

# Monarch Server Report Mining Edition

**Version 14.1**



**[User Guide]**



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*Monarch Server Version 14.1 Report Mining Edition – User Guide*

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# Table of Contents

<b>Introduction .....</b>	<b>1</b>
<b>Logging in to RMS Client .....</b>	<b>2</b>
<b>Terminology.....</b>	<b>3</b>
About Filters .....	3
About Sorts.....	3
About Summaries .....	4
About Portable Reports .....	4
About RMS Models .....	5
<b>Working with Output Views .....</b>	<b>6</b>
My Home Page .....	6
Uploading Files .....	7
Model to Template Mapping .....	8
Report View Page.....	8
Data View Page .....	9
Summary View Page .....	11
XLS Data View Page .....	12
XLS Summary View Page .....	13
PRF View Page.....	14
ES Style View Page .....	14
My Models Page .....	15
Portlets .....	16
Dynamic View Report .....	17
Autofilters .....	18
Aggregation .....	19
Calculated Fields Dialog Box .....	19
View Definitions Dialog Box .....	20
Save View Definition Dialog Box .....	20
Exporting Dynamic View Report to CSV .....	21
Dynamic Filters.....	21
Applying Filters, Sorts and Summaries to a Report.....	21
Printing Data.....	22
Exporting to PDF.....	22
Specifying Dynamic Filters.....	22
Column Menus.....	24

**Troubleshooting ..... 25**

Error Messages .....25

Contacting Technical Support .....25

**Appendix - Interface Reference ..... 27**

Customizing Your Preferences .....27

Changing Your Password .....28

Calendar Window .....28

Page Navigation.....29

# Introduction

Welcome to the Report Mining Server (RMS). RMS is a powerful tool that allows you to extract data from structured documents or reports. Datawatch has further developed RMS with the ability to provide the extracted data in various analytical and presentation formats for delivery over the Web.

RMS employs innovative technology that allows any PC or laptop connected to the Internet, or to a corporate intranet, to access reports stored in other systems. All of these capabilities make RMS truly unique.



# Logging in to RMS Client

## To log in to RMSClient

1. Launch Microsoft Internet Explorer, or another browser, by clicking its shortcut.
2. Type the RMSClient address in the Address bar, which may look like this:  
http://servername/RMSClient
3. Press **Enter**. Your browser will load the Login page.
4. In the upper right corner of the page, select a locale. The list includes locales that were selected during the installation.
5. In the **User Name** field, enter your logon name.
6. In the **Password** field, enter your logon password.
7. Click **Sign In** button.

When you first log in to RMSClient, the **My Home** page is displayed by default.



### NOTES

You can select what panes are available on the **My Home** page via the **Customizing Your Preferences** page.

Only users with the following privileges can log in to RMSClient via the Login page: **RMS User, RMS Administrator**.



To log off from RMSClient, click **End Session** in the upper right corner of the page.



### NOTES

If you try to log in to the application again, while running it, a message will appear on the Login page, informing you that you have already logged in to the application. To clear the current session and log in to a new one, select the check box below the message, and click Sign In. This option is available only for the Named license type.



# Terminology

In order to understand how Report Mining Server works, you need to understand its terminology. Although the terms are familiar, they have specific meanings in the context of Report Mining Server.

In this section you will learn about:

- ❑ [Filters](#)
- ❑ [Sorts](#)
- ❑ [Summaries](#)
- ❑ [PorData Reports](#)
- ❑ [RMS Models](#)

## About Filters

A **filter** provides the means of selecting specific records and filtering out the rest. For example, the filter **LASTNAME=Smith** would display only the records with a value of **Smith** in the **LASTNAME** field. When viewing data on the [Data View](#) or [Summary View](#) page, in the **Customize** section, you can select defined filters, to limit the displayed data.



### NOTES

The filters available, if any, are determined by the associated model file. If no filters are available, none is contained in the model file.



When you apply a filter, RMS examines each record in the table. Records that meet the filter criteria are displayed, and all other records are temporarily ignored.

## About Sorts

A **sort** is a method of ordering data on the [Data View](#) page according to the values in one or more fields. When viewing the data on the Data View page, in the **Customize** section, you can select a sort from the **Sort** list.




### NOTES

The sorts available, if any, are determined by the associated model file. If no sorts are available, none is contained in the model file.







When you apply a sort to the data, you tell RMS which fields to sort and the sort order or direction (that is, ascending or descending) for each field.


## About Summaries

A **summary** displays summarized information about one or more fields in a one- or two-dimensional matrix. When viewing data on the [Summary View](#) page, if any summaries are available, you can select a summary from the **Summary** list in the **Customize** section, to apply to the data.



### NOTES

The summaries available, if any, are determined by the associated model file. If no summaries are available, none is contained in the model file.



## About Portable Reports

A **portable report**, also known as a PRF (portable report format) file, is a file format that can be used to distribute report files along with a layer of information describing the data structure of reports. This data description layer allows the end user of a report to intelligently explore the report on-screen, to extract data from it for analysis, or to export data from it to another application, such as a spreadsheet or a database.

The data description layer may include a Datawatch model file, a field-based index (called a tree view index) and a page index. A portable report may also include data pre-extracted from the report in the form of a **Datawatch Table** window database.

Portable reports offer several advantages over other electronic report distribution methodologies. A portable report is a single object that contains all of the intelligence needed to explore a report or series of reports electronically. Portable reports provide built-in compression and data encryption, which minimizes transfer times via e-mail or the Internet while maintaining security of confidential information.

### Benefits of Portable Reports

Using an electronic copy of a report versus a hard copy yields several benefits: you can look up information in a report file, copy information to other applications and print only those report pages that you need.

Portable Reports extend these capabilities, providing several advantages over traditional methods of report distribution and access:

- ❑ **Report distribution:** Portable reports allow you to easily distribute reports electronically. A portable report is much more than a report file. Portable reports encapsulate information about the structure of the report, allowing recipients to quickly and easily turn report data into



information, that is, queries, summaries and data extracts. Since a portable report is a single file, it can be easily distributed across a LAN or WAN or via e-mail, the Internet or an intranet.

