# Table of Contents

Introduction ................................................................................................................. 5  
  Evisions Support Site ................................................................................................. 5

Getting Started ........................................................................................................... 6  
  Starting Argos ........................................................................................................... 6  
  Change Password ...................................................................................................... 6

Navigation .................................................................................................................... 7  
  Action Area .............................................................................................................. 7  
  Navigation Area ......................................................................................................... 7  
  Explorer view ............................................................................................................ 7  
  QuickLaunch view ..................................................................................................... 8  
  Dashboard view ......................................................................................................... 9

DataBlocks .................................................................................................................. 10

Reports ......................................................................................................................... 11  
  QuickView ............................................................................................................... 11  
  CSV Report .............................................................................................................. 11  
  Banded Report ........................................................................................................ 11  
  Extract Report ......................................................................................................... 11  
  Executing Argos Reports .......................................................................................... 12

Executing a QuickView Report .................................................................................. 13  
  Report Options ....................................................................................................... 13

Executing a CSV Report ............................................................................................ 17  
  Save to File .............................................................................................................. 17  
  Email ....................................................................................................................... 17  
  Create and Launch ................................................................................................. 17

Executing a Banded Report ......................................................................................... 18  
  Preview .................................................................................................................... 18  
  Save to File .............................................................................................................. 19  
  Email ....................................................................................................................... 19  
  Print ......................................................................................................................... 19  
  Executing an Extract Report .................................................................................... 20
Save to File .............................................................................................................................. 20

Email.......................................................................................................................................... 20

Create and Launch...................................................................................................................... 20

Viewing a Report in a Saved State ........................................................................................... 21

Executing Reports using QuickLaunch .................................................................................. 21

Executing Reports using Dashboards ...................................................................................... 22

OLAP .......................................................................................................................................... 23

Overview ......................................................................................................................................... 23

Measures .................................................................................................................................. 24

Dimensions ................................................................................................................................. 24

Working with OLAP Cubes ......................................................................................................... 25

Dimension Toolbar ................................................................................................................... 25

Expand/Collapse Toolbar ....................................................................................................... 25

Dimension Items ....................................................................................................................... 25

Dimension Item Labels ............................................................................................................ 25

Activate Dimension Editor ..................................................................................................... 25

Measures Toolbar ....................................................................................................................... 27

Expand/Collapse Toolbar ....................................................................................................... 27

Activate Global Measure Manager ...................................................................................... 27

Calculated Measures Manager ............................................................................................... 28

Measure Items .......................................................................................................................... 28

Activate Individual Measure Manager ................................................................................ 28

Sample OLAP Cube .................................................................................................................. 29

Graphs ...................................................................................................................................... 30

Graph Options .......................................................................................................................... 30

Argos Resources ...................................................................................................................... 32

The Support Site ....................................................................................................................... 32

The CO-OP User Community .................................................................................................. 33

Important Links .......................................................................................................................... 33

Table of Figures ........................................................................................................................ 34
Introduction

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

DataBlock Designers: Argos “power users” who create DataBlocks.

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

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

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

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

• Launch and log in to Argos (Getting Started)
• Navigate the menus and Explorer (Navigation)
• Run a variety of reports and save the output
• Know where to find additional help

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

Evisions Support Site

The easiest way to get to the Evisions support site is to access it through Argos. Under the Help menu is a link to the Support page. A link to the Support page also exists on the Argos toolbar. All the technical documentation available for download is found under the Support page.

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

What is this over here?

This sidebar will be used throughout the guide to define terms, show examples and provide further clarity.

Argos

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

DataBlock

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

Explorer

The Explorer view is one way to navigate the folders, DataBlocks and reports in Argos.

Support icon on Argos toolbar
Getting Started

Starting Argos

Argos is Windows PC software which is web-enabled, meaning it is accessible from your web browser via an Internet connection. Before launching Argos, you may need to disable any pop-up blockers running on your computer. To disable the pop-up blocker in Microsoft (MS) Internet Explorer, select Tools, Pop-up Blocker, Turn off Pop-up Blocker. You should be able to re-enable the pop-up blocker once you have downloaded the software.

