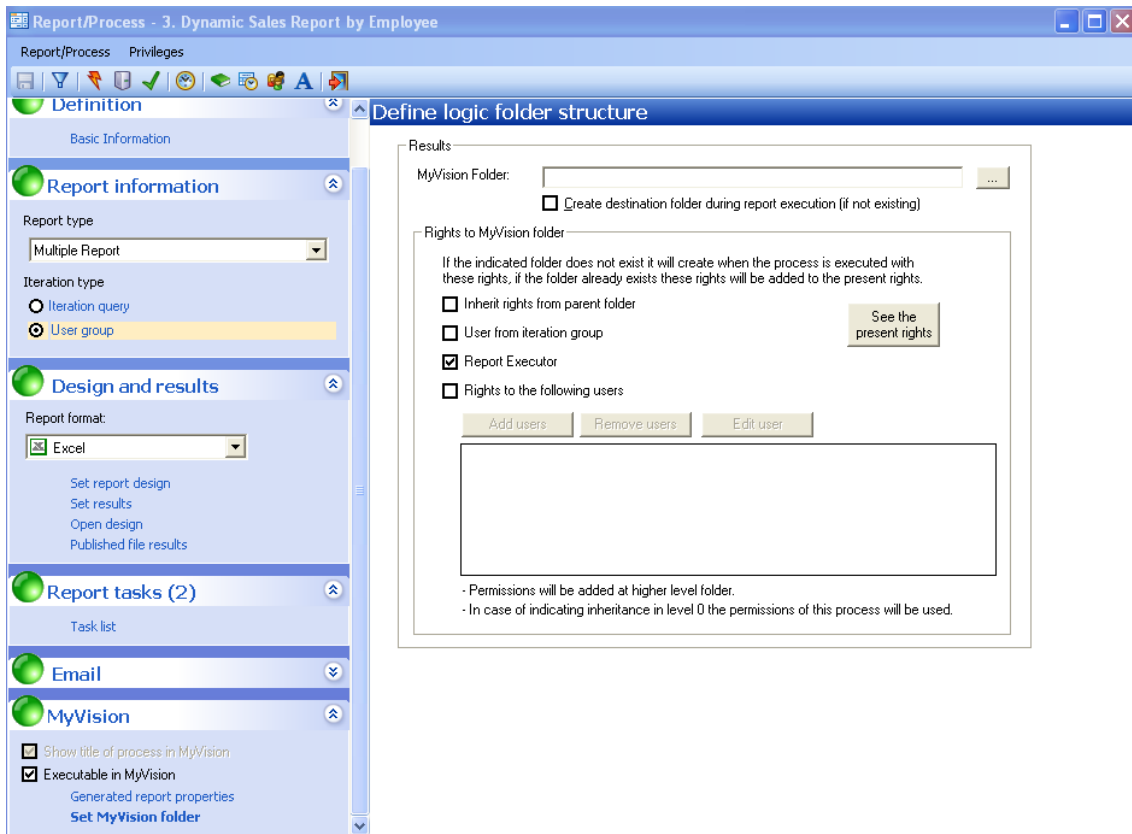
Available records:

-  [SalesAnalysis_Nancy_Davolio.xls](#) [412 Kb] [01/12/2010 19:17:21]
-  [SalesAnalysis_Andrew_Fuller.xls](#) [412 Kb] [01/12/2010 19:17:31]
-  [SalesAnalysis_Janet_Leverling.xls](#) [412 Kb] [01/12/2010 19:17:41]
-  [SalesAnalysis_Margaret_Peacock.xls](#) [412 Kb] [01/12/2010 19:17:51]
-  [SalesAnalysis_Steven_Buchanan.xls](#) [412 Kb] [01/12/2010 19:18:01]
-  [SalesAnalysis_Michael_Suyama.xls](#) [412 Kb] [01/12/2010 19:18:09]
-  [SalesAnalysis_Robert_King.xls](#) [412 Kb] [01/12/2010 19:18:17]
-  [SalesAnalysis_Laura_Callahan.xls](#) [412 Kb] [01/12/2010 19:18:24]
-  [SalesAnalysis_Anne_Dodsworth.xls](#) [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.