- ❑ **Report storage and security:** Portable reports offer both data compression and security. Compression, which averages 10:1, allows you to save space when storing reports on a network or local drive and also reduces transmission time when distributing reports electronically. Security provides the functionality to restrict access to confidential reports.
- ❑ **Performance:** By pre-extracting and storing report data, a portable report offers instant access to the Datawatch window database. This is especially valuable if you work with very large reports (over 1MB) or if you frequently load a report into Datawatch to perform data analysis.

### Components of a Portable Report

- ❑ **One or more instances of a report file:** For example, a portable report may include an entire year of monthly sales reports. A portable report must contain at least one report file.
- ❑ **Tree view index:** The tree view index represents a high level view of the data in the report. Typically, the tree view index contains values from fields at each sort level in the report. When a portable report is viewed in the Datawatch Report Explorer, the tree view index is displayed in the same manner that Windows Explorer (in Windows 95 and 98) and Windows NT Explorer display a directory tree. Each report represents a root of the tree, with branches for each field selected as part of the tree view index.
- ❑ **Page Index:** The page index contains the offset of each page in each report file. This information is used for speed navigation and on-screen exploration of the report data. The page index is usually built by Datawatch on-the-fly as the user works with a report in a Datawatch session. By pre-building the page index and including it in a portable report, report navigation commands in Datawatch operate much faster.
- ❑ **Model:** The data extraction model contains information about the structure of the report, specifically the intelligence needed to extract data from the report. The model may include one or more filter, sort, calculated field and summary definitions that can be applied to the extracted data.
- ❑ **Table window database:** Pre-building and storing the table window database in a portable report file provides a performance advantage, since the recipient of the portable report does not need to perform the data extraction process to build the table database.

## About RMS Models

There are two models of the RMS application: **Interactive** and **Export**.

- ❑ **Interactive** is the default model of RMS, it has a web interface with all available views and features.
- ❑ **Export** is a simplified model meant *strictly for exporting report data*. It is a single web page without a user interface, whereas in the Interactive model different settings may be displayed on different view of the application.



# Working with Output Views

The RMS user interface is view-based. There are two different types of views: data derived and non-data derived. The data derived views represent results from processing the original report data, these views are the following:

- ❑ [Report View](#)
- ❑ [Dynamic View](#)
- ❑ [Data View](#)
- ❑ [Summary View](#)
- ❑ [XLS Data View](#)
- ❑ [XLS Summary View](#)
- ❑ [PRF View](#)
- ❑ [ES Style View](#)

The non-data derived view serves various functional needs – those views are the [My Home Page](#).

The output views are organized into tabs. To view tabs, simply click the corresponding link (e.g., to view a report on the **Data View** page, click the **Data** link). To open a tab in the new window, click the middle mouse button.

## My Home Page

The **My Home** page is the first screen you see when accessing RMS.

The screenshot displays the 'My Home Page' of the Report Mining Server. At the top left is the logo for 'REPORT MINING SERVER' with a stylized 'D' icon. Below the logo is a brief introductory text: 'Datawatch Report Mining Server is your unified point of entry for viewing and analyzing corporate report information. Now you can easily get the right information at the right time and place to make the right decisions.'

The main content area is divided into four panels, each with a search bar and a table of data:

- Selected Reports:** A table with columns 'NAME', 'LAST MODIFIED', and 'SIZE (BYTES)'. It contains one entry: 'Classic.ppt' with a last modified date of '07/18/2016' and a size of '23514'.
- Selected Models:** A table with columns 'NAME', 'LAST MODIFIED', and 'SIZE (BYTES)'. It contains two entries: 'Lesson11.rmod' (28454 bytes) and 'Music\_Shipping\_ESStyle\_Modelv4.xls' (20112 bytes).
- Selected Templates:** A table with columns 'NAME', 'LAST MODIFIED', and 'SIZE (BYTES)'. It contains one entry: 'MusicESStyleTemplate-v4.xls' with a last modified date of '07/18/2016' and a size of '11419'.
- Model to Template Mappings:** A table with columns 'TEMPLATE NAME', 'TEMPLATE SIZE', 'MODEL NAME', and 'MODEL SIZE'. It contains one entry: 'MusicESStyleTemplate-v4.xls' (11419 bytes) mapped to 'Music\_Shipping\_ESStyle\_M...' (20112 bytes).



This screen displays any system warnings regarding data validation. For example, if the size of a model or a template exceeds the limit defined by the Administrator, a corresponding warning message is shown.

This screen displays the following panes:

- ❑ **Selected Reports:** Displays the list of reports selected while logging on.
- ❑ **Selected Models:** Displays the list of models and templates models selected while logging on, and models saved for the document type ID.
- ❑ **Selected Templates:** Displays the list of templates selected while logging on.
- ❑ **Model to Template Mappings:** Displays the list of templates models selected while logging on.
- ❑ **News:** Shows the latest news you have access to. The news is created with the help of RMS Administrator.

To change the **My Home page** layout, see [Customizing Your Preferences](#).

**To view the detailed item information**, move mouse pointer to the image. The box displaying detailed information appears.

## UPLOADING FILES

To start working with your data in RMSClient, upload the necessary files on My Home Page.

To activate the **Add Files area** either:

- ❑ Drag the file over the My Home Page.
- ❑ Click the **Add** button inside any pane present on the page.

The **Add Files area** will appear.

To upload a file either:

- ❑ Drop the file into the **Add Files area**.
- ❑ Click **Add files...** and select the file via the your browser's file selection dialog.

The files will appear inside the Add Files area.

The files are automatically assigned a certain type such as **Report**, **Template** or **Model**. It is also possible to assign a type manually by selecting from the drop-down menu. Unnecessary files that were uploaded can be deleted by clicking the **X** button.