Connect to the Server

Type the web address provided by your system administrator into the address bar of your browser to access the Multiple Application Platform Server (MAPS) launch page. This webpage provides a central access point for all MAPS applications, including Argos, FormFusion, IntelleCheck and the MAP Server Configuration Tool.

Start Argos

Click Argos from the menu on the left.

Click the “Start Here” button to launch Argos.

NOTE: If this is the first time Argos has been launched from this PC, an information bar will appear at the top of the screen. Click the bar and choose “Install ActiveX Control” to install the “MAP Client Universal Launcher” from “Global Evisions Solutions, Inc.”

Enter your user name and password (obtained from your system administrator) in the Login box. The “Remember this user” and “Remember the password for this user” are check boxes (available as determined by the MAPS Administrator) that are optional and should not be used on shared computers. Check them as desired.

Click the Login button.

Change Password

To change your password, select Tools from the menu at the top of the screen and then select Change Password. You must know your current password in order to change it. The password strength indicator will help you determine if your password is secure enough. It is advisable to contact your system administrator before changing your password to verify that the change will not produce any undesirable results.

Browser support

Argos is designed to operate using MS Internet Explorer browser. You can also use other browsers, such as Firefox, but they may require some configuration first. Configuration information for Firefox exists on the Evisions website at http://www.evisions.com/Default.aspx?tabid=67&id=641

Multiple Application Platform Server

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

FormFusion

Evisions’ solution for enhancing documents and managing distribution via email, imaging software, print, etc. Users can rearrange and add data and images, change the layout, format fonts, etc.

IntelleCheck

Evisions solution for payment processing – Accounts Payable, payroll and refund checks, Direct Deposit Advices and electronic refunds.

ActiveX Control

Browser software components that are needed to launch Argos.

Password Strategies

The following strategies will help you make a more secure password.

✓ Increase password length
✓ Include letters and numbers.
✓ Use both upper and lower case.
✓ Include special characters [], !, @, etc.
Navigation

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

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

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

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

Action Area

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

Navigation Area

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

Explorer view

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

Folders – Contains objects, including other folders

DataBlocks – The "parent" object for one or more reports

QuickView Report – A display-only report or Dashboard

CSV Report – A comma-separated values report

Banded Report – A fully-formatted report

Extract Report - A text report that meets pre-defined specifications

Schedule – Reports may be scheduled to run automatically

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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Explorer Objects</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Folder</td>
</tr>
<tr>
<td></td>
<td>DataBlock</td>
</tr>
<tr>
<td></td>
<td>QuickView Report</td>
</tr>
<tr>
<td></td>
<td>CSV Report</td>
</tr>
<tr>
<td></td>
<td>Banded Report</td>
</tr>
<tr>
<td></td>
<td>Extract Reports (Delimited, Fixed Width, XML)</td>
</tr>
<tr>
<td></td>
<td>Private Report (Banded)</td>
</tr>
<tr>
<td></td>
<td>Schedule</td>
</tr>
</tbody>
</table>

Figure 1 – Explorer objects

Report Viewers do not have privileges to add, modify, or delete objects within the Explorer tree.
Dashboards and Schedules will appear in the navigation area only if these features were purchased and included within your software license.

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

Are my reports secure?

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

Is my data secure?

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

QuickLaunch

A QuickLaunch is a shortcut to a DataBlock or Report. They can be Public (so all users can see them) or Private (so only the creator can see them). Click the QuickLaunch tab to switch to the QuickLaunch view.

QuickLaunch view

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

Figure 3 – Explorer Navigation

If you use a DataBlock or report frequently, you can right-click on it and choose “Add to QuickLaunch”. You can also right-click on a QuickView report and choose “Add to Dashboard”. Adding objects to the QuickLaunch and Dashboard views makes it easier to find what you need.

Figure 4 – QuickLaunch View

Figure 2 – Options for QuickLaunch

Execute the target of the QuickLaunch
Remove the selected QuickLaunch
Delete the selected QuickLaunch
Locate the target of this QuickLaunch in the Explorer Tree
Dashboard view

Dashboards provide an organized, direct way of accessing and running your reports. Here is an example of a QuickView report that has been run as a Dashboard. The report is within the main Argos window.