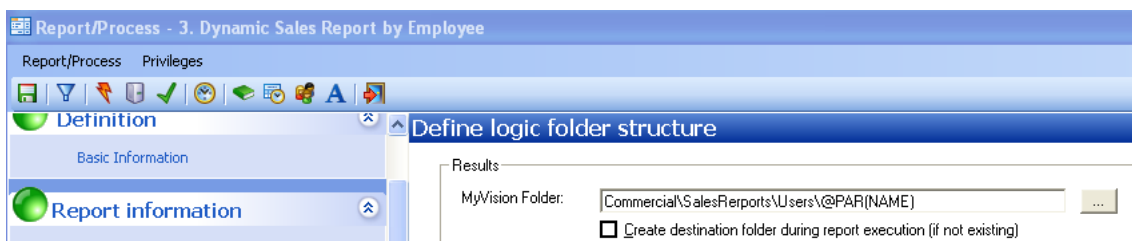


Here we have the follow options:

- 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.



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.

Rights to MyVision folder

If the indicated folder does not exist it will create when the process is executed with these rights, if the folder already exists these rights will be added to the present rights.

- Inherit rights from parent folder
- User from iteration group
- Report Executor
- Rights to the following users

See the present rights

Add users Remove users Edit user

 Steven Buchanan

- Permissions will be added at higher level folder.
- In case of indicating inheritance in level 0 the permissions of this process will be used.

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



[Back](#)

[My Favourites](#)

[Nancy Davolio](#)

(This folder is empty.)

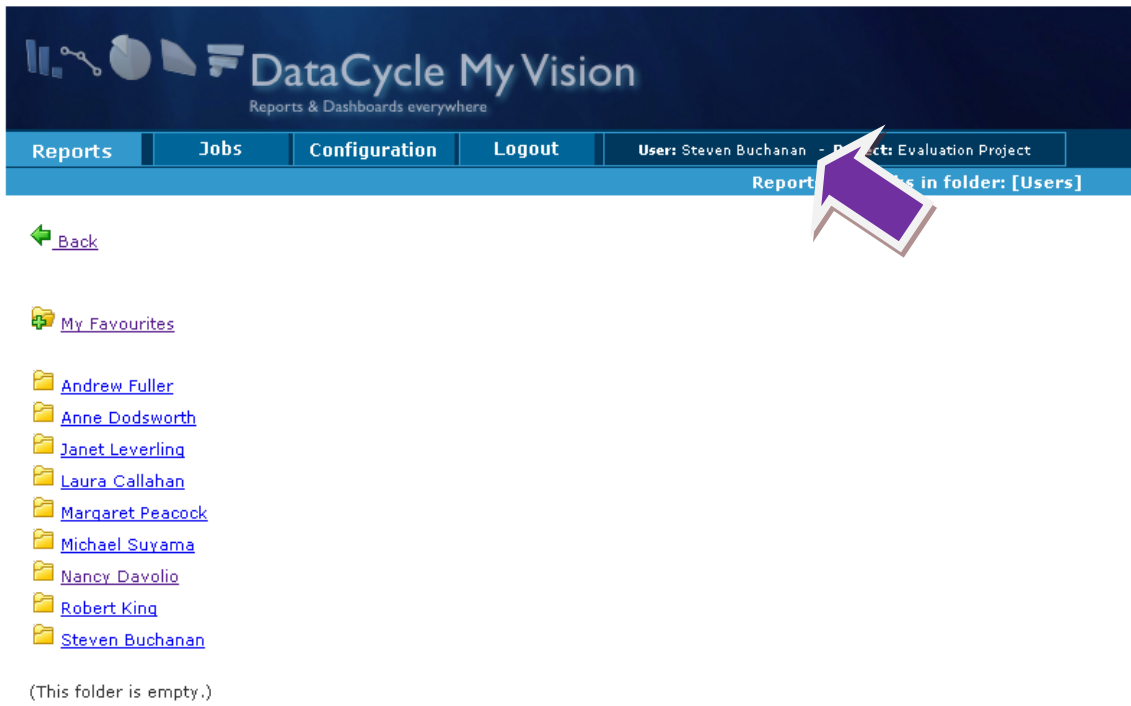


[Back](#)