The **Add Files area** contains the following controls:

- ❑ **Save:** Saves uploaded files.
- ❑ **Cancel:** Returns to My Home Page without saving the uploaded files.
- ❑ **Clear** or **Delete All Files:** Deletes the uploaded files without returning to My Home Page.



## MODEL TO TEMPLATE MAPPING

By default, each newly uploaded template is mapped to the oldest uploaded model.

It is possible to change model/template mapping manually by clicking the **Edit Mappings** icon in the lower left corner of the **Model to Template Mappings** pane on My Home Page. This will show a dialog box allowing to set the correspondence between all the uploaded models and templates. Clicking **Save** applies the changes.

## Report View Page

The **Report View** page displays data much as they would appear if they were printed reports.

### Toolbars

The **Report View** page contains two toolbars at the top of the page.

- The toolbar in the upper right corner of the **Report View** page contains the following icons:



Use this toolbar to perform the following actions.



#### **Export to PDF**

Click to open the selected report as a PDF file in the current window.



#### **Export to PDF**

Click to open the selected report as a PDF file in a new window.



#### **View original Report**

Click to open the original report.

Click the Report List icon  to open the **Report List** dialog box, where you can select another report.

- The lower toolbar, on the second row, contains the following icons:



Use this toolbar to perform the following actions.



#### **Increase report font size**

Click to increase the font size.



#### **Decrease report font size**

Click to decrease the font size.



#### **Greenbar**

Click to show or hide the greenbar.

To export the current page to PDF, click the **PDF** icon . The page opens in a new window.



To navigate between pages, use [page navigation buttons](#).

# Data View Page

The **Data View** page displays the report in a table form, allowing you to apply sorts and filters to the report.



## NOTES

The associated model file determines which fields, sorts and filters are available.



The **Data View** page contains the following items:

### □ Toolbars

The **Data View** page contains two toolbars at the top of the page.

- The toolbar in the upper right corner of the Data View page contains the following icons:



Use this toolbar to perform the following actions:



#### **Export to PDF**

Click to open the report as a PDF file in the current window.



#### **Export to PDF**

Click to open the report as a PDF file in a new window.



#### **Download as CSV**

Click to download the report in the CSV format.

- The lower toolbar, on the second row, contains the following icons:



Use this toolbar to perform the following actions:



#### **Increase report font size**

Click to increase the font size.

**NOTE:** The icon is available only if the **Apply the style from the model** checkbox is not enabled. Refer to [Customizing Your Preferences](#) section.



#### **Decrease report font size**

Click to decrease the font size.

**NOTE:** The icon is available only if the **Apply the style from the model** checkbox is not enabled. Refer to

[Customizing Your Preferences](#) section.



**Increase Horizontal Padding**

Allows you to increase the horizontal padding between columns used in your view.

**NOTE:** The icon is available only if the **Apply the style from the model** checkbox is not enabled. Refer to [Customizing Your Preferences](#) section.



**Decrease Horizontal Padding**

Allows you to decrease the horizontal padding between columns used in your view.

**NOTE:** The icon is available only if the **Apply the style from the model** checkbox is not enabled. Refer to [Customizing Your Preferences](#) section.



**Increase Vertical Padding**

Allows you to increase the vertical padding between rows used in your view.

**NOTE:** The icon is available only if the **Apply the style from the model** checkbox is not enabled. Refer to [Customizing Your Preferences](#) section.



**Decrease Vertical Padding**

Allows you to decrease the vertical padding between rows used in your view.


**NOTE:** The icon is available only if the **Apply the style from the model** checkbox is not enabled. Refer to [Customizing Your Preferences](#) section.



**Toggle use of alternative row color**

Allows you to turn on/off the alternate row color display in your view.

**NOTE:** The icon is available only if the **Apply the style from the model** checkbox is not enabled. Refer to [Customizing Your Preferences](#) section.

- ❑ **Customize:** Click the  icon in the top left corner of the screen to show a hidden section, allowing you to select a report model, summary, drill level, defined filter, and conjunction with dynamic filter, as well as to specify dynamic filters. For information on how to specify a dynamic filter, see [Specifying dynamic filter](#). Clicking the icon again hides the section.
- ❑ **Apply the style from the model** (background, font size, table settings, etc. will be applied from the report model).
- ❑ **Apply data formatting from the model.**
- ❑ **Visible Fields:** Click the heading to open a hidden section, allowing you to select table columns to be displayed. To display a column in the table, select the check box by its name. To hide a column, clear the check box by its name.
- ❑ **Apply:** Click this button to apply the changes made in the **Customize** and **Visible Fields** sections.

To navigate between pages, use [page navigation buttons](#).



# Summary View Page

The **Summary View** page displays reports in a summary. A summary tabulates information for selected fields and presents the results in a one- or two-dimensional matrix.



## NOTES

A summary may not always be available. Summary availability depends on the Datawatch model file. If the model file has summaries defined in it, then there will be summaries available for viewing in RMS on the **Summary View** page.

The **Summary View** page contains two toolbars at the top of the page.

- The toolbar in the upper right corner of the **Summary View** page contains the following icons:



Use this toolbar to perform the following actions.



### Export to PDF

Click to open the report as a PDF file in the current window.



### Export to PDF

Click to open the report as a PDF file in a new window.

- The lower toolbar, on the second row, contains the following icons:



Use this toolbar to perform the following actions:



### Increase report font size

Click to increase the font size.

**NOTE:** The icon is available only if the **Apply the style from the model** checkbox is not enabled. Refer to [Customizing Your Preferences](#) section.



### Decrease report font size

Click to decrease the font size.

**NOTE:** The icon is available only if the **Apply the style from the model** checkbox is not enabled. Refer to [Customizing Your Preferences](#) section.



### Increase Horizontal Padding

Allows you to increase the horizontal padding between columns used in your view.





### Decrease Horizontal Padding

**NOTE:** The icon is available only if the **Apply the style from the model** checkbox is not enabled. Refer to [Customizing Your Preferences](#) section.