Figure 6 – Dashboard View

Dashboard

Dashboards are a special way of running QuickView reports that can include charts and drill-through navigation. Unlike normal QuickViews, Dashboards start inside Argos, not in a different window. Dashboards can be added to the Dashboard view for ease of navigation. You can also set one Dashboard as the default, so it will start automatically when you login to Argos.

Figure 5 – Dashboard options
DataBlocks

Although Report Viewers do not create DataBlocks, an understanding of the components of the DataBlock aids the Report Viewer in understanding the relationship between DataBlocks and the various report types.

The DataBlock is the foundation from which all reports are created and contains **Forms** and **Queries**. Only users with DataBlock Designer privileges can create DataBlocks.

The **Queries** obtain data from a database. When results of a query are displayed on a form, this is called a QuickView Report. In the case of CSV, Banded, and Extract Reports, the results of the query are input to the report design with the results displayed or stored elsewhere. Within the Argos Explorer tree, reports exist as "child" objects of a DataBlock.

The **Form**, created by the DataBlock Designer using the Argos DataBlock Designer, is used for two purposes:

- To obtain input selections from the user executing the report. The input selections can be passed to the queries to limit the results.
- To display the results of the report. QuickView reports can display results on the form.

Whenever a user executes a report, the form designed as part of a DataBlock will be displayed. **The input selections made by the user become query parameters.**

Any report type (QuickView, CSV, Banded, Extract) can utilize the data obtained from the queries. The tree structure shown on the right denotes that all report types underneath the DataBlock will obtain the same results from the queries, but of course each report type will print the data using methods available to the given report type.
Reports

Argos reports come in four different types, including “QuickView”, “CSV”, “Banded”, and “Extract” reports. Argos reports exist underneath a DataBlock, utilizing the data from the DataBlock to generate the report.

QuickView

A situation in which a user needs to access information quickly and often is usually a case in which one would want to use a “QuickView”. A good example is a situation where the head of Sales needs to view sales results for the organization. The design of the QuickView report could allow the Sales Manager to view a sales summary for the organization, by region, for each quarter. The QuickView form could provide additional ‘drill down’ functionality such as monthly sales results for each salesperson. The QuickView results are displayed directly on the user’s browser.

CSV Report

A “Comma Separated Value” or “CSV” report is a relatively simple report. A comma delimited file simply separates the desired columns by a comma or other specified delimiter. This type of report is especially useful when obtaining data quickly for manipulation in spreadsheet software such as MS Excel. It is also useful when creating files used by third party applications.

Banded Report

The Banded Editor is the mechanism by which a report writer creates a fully formatted report. It is an advanced reporting mechanism that results in what is called a “Banded” report. The name was inspired by the fact that the reports themselves are organized into ‘logical’ bands. These bands represent areas in the report that hold specific data. For example, the “Title Band” would typically contain the title of the report, report date and logo. However, it may just contain the title, while the “Page Header” band contains the page number, report date and logo.

The banded report is especially useful when a report is needed that contains special formatting, grouping, subtotals, totals, summary information, rich text, charts, graphs, images and other special information. Banded reports can also be utilized to facilitate correspondence in the form of mailing labels or as an actual letter that could be printed or emailed directly to an individual.

Extract Report

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

Extract Reports are somewhat similar in design to a Banded Report. Similar to bands within a Banded Report, an Extract Report has sections, each of which can include different data fields. However, in an Extract Report you can loop through as many datasets as your report requires, and you can precisely control the position of your data in the output file.
Executing Argos Reports

Reports can be executed using any of the following methods:

- You can click on the execute button shown in the figure at the right.
- You can right click on the report and select Execute from the menu.
- Or you can double click on the report.
- You can view a report that was previously executed and saved by clicking the ‘Run Saved’ button. See the “Viewing a Report in a Saved State” section for a description of this option.

After selecting the method of execution, you will see the following dialog box if a saved state exists for the selected report.

The existence of this dialog box indicates that this report was previously executed and saved (called a saved state). If you wish to view the report that was previously created and saved, select appropriate item and click OK. The report that was saved will then be displayed. If you do not wish to see the previously executed report and wish to execute the report now, select <run live> , click OK, and the report will run using the current data in the database.

The saved states above are stored on the MAP Server. However, saved states can also be stored as a file on another PC (using a file extension of *.argosstate). To view a report stored on a PC, select <load from> file. This will bring up the same dialog box that appears when you click the “Run Saved” button. The use of this dialog box is explained in “Viewing a Report in a Saved State” section below.