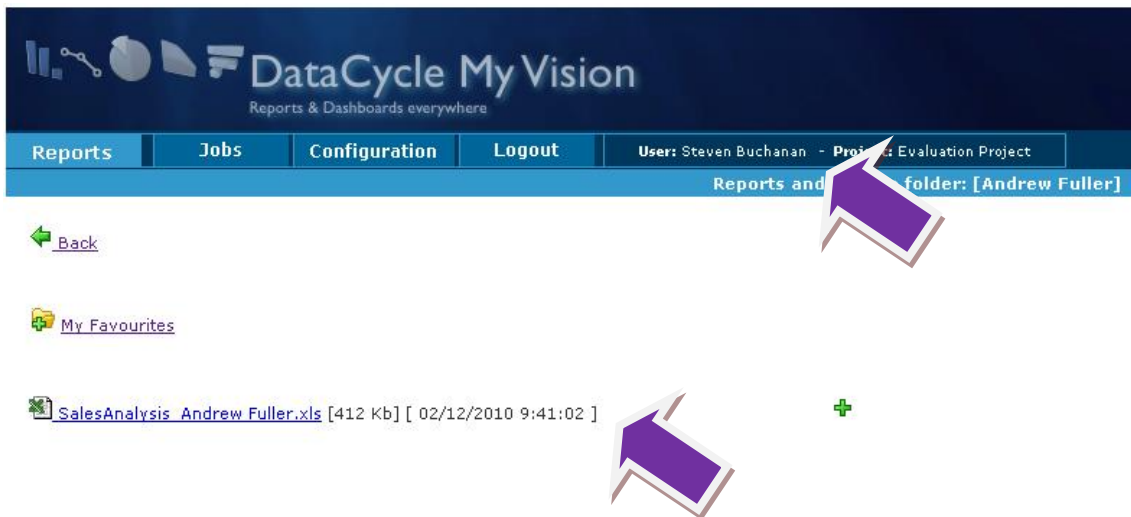
[My Favourites](#)

[SalesAnalysis Nancy Davolio.xls](#) [412 Kb] 02/12/2010 9:40:54]

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



The screenshot shows the DataCycle My Vision interface. The header includes the logo and the text "DataCycle My Vision Reports & Dashboards everywhere". The navigation bar contains "Reports", "Jobs", "Configuration", and "Logout". The user information bar shows "User: Steven Buchanan" and "Project: Evaluation Project". The breadcrumb trail indicates the current location is "Reports and Dashboards in folder: [Users]". A purple arrow points to the breadcrumb. Below the breadcrumb is a "Back" link with a left-pointing arrow. Under "My Favourites", there is a list of user folders: Andrew Fuller, Anne Dodsworth, Janet Leverling, Laura Callahan, Margaret Peacock, Michael Suyama, Nancy Davolio, Robert King, and Steven Buchanan. Below the list, it says "(This folder is empty.)".



The screenshot shows the DataCycle My Vision interface. The header and navigation bar are the same as in the previous screenshot. The breadcrumb trail indicates the current location is "Reports and Dashboards in folder: [Andrew Fuller]". A purple arrow points to the breadcrumb. Below the breadcrumb is a "Back" link with a left-pointing arrow. Under "My Favourites", there is a list of reports: "SalesAnalysis Andrew Fuller.xls [412 Kb] [02/12/2010 9:41:02]". A green plus sign is visible to the right of the report name. A purple arrow points to the report name.

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.

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 **+** located at the left hand side after this, click again on **+** at the right hand side of file name.

DataCycle My Vision
Reports & Dashboards everywhere

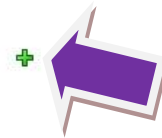
Reports | Jobs | Configuration | Logout | User: Janet Leverling - Project: Evaluation Project

Reports and links in folder: [Janet Leverling]

[← Back](#)

My Favourites

[SalesAnalysis_Janet Leverling.xls](#) [412 Kb] [02/12/2010 9:41:10]



DataCycle My Vision
Reports & Dashboards everywhere

Reports | Jobs | Configuration | Logout | User: Janet Leverling - Project: Evaluation Project

Inform: 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.