Allows you to decrease the horizontal padding between columns used in your view.

**NOTE:** The icon is available only if the **Apply the style from the model** checkbox is not enabled. Refer to [Customizing Your Preferences](#) section.



### Increase Vertical Padding

Allows you to increase the vertical padding between rows used in your view.

**NOTE:** The icon is available only if the **Apply the style from the model** checkbox is not enabled. Refer to [Customizing Your Preferences](#) section.



### Decrease Vertical Padding

Allows you to decrease the vertical padding between rows used in your view.


**NOTE:** The icon is available only if the **Apply the style from the model** checkbox is not enabled. Refer to [Customizing Your Preferences](#) section.



### Toggle use of alternative row color

Allows you to turn on/off the alternate row color display in your view.

**NOTE:** The icon is available only if the **Apply the style from the model** checkbox is not enabled. Refer to [Customizing Your Preferences](#) section.

- ❑ **Customize:** Click the  icon in the top left corner of the screen to show a hidden section, allowing you to select a report model, summary, drill level, defined filter, and conjunction with dynamic filter, as well as to specify dynamic filters. For information on how to specify a dynamic filter, see [Specifying dynamic filter](#). Clicking the icon again hides the section.
- ❑ **Apply the style from the model** (background, font size, table settings, etc. will be applied from the report model).
- ❑ Apply data formatting from the model.
- ❑ **Apply:** Click this button to apply the changes made in the **Customize** and **Visible Fields** sections.

To navigate between pages, use [page navigation buttons](#).

## XLS Data View Page

In any page, click the **XLS Data** tab.

In the dialog box, select either the **Open with Microsoft Excel** option, or the **Save File** option, and click **OK**.



### NOTES



Click **Cancel**, if you want to further customize the list and specify visible fields on the **XLS Data View** page.



The **XLS Data View** page allows you to:

- ❑ Display one or several xls-tables in an Excel worksheet.
- ❑ Customize the list and specify which fields should be visible.

The **XLS Data View** page contains the following items:

- ❑ **Customize**: Click the heading to open a hidden section, allowing you to select a report model, sort, template, defined filter, and conjunction with dynamic filter (**AND** or **OR**), as well as to specify dynamic filters. For information on how to specify a dynamic filter, see [Specifying dynamic filter](#).
- ❑ **Auto-filter**: Select this check box to allow controls in the Excel worksheet to filter data based on the provided values in the spreadsheet.
- ❑ **Embed report in workbook for context searching**: If configured by the RMS administrator, a user can embed a copy of the source report in the Excel spreadsheet, by selecting Datawatch Context. The functionality requires the user to [set a user preference of XLSX Excel format](#). Datawatch Context is an Excel plug-in for Microsoft Excel 2007 and requires installation.
- ❑ **Use XLSX Excel spreadsheet format**. Select this check box, to use the XLSX format for Excel output.
- ❑ **Visible Fields**: Click the heading to open a hidden section, allowing you to select table columns to be displayed. To display a column in the table, select the check box by its name. To hide a column, clear the check box by its name.
- ❑ **Execute Export**: Click this button to apply the changes made in the **Customize** and **Visible Fields** sections. A dialog box will appear, where you can select either the **Open with Microsoft Excel** option, or the **Save File** option. Then click **OK**.

## XLS Summary View Page

The **XLS Summary View** represents a table with the summary information of a report. If the model has no summaries, a warning message appears.

In the dialog box, select either the **Open with Microsoft Excel** option, or the **Save File** option, and click **OK**.



### NOTES

To further customize the summary on the **XLS Summary View** page, click **Cancel**.



The **XLS Summary View** page allows you to display one or several XLS-summaries in an Excel worksheet.

On the **XLS Summary View** page, you can customize the summary.

The **XLS Summary View** page contains the following items:



- ❑ **Customize:** Click the heading to open a hidden section, allowing you to select a report model, summary, drill level, template, defined filter, and conjunction with dynamic filter (**AND** or **OR**), as well as to specify dynamic filters. For information on how to specify a dynamic filter, see [Specifying dynamic filter](#).
- ❑ **Include formulas to facilitate editing in Excel:** Select this check box to include formulas in the spreadsheet for the aggregated fields.
- ❑ **Include outlines to enable drill up/down in Excel:** Select this check box to enable drill-in/drill-out functionality of the data in the Excel spreadsheet.
- ❑ **Use XLSX Excel spreadsheet format.** Select this check box, to use the XLSX format for Excel output.
- ❑ **Execute Export:** To apply the changes made in the **Customize** section, click this button. A dialog box will appear, where you can select either the Open with Microsoft Excel option, or the Save File option. Then click **OK**.

## PRF View Page

The **PRF View** page allows you to display one or several PRF-reports in the [Portable Report Format \(PRF\)](#), for online reports only.



### NOTES

To use PRF-reports, you need Datawatch Report Explorer installed on your computer.

On any view, click the **PRF** tab. In the Open dialog box, click **Save File**.



### NOTES

Click **Cancel**, if you want to specify a different report model on the PRF View page, in the **Customize** section.

The **PRF View** page contains the following items:

- ❑ **Customize:** Click the heading to open a hidden section, allowing you to select a report model from the list. Click the drop-down arrow to expand the list of available options.
- ❑ **Execute Export:** Click this button to apply the changes made in the **Customize** section. In the **Open** dialog box, click **Save File**.

## ES Style View Page

The **ES Style View** page allows to apply XML/XSL table transformation for one or several reports (each in a separate frame).



- The toolbar in the upper right corner of the **ES Style View** page contains the following icons:



Use this toolbar to perform the following actions.



**Print**

Click to print the report.



**Export to PDF**

Click to open the report as a PDF file in the current window.



**Export to PDF**

Click to open the report as a PDF file in a new window.