The Report Viewer can store a saved state on the MAP Server onto a PC by clicking “Save Run State” shown (in grey) in the above figure. A dialog box will be displayed which allows the user to store the saved state onto a PC.

Creating Saved States

Only the DataBlock Designer and Administrator has privileges to create Saved States.

Saved States are useful for long running reports, such as OLAP cubes. These reports, which can take hours to create, can be run at night with results saved as a Saved State. The OLAP cube can then be used at a convenient time the next day.
Executing a QuickView Report

This is an example of how to run a QuickView report. The same search parameters entered onto the form can be used for multiple reports under this DataBlock, but even though they use the same form, the output may be different (different reports use the data obtained from the same DataBlock, but the reports may have been designed to report on different items or to format them differently).

- Navigate to the appropriate folder.
- Click once on the QuickView report. Notice the options in the panel on the right. The panel contains all action items the current user has the ability to do on the given report.
- Click the “Execute” button from the panel on the right. The first thing shown is the form where the user has the ability to filter and narrow search results.
- Input search parameters. The report results are typically displayed in a multi-column list box as shown in the figure below.

Report Options

Even though results have not yet been saved, you can do some minor sorts on this data. You can also move a column by clicking on it and holding the mouse key down, and drag it to a new location. You can also click on a column header to sort by that column.

![Figure 10 – options for executing QuickView Report](image)

Edit Sort

You also have the option to run multiple sorts on your data by right clicking on your results. This brings up the dialog box below which gives you the option to run multiple sorts on your results.
Figure 12 – Sorting the results

You can sort by multiple columns if desired. Double-click on a field to add it to the sort (or you can select a column and use the arrow to add it to the sort window). You can also drag the field into the sort window. If you want to remove a column, click the back arrow. Once you have all the columns that you want in the sort window, you can modify the order the columns are sorted in by using the blue arrows on the side to move a column up or down. You can also click the green arrows to toggle between sort ascending or descending.

Once you are done, click OK to view your QuickView results.

Edit Filter

Selecting “Edit Filter” brings up the following dialog box where you can filter results further. In this example we will filter the data to display only salaries above 80000 for employees whose hire data was after 1/1/2000.

Select the desired field (“salary” in this case), the operator (“greater than”), then enter the value (80000). Then click the green plus sign to move the filter into the “Existing Filters” window. Then select the hire date field, select >, then enter 1/1/2000 and click the green plus sign again. The resulting filter will appear as follows:

Figure 13 – Filtering the results

Click OK to review the QuickView results. You will now see the filtered employee list.
Save Results

In addition to doing multiple sorts on your results you have the option to export these results to a comma delimited file that can be used in any spreadsheet program, such as Excel.

Right click on the results display and choose “Save results”. The following dialog box will appear:

![Save Results dialog box](image)

You can select which fields will appear in the report by checking the corresponding check box. You can also order the fields by clicking the blue up/down arrows. Using the Rename button, you can rename the fields. Note the field at the bottom called “Edit1”. This is the name of the edit box used in the form where the salary was entered. Other types of controls besides edit boxes (such as list boxes) can be used in the form and will be displayed accordingly.

After making the above choices, click the “Launch” button and the following dialog box will appear where you can enter the name and destination of the CSV file to be created. Click Save to continue.

![Saving the CSV file](image)
Notice that Argos has exported the values and launched your spreadsheet application automatically.

![Spreadsheet Image]

**Figure 16 – The CSV file within the spreadsheet application.**

Alternatively, if you just want to save the CSV file and not launch your spreadsheet application – just click Save in the “Save Results” dialog box shown above (don’t click Launch) and a dialog box will be displayed where you enter the name and destination of the CSV file to be created.
**Executing a CSV Report**

Click once on the CSV report. Notice the options in the panel on the right (Execute, Run Saved, Dashboard, QuickLaunch). The panel contains all action items the current user has the ability to do on the given report.

Click the “Execute” button from the panel on the right. The first thing shown is the form where you input the search parameters.

Click the “Next” button in the lower right corner. Notice there are additional button choices in the upper left corner of the screen (Save to File, Email, Create and Launch). These are shown on the sidebar to the right.

With a CSV report, there are three execute options:

**Save to File**

This option saves the CSV report to a desired location. After clicking “Save to File” a dialog box will appear where you will enter the filename and destination of the CSV file to be created.

**Email**

This option emails file to individual or group. When selecting this option, a dialog box will appear which allows you to select the destination of a temporary .CSV file. After entering the destination, another dialog box will appear (see figure below) in which you enter the destination of the email. The CSV file will appear as an attachment to the email.

![Figure 19 – Sending report results as an email](image)

**Create and Launch**

This option saves the file to a desired location then automatically brings it up in the default spreadsheet software (such as Excel). Click “Create and Launch", then a dialog box will appear where you enter a file name and destination for the CSV file. After clicking “Save” the file will be saved and automatically launched in your installed spreadsheet application. Click the “Close” button to complete the process.
Executing a Banded Report

Click on the Banded report. Notice the options in the panel on the right (Execute, Run Saved, Dashboard, QuickLaunch). The panel contains all action items the current user has the ability to do on the given report.

Click the “Execute” button from the panel on the right. The first thing shown is the form where you enter search parameters.

Input search parameters.

Click the “Next” button in the lower right corner.

With a Banded report, there are four options for processing the report (Preview, Save to File, Email, Print).

Preview

This option allows the user to preview the report prior to additional action. Notice the contents of this report is formatted in a way that is easy to read with colored bands, grouping, page numbers, logos, etc.

From this preview screen you can scroll through the pages by clicking on the thumbnails, or you can use the arrows at the top (the single arrow moves through a page at a time, the double arrow goes to the beginning or to the end). You can go directly to a page by inputting the page number, zoom in and out, or you can search for something by clicking on the binoculars. Or you can simply print or save.
**Save to File**

This option saves the Banded report to a desired location. The report can be saved in a number of formats including .PDF, .TXT, .HTML, and .XLS.

**Email**

This option emails the report to an individual or group. Several dialog boxes will appear in which you supply information required to send the email. The report will be included as an attachment to the email in pdf format. There are a number of preferences for the pdf file that you will be allowed to enter if desired.

**Print**

This option sends the report to a desired printer. If you choose print, a printer selection window will pop up. Notice that you don’t need to save the file prior to printing. If you do want to save a copy, you will need to click the save to file option in addition to the print option.
**Executing an Extract Report**

Click on the Extract report. Notice the options in the panel on the right (Execute, Run Saved, Dashboard, QuickLaunch). The panel contains all action items the current user has the ability to do on the given report.

Click the “Execute” button from the panel on the right. The first thing shown is the form where you enter search parameters.

Input search parameters.

Click the “Next” button in the lower right corner.

With an Extract Report, there are three options for processing the report (Save to File, Email, Create and Launch).

**Save to File**

This option saves the Extract report to a desired location. The report can be saved in .csv, .txt, and .xml formats.

**Email**

This option emails the report to an individual or group. Several dialog boxes will appear in which you supply information required to send the email. The report will be included as an attachment to the email in pdf format. There are a number of preferences for the pdf file that you will be allowed to enter if desired.

**Create and Launch**

This option saves the file to a desired location then automatically brings it up in the default application for the chosen file type (.csv, .txt, or .xml). Click “Create and Launch”, then a dialog box will appear where you enter a file name and destination for the file. After clicking “Save” the file will be saved and automatically launched in your installed application. Click the “Close” button to complete the process.
Viewing a Report in a Saved State

Any report type can be run from a Saved State (assuming that a Saved State was created for the report). After clicking the “Run Saved” button the dialog box shown below will be displayed, which allows you to select a saved report that you wish to view. Select the file, click “Open” and the saved report will be displayed.

Executing Reports using QuickLaunch

The QuickLaunch is useful for users who run the same reports on a regular basis. Rather than navigating through the Explorer Tree to find the report you need to run, add it to the QuickLaunch for easy access. It is very similar to creating a Shortcut in Windows.

Adding a report to the QuickLaunch

- Right click on the report in the Explorer Tree.
- Select Add To QuickLaunch.
- A prompt to choose if the report will be private or public will pop up. Private makes the QuickLaunch report viewable only to the user who created it, and public allows everyone to use it. Only DataBlock Designers and Administrators can create public QuickLaunches.