DataCycle My Vision
Reports & Dashboards everywhere


Reports | Jobs | Configuration | Logout | User: Janet Leverling - Project: Evaluation Project

Reports and links in folder: [My Favourites]

[← Back](#)

[SalesAnalysis_Janet Leverling.xls](#) [412 Kb] [02/12/2010 9:41:10]



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

DataCycle My Vision
Reports & Dashboards everywhere

Reports Jobs Configuration Logout User: Janet Leverling - Project: Evaluation Project

Reports and links in folder: [My Favourites]

[Back](#)

 [SalesAnalysis_Janet Leverling.xls](#) [412 Kb] [02/12/2010 9:41:10]



DataCycle My Vision
Reports & Dashboards everywhere

Reports Jobs Configuration Logout User: Janet Leverling - Project: Evaluation Project

Report: SalesAnalysis_Janet Leverling.xls

[Back](#)

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.

DataCycle My Vision
Reports & Dashboards everywhere

Reports Jobs Configuration Logout User: Janet Leverling - Project: Evaluation Project

Current password:

New password:

Confirm new 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.



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
- pMVAAsistenteTabDyn.xlsm

Office 97-2003

- pMVPlantilla_base.xls
- pMVAAsistenteTabDyn.xls

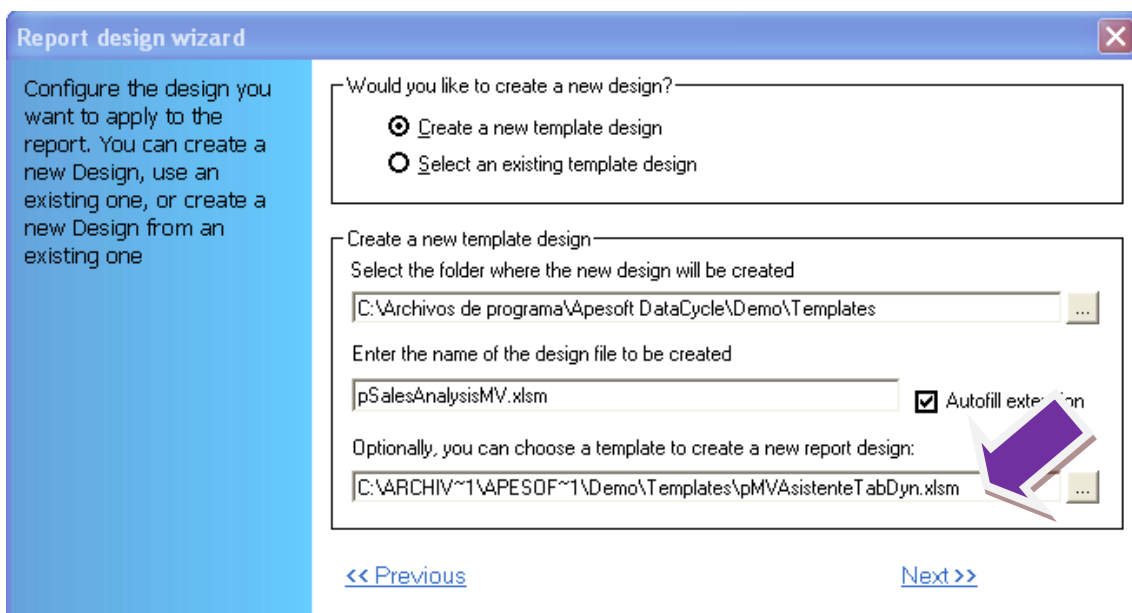
These templates execute macros in user terminals avoiding parallel executions on host machine, solving the concurrence problem.

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

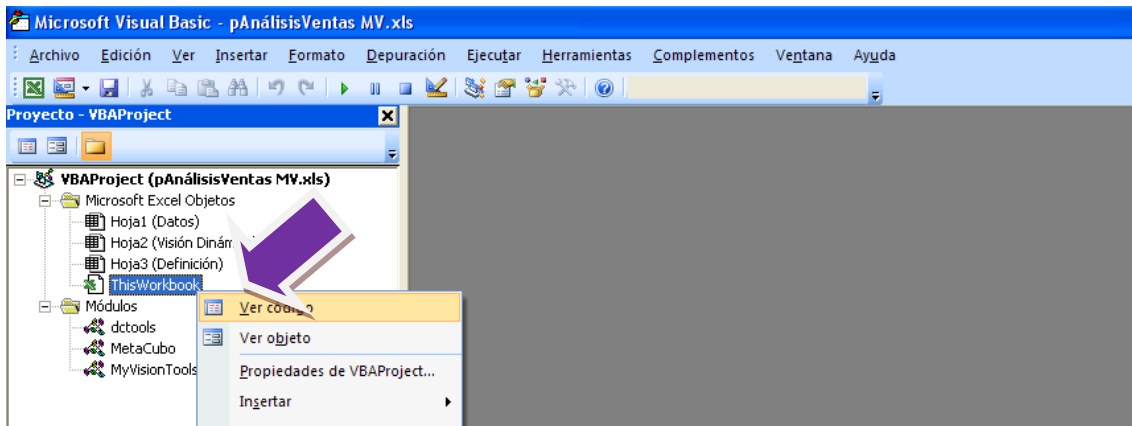
Starting with process creation, we will name it as Sales analysis MV and then click in Create/Use a design from an existing one.