- **Customize:** Click the heading to open a hidden section, allowing you to select a sort order, a template, a defined filter, and conjunction with dynamic filter, as well as to specify dynamic filters. For information on how to specify a dynamic filter, see [Specifying dynamic filter](#).
- **Apply:** To apply the changes made in the **Customize** section, click this button.

To navigate between pages, use [page navigation buttons](#).

## My Models Page

This page allows you to upload custom models for processing data.

### To upload a model

1. Enter model name in the **Model Name** field.
2. Enter model description in **Model Description** field. This step is optional.
3. To specify the location of your model file in the **Model Content** field, click **Upload**.



### NOTES

To create a *global model*, select the **All users will have access to resources** check box **before** uploading the model.

In order to do this you have to be logged in *Admin* mode.

4. Click **Save**.



### NOTES

When you upload a model with a name that already exists in the system, the old model is overwritten with the new one.

Custom models are displayed in menus with the names of users that uploaded them.



### To search for a custom model

- ❑ Enter its name in **Search** field

Search

### To delete a model

- ❑ Select it and click **X** below or above the table.



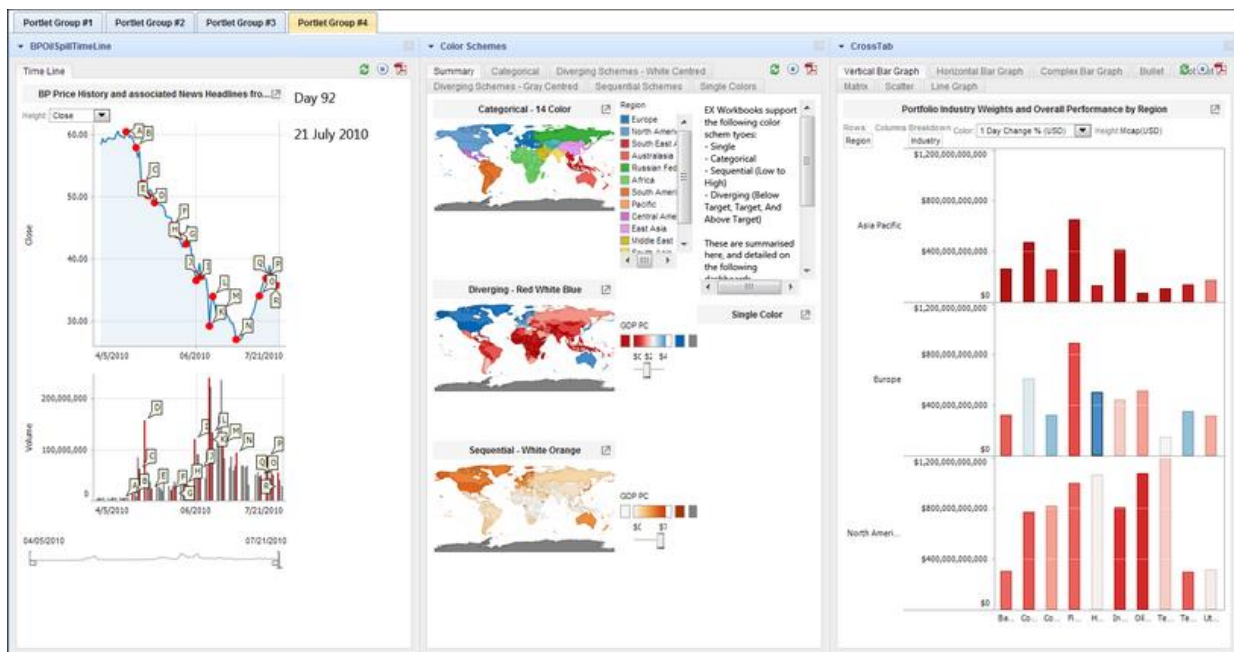
### NOTES

In order to do this you have to be logged to Report Mining Server in *Admin* mode.

# Portlets

A portlet contains one or more visual elements used for presentation of data. Portlets integrated to RMS represent Panopticon Workbooks and Dashboards. Portlets are created in MSAdmin.

In RMSClient, you can view only those portlets that were assigned to you in MSAdmin. The following figure illustrates portlets in RMS Client.



### To view portlets

1. Select the **Portlets** tab at the top of the page.
2. Select a tab with the portlet group that you want to view.



### To collapse or expand a portlet

- ❑ Click the portlet title bar.

### To open a portlet in a new window

- ❑ Click **Open this portlet in new window** icon  on the portlet title bar.

# Dynamic View Report

The **Dynamic View** presents a report based on pre-mined table data. The structure of dynamic table data is derived from the selected Datawatch data model.

On the **Dynamic View Report** page, you can modify the fields hierarchy, display and hide fields, apply autofilters, add calculated field and statistic fields. The resulting view definition can be saved to the local storage for reusing.

The **Dynamic View Report** page is displayed. It contains the following items:

- ❑ The **Calculated Fields** icon in the upper left corner of the page:



- ❑ The Filter icon in the upper left corner of the page.
- ❑ The toolbar in the upper right corner of the page:



Use this toolbar to perform the following actions.



#### **Calculated Fields**

Click to [add a calculated field](#).



#### **View Definition List**

Click to [load previously saved View Definitions](#) and apply them to the current reports you are viewing.



#### **Save View Definition**

Click to [save the current View Definition](#), to load in the next session and apply it to different reports or allow other users to use it.



#### **Download current view data in CSV format**

Click to export the **Dynamic View Report** to CSV.



#### **Export to PDF**

Click to export the **Dynamic View Report** to PDF.



#### **Export to PDF**

Click to open the report as a PDF file in a new window.



#### **Customize**

Allows you to select a report model from the list, define filters and sorts.



## Filters

Click to apply a dynamic filter

- ❑ **Hierarchy Levels:** The placement of column titles above the table represents the levels of fields' hierarchy. You can modify the hierarchy of fields, by dragging column headers to the space above the table. Data will be grouped by these columns. You can drag any number of column headers to any level. This allows creating different groupings of fields, to obtain the desired view of the report data. Use arrows to expand or collapse rows with data.
- ❑ **Aggregation:** After you assign a column heading to a hierarchy level, you can add an [Aggregation field](#) to the Dynamic View Report. Point to a column heading on any hierarchy level, and click the plus sign that will appear on the right of its name, to open the **Aggregation** dialog box.

