

Altair® Monarch® v2021.1.1
MONARCH SERVER
REPORT WAREHOUSE - USER GUIDE

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INTRODUCTION

Welcome to the User Guide of Report Warehouse.

In this Guide, you will be introduced to MSClient, the fully functional Web-based client for Monarch Server's Report Warehouse module. MSClient uses innovative technologies to allow any computer connected to the Internet, or to a corporate intranet, to securely access reports stored in the Monarch Server system. With MSClient, you can [configure simple and advanced searches](#) to quickly and easily retrieve specific documents, or you can configure [report search](#) to retrieve specific reports from your company's report warehouse.

MSClient uses special [Portable Report](#) technology that transforms existing reports into Live Report Objects. Portable reports encapsulate the constructed report along with data, metadata, index values and custom views. They are compressed, encrypted and password protected. Portable reports can be constructed and downloaded for later viewing or redistribution.

MSClient is a scalable solution capable of reliably supporting thousands of users.

LOGGING IN TO MSCLIENT

To log in to MSClient

1. Launch Microsoft Internet Explorer, or another browser, by clicking its shortcut.
2. Type the MSClient address in the Address bar, which may look like this:
`http://servername/MSClient`



NOTES

In Monarch Server v2021.1.1 that is upgraded from previous versions (e.g., v13.2), the virtual folders could still be labeled as "DSClient" (or "DSAdmin"). In this case, use "DSClient" (or "DSAdmin") instead of "MSClient" (or "MSAdmin") to open the Client (or Admin) page.

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 MSClient, the [My Home](#) page is displayed by default.



NOTES

If you prefer a home page other than the My Home page, you can

customize it via the [Output Settings](#) page.

To log off from MSCClient, 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.

NOTE ABOUT USING THIS HELP

The MSCClient interface can be displayed in two different modes or styles: tree-based and tab-based.

The step-by-step instructions in this user guide assume you are using the tab-based site style. If you are currently using the tree-based style, you can switch to the tab-based style (see [Specifying a Site Style](#) for more information) or, if you prefer, you can select the links on the Navigation Tree that correspond to the tabs mentioned.

For example, if the instructions say to click the **Document Search** tab, you would select **Document Search** on the Navigation Tree instead.

MY HOME PAGE

The system displays the My Home page, if you click the **My Home** tab. Use this page to view the latest news, to use your favorite searches, to view documents and to view and delete offline task results.

This page contains the following panes:

- News:** Shows the latest news you have access to. The news is created with the help of Monarch Server Administrator.



NOTES

The news is displayed on the News page, if the expiration date is not passed, and you are given rights to see news message, or the news message is global.

- Favorites Searches:** Allows you to view the favorite searches list, to edit and delete favorite searches, and to send a link to a search by e-mail to any user of MSCClient. For more information, see [Adding a Search to the Favorites Pane](#).
- Offline Tasks:** Allows you to view and delete offline task results. For more information, see [Managing Offline Processing Tasks](#).

- ❑ **Work List:** Displays the list of Documents the state of which user has the right to edit. For more information, see [Managing Work List](#).



NOTES

The panes available in the My Home page are those selected in the Global User Settings in MSAdmin. If no pane is selected in the Global User Settings, no pane will be shown.



To change the My Home page layout

Drag the lists to arrange them in the comfortable for you order.

Managing Work List

Work List window displays the list of Documents the state of which the user has the right to edit.

To go to the report view

1. Select the document(s) you want to open.
2. Click the  button, to proceed to the [Report View page](#) or [Native View page](#).



NOTES

The document(s) will be displayed on the Report View page or Native View page depending on the format, in which documents were filed into the system.



To view the document state information

Move mouse pointer to the state name. The box displaying document state information appears.

Work List						
Search <input type="text"/>						
  Page 1 of 3   10 						
	<input type="checkbox"/>	Name	Document Type	Document Date	State	
1	<input type="checkbox"/>	Classic - 04/01/2010	_classic	12/07/2012 10:01:35 A	approve	
2	<input type="checkbox"/>	Classic - 04/01/2010	classic	12/07/2012 10:01:35 A	New	
3	<input type="checkbox"/>	Cl	approve	Administrator	12/12/2012 12:16:58 PM	New
4	<input type="checkbox"/>	Cl	disapprove	Administrator	12/12/2012 12:22:22 PM	review
5	<input type="checkbox"/>	Cl	approve	Administrator	12/12/2012 12:22:24 PM	New

The user cannot view the document marked as locked in the **Work List**. It means that another user is currently viewing this document.

Work List						
Search <input type="text"/>						
☰ ▶		Page 1 of 3			▶▶ 10 ▼	
View 1 - 10 of 30						
	<input type="checkbox"/>	Name ↕	Document Type	Document Date	State	Locked
1	<input type="checkbox"/>	Classic - 04/01/2010	_classic	12/07/2012 10:01:35	approve	
2	<input type="checkbox"/>	Classic - 04/01/2010	_classic	12/07/2012 10:01:35	New	🔒
3	<input type="checkbox"/>	Classic - 04/04/2010	_classic	12/07/2012 10:01:35	New	🔒
4	<input type="checkbox"/>	Classic - 04/05/2010	_classic	12/07/2012 10:01:35	review	🔒
5	<input type="checkbox"/>	Classic - 04/05/2010	_classic	12/07/2012 10:01:35	New	



NOTES

The user can access the document marked as locked in the **Work List** from the **Document List** page. For more information, see [Document List Page](#).



MSCLIENT TERMINOLOGY

In order to understand how Monarch Server works, you need to understand its terminology. Although the terms are familiar, they have specific meanings in the context of Monarch Server. In this section you will learn about:

- [Documents and Reports](#)
- [Document Groups](#)
- [Document Types](#)
- [Index Fields](#)
- [Index Values](#)
- [Filters](#)
- [Sorts](#)
- [Summaries](#)
- [Portable Reports](#)

ABOUT DOCUMENTS AND REPORTS

A **report** is a formal record containing information in a printed or electronic format. Reports have a consistent, structured layout and are generally stored in a single file on a storage volume.

A **document** is a section of a report that is logically independent from other sections. Documents are the units that a report is divided into, when it is stored in the report warehouse.

When reports are stored in Monarch Server, they are compressed and stored in their entirety. Users retrieving information from the report warehouse, however, may choose to retrieve a report ([Report search](#)) or portions of a report ([Document search](#)).

For example, a February music invoice report may contain invoices for dozens of different music stores. But a user looking for the February invoice for only Betty's Music Store needs to retrieve just that portion of the file. The invoice for Betty's Music Store can be represented as a single document in the stored February invoice report.

ABOUT DOCUMENT GROUPS

A **document group** is a set of [document types](#) that are associated because they share a common subject or similar content. For example, a document group called **Financial Reports** might contain several document types, such as **Weekly Sales**, **Weekly Purchases** and so on. Document groups are a way of organizing related document types so that they can be easily located. A document group can contain numerous document types.

When adding a document group to the system, an administrator assigns document types to it. Document types have [index fields](#) (also called *keyword types*) assigned to them. When you configure a search, you can specify [index values](#) (also called *keyword values*) for these index fields. The index values you specify are the *search terms* used to retrieve any matching documents from the report warehouse.



NOTES

Your system administrator decides, which document groups are available to you. When you [configure a simple, advanced search](#) or [report search](#), the document groups available to you are listed in the **Document Groups** list.