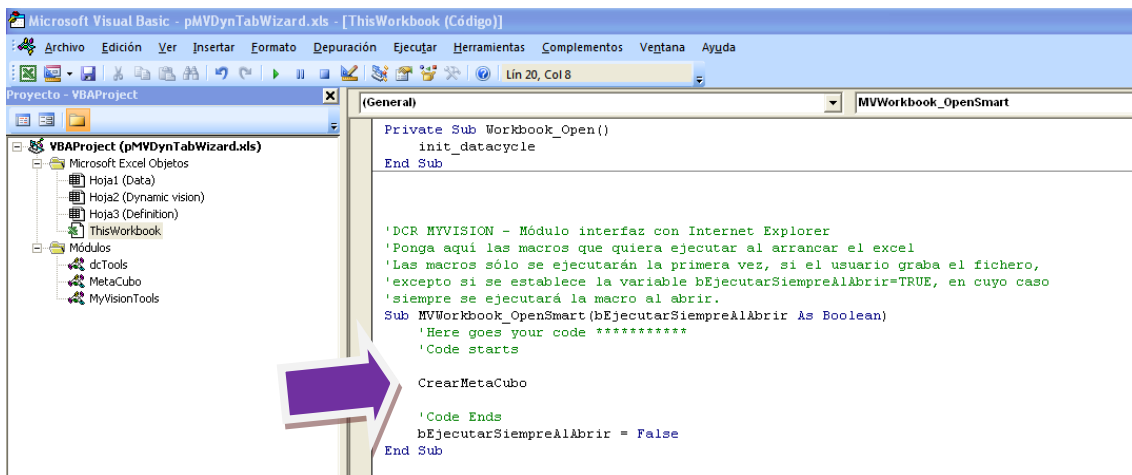
At the bottom of wizard form we will indicate the location, optionally, you can choose, **Create/Use a design from existing one** and we select **pMVAsistenteTabDyn.xls** for Excel 97-2003 or **pMVAsistenteTabDyn.xlsm** for Excel 2007.



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.



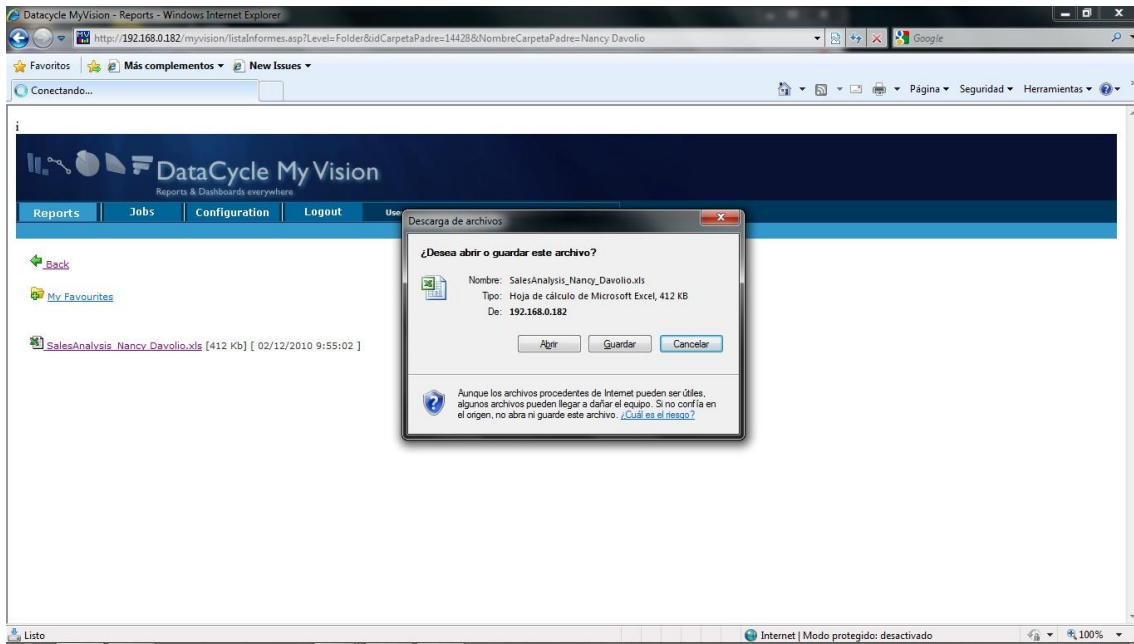
Add the macro name wished to execute, in this case “CrearMetacubo”



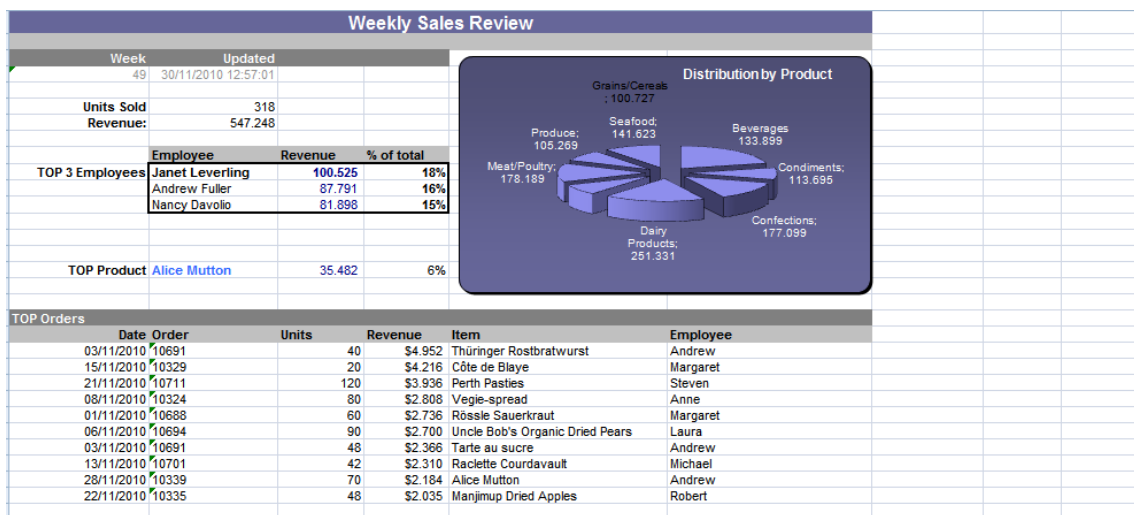
Whiter Macros has parameters, they has to be with quotations and followed by comas.

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.



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



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	Updated
49	30/11/2010 12:57:01
Units Sold	318
Revenue:	547,248

Distribution by Product

Employee	Revenue	% of total
TOP 3 Employees		
Janet Leverling	100,525	18%
Andrew Fuller	87,791	16%
Nancy Davolio	81,898	15%

TOP Product Alice Mutton

TOP Orders	
Date	Order
03/11/2010	10691
15/11/2010	10329
21/11/2010	10711
08/11/2010	10324
01/11/2010	10688
06/11/2010	10694
03/11/2010	10691
13/11/2010	10701
28/11/2010	10339
22/11/2010	10335

Archivo en uso

SalesDashboard.xls está bloqueado para modificarlo por 'Administrador'.

Abra el documento como 'Sólo lectura' o haga clic en 'Notificar' para abrir una copia de sólo lectura y recibir una notificación cuando el documento deje de estar en uso.

20	\$4,216	Côte de Blaye	Margaret
120	\$3,936	Perth Pasties	Steven
80	\$2,808	Veggie-spread	Annie
60	\$2,736	Rössle Sauerkraut	Margaret
90	\$2,700	Uncle Bob's Organic Dried Pears	Laura
48	\$2,368	Tarte au sucre	Andrew
42	\$2,310	Raclette Courdavault	Michael
70	\$2,184	Alice Mutton	Andrew
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.