To navigate between pages, use [page navigation buttons](#).

## AUTOFILTERS

Autofilters are a simplified filtering functionality that allows you to sort the data by fields.

Click the filter icon in the column title to see the filter options.

	Filter	
	AR	71801
	GA	30067
	TN	37215
ais		45400
	PA	19107
	PA	19107
	GA	30067
		50781
	GA	30067
		54510

Select All  
 Amsterdam  
 Chicago  
 Cork  
 Fleury-les-Aubrais  
 Hannover  
 Hope  
 La Paz  
 Marietta  
 Nashville  
 Neuvy-le-Roi  
 ...

Filtering values are taken from the selected model.

It is possible to filter data by more than one column. Filtering results will contain only data that corresponds to all specified filter values. Therefore, choose only those values that you want to see in the data result.



## AGGREGATION

You can add statistic fields to the **Dynamic View Report** using the **Aggregation** dialog box.

The statistic columns are based on the data fields, and calculated with a standard SQL aggregate operation (**SUM, MAX, MIN, COUNT, AVG**) or a ratio expression (the formula for ratio expression is **SUM(<data field>/SUM(<ratio data field>))**). Only numeric fields and calculated fields are used in a statistic expression.

There are two types of statistic fields:

- Plain statistic fields, which are displayed in the same way as all other fields.
- Dynamic fields, which are displayed under the columns, for which they are calculated, if the columns are present in the view, or behave like plain statistic fields otherwise.

To display the Aggregation dialog box, on the [Dynamic View Report page](#), after you assign column headings to hierarchy levels, point to a column heading on any hierarchy level, and click the **sum symbol** that will appear on the right of its name.

The Aggregation dialog box appears. It contains:

- Name:** By default, the title of the column and the name of the aggregation function used. A custom name can be entered by checking the **Override Name** checkbox next to it.
- Aggregate Function:** Select the aggregate operation (**Sum, Max, Min, Count, Average, Ratio**).
- Apply:** Click to add the statistic field to the **Dynamic View Report**.
- Cancel:** Click to cancel the operation.

To change the level of a field in the **Dynamic View**, drag it to another level.

To remove a field from **Dynamic View**, click on the cross symbol preceding the field's name.

## CALCULATED FIELDS DIALOG BOX

The **Dynamic View Report** can display calculated fields.

You can calculate an arithmetical expression for each row in the report view, and display the result of the expression in an additional column. Any data field of a numeric type can be used in an expression. RMS supports all arithmetical operations and expressions, permitted by the standard SQL language.

To display the **Calculated Fields**, click  on the [Dynamic View Report](#) page.

The **Calculated Fields** dialog box contains the following items:

- Name:** Type the name of a calculated field.
- Functions:** Click to display the list of allowed standard SQL functions. Double-click the function that you want to add to the expression.
- Operators:** Click to display the list of allowed relational operators for the expression. Double-click the operator that you want to add to the expression.
- Fields:** Click to display the list of numeric fields used in the report. Double-click the field that you want to add to the expression.




- ❑ **Decimal places:** rounds the number to the given number of decimal places. Leaving this field empty rounds to the nearest integer.

If any calculated fields are already present, their list is displayed. In this case the dialog box contains the following items instead:

- ❑ **Name:** clicking on a calculated field's name opens the dialog that allows to edit that calculated field.
- ❑ **Delete:** clicking this button removes the calculated field.
- ❑ **Add:** opens the dialog that allows to create a new calculated field.
- ❑ **Cancel:** closes the calculated fields dialog.

## VIEW DEFINITIONS DIALOG BOX


To display the **View Definitions** dialog box, click  on the [Dynamic View Report page](#).

It contains report definitions that you have configured and saved.

The **View Definitions** dialog box contains:

- ❑ **Name:** Lists the names of the definitions. To view the definition, click on its name.
- ❑ **Delete** button: Click to delete the adjacent definition from the definition list.
- ❑ **Default View** button: Click to select a view with default settings without your sorted, calculated and filter fields.
- ❑ **Cancel:** Click to close the **View Definitions** dialog box without saving.

## SAVE VIEW DEFINITION DIALOG BOX

To display the **Save View Definition** dialog box, click  on the [Dynamic View Report page](#). Use it to save your report definition.

The **Save View Definition** dialog box contains the following items:

- ❑ **Name:** Type the name of a view definition.
- ❑ **Document Type:** Displays the document type the documents belong to.
- ❑ **Filters:** Displays the filters set for the view.
- ❑ **Sorts:** Displays the sorts set for the view.
- ❑ **Allow all users of the document type to use this view definition:** Select this check box to make the view definition accessible for all document type users. Check box is shown when chosen model was shared.
- ❑ **Add:** Click to save the view definition with a new name.
- ❑ **Save:** Click to save or update the view definition.
- ❑ **Close:** Click to close the **Save View Definition** dialog box without saving.





## NOTES

View definitions depend on both the document type and the model; when a different model is selected, or a different document type is used, the set of available view definitions changes. This rule disregards whether the model was shared or uploaded locally: if it adheres to the view definition, it will be available.




## EXPORTING DYNAMIC VIEW REPORT TO CSV

To export the **Dynamic View Report to CSV**

1. On the [Dynamic View Report page](#), click , in the upper right corner of the page.
2. Enter the name of a file in the **Save As** dialog box and click **Save**.

## DYNAMIC FILTERS

You can specify additional search criteria including several conditions, using the Dynamic Filters dialog box.

To display the **Dynamic Filters** dialog box, click  on the Dynamic View Report page.

See [Specifying dynamic filters](#) for instructions on setting dynamic filters.

# Applying Filters, Sorts and Summaries to a Report

If [filters](#), [sorts](#) and [summaries](#) are defined in the Datawatch model file, they are available in RMS, and you can apply them to your report.

Sorts can be applied to a report displayed on the [Data View page](#), summaries can be applied to report displayed on the [Summary View page](#), and filters can be applied to report displayed on either page.

To apply a filter, sort or summary to a report, when viewing report on either the [Data View](#) or [Summary View](#) page, in the **Customize** section, select it from the **Sort**, **Defined Filter**, or **Summary** drop-down list.

To apply the selected sort, filter or summary to a report, click **Execute Export**.



# Printing Data

When you access RMS, output views will appear and tabs will be displayed. You can then select the view from which you want to print.

You can print data in the following ways:

- ❑ **From within RMS:** When viewing the report on the [Report View](#), [Data View](#) or [Summary View](#) page, in Internet Explorer, on the **File** menu, click **Print**.
- ❑ **From within an exported file:** You can [export to a PDF file](#), then print them from Adobe Acrobat. To do so, in Adobe Acrobat, on the **File** menu, click **Print**.

# Exporting to PDF



In RMS, you can export data to PDF (portable document format).



## NOTES

Adobe Acrobat should be installed on your computer.


### To export data to PDF

1. On the [Report View](#), [Summary View](#), [Dynamic View](#) or [Data View](#) page, on the toolbar in the upper right corner of the page, click  to open the selected reports in the current window, or click  to open the selected document in a new window.
2. In the **Export to PDF** dialog box, select one of the following options for generating a report:
  - **Page/row range** (if you select this option, specify the first and the last page or row in the boxes below).
  - **Entire report/table** (if you select this option, the entire report/table will be exported).
  - **Current page** (if you select this option, the current page will be exported).
3. Optionally, type the name of a PDF file.
4. Click **Save** to apply the settings. The report is displayed as a PDF file.
5. To save the PDF file, click the **Save a copy** icon on the toolbar, at the top of the page.

# Specifying Dynamic Filters

You can specify additional search criteria including several conditions, using the Dynamic Filters.



To display the **Dynamic Filters** dialog box, click the  icon in the top left corner of the screen to show a hidden section containing a number of options including Dynamic Filter on Data View or Summary View page.

**To set a dynamic filter**

1. In the **Dynamic Filters** dialog box, select a Boolean operator (**AND** or **OR**) to link the search phrases.  
By default **AND** is selected. Click it to change to **OR**.



**NOTES**

If you want to apply only one filter criterion, you don't need to select a Boolean operator.

2. Click **+** to add a condition. A row of boxes will appear.
3. Select an field from the drop-down list, displaying all data fields from the model.
4. Select a relational operator from the following options: Is equal to, Is not equal to, Is less than, Is less than or equal to, Is greater than or equal to, Is greater than.
5. Enter a value in the box.
6. To add another condition of the same level, click **+** in the parent level and repeat steps 3-5.
7. To add a nested condition, click **+** in the current level and repeat steps 1, 3-5.
8. To apply the dynamic filter, click Apply.



**NOTES**

To remove a condition, click **x**.

The following example shows how dynamic filters work:

Dynamic Filter:

```

x [ AND v ] +
  x [ AND v ] +
    x [ Report Date v ] = [ 03/03/2012 ] +
  x [ OR v ] +
    x [ Order Number v ] <> [ 536020 ] +
    x [ Contact v ] = [ Marvin ] +
  
```

This filter reads as follows:



**Report Date** is equal to **March 3, 2012** AND (**Order Number** is not equal to **536020** OR **Contact** contains **Marvin**).

## Column Menus

Column Menu is a simplified piece of filtering functionality that allows the user to hide columns or lock them in place if horizontal scrolling is necessary. Click the chevron icon next to the column title to see the list of available filters:

**Columns:** moving a pointer over this item displays a list of columns. Clearing the checkbox next to a column name hides the corresponding column.

**Show All Columns:** clicking this option shows all columns, reverting all changes made in Columns.

**Lock:** this option is only available if the screen has insufficient width to show all columns, and horizontal scroll is available. Moves the column to the leftmost position and pins it so that it does not get scrolled away with horizontal scroll.

**Unlock:** unlocks a locked column and returns it to its original position in the table.

**Sort Ascending:** Only available for **Dynamic views** and **Data views**. Sorts the data in the table in ascending order based on the data in the selected column.

**Sort Descending:** Only available for **Dynamic views** and **Data views**. Sorts the data in the table in descending order based on the data in the selected column.

**Filter:** Only available for **Dynamic views**. Filters the data by a number of values selected. Only entries that contain the selected values will be shown.



# Troubleshooting

When using RMS, you may occasionally encounter unexpected events. The topics in this section cover:

- ❑ [Error messages](#)
- ❑ [Contacting technical support](#)

## Error Messages

If the system registers a condition in which the application is unable to function properly (for example, the path to a report is false or no valid model was specified) a corresponding error message is displayed.

## Contacting Technical Support

### Before Contacting Technical Support

A variety of resources have been made available to assist you with questions or concerns regarding Monarch Server. Before you contact Technical Support we ask that you please:

- ❑ Refer to the Monarch Server documentation. You may find the answer to your question in the help file.
- ❑ Check your configuration and resources. In some cases simply restarting can solve the problem.

### You may receive help by:

- ❑ Filling out and submitting the Tech Support Form on the Datawatch Web site. When doing so:
  - Please be as specific as possible and provide all of the requested information. Please note that fields preceded by an asterisk are required fields.
  - Click the **Submit Form** button to complete your request for support. Our support staff will answer your question within 1-2 business days.
- ❑ Calling the Datawatch Support at the numbers provided below. Please provide as much information as possible, including:
  - Product name and version number
  - Registration number
  - Operating system and version number
  - Exact error messages (where applicable)
  - A description of the problem, including the steps necessary to reproduce it, and how you attempted to solve it



- Your contact information

### **What to Expect**

We'll answer your call in the order we receive it. Here's what you can expect:

- ❑ If all support specialists are engaged with other customers, you will have the option to continue holding or to leave a message.
- ❑ The specifics of your call are logged into our call tracking system and queued for the appropriate technical support specialist.
- ❑ We will return your call as soon as a support specialist becomes available.
- ❑ Faxed requests are collected periodically throughout the day and then assigned to available support specialists.

### **To contact the Datawatch Support Center via e-Mail**

Write to us at: [support@datawatch.com](mailto:support@datawatch.com)

### **To contact the Datawatch Support Center via Phone**

#### **US and Canada**

Phone: +1-800-988-4739

Phone: +1-978-441-2200

Hours: Monday - Friday, 8:30am - 6:00pm Eastern ( EST/EDT)

#### **Europe, MidEast, Africa**

Phone: +44 (0) 2081 232995

Phone: +49 (0) 89 8890 5709

Hours: Monday - Friday, 8:30am - 6:00pm London ( GMT/BST )

#### **Asia Pacific**

Phone: + 61 3 9078 1320

Fax: + 61 3 9833 3902

Hours: Monday - Friday, 9:00am - 5:00pm Sydney ( GMT+10 )



# Appendix - Interface Reference

This section provides information about:

- ❑ [Customizing Your Preferences](#)
- ❑ [Changing Your Password](#)
- ❑ [Calendar Window](#)
- ❑ [Page Navigation](#)

## Customizing Your Preferences

You can specify output settings for RMS, such as a home page, document sort order, date format and so on, on the **Preferences** page. To display the page, click **Preferences** in the upper rightcorner of the RMS window.

The **Preferences** page allows you to customize the following settings:

### Output Settings tab

- ❑ **Excel Output:**
  - Use XLSX Excel spreadsheet format. This format requires Office 2007 installed on the client computer:  
Select this check box, to use the XLSX format for Excel output.
  - Request customize dialog: Select this check box, to specify customize properties before data export.
- ❑ **Data/Summary View:**
  - Apply the style from the model (background, font size, table settings, etc. will be applied from the report model).
  - Apply data formatting from the model.
- ❑ **Locale Settings:** Specify the date format, decimal separator and group separator.
  - **Date Format:** Select one of the following options to specify a date format:
    - ◆ mm/dd/yyyy: Select to use the month/day/year date format.
    - ◆ dd/mm/yyyy: Select to use the day/month/year date format.
  - **Decimal Separator:** Select one of the proposed decimal separators: comma or period.
  - **Group Separator:** Select one of the proposed group separators: comma, space or period.

### Locale tab

- ❑ **Locale:** Select language from the drop-down list.

### My Home tab





- ❑ **Display Report List:** Select check box, to display the list of reports selected while logging on.
- ❑ **Display Model List:** Select check box, to display the list of models and templates models selected while logging on, and models saved for the document type ID.
- ❑ **Display Template List:** Select check box, to display the list of templates selected while logging on.
- ❑ **Display model to template mapping list:** Select check box, to display the list of templates models selected while logging on.
- ❑ **Display news list:** Select check box, to display the news list.

#### When you made your changes

- ❑ To save the changes, click the **Save** button.
- ❑ To cancel any changes you have made at particular tab, click the **Clear** button (not available at the **Locale** tab).
- ❑ To close the **Preferences** page without saving, click **Cancel**. Keep in mind that no changes will be saved.


## Changing Your Password

Once your system administrator has provided you with a login name and password, you can login to RMS Client and then specify a new password.

#### To change your password

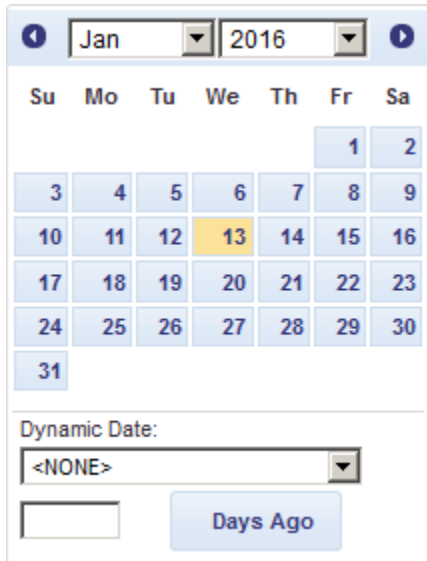
1. Click **Preferences** in the upper right corner of the page, to display the Output Settings page.
2. Select the **Password** tab at the top of the page.
3. Enter your current password in the **Old Password** field.
4. Enter the new password in the **New Password** and **Repeat Password** fields.
5. Click **Save**.

## Calendar Window

When completing input information requirements of some pages you are required to define the date. To access the **Calendar** window, click the  icon next to a date field, or click the date field itself.




The **Calendar** window appears on your screen:






The left arrow navigates to the previous month, and the right arrow navigates to the next month.




#### To set a date

- ❑ Select a month on the **Calendar** using arrows and then select the date.
- ❑ Select one of the following predefined relative date values from the **Dynamic Date** list: Yesterday, End of Last Week, Start of This Quarter and so on.
- ❑ Set a date as a number of days ago. Enter the corresponding value in the box and click **Days Ago**.
- ❑ You can also use the following buttons, placed next to a date field:
  - To decrease the date by one day, click .
  - To enter the current date, click .
  - To increase the date by one day, click .

## Page Navigation

To navigate between pages, type a page number in the **Page** box, at the bottom of the table, or use the page navigation buttons:

- ❑ To navigate to the next page, click .

- ❑ To navigate to the last page, click  .
- ❑ To navigate to the previous page, click  .
- ❑ To navigate to the first page, click  .

To change the number of items to be displayed on one page, select an option (**10**, **20**, **50**, **100**, or **500**) from the **Items per Page** drop-down list, at the bottom of the table.

Column elements are sortable. To sort the list in ascending order, click the column heading. To display the list in descending order, click the column heading once again.