ABOUT DOCUMENT TYPES

A **document type** is a generic class of documents that have the same physical layout and function. Document types are given names and are assigned to [document groups](#) by a system administrator. For example, a document type called **Weekly Sales** might belong to a document group called **SalDS Reports**.

When adding a document type to the system, an administrator assigns [index fields](#) (also called *keyword types*) to the document type. When you configure a search, you can specify [index values](#) (also called *keyword values*) for these index fields. The index values you specify are the *search terms* used to retrieve any matching documents from the report warehouse.

Your system administrator decides, which document types are available to you. When you [configure a simple, advanced search](#) or [report search](#), the document types available to you are listed in the **Document Types** list.



NOTES

The selected document group determines which document type(s) are displayed.



ABOUT INDEX FIELDS

Index fields (also called *indexes* or *keyword types*) are fields of information, upon which document retrievals are based. Within Monarch Server, index fields are used to locate and retrieve documents according to specified [index values](#) (also called *keyword values*). For example, when [configuring a simple, advanced search](#) or [report search](#), if you specify an index value of **011-39-0778** for a **Social Security Number** index field, documents that contain the **Social Security Number** index field and an index value of **011-39-0778** in that field, will be retrieved.

When adding a [document type](#) to the system, an administrator assigns index fields to the document type. For example, an index field specified for the **Orders** document type might be **Purchase Order Number**, while one for the **Personnel** document type might be **Employee Social Security Number**. When you configure a search, you can specify index values for these index fields. The index values you specify are the *search terms* used to retrieve any matching documents from the report warehouse.

ABOUT INDEX VALUES

While an [index field](#) is a particular field within a document, an **index value** (also called *keyword value*) is a specific value of an index field. For example, **Q197-4112** could be an index value for the **Purchase Order Number** index field, and **123-45-6789** could be an index value for the **Social Security Number** index field.

When [configuring a simple](#) , [advanced search](#) or [report search](#), only index fields assigned to the specified [document type](#) are available. The system administrator selects index fields to assign to the document type, when adding a document type to the system.

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 search results on the [Data View](#) or [Summary View](#) page, in the **Customize** section, you can select defined filters, to limit the search results.



NOTES

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

When you apply a filter, MSClient 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 search results 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, which is specified by your system administrator. If no sorts are available, none is contained in the model file.

When you apply a sort to the search results, you tell MSClient 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 search results 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 search results.



NOTES

The summaries available, if any, are determined by the associated model file, which is specified by your system administrator. 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 allows an organization 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 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 saIDS 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 Monarch 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 Server session. By pre-building the page index and including it in a portable report, report navigation commands in Modeler 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.

LESSONS

MSClient offers lessons instructing users on what to do next to make usage of the application easier.

To run lessons

1. Click **Lessons** at the top of the page.
2. In the **Lessons Chooser** dialog box, choose the lesson. The lesson window appears.
3. Follow the instructions in the window and click **Next**, to proceed.
4. To finish lesson, click **Finish**.



NOTES

To resume the unfinished lesson, open the **Lessons Chooser** window and click the **Back to lesson** button.



SEARCHES

With MSClient, you can [configure simple and advanced searches](#) to quickly and easily retrieve specific documents, or you can configure [report search](#) to retrieve specific reports from your company's report warehouse.

DOCUMENT SEARCH

To retrieve [documents](#) from the Monarch Server report warehouse, you can submit a pre-configured search (listed on the [Saved Views](#) page, and in the **Favorites** pane on the [My Home](#) page) or, if you have been granted the **Document Search** privilege by a system administrator, you can configure and submit your own searches.

The following types of searches can be configured:

- [Simple searches](#)
- [Advanced searches](#)

Configuring a Simple Search

With simple searches you can specify one index value for any given index field. For example, you could specify the index value **Betty's Music Store** for the **Customer Name** index field. As a result, only documents that contain **Betty's Music Store** in the **Customer Name** field would be retrieved.

Simple searches can include the **AND** [Boolean operator](#) (they cannot include the **OR** operator) and only the **equal to** (=) [relational operator](#) (they cannot include any other relational operators).

Though simple searches aren't as powerful as advanced searches, they can be configured quickly (partly because the Simple Search page displays all the [index fields](#) assigned to the specified [document type](#), with text boxes for their corresponding [index values](#)). If you want to quickly configure a search, a simple search is a better choice than an advanced one.

To configure a simple search

1. Click the **Document Search** tab to display the **Simple Search** page.
2. Select a document group from the **Document Groups** list. The document group you select determines, which document types are available.
3. Select a document type from the **Document Types** list. After you select a document type, an additional section of the Simple Search page appears.



NOTES

If the **Allow multiple Document Type selection in Simple Search** check box is selected on the [Output Settings](#), you will be able to select multiple document types. The alternative way for selecting multiple document types is to use the **Open multiple Document Types selection** arrow that flanks right the **Document Types** list. To stop selecting multiple document types, click this arrow once again.



- Specify the report date or date range in the From and/or To fields. You can manually enter dates in the date fields (mm/dd/yyyy), or you can click the  icon and select dates from the Calendar window.



NOTES

This step is optional. But if no dates are supplied, *all* documents in the Monarch Server system of the specified document type are included in the search.

You can also select the **Latest Reports** check box, to include all reports that were added to the system during the last filing.

To display or hide the **Latest Reports** check box, use the **Show advanced options / Hide advanced options** heading correspondingly. Availability of this heading depends on Administrator's settings.



- Use the **Annotation Criteria** list to specify whether annotated or not-annotated reports are to be included in the search. This list contains the following options: **All Reports**, **Not-Annotated Reports Only**, **Annotated Reports Only**.



NOTES

Annotation Criteria list, use the **Show advanced options / Hide advanced options** heading correspondingly. Availability of this heading depends on Administrator's settings.

This step is optional. Annotation criteria selection is available under the corresponding license.



- In the text boxes by the appropriate index fields, specify index values for as many of the index fields as you want to. You can type index values, or you can click  and select a value using the [Keyword Lookup](#) dialog box.
- Click the **Search** button to submit the search.

After you submit the search, the [Document List](#) appears, displaying all documents that match your search criteria.

You can re-use the last search query conditions for another search. For that, use the **Apply** button in the **Last search query** box.

Configuring an Advanced Search

With advanced searches you can specify multiple index values for the same index field. For example, using the **OR** Boolean operator, you could specify **Betty's Music Store**, **Big Shanty Music**, **Fandangos Records** and so on, as index values for the **Customer Name** index field. As a result, all documents with any one of the specified customer names in the **Customer Name** field would be retrieved.

Advanced searches can include both the **AND** and the **OR Boolean operators** to link multiple search conditions. They can also include any [relational operators](#).

So if you want to configure a search that will retrieve very specific information, and configuration speed is of no concern, then an advanced search would be a better choice than a simple one.

But advanced searches take longer to configure than [simple searches](#).

To configure an advanced search

1. Click the **Document Search** tab to display the **Simple Search** page.
2. Click the **Advanced** tab.
3. Select one or several document groups from the list.



NOTES

To select multiple document groups, hold down the CTRL key, while you click their names. To select all document groups, click **Select All** below the list.

4. Click the **Select** button below the list. A list of document types, assigned to the selected document groups, appears on the right.
5. Select one or several document types from the list.



NOTES

To select multiple document types, hold down the CTRL key, while you click their names. To select all document types, click **Select All** below the list.

6. Click the **Select** button below the list. The **Search** section of the page appears.
7. Specify the report date or date range in the **From** and/or **To** fields. You can manually enter dates in the date fields (mm/dd/yyyy), or you can click the  icon and select dates from the [Calendar window](#).