Report Options

Click on the report added to the QuickLaunch to see the options for the report:

- Execute - run the report that was added to the QuickLaunch.
- Rename - change the name of the QuickLaunch.
- Delete - remove a report from the QuickLaunch.
- Locate - show the target of the QuickLaunch inside the Explorer Tree.

Note that you cannot view a saved state from QuickLaunch.
**Executing Reports using Dashboards**

Dashboards are typically used to display charts and provide a convenient method of executing reports in a manner similar to QuickLaunch.

The Dashboards tab displays any reports you have added to this tab. The dashboard module allows you to graphically display information in a QuickView and click through those graphs to drill down into the data. They are great ways to monitor performance indicators such as sales or cost data, or budget comparisons.

When a Dashboard is launched, it will appear on the right side of the main Argos window instead of opening in a new window. To add a report to your Dashboard, right-click on the report then select Add to Dashboard.

**Dashboard Options**

The following actions can be taken from this screen:

- **Activate Dashboard**: the currently selected Dashboard will be activated on the right side of the main Argos window.
- **Rename**: Change the name of the selected Dashboard (has no effect on original).
- **Delete**: Remove the selected object from the Dashboard tab (has no effect on original).
- **Locate**: Find the report that the Dashboard was created from in the Argos Explorer Tree.

To close the Dashboard view, click the x in the upper right-hand corner of the Dashboard frame.

**The Default Dashboard**

You can also set one Dashboard as the default, so it will start automatically when you login to Argos.
OLAP
On-Line Analytical Processing

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

Overview

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

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

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

Figure 30 – Sample OLAP Data Cube

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

OLAP-(On-line Analytical Processing)

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

Measures
The numbers in the OLAP spreadsheet or cube.

Dimensions
Fields by which data records are grouped.
Measures

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

Fact tables typically contain the following types of fields:

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

Dimensions

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

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

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

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

Dimension Toolbar
The dimension toolbar is used to manipulate the dimensions on the cube.

Expand/Collapse Toolbar
You can collapse the dimension toolbar in order to have a bigger display area for the Cube Grid. The button acts as a toggle.

Dimension Items
The dimensions that are displayed are obtained from the list of available dimensions the designer added to the cube. All dimensions are displayed, except for those already added to the dimension rows or column toolbars. If any of the dimensions were added by the designer to be columns or rows, they will not be listed here.

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

Dimension Item Labels
The dimension labels are obtained from the Display Name property of the defined dimension.

Activate Dimension Editor
To Activate the Dimension editor click the down arrow on one of the dimensions.

Dimension Editor
Allows the end user to 'override' or change some of the default settings defined by the creator of the DataBlock.
The dimension editor allows the user running the report to ‘override’ or change some of the default settings defined by the creator of the DataBlock.

The Dimension editor allows the user to ‘filter’ the data or resort the data.

To filter the data to display only the items selected, change the green check mark to a blue or red check mark by clicking on the current value.

Clicking the Help Button (the blue question mark) describes the use of each of the icons displayed at the bottom of the Dimension editor.

In addition you can change the sort order by clicking on the ‘Sort Dimension’ icon on the bottom tool bar. You can select to sort by Name, Key value, or not sort at all. You can also group within the Dimension editor. Click on the folder with a plus sign - Add Hierarchy group. Name it, then drag and drop choices onto it to create a folder of choices. Any dimensions you want to group (i.e. states into west and east regions) you can.

You can also quickly get totals on the fly. Hold shift and click on a column in the OLAP cube, the totals will be highlighted in yellow.

**Check box colors**

The check boxes shown in the figure to the left can be set to green, blue, or red. The colors indicate the following:

Green indicates that the Dimension value is computed in the measures and the dimension value is displayed.

Blue indicates that the Dimension value is not computed in the measures but the dimension value is displayed.

Red indicates that the Dimension value is not computed in the measures and the dimension value is not displayed.

**Figure 32 - Dimension editor**

The dimension editor allows the user running the report to ‘override’ or change some of the default settings defined by the creator of the DataBlock.
Measures Toolbar
The measure toolbar allows the end user to modify the default settings for the added measures.

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

Activate Global Measure Manager
To activate the global measure manager click the global message manager icon shown in the above figure.

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

Figure 33 - Measure Toolbar

Figure 34 - Measure Manager
The measure manager is used to easily set the attributes of each measure item. Among the attributes you can set are the visibility of each measure, the displayed measure value and the filtered valued. On the example, to display the unit_price measure, click on the red x to change to a green check mark.

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

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

**Calculated Measures Manager**

![Calculated Measures Manager](Calculated Measures Manager_used to add additional measures.)

In this example a new measure was added that multiplies the quantity sold by the unit price.

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

**Measure Items**

Display the ‘visible’ or active measures.

**Activate Individual Measure Manager**

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

In the following sample, the product_name dimension was dragged into the Dimension Row Toolbar, the region_name dimension dragged into the Dimension Column Toolbar, and checked the quantity and ExtendedPrice measures to be visible.

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

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

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

Figure 39 - OLAP Graph

Graph Options

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

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

Figure 40 - OLAP Graph Types
Figure 41 - OLAP Graph Options
Argos Resources

The Support Site

The support site can be accessed through the web using the following URL:


Navigating to this site through the link or from Evisions’ main page will require login credentials before allowing material to be downloaded.

The support site can also be accessed through Argos by clicking the Help button on the Argos menu bar shown below.

Figure 42 – Link to support site from Argos

Accessing the support site from Argos requires login credentials for the first use of the site. Subsequent access to the site will bypass the security page, allowing the user to access materials without credentials. The figure on the right shows the screen that appears when accessing the support site for the first time.

Enter your username and password, which are required only the first time you visit the support site. If you do not have a name or password, contact your systems administrator or you may create your own account by filling in the items under “Register New Account”. If you register yourself, you will be granted a default set of privileges. Therefore if you require additional privileges see your systems administrator.

After accessing the site, navigate around the site noting the available tools for Argos users.

Once in the support site, there are several things that Argos users may find useful:

- Argos Documentation: All Argos documentation (technical and functional) can be downloaded here. This includes user guides, installation guides, and white papers.
- Don’t forget to use the In-Product Help within Argos.
- The Training Calendar: A calendar of all online training sessions. The sessions are completely free and can be repeated as needed.
- Multimedia Content: In addition to the documentation, Evisions records on video all online training. This gives users the opportunity to download the flash video files and watch the training at their leisure.

Evisions Forum
Comprised of Argos clients for sharing of information about Evisions’ products.

HelpDesk
Technical issues can be logged here.

Training Calendar
A calendar of all online training.

Argos Documentation
All Argos Documentation (technical & functional) can be downloaded here.

Multimedia Content
Gives users the opportunity to download the flash video files.

COOP
A DataBlock repository for all Argos’ clients.
• Evisions Forums: collaborate with peers and share ideas about the Evisions Suite of Products based on specific topics. The forums are also used to provide Evisions product/update information to clients. Forums can be found on the Evisions web site under the CO-OP User Community page.

• The HelpDesk: Technical issues can be logged here. The link to the HelpDesk is listed below under “Important Links”.

The CO-OP User Community

Like the support site, the COOP can be accessed in two ways:

• Through the Evisions main page under the Support tab.

• Using the COOP button in the Argos interface

The COOP is a DataBlock repository for all Argos clients. Evisions periodically uploads DataBlocks to the COOP for use in its client base. In addition, clients are encouraged to use the COOP as a mechanism to share the DataBlocks they have put together. Joining the Evisions CO-OP User Community also allows users to participate in forums and obtain Evisions documentation and software.

Click the “Visit the Argos COOP Site” icon on the toolbar. Enter your username and password shown on the Account Login screen shown on the previous page. This is only required the first time you visit the COOP site. If you do not have a username or password, contact your systems administrator or you may create your own account by filling in the items under “Register New Account”. If you register yourself, you will be granted a default set of privileges. If you require additional privileges, see your systems administrator. The default privilege will allow you to download and view files from the CO-OP.

Important Links

Evisions Help Desk:  http://helpdesk.evisions.com

Evisions Training Calendar:  http://www.evisions.com/calendar
## Table of Figures

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Explorer objects</td>
<td>7</td>
</tr>
<tr>
<td>2</td>
<td>Options for QuickLaunch</td>
<td>8</td>
</tr>
<tr>
<td>3</td>
<td>Explorer Navigation</td>
<td>8</td>
</tr>
<tr>
<td>4</td>
<td>QuickLaunch View</td>
<td>8</td>
</tr>
<tr>
<td>5</td>
<td>Dashboard options</td>
<td>9</td>
</tr>
<tr>
<td>6</td>
<td>Dashboard View</td>
<td>9</td>
</tr>
<tr>
<td>7</td>
<td>Reports associated with a DataBlock</td>
<td>10</td>
</tr>
<tr>
<td>8</td>
<td>Choosing a saved state to view</td>
<td>12</td>
</tr>
<tr>
<td>9</td>
<td>Options available to the report viewer</td>
<td>12</td>
</tr>
<tr>
<td>10</td>
<td>Report Options (save, sort, filter) after right-click</td>
<td>13</td>
</tr>
<tr>
<td>11</td>
<td>Sorting the results</td>
<td>14</td>
</tr>
<tr>
<td>12</td>
<td>Filtering the results</td>
<td>14</td>
</tr>
<tr>
<td>13</td>
<td>Saving the Results</td>
<td>15</td>
</tr>
<tr>
<td>14</td>
<td>Saving the CSV file</td>
<td>15</td>
</tr>
<tr>
<td>15</td>
<td>The CSV file within the spreadsheet application</td>
<td>16</td>
</tr>
<tr>
<td>16</td>
<td>Sending report results as an email</td>
<td>17</td>
</tr>
<tr>
<td>17</td>
<td>Options for executing CSV report</td>
<td>17</td>
</tr>
<tr>
<td>18</td>
<td>Options for processing a created CSV file</td>
<td>17</td>
</tr>
<tr>
<td>19</td>
<td>Report Preview Screen</td>
<td>18</td>
</tr>
<tr>
<td>20</td>
<td>options for executing Banded Report</td>
<td>18</td>
</tr>
<tr>
<td>21</td>
<td>Options for processing a Banded Report</td>
<td>18</td>
</tr>
<tr>
<td>22</td>
<td>options for executing an Extract Report</td>
<td>20</td>
</tr>
<tr>
<td>23</td>
<td>options for processing an Extract Report</td>
<td>20</td>
</tr>
<tr>
<td>24</td>
<td>options for processing an Extract Report after right-click</td>
<td>20</td>
</tr>
<tr>
<td>25</td>
<td>Selecting a saved state</td>
<td>21</td>
</tr>
<tr>
<td>26</td>
<td>the “Run Saved” option</td>
<td>21</td>
</tr>
<tr>
<td>27</td>
<td>QuickLaunch options</td>
<td>21</td>
</tr>
<tr>
<td>28</td>
<td>Dashboard options</td>
<td>22</td>
</tr>
<tr>
<td>29</td>
<td>Setting the default dashboard</td>
<td>22</td>
</tr>
<tr>
<td>30</td>
<td>Sample OLAP Data Cube</td>
<td>23</td>
</tr>
<tr>
<td>31</td>
<td>Dimension Toolbar</td>
<td>25</td>
</tr>
<tr>
<td>32</td>
<td>Dimension editor</td>
<td>26</td>
</tr>
<tr>
<td>33</td>
<td>Measure Toolbar</td>
<td>27</td>
</tr>
<tr>
<td>34</td>
<td>Measure Manager</td>
<td>27</td>
</tr>
<tr>
<td>35</td>
<td>Calculated Measures</td>
<td>28</td>
</tr>
<tr>
<td>36</td>
<td>Activate Individual Measure Manager</td>
<td>29</td>
</tr>
<tr>
<td>37</td>
<td>Sample OLAP Cube</td>
<td>29</td>
</tr>
<tr>
<td>38</td>
<td>Activate the Individual Measure Manager for quantity measure</td>
<td>29</td>
</tr>
<tr>
<td>39</td>
<td>OLAP Graph</td>
<td>30</td>
</tr>
<tr>
<td>40</td>
<td>OLAP Graph Types</td>
<td>30</td>
</tr>
<tr>
<td>41</td>
<td>OLAP Graph Options</td>
<td>31</td>
</tr>
</tbody>
</table>
Figure 42 – Link to support site from Argos ................................................................. 32