

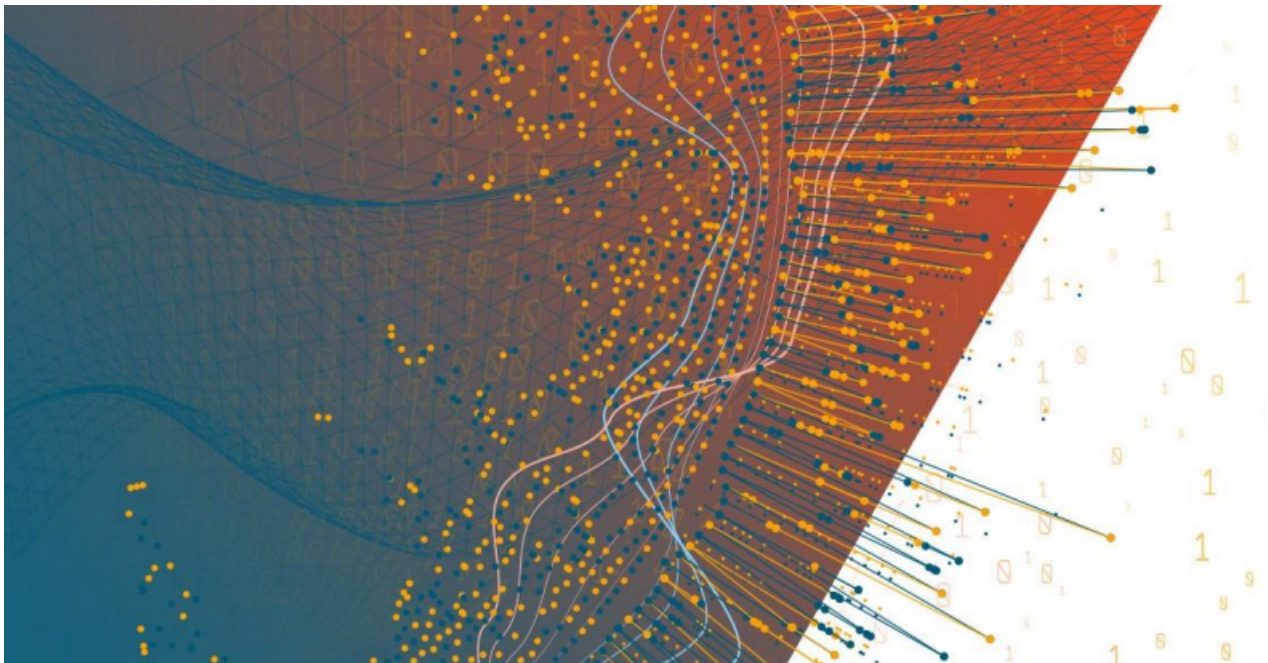


# ALTAIR Monarch Report Mining Edition Server User Guide

[Home](#) » [ALTAIR](#) » ALTAIR Monarch Report Mining Edition Server User Guide 



**Altair® Monarch® v2021.0**  
**MONARCH SERVER**  
**REPORT MINING EDITION**  
**USER GUIDE**



## Contents

1	INTRODUCTION
2	LOGGING IN TO RMS CLIENT
3	TERMINOLOGY
4	ABOUT FILTERS
5	ABOUT SORTS
6	ABOUT SUMMARIES
7	ABOUT PORTABLE REPORTS
8	WORKING WITH OUTPUT VIEWS
9	MY HOME PAGE
10	REPORT VIEW PAGE
11	DATA VIEW PAGE
12	SUMMARY VIEW PAGE
13	XLS DATA VIEW PAGE
14	XLS SUMMARY VIEW PAGE
15	ES STYLE VIEW PAGE
16	MY MODELS PAGE
17	PORTLETS
18	DYNAMIC VIEW REPORT
19	PRINTING DATA
20	SPECIFYING DYNAMIC FILTERS
21	COLUMN MENUS
22	TROUBLESHOOTING
23	APPENDIX – INTERFACE
	REFERENCE
24	Documents / Resources
	24.1 References
25	Related Posts

## INTRODUCTION

Welcome to the Report Mining Server (RMS). RMS is a powerful tool that allows you to extract data from structured documents or reports. Altair 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.com>
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 thinstallation.
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
- ☐ Portable 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 Monarch 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 Monarch 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 Monarch window database. This is especially valuable if you work with very large reports (over 1MB) or if you frequently load a report into Monarch Server to perform data analysis.
- **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 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 Monarch

on-the-fly as the user works with a report in a Monarch session. By pre-building the page index and including it in a portable report, report navigation commands in Monarch 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.

# Altair® Monarch®

## Report Mining Server

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 screenshot displays the Altair Monarch Report Mining Server interface, which is divided into four main panes:

- Selected Reports:** A table with columns NAME, LAST MODIFIED, and SIZE (BYTES). It shows one report named 'Classic.prm' with a last modified date of 08/09/2020 and a size of 23514 bytes. There is a search bar, pagination controls (Page 1 of 1), and an 'Add' button.
- Selected Models:** A table with columns NAME, LAST MODIFIED, and SIZE (BYTES). It shows one model named 'Lesson11.xmod' with a last modified date of 08/09/2020 and a size of 21575 bytes. It includes a search bar, pagination controls (Page 1 of 1), and an 'Add' button.
- Selected Templates:** A large dashed box with the text 'Drop files here' and an 'Add' button.
- Model to Template Mappings:** A table with columns TEMPLATE NAME, TEMPLATE SIZE, MODEL NAME, and MODEL SIZE. It shows 'No records to view' and includes a search bar, pagination controls (Page 1 of 0), and an 'Add' button.

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 RMSCClient, 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 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.

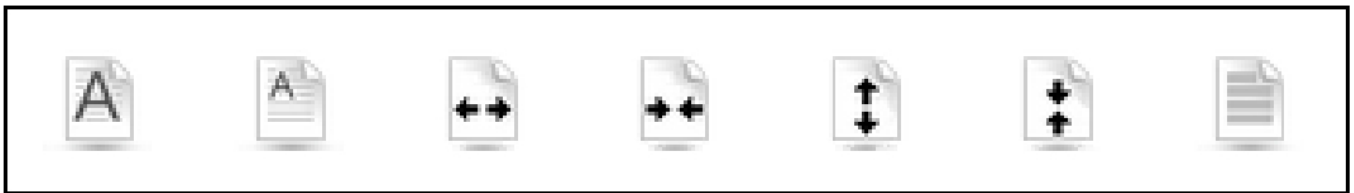
- The toolbar in the upper right corner of the Data View page contains the following icons:








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.

- 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 Monarch 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:




- 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. <b>NOTE:</b> 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. <b>NOTE:</b> 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. <b>NOTE:</b> 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. <b>NOTE:</b> 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. <b>NOTE:</b> 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. <b>NOTE:</b> 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 alternate row color	Allows you to turn on/off the alternate row color display in your view. <b>NOTE:</b> 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.
- **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 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.

The All users will have access to resources checkbox is not available if the Do not include Global option on Rights tab option is selected on MSAdmin.

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

#### To delete a model

- Select it and click  below or above the table.

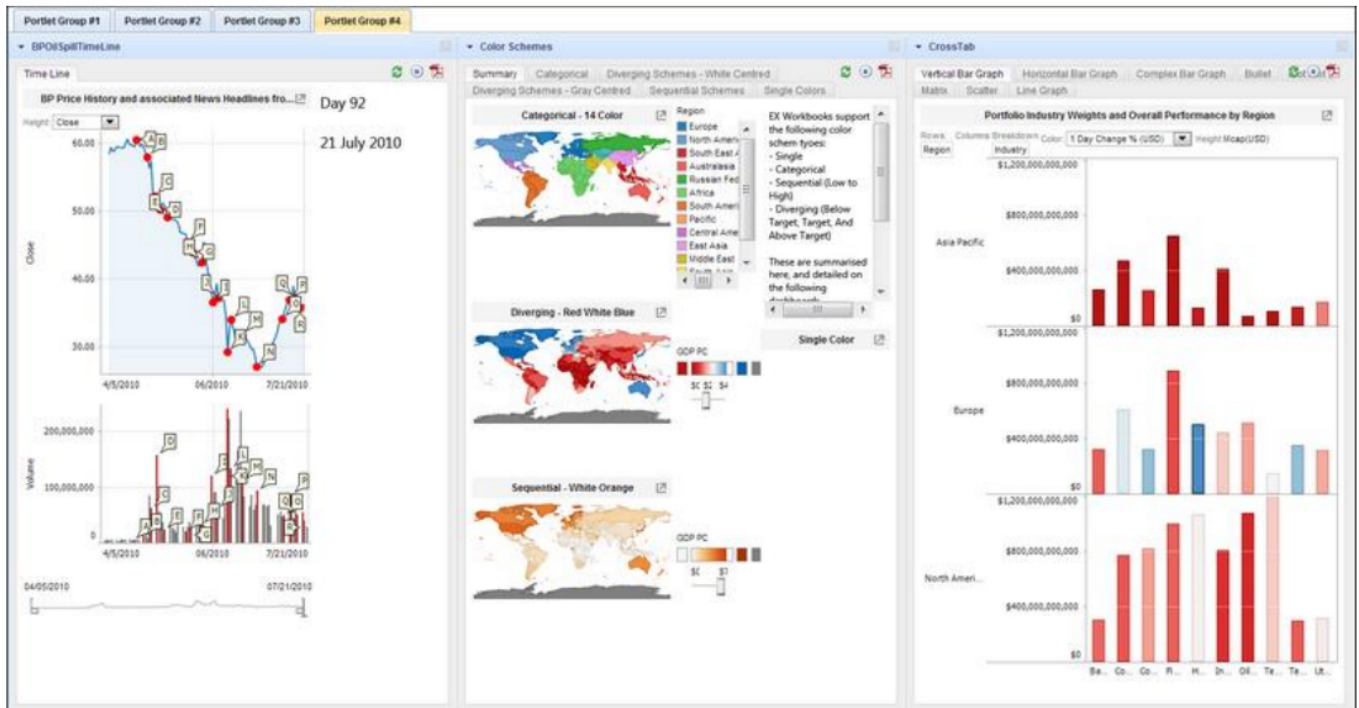
### NOTES

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 Monarch 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  $\text{SUM}(\text{<data field>}/\text{SUM}(\text{<ratio data field>}))$ ). 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 Monarch 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.

The following example shows how dynamic filters work:

Dynamic Filter:

The screenshot shows a dynamic filter interface with the following structure:

- Level 1: A dropdown menu set to "AND" with a plus sign to its right.
- Level 2: A dropdown menu set to "AND" with a plus sign to its right.
- Level 3: A filter rule "Report Date" followed by an equals sign "=" and a date input field containing "03/03/2012".
- Level 4: A dropdown menu set to "OR" with a plus sign to its right.
- Level 5: Two filter rules:
  - "Order Number" followed by a not-equal-to "<>" operator and a text input field containing "536020".
  - "Contact" followed by a "Contains" operator (partially visible as "Con") and a text input field containing "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

Software Support Policy

For details about the latest product versions, product development, software releases, and maintenance and support policy, contact Altair Support.

### Before Contacting Technical Support

You have access to a variety of resources that can help you address any questions or concerns about Monarch

Server. Before you contact Technical Support, do the following:

- 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, a simple restart can solve the problem.
- Check your license, especially when you exceed the number of CPU cores allowed by your license, in which case the following message appears in the login page:  
“The license for Monarch Server is used improperly. Please contact your Altair sales representative for extended options.”

## How to Receive Help

- Access the Altair Community.
- Email Altair Support at [dasupport@altair.com](mailto:dasupport@altair.com).
- Call Altair Support.

## US and Canada

Phone: +1-800-988-4739

Phone: +1-978-275-8350

Europe, Middle East, Africa

Phone: +44 (0) 8081 892481

## NOTES

Provide as much information as possible, including the following:

- 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.

## 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 right corner 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.
- CSV Output: Column Separator: Specify the delimiter for CSV export.
  - Apply delimiter from the model: Select this check box to apply the delimiter from the model.
  - Comma: Select this button to use a comma as the delimiter for the CSV export.
  - Semicolon: Select this button to use a semicolon as the delimiter for the CSV export.
  - Tab: Select this button to use a tab as the delimiter for the CSV export.
  - Pipe: Select this button to use a pipe as the delimiter for the CSV export.
  - Other: Select this button to specify a preferred delimiter.
- 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

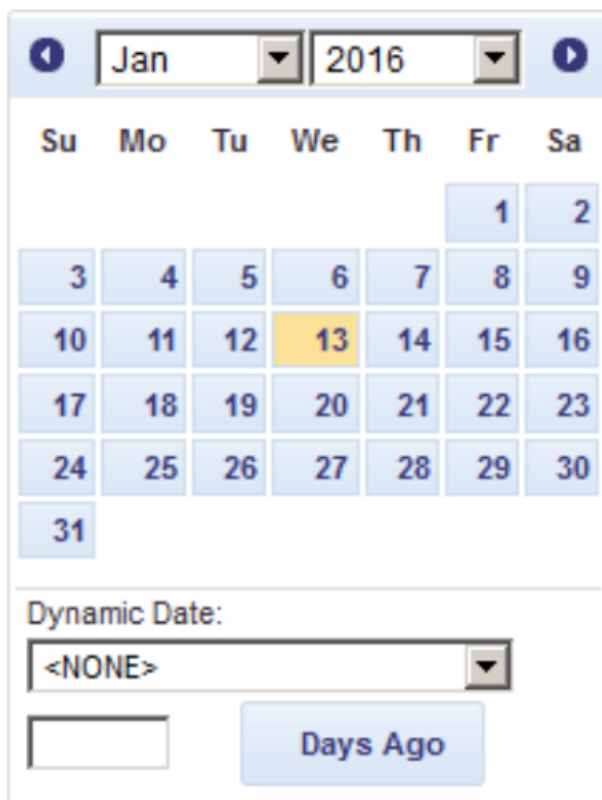
1. Click Preferences in the upper right corner of the page, to display the Output Settings page.
2. Select the Password tab at the top of the page.
3. Enter your current password in the Old Password field.
4. Enter the new password in the New Password and Repeat Password fields.
5. Click Save.

### 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 screenshot shows a calendar window for January 2016. At the top, there are navigation arrows and dropdowns for the month (Jan) and year (2016). The calendar grid displays days from Sunday to Saturday. The 13th is highlighted in yellow. Below the grid, there is a 'Dynamic Date:' section with a dropdown menu currently showing '<NONE>' and a 'Days Ago' button.

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.

CONTACT US

GET IN TOUCH

We'd love to hear from you. Here's how you can reach us.

SALES CONTACT INFORMATION

US: + 1.800.445.3311

International: + 1.978.441.2200

Sales Email

US: [sales@datawatch.com](mailto:sales@datawatch.com)

Europe: [sales\\_euro@datawatch.com](mailto:sales_euro@datawatch.com)

Asia Pacific: [sales\\_apac@datawatch.com](mailto:sales_apac@datawatch.com)

SUPPORT CONTACT INFORMATION

Customer Portal: <https://community.altair.com/community>


Email: [dasupport@altair.com](mailto:dasupport@altair.com)

US: +1 800.988.4739

Canada: +1 978.275.8350

Europe, Middle East, Africa: +44 (0) 8081 892481

**Documents / Resources**

	<p><a href="#">ALTAIR Monarch Report Mining Edition Server</a> [pdf] User Guide</p> <p>Monarch Report Mining Edition Server, Monarch Server, Report Mining Edition Server, Report Mining Edition, Report Mining Server</p>
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**References**

- [!\[\]\(8c2e0322b8b969b24b74c05608fd44ba\_img.jpg\) \*\*Altair | Discover Continuously. Advance Infinitely - Only Forward.\*\*](#)
- [!\[\]\(55384de52fe16cec31fb89fa823a1bb2\_img.jpg\) \*\*Altair Community - Altair Community\*\*](#)
- [!\[\]\(ce79f088ec0b21db95850d351ca7e897\_img.jpg\) \*\*Contact Altair\*\*](#)