NOTES

This step is optional. But if no dates are supplied, all documents in the Monarch Server system of the specified document type are included in the search.

You can also select the **Latest Reports** check box, to include all reports that were added to the system during the last filing.

To display or hide the **Latest Reports** check box, use the **Show advanced options / Hide advanced options** heading correspondingly. Availability of this heading depends on Administrator's settings.

8. Use the **Annotation Criteria** list to specify whether annotated or not-annotated reports are to be included in the search. This list contains the following options: **All Reports**, **Not-Annotated Reports Only**, **Annotated Reports Only**.



NOTES

Annotation Criteria list, use the **Show advanced options / Hide**

advanced options heading correspondingly. Availability of this heading depends on Administrator's settings.

This step is optional. Annotation criteria selection is available under the corresponding license.

9. Under the **Filters** heading, click the **Add condition** button. A row of fields will appear.



The screenshot shows a 'Filters' section with a row of fields. The first field is a dropdown menu with 'AND' selected. The second field is a text box containing 'Account Number'. The third field is a dropdown menu with '=' selected. The fourth field is an empty text box. To the right of the text boxes are 'Add' and 'Remove' icons. Below the row is an 'Add condition' button.

10. Select a Boolean operator (AND or OR) from the list. While the AND operator can be used to link search criteria of different index fields, the OR operator can only be used to link search criteria of the same index field.
11. Select an index field from the list. The list contains index fields that are used in the selected document types.
12. Select a relational operator: equal to (=), not equal to (<>), less than (<), greater than (>), less than or equal to (<=), greater than or equal to (>=).
13. Enter an index value. To [look up available index values](#), click the **Lookup** button.
14. To add another condition, click the **Add condition** button, and repeat steps 10-13. To remove a condition, click the **Remove** button.



NOTES

You can save this combination of search conditions, by clicking the **Save Filter** button. Next time when you search for documents, you can apply this filter, by selecting it from the drop-down list, and clicking the **Add Filter** button.

15. Submit the search, by clicking the **Search** button.



NOTES

You can click the **Clear** button to clear all boxes, and reconfigure the search.

After you submit the search, the [Document List](#) appears, displaying the documents that match your search criteria. You can display the search results in a number of views (for example, [Report View](#), [Data View](#), and so on).

You can re-use the last search query conditions for another search. For that, use the **Apply** button in the **Last search query** box.

REPORT SEARCH

To retrieve [reports](#) from the Monarch Server report warehouse, you can submit a pre-configured search (listed on the [Saved Views](#) page and in the **Favorites** pane on the [My Home page](#)) or, if you have been granted the **Report Search** privilege by a system administrator, you can configure and submit your own searches.

The following types of report searches can be configured:

- [Simple searches](#)
- [Advanced searches](#)

Reports List

The **Reports List** makes it easier for Monarch Server users to access the reports and data they intend to retrieve. The **Reports List** reduces the number of mouse clicks to the desired data view.

To display the **Reports List**, select the **Report Search** tab at the top of the page.

The **Reports List** contains the following items:

- Search Conditions section with the following options:
 - **Report Date:** Specify the date range.
 - **Latest Reports:** Select the check box, to include all reports that were added to the system during the last filing.
 - **Search by Group:** Select a document group from the drop-down list.
 - **Filter Report Name:** Type a report name to filter the list.
 - **Reset** button: Click to clear the boxes.
- Edit Visible Fields** section: 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** button: Click to apply changes, made in the Search Conditions and Edit Visible Fields sections.
- Open View** button: Click to open the dialog box, allowing you to select a saved view. Click Default View in the dialog box to display a view with default settings.
- Save View** button: Click to save the current view with its settings. In the dialog box, enter the name of a view and click Add, if you want to create a new view. If you want to save changes made to the current view, click Save.
- Views toolbar:** When you click a report name in the table, the Views toolbar appears:



Use this toolbar to display the report in one of the following available views:

-  **Report View**
-  **Dynamic View**
-  **Data View**
-  **Summary View**
-  **XLS Data View**
-  **XLS Summary View**

-  **PRF View**
-  **ES Style View**
-  **ES Report Style**
-  **ES Style PDF**
-  **Archive Report**

For offline reports some views are unavailable:



You can send a request for offline reports, by clicking an icon on the toolbar. The **Request Offline Reports** dialog box will appear. Click **Send** to send the request.

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

Configuring a Simple Report Search

With simple searches you can specify one index value for any given index field. For example, you could specify the index value **Betty's Music Store** for the **Customer Name** index field. As a result, only reports that contain **Betty's Music Store** in the **Customer Name** field would be retrieved.

Simple searches can include the **AND Boolean operator** (they cannot include the **OR** operator) and only the **equal to** (=) [relational operator](#) (they cannot include any other relational operators).

To configure a simple report search

1. Click the **Report Search** tab.
2. Select the **Simple** tab.
3. Select a document group from the list. The document group you select determines, which document types are available.
4. Select a document type from the list. After you select a document type, an additional section of the page appears.



NOTES

If the **Allow multiple Document Type selection in Simple Search** check box is selected on the [Output Settings](#), you will be able to select multiple document types.

5. Specify the report date or date range in the **From** and/or **To** fields. You can manually enter dates in the date fields (mm/dd/yyyy), or you can click the  icon and select dates from the [Calendar window](#).



NOTES

This step is optional. But if no dates are supplied, all reports in the

Monarch Server system of the specified document type are included in the search.

You can also select the **Latest Reports** check box, to include all reports that were added to the system during the last filing.

6. Use the **Annotation Criteria** list to specify whether annotated or not-annotated reports are to be included in the search. This list contains the following options: **All Reports**, **Not-Annotated Reports Only**, **Annotated Reports Only**.



NOTES

This step is optional. Annotation criteria selection is available under the corresponding license.

7. In the text boxes by the appropriate index fields, specify index values for as many of the index fields as you want to. You can type index values, or you can click  and select a value using the [Keyword Lookup](#) dialog box.
8. To submit the search, click the **Search** button.
After you submit the search, the [Report List](#) appears, displaying the reports that match your search criteria.

Configuring an Advanced Report Search

With advanced searches you can specify multiple index values for the same index field. For example, using the **OR** Boolean operator, you could specify **Betty's Music Store**, **Big Shanty Music**, **Fandangos Records** and so on, as index values for the **Customer Name** index field. As a result, all reports with any one of the specified customer names in the **Customer Name** field would be retrieved.

Advanced searches can include both the **AND** and the **OR** [Boolean operators](#) to link multiple search conditions. They can also include any [relational operators](#).

So if you want to configure a search that will retrieve very specific information, and configuration speed is of no concern, then an advanced search would be a better choice than a simple one.

But advanced searches take longer to configure than [simple searches](#).

To configure an advanced report search

1. Click the **Report Search** tab.
2. Select the **Advanced** tab.
3. Select one or several document groups from the list.



NOTES

To select multiple document groups, hold down the CTRL key, while you click their names. To select all document groups, click **Select All** below the list.

- Click the **Select** button below the list. A list of document types, assigned to the selected document groups, appears on the right.
- Select one or several document types from the list.



NOTES

To select multiple document types, hold down the CTRL key, while you click their names. To select all document types, click **Select All** below the list.



- Click the **Select** button below the list. The **Search** section of the page appears.
- Specify the report date or date range in the **From** and/or **To** fields. You can manually enter dates in the date fields (mm/dd/yyyy), or you can click the  icon and select dates from the [Calendar window](#).



NOTES

This step is optional. But if no dates are supplied, all reports in the Monarch Server system of the specified document type are included in the search.

You can also select the **Latest Reports** check box, to include all reports that were added to the system during the last filing.



- Use the **Annotation Criteria** list to specify whether annotated or not-annotated reports are to be included in the search. This list contains the following options: **All Reports**, **Not-Annotated Reports Only**, **Annotated Reports Only**.



NOTES

This step is optional. Annotation criteria selection is available under the corresponding license.



- Under the **Filters** heading, click the **Add condition** button. A row of fields will appear.

Filters

⋮	AND ▼	Account Number ▼	= ▼		🔍	✕
<input type="button" value="Add condition"/>						

- Select a Boolean operator (AND or OR) from the list. While the AND operator can be used to link search criteria of different index fields, the OR operator can only be used to link search criteria of the same index field.
- Select an index field from the list. The list contains index fields that are used in the selected document types.
- Select a relational operator: equal to (=), not equal to (<>), less than (<), greater than (>), less than or equal to (<=), greater than or equal to (>=).
- Enter an index value. To [look up available index values](#), click the Lookup button.

14. To add another condition, click the **Add condition** button, and repeat steps 10-13. To remove a condition, click the **Remove button**.



NOTES

You can save this combination of search conditions, by clicking the **Save Filter** button. Next time when you search for documents, you can apply this filter, by selecting it from the drop-down list, and clicking the **Add Filter** button.

15. Submit the search, by clicking the **Search** button.



NOTES

If you want to reconfigure the search,click the **Clear** button.

After you submit the search, the [Report List](#) appears, displaying the reports that match your search criteria. You can display the search results in a number of views (for example, [Report View](#), [Data View](#), and so on).

BOOLEAN OPERATORS

Boolean operators enable you to define searches that include more than one search phrase. Searches made up of two or more search phrases can include multiple [index fields](#) and [index values](#). Boolean operators can only be used in an [advanced search](#).

The Boolean operators are located on the Advanced Search page, under the **Filters** heading.



NOTES

This list is not visible, until you select a [document group](#) and [document type](#), and click the **Add condition** button under the **Search Criteria** heading.

Click the drop-down arrow to select a Boolean operator from the list.



NOTES

While the **AND** operator can be used to link search criteria containing different index fields, the **OR** operator can only be used to link search criteria containing the same index field.

The following Boolean operators are available:

- ❑ **AND Operator:** The **AND** operator specifies that, in order for a document to be retrieved, all search phrases linked by it must be true. The search phrases linked with the **AND** operator can contain different index fields.

Examples:

Ship Date > 01/31/2001 AND Ship Date < 03/02/2001 — This retrieves all documents with ship dates from February 1, 2001 through March 1, 2001.

Customer name = Betty's Music Store AND Ship Date = 01/31/2001 — This returns only documents for Betty's Music Store that have a ship date of January 31, 2001.

- ❑ **OR Operator:** Use the **OR** operator to configure a search, in which only one of the search phrases linked by it must be true for a document to be retrieved. The **OR** operator will also retrieve any documents that meet both or all of the search phrases. **NOTE:** The **OR** operator can only be used to link search criteria containing the same index field. For example, the search phrase **Employee Name = John Smith OR Department = Accounting** would not work because **Employee Name** and **Department** are two different index fields. (This search phrase would work if you linked the search criteria with the **AND** operator, however.)

Examples:

Customer Name = Bluegrass Records OR Customer Name = The Glass Harmonica — This search returns documents for either **Bluegrass Records** or **The Glass Harmonica** (or both, if the document type selected contains documents for both stores).

Invoice Number = 11187 OR Invoice Number = 11189 — This search will return documents for either invoice **11187** or invoice **11189** or both.

RELATIONAL OPERATORS

Relational operators let you specify the relationship between an index field and an index value in your search criteria.



NOTES

Relational operators can only be used when [configuring an advanced search](#). (They cannot be used when [configuring a simple search](#).)

The relational operators are located in the **Operator** drop-down list, on the Advanced Search page .



NOTES

This list is not visible, until you select a document group and document type from the corresponding drop-down lists.

The following relational operators are available:

- ❑ [Equal to](#) (=)
- ❑ [Not equal to](#) (<>)
- ❑ [Less than](#) (<)
- ❑ [Greater than](#) (>)
- ❑ [Less than or equal to](#) (<=)

□ [Greater than or equal to \(>=\)](#)

When using relational operators in conjunction with [Boolean operators](#), make sure that your search criteria make sense. For example, if your search criterion is **House Style = Ranch** and you add the search phrase **House Style = Colonial** to it, you cannot link the two phrases with the **AND** operator, because none of the **House Style** index fields would contain both **Colonial** and **Ranch** index values (since no house is both a colonial and a ranch). To use these two search phrases in your search criteria, you would have to link them with the **OR** operator.

Equal to (=) Operator

When [configuring a search](#), the **equal to (=)** operator is one of the [relational operators](#) you can use to specify the relationship between an [index field](#) and an [index value](#) in your search criteria.

In both simple and advanced searches, the **equal to (=) operator** is the default relational operator used. Though you cannot specify a different relational operator with a simple search, with an advanced search you can select any other relational operator from the **Operator** drop-down list on the [Advanced Search page](#).



NOTES

This list is not visible, until you select a [document group](#) and [document type](#) from the corresponding drop-down lists.

Use the **equal to (=)** operator to retrieve only those documents that contain, in the specified index field, the index value contained in the search phrase.

Examples:

Customer Name = Bob's Records retrieves all documents with an index value of **Bob's Records** in the **Customer Name** index field.

Ship Date = 01/31/2001 retrieves all the documents with an index value of **01/31/2001** in the **Ship Date** index field.

Not Equal to (<>) Operator

When [configuring a search](#), the **not equal to (<>)** operator is one of the [relational operators](#) that lets you specify the relationship between an [index field](#) and an [index value](#) in your search criteria.

The **not equal to (<>)** operator is located in the **Operator** drop-down list, on the [Advanced Search page](#).



NOTES

This list is not visible, until you select a [document group](#) and [document type](#) from the corresponding drop-down lists.

Use the **not equal to (<>)** operator to retrieve only those documents that do not contain, in the specified index field, the same index value as the one in the search phrase.

Examples:

Customer Name <> Betty's Music Store retrieves all documents with index values other than **Betty's Music Store** in the **Customer Name** index field.

Ship Date <> 01/31/2001 retrieves all documents with index values other than **01/31/2001** in the **Ship Date** index field.

Less Than (<) Operator

When [configuring a search](#), the **less than** (<) operator is one of the [relational operators](#) you can use to specify the relationship between an [index field](#) and an [index value](#) in your search criteria.

The **less than** (<) operator is located in the **Operator** drop-down list, on the [Advanced Search page](#).



NOTES

This list is not visible, until you select a [document group](#) and [document type](#) from the corresponding drop-down lists.

Use the **less than** (<) operator in a search to retrieve only those documents that contain, in the specified index field, an index value that is less than the one in the search phrase.

Examples:

Ship Date < 06/01/2001 retrieves all documents with an index value of **05/31/2001** or earlier in the **Ship Date** index field.

Invoice Amount < 20000 retrieves all documents with an index value of **19,999.99** or less in the **Invoice Amount** index field.

Greater Than (>) Operator

When [configuring a search](#), the **greater than** (>) operator is one of the [relational operators](#) you can use to specify the relationship between an [index field](#) and an [index value](#) in your search criteria.

The **greater than** (>) operator is located in the **Operator** drop-down list, on the [Advanced Search page](#).



NOTES

This list is not visible, until you select a [document group](#) and [document type](#) from the corresponding drop-down lists.

Use the **greater than** (>) operator to retrieve only those documents that contain, in the specified index field, an index value that is greater than the one in the search phrase.

Examples:

Ship Date > 06/01/2001 retrieves all documents with an index value of **06/02/2001** or later in the **Ship Date** index field.

Invoice Amount > 20000 retrieves all documents with an index value of **20,000.01** or more in the **Invoice Amount** index field.

Less Than or Equal to (<=) Operator

When [configuring a search](#), the **less than or equal to** (<=) operator is one of the [relational operators](#) you can use to specify the relationship between an [index field](#) and an [index value](#) in your search criteria.

The **less than or equal to** (<=) operator is located in the **Operator** drop-down list, on the [Advanced Search page](#).



NOTES

This list is not visible, until you select a [document group](#) and [document type](#) from the corresponding drop-down lists.



Use the **less than or equal to** (<=) operator to retrieve only those documents that contain, in the specified index field, an index value that is less than or equal to the one in the search phrase.

Examples:

Ship Date <= **07/01/2001** retrieves all documents with an index value of **07/01/2001** or earlier in the **Ship Date** index field.

Invoice Amount <= **15000** retrieves all documents with an index value of **15,000** or less in the **Invoice Amount** index field.

Greater Than or Equal to (>=) Operator

When [configuring a search](#), the **greater than or equal to** (>=) operator is one of the [relational operators](#) you can use to specify the relationship between an [index field](#) and an [index value](#) in your search criteria.

The **greater than or equal to** (>=) operator is located in the **Operator** drop-down list, on the [Advanced Search page](#).



NOTES

This list is not visible, until you select a [document group](#) and [document type](#) from the corresponding drop-down lists.



Use the **greater than or equal to** (>=) operator to retrieve only those documents that contain, in the specified index field, an index value that is greater than or equal to the one in the search phrase.

Examples:

Ship Date >= **07/01/2001** retrieves all documents with an index value of **07/01/2001** or later in the **Ship Date** index field.

Invoice Amount >= **15000** retrieves all documents with an index value of **15,000** or more in the **Invoice Amount** index field.

SAVED VIEWS

After you configure and submit a search, you can [save this search](#). When you save a search, you actually save both the search configuration and the search results. You can save a search in any of the search result views available (for example, [Report View](#), [Data View](#), and so on). When you save a search, it is added to the Saved Views page.

To display the **Saved Views** page, click the **Saved Views** tab, at the top of the page.

The **Saved Views** page displays a list of all views that you saved, and contains the following items:

- Search Name:** Lists the names of searches that you saved or other DS users assigned to you.
-  Click to [send the search by e-mail](#).
- Type:** Displays the type of a search: **Document Search** or **Report Search**.

- Favorite:** A star icon in this column denotes searches added to favorites.
-  Click to [delete a search](#) from the **Saved Views** page.
-  Click to [edit a saved search](#).
-  Click to [delete a search](#) from the **Saved Views** page.
-  Click to [add a search to favorites](#).

Use the **Saved Views** page to:

- [Add a search to the Favorites page](#)
- [Open a saved search](#)
- [Edit a search](#)
- [Send a search by e-mail](#)
- [Delete a search](#)

Saving a Search

To save a search

1. After you configure and submit a [document search](#) or [report search](#), the [Document List](#) or [Report List](#) appears, displaying search results.
2. Click  to save the search. The **Save** dialog box appears.



NOTES

If you want to save the search results displayed in a different way, select a view from the toolbar, in the upper left corner of the page, then click . Whenever you open the search, the search results will be displayed in the selected view.

3. Enter a name for the search in the **Search Name** field.
4. Select a search group from the **Groups** list, to assign the search to it.
5. Click the **User**, **User Groups** or **Roles** heading to expand hidden sections. Select user groups, roles and users (if any) that you want to have access to the search, by dragging their names from the left pane to the right pane, in an appropriate section.
6. Click the **Save** button. The search is added to the **Saved Views** page.



NOTES

Once a search is saved, you can open, edit or submit it at any time.

Adding a Search to the Favorites Page

If you plan to use a search on a regular basis, you can add it to your **Favorites** pane on the [My Home](#) page for easy access.



NOTES

Before you can add a search to your **Favorites** pane, you need to [save the search](#).



To add a search to the Favorites page

1. After you configure and submit a [document](#) or [report search](#), the [Document List](#) or [Report List](#) appears, displaying the search results.
2. To [save the search](#), click  icon.
3. To display the **Saved Views** page, click the **Saved Views** tab, at the top of the page.
4. To select the search you want to add to the **Favorites** pane, click anywhere on the row.
5. Click the Add to Favorites icon , at the bottom of the list. The search is added to the **Favorites** pane.

See also: [Removing a Search from the Favorites Page](#).

Removing a Search from the Favorites Page

You can remove from the [Favorites pane](#) any searches that you have [added to it](#).



NOTES

Removing a search from the Favorites pane of the [My Home page](#) does not delete the search, and it does not remove it from the [Saved Views page](#).



To remove a search from the Favorites pane

1. Click the **My Home** tab, to display the Favorites pane.
2. Select the search you want to remove, by clicking anywhere on the row.
3. Click . A dialog box will appear.
4. To delete the search from the Favorites list, click **Delete**.

Opening a Saved Search

You can open a saved search, using the [Saved Views](#) tab, at the top of the page.

When you open a search, you can choose to open the search itself (that is, the search configuration), or you can choose to open the search results.

To open the search configuration, select a search by clicking anywhere on the row, and then click  at the bottom of the list.

To open the search results, click the name of a search on the list.

Editing a Search

To edit a search

1. Click the **Saved Views** tab, at the top of the page, to display the list of saved searches.
2. Select a search, by clicking anywhere on the row.
3. Click  at the bottom of the list.
4. Make the necessary changes to the search configuration, then click **Search**.



NOTES

To save the search, when the search results are displayed, click  on the toolbar, in the upper right corner of the page.

Sending a Search

You can send, via e-mail, any search on your My Home or Saved Views page to other Monarch Server users. When you send a search to someone, they receive an e-mail containing a link to the search, as well as any comments you have provided. When the recipient clicks the link, MSClient is launched on their machine, displaying the search on the Advanced Search page. They can then edit, submit or save the search.

To send a search

1. On the [My Home](#) or [Saved Views](#) page, click  next to the search you want to send. The Mail dialog box opens.
2. Select users you want to send the search to, by dragging their names from the **Users** pane to the **Send To** pane.
3. If you want to send a search to a user who is not listed in the Users pane, enter their e-mail address in the E-mail field, then click **Add** to add them to the **Send To** field.
4. To send a text comment with the e-mail, type it in the **Comments** field.
5. To send the search to the specified recipient(s), click **Send**.
6. To close the window without sending the search, click **Cancel**.

Deleting a Search

You can remove a search from the [Saved Views page](#) at any time.



NOTES

When you delete a search from the Saved Views page, if it is also listed on your [My Home](#) page, it is removed from that page as well.



To delete a search

1. Click the **Saved Views** tab.
2. Click  at the end of the row with the search you want to delete.
3. To confirm the deletion of the search from the list, click **Delete**.

SEARCH RESULTS

Search results are first displayed on the [Document List page](#) or [Report List page](#).

You can also display search results in a number of other views:

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

DOCUMENT LIST PAGE

After you [submit a document search](#), the Document List page appears. It displays a list of all documents that match your search criteria.

The list contains the following columns:

- Name
- Document Type
- Document Date
- State
- Annotated
- Native
- Offline
- Premined

To sort the list in ascending order, click the column heading (**Name**, **Document Type**, or **Document Date**).

To display the list in descending order, click the column heading once again.

To apply a filter, click the  icon to the left of the list, select the appropriate type, and then click **Apply Filter**.

To select multiple types, hold down the CTRL key, while you click their names, and then click **Apply Filter**.

Toolbars

The **Document List** page contains two toolbars at the top of the page.

- The **Views** toolbar in the upper left corner of the Document List page contains the following icons:



Use this toolbar to display the list in one of the following available views.

-  **Document List**
-  **Report View**
-  **Dynamic View**
-  **Data View**
-  **Summary View**
-  **XLS Data View**
-  **XLS Summary View**
-  **PRF View**
-  **ES Style View**
-  **ES Report Style View**
-  **ES Style PDF**
-  **Native View**

To specify which documents from the list you want to display in a **Report View, Dynamic View, Data View, Summary View, XLS Data View, XLS Summary View, PRF View, or ES Style View**, select check boxes by their names on the list. To display all documents, select the check box by the **Name** column heading or select an area containing the items you want to display for multiple selection.

- The toolbar in the upper right corner of the Document List page contains the following icons:



Use this toolbar to perform the following actions:

-  **Server Export** Click to export data to a server-based folder.
-  **Delete selected documents** Click to remove selected documents from the database.
NOTE: You can use this option, if you have the **Delete Document** privilege. Otherwise this button is not displayed on the screen.
-  **Mail** Click to display the **Mail** dialog box, allowing you to send links to selected documents via e-mail to other users.
-  **Save** The **Save** dialog box allows you to save the current search to the database. If you save a search from the Document List

page, the results of this search will be displayed only on the Document List page.

NOTE: You can use this option, if you have the **Save Search** privilege. Otherwise this button is not displayed on the screen.



Details

Click to display the details of the current search.



Request Off-line Documents

Click to open the **Request** dialog box, allowing to send a request for offline documents to the system administrator.

NOTE: This icon is visible only if the selected document type contains offline documents.



Export to PDF

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



Export to PDF

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



View original Report

Click to open the original report.



Export to TXT

Click to open the selected document as a TXT file in the current window.



Export to TXT

Click to open the selected document as a TXT file in a new window.



Download Document List data in CSV format

Click to open the current document list in the CSV format.

- Customize:** Click this heading to open a hidden section, allowing you to select a report model, sort, defined filter, and summary.

After the defined filter is applied, the **Customize** dialog is highlighted by a red frame.

- Save sorting selection:** Click this heading to save the last sorting order of the search results in the **Name** column of the resulting table. The selection will be applied for the next search query.

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

REPORT LIST PAGE

After you [submit a report search](#), the Report List page appears. It displays a list of all reports that match your search criteria.

The list contains the following columns:

- Name
- Document Type
- Document Date
- Annotated
- Native
- Original
- Offline

- Premined

To sort the list in ascending order, click the column heading (**Name**, **Document Type**, or **Document Date**).

To display the list in descending order, click the column heading once again.

To apply a filter, click the  icon to the left of the list, select the appropriate type or document type, and then click **Apply Filter**.

To select multiple types, hold down the CTRL key, while you click their names, and then click **Apply Filter**.

Toolbars

The Report List page contains two toolbars at the top of the page.

1. The **Views** toolbar in the upper left corner of the Report List page contains the following icons:



Use this toolbar to display the list in one of the following available views:

-  **Document List**
-  **Report View**
-  **Dynamic View**
-  **Data View**
-  **Summary View**
-  **XLS Data View**
-  **XLS Summary View**
-  **PRF View**
-  **ES Style View**
-  **ES Report Style View**
-  **ES Style PDF**

To specify which reports from the list you want to display in a **Report View**, **Dynamic View**, **Data View**, **Summary View**, **XLS Data View**, **XLS Summary View**, **PRF View**, or **ES Style View**, select check boxes by their names on the list. To display all documents, select the check box by the **Name** column heading or select an area containing the items you want to display for multiple selection.

To display all reports, select the check box by the **Name** column heading.



NOTES

At the Reports List page you can select another report.

2. The toolbar in the upper right corner of the Report List page contains the following icons:



Use this toolbar to perform the following actions:



Mail

Click to display the **Mail** dialog box, allowing you to send links to selected reports via e-mail to other users.



Save

The **Save** dialog box allows you to save the current search to the database. If you save a search from the Report List page, the results of this search will be displayed only on the Report List page.

NOTE: You can use this option, if you have the **Save Search** privilege. Otherwise this button is not displayed on the screen.



Details

Click to display the details of the current search.



Request Off-line Documents

Click to open the **Request** dialog box , allowing to send a request for offline reports to system administrators.

NOTE: This icon is visible only if the selected document type contains offline reports.



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.



Export to TXT

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



Export to TXT

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

- Customize:** Click this heading to open a hidden section, allowing you to select a report model, sort, defined filter, and summary.

After the defined filter is applied, the **Customize** dialog is highlighted by a red frame.

- Save sorting selection:** Click this heading to save the last sorting order of the search results in the **Name** column of the resulting table. The selection will be applied for the next search query.

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

REPORT VIEW PAGE

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

To display search results on the **Report View** page, when viewing the document or report search results on the [Document List](#) or [Report List page](#), click  on the toolbar, in the upper left corner of the page.

Toolbars

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

1. The [Views toolbar](#) in the upper left corner of the **Report View** page is the same as the one available on the [Document List](#) or [Report List page](#). It contains the following icons:



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



Use this toolbar to perform the following actions.

- | | | |
|---|----------------------------------|---|
|  | Create Report Annotation | Click the right button to create a report annotation.
NOTE: This icon is available only for reports (not for documents). |
|  | Increase report font size | Click to increase the font size. |
|  | Decrease report font size | Click to decrease the font size. |
|  | Full-Text Search | Click to find text within report/documents.
NOTE: If the model contains a redaction, then the Full-Text Search icon is set as disabled. |
|  | Show/Hide Annotations | Click to show or hide annotation icons. |
|  | Consolidated View | Click to easily manage annotations. You can look through Report/Page/Select annotations, find and print them. For more information, see Consolidated View . |

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



Use this toolbar to perform the following actions.

- | | | |
|---|----------------------|---|
|  | Server Export | Click to export data to a server-based folder. |
|  | Mail | Click to display the Mail dialog box, allowing you to send links to selected documents via e-mail to other users. |
|  | Save | The Save dialog box allows you to save the current search to the database. If you save a search from the Document List page, the results of this search will be displayed only on the Document List page.
NOTE: You can use this option, if you have the Save Search privilege. Otherwise this button is not displayed on the screen. |

	Details	Click to display the details of the current search.
	Export to PDF	Click to open the selected document as a PDF file in the current window.
	Export to PDF	Click to open the selected document as a PDF file in a new window.
	View original Report	Click to open the original report.
	Export to TXT	Click to open the selected document as a TXT file in the current window.
	Export to TXT	Click to open the selected document as a TXT file in a new window.

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



NOTES

This icon is available only for reports (not for documents).

5. Point to the Report Annotation icon  to view the report annotation details. If there is no annotation created to the report, the Report Annotation icon is displayed as follows .
6. Point to the Page Annotation icon  to view the page annotation details. If there is no annotation created to the page, the Page Annotation icon is displayed as follows .
7. Click the PDF icon  to export the page to PDF. The page opens in a new window.

On the **Report View** page, you can also:

- Create [page and report annotations](#)
- Create [annotations for selected text](#)
- Manage [document states](#)

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

DATA VIEW PAGE

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



NOTES

The associated model file, specified by your system administrator, determines which fields, sorts and filters are available.



To display search results on the **Data View** page, when viewing the document or report search results on the [Document List](#) or [Report List page](#), click  on the toolbar, in the upper left corner of the page.

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

□ **Toolbars**

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

- The [Views toolbar](#) in the upper left corner of the **Data View** page is the same as the one available on the [Document List](#) or [Report List page](#). It 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.

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

**Toggle border**

Allows you to show/hide border in your view.

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

**Open View Definition**

Click to show the list of saved view definitions for **Summary View**.

**Save View Definition**

Click to save the current view definition.

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



Use this toolbar to perform the following actions:

**Delete selected documents**

Click to remove selected documents from the database.

NOTE: You can use this option, if you have the **Delete Document** privilege. Otherwise this button is not displayed on the screen.

**Mail**

Click to display the **Mail** dialog box, allowing you to send links to selected documents via e-mail to other users.

**Save**

The **Save** dialog box allows you to save the current search to the database. If you save a search from the Document List page, the results of this search will be displayed only on the Document List page.

NOTE: You can use this option, if you have the **Save Search** privilege. Otherwise this button is not displayed on the screen.

**Details**

Click to display the details of the current search.

**Export to PDF**

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

**Export to PDF**

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

**Download as CSV**

Click to download the current document list in the CSV format.

- 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.**
- Execute Export:** Click this button to apply the changes made in the **Customize** section.

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

SUMMARY VIEW PAGE

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

To display search results on the Summary View page, when viewing the document or report search results on the

[Document List](#) or [Report List page](#), click  on the toolbar, in the upper left corner of the page.

NOTE: 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 MSClient on the Summary View page.

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

□ Toolbars

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

- The [Views toolbar](#) in the upper left corner of the **Summary View** page is the same as the one available on the [Document List](#) or [Report List page](#). It 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.

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



Toggle border

Allows you to show/hide border in your view.

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



Open View Definition

Click to show the list of saved view definitions for **Summary View**.



Save View Definition

Click to save the current view definition.

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



Use this toolbar to perform the following actions.



Delete selected documents

Click to remove selected documents from the database.

NOTE: You can use this option, if you have the **Delete Document** privilege. Otherwise this button is not displayed on the screen.



Mail

Click to display the **Mail** dialog box, allowing you to send links to selected documents via e-mail to other users.



Save

The **Save** dialog box allows you to save the current search to the database. If you save a search from the Document List page, the results of this search will be displayed only on the Document List page.

NOTE: You can use this option, if you have the **Save Search** privilege. Otherwise this button is not displayed on the screen.



Details

Click to display the details of the current search.



Export to PDF

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



Export to PDF

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

- 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** section.

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

XLS DATA VIEW PAGE

To display document or report search results in an Excel worksheet, on the [Document List](#) or [Report List page](#), click  on the toolbar, in the upper left corner of the page.

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

Note. 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, for online documents only. If selected documents have different document types, a table will not be displayed.

On the **XLS Data View** page, you can customize the list and specify which fields should be visible.

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

- [Views toolbar](#) in the upper left corner of the **XLS Data View** page is the same as the one available on the [Document List](#) or [Report List page](#). It contains the following icons:



- 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 for selected document type or document types has not summaries, a warning message appears.

To display a summary in an Excel worksheet, on the [Document List](#) or [Report List page](#), click  on the toolbar, in the upper left corner of the page.

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 summary on the **XLS Summary View** page.

The **XLS Summary View** page allows you to display one or several xls-summaries in an Excel worksheet, for online documents only. If selected documents have different document types, a summary will not be displayed.

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

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

- ❑ [Views toolbar](#) in the upper left corner of the **XLS Summary View** page is the same as the one available on the [Document List](#) or [Report List page](#). It contains the following icons:



- ❑ **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:** Click this button to apply the changes made in the **Customize** section. 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 documents only.



NOTES

NOTE: To use prf-reports, you need Monarch Report Explorer installed on your computer.)

To display document or report search results as a PRF file, on the [Document List](#) or [Report List page](#), click  on the toolbar, in the upper left corner of the page. 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:

- ❑ [Views toolbar](#) in the upper left corner of the **PRF View** page is the same as the one available on the [Document List](#) or [Report List page](#). It contains the following icons:



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



Use this toolbar to perform the following actions.



Delete selected documents

Click to remove selected documents from the database.

NOTE: You can use this option, if you have the **Delete Document** privilege. Otherwise this button is not displayed on the screen.



Mail

Click to display the **Mail** dialog box, allowing you to send links to selected documents via e-mail to other users.



Save

The **Save** dialog box allows you to save the current search to the database. If you save a search from the Document List page, the results of this search will be displayed only on the Document List page.

NOTE: You can use this option, if you have the **Save Search** privilege. Otherwise this button is not displayed on the screen.



Details

Click to display the details of the current search.

- **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).

To view a report, on the [Document List](#) or [Report List page](#) select documents you want to view a report for, and click  on the toolbar, in the upper left corner of the page.

The **ES Style View** page contains the following items:

- **Views toolbar** in the upper left corner of the **ES Style View** page is the same as the one available on the [Document List](#) or [Report List page](#). It contains the following icons:



- 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.



Delete selected documents

Click to remove selected documents from the database.

NOTE: You can use this option, if you have the **Delete Document** privilege. Otherwise this button is not displayed on the screen.

	Print	Click to print the report.
	Mail	Click to display the Mail dialog box, allowing you to send links to selected documents via e-mail to other users.
	Save	The Save dialog box allows you to save the current search to the database. NOTE: You can use this option, if you have the Save Search privilege. Otherwise this button is not displayed on the screen.
	Details	Click to display the details of the current search.
	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](#).
- Execute Export:** Click this button to apply the changes made in the **Customize** section.

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

ES REPORT STYLE VIEW PAGE

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

To view a report, on the [Document List](#) or [Report List page](#) select documents you want to view a report for, and click



on the toolbar, in the upper left corner of the page.

The **ES Report Style View** page contains the following items:

- [Views toolbar](#) in the upper left corner of the **ES Report Style View** page is the same as the one available on the [Document List](#) or [Report List page](#). It contains the following icons:



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



Use this toolbar to perform the following actions.



Delete selected documents

Click to remove selected documents from the database.

NOTE: You can use this option, if you have the **Delete Document** privilege. Otherwise this button is not displayed on the screen.



Print

Click to print the report.

	Mail	Click to display the Mail dialog box, allowing you to send links to selected documents via e-mail to other users.
	Save	The Save dialog box allows you to save the current search to the database. NOTE: You can use this option, if you have the Save Search privilege. Otherwise this button is not displayed on the screen.
	Details	Click to display the details of the current search.
	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 report model, and a template. Click a drop-down arrow to expand the list of available options.
- Execute Export:** Click this button to apply the changes made in the **Customize** section.

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

ES STYLE PDF PAGE

The **ES Style PDF** page displays the [ES Style View](#) as a PDF file.

To view a report, on the [Document List](#) or [Report List page](#) select documents you want to view a report for, and click

 on the toolbar, in the upper left corner of the page.

The **ES Style PDF** View page contains the [Views toolbar](#) in the upper left corner.



It is the same as the one available on the [Document List](#) or [Report List page](#).

NATIVE VIEW PAGE

The **Native View** page displays documents in exactly the same format as they were filed into the system. This is useful for processing any file or document that does not require index values, extraction, and mining from its content.

Native documents require licensing of this option. To display native documents, the client's computer will require a viewer (for example, XLS documents will require MS Excel application or viewer).

To display documents on the **Native View** page

When viewing document search results:

1. On the [Document List](#), click the name of a native document.

2. Click  on the toolbar, in the upper left corner of the page.

When viewing report search results:

1. On the [Report List](#), click the name of a native document.

2. Click the  icon that will appear by its name.

On the **Native View** page, you can:

- Manage [document states](#).
- Save the document to your computer by clicking the **Download** button.

DYNAMIC VIEW REPORT

The **Dynamic View** presents a report based on premed table data. The structure of dynamic table data is derived from the Monarch data model, assigned to the document type. The data is put into the DS database during the indexing (filing) process.

On the Dynamic View Report page, you can modify the fields hierarchy, display and hide fields, apply dynamic filters, add calculated fields, joined fields and statistic fields. The resulting view definition can be saved to the DS database for reusing.

To display the **Dynamic View Report**, on the [Document List](#) or [Report List page](#), click  on the **Views** toolbar, in the upper left corner of the page.



NOTES

The **Dynamic View Report** is available only under the Report Writing license.

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

- [Views toolbar](#) in the upper left corner of the **Dynamic View Report** page is the same as the one available on the [Document List](#) or [Report List page](#). It contains the following icons:



- The toolbar in the upper right corner of the page:



Use this toolbar to perform the following actions.



Filter View Data

Click to open the Dynamic Filters dialog box, allowing you to specify additional search criteria, including several conditions.



Calculated Fields

Click to **add a calculated field**.



Join Data

Click to **add a joined 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.



Save

The **Save** dialog box allows you to save the current search to the database. If you save a search from the **Document List** page, the results of this search will be displayed only on the Document List page.

NOTE: You can use this option, if you have the **Save Search** privilege. Otherwise this button is not displayed on the screen.

- 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.
- Statistic fields:** 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.
- View Report:** Click this button to view a report in a new window.

Dynamic Filters

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

To display the **Dynamic Filters** dialog box, click  on the [Dynamic View Report](#) 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 a field from the drop-down list, displaying all data fields from the model, all calculated fields and all join fields available to the user for this document type.
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 ✕.



Use data columns: It is now possible to create filters using variables existing in the current Dynamic View, including data from the **Calculated** columns and fields that are added via **Joined Data**. To use this feature, activate the check box following the relational operator.

The following example shows how dynamic filters work:

Dynamic Filter:

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

- Level 1: ✕ [AND] +
- Level 2: ✕ [AND] +
 - Level 3: ✕ [Report Date] [=] [03/03/2012] +
 - Level 3: ✕ [OR] +
 - Level 4: ✕ [Order Number] [<>] [536020] +
 - Level 4: ✕ [Contact] [Con] [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**).

Aggregation

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

The aggregation 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 2 types of aggregation fields:

1. Plain aggregation fields, which are displayed in the same way as all other fields.
2. Total fields, which are displayed under the columns, for which they are calculated, if the columns are present in the view, or behave like plain aggregation 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 plus sign 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** check box 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.

You can change the level of a field in the **Dynamic View**, by dragging 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. DS 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.

Joining Definition List Dialog Box

In the **Dynamic View**, you can join report data to the data of all reports of a document type. The feature allows assembling the joined data into one final analysis form.

There are 2 types of Join Definitions:

1. Dynamic Join Definition is not stored in the database and is valid only in the current view.
2. Saved Join **Definition** is stored in the database and belongs to a View Definition. A Join Definition can't be saved until the corresponding View Definition is saved.

To define a Join Definition

1. On the [Dynamic View Report page](#), click  to open the **Joining Definition List** dialog box. It displays joining definitions for the Dynamic View Report.
2. Click **Add** to define a new Join Definition.
3. In the **Name** box, enter the name of a new Join Definition.
4. Select the **Document type group** and **Document type** in the appropriate fields.

5. Select fields for joining from the list labeled **Available Join Fields**.
6. Under the **Join Type** heading, click the drop-down arrow, to define the join type. Two standard database join types are supported:
 - **Inner join**. Inner join uses a comparison operator to match rows from the base data table and joining data table, based on the values in common columns from each table.
 - **Outer join**. The result set of an outer join includes all the rows from the base data table, not just the ones in which the joined columns match. When a row in the base data table has no matching rows in the joining data table, the associated result set row contains null values for all of the select list columns coming from the joining table.
7. Define the **Source Key Field** and the **Destination Key Field** for joining. To display the list of available fields, click the drop-down arrow.
8. In the box, in the lower-right corner of the dialog box, select fields for joining.
9. Click **OK** to apply the created Join Definition to the current view.

The Join Definition is not saved to the database.

To save the Join Definition to the database, click Save View Definition on the Dynamic View page. The Join Definition cannot be saved separately from the View Definition. It is saved on the same level as filters and calculated fields.

The columns with joined data will be placed in the Dynamic View after the base data columns and will look like the original report data columns. Only the sort operation can be performed with the joined columns. All other operations on joined data are available via the **Joining Definition** dialog box only.

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, as well as any document type definitions that other Monarch Server users have saved and granted other users access to.

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** 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 to the DS database.

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

- Name**: Type the name of a view definition.
- Document Group**: Displays the document group the documents belong to.
- 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.

- Fields:** Displays the fields 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. This is shown only for the users who have System Administrator rights.
- 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 the search.

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**.

Exporting Dynamic View Report to PDF

To export the Dynamic View Report to PDF

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**.

VIEWING THE RESULTS OF SAVED SEARCHES

To view the results of previously configured and saved searches

1. Click the **Saved Views** tab.
2. Click the name of a search that you want to view the results of. The [Document List](#) or [Report List page](#) appears, displaying the search results.
3. Select the document(s) you want to view from the ones listed.



NOTES

If you want to display all search results, select the check box by the **Name** column heading.

4. On the **Views** toolbar, in the upper left corner of the **Document List** page or **Report List** page, click an appropriate icon (for example, **Report View**, **Data View**, and so on). The results are displayed in the view you selected.

APPLYING FILTERS, SORTS AND SUMMARIES TO SEARCH RESULTS

If [filters](#), [sorts](#) and [summaries](#) are defined in the Monarch model file, they are available in MSCClient, and you can apply them to your search results.

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

To apply a filter, sort or summary to search results, when viewing search results 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 search results, click **Execute Export**.

VIEWING SEARCH DETAILS

After saving or submitting a search, you can view detail information about the search, such as the [document group](#) and [document type](#) specified in the search. You can view search details from any of the view search results pages (for example, Document List page, Report View page, and so on).

To do this, after configuring and submitting a search, when viewing the search results, click  on the toolbar in the upper right corner of the page.

The **Details** window opens, displaying the detailed information about:

- Document Groups** specified in the search.
- Document Types** specified in the search.
- From:** the starting date of the date range specified in the search.
- To:** the ending date of the date range specified in the search.
- Current View** (for example, Document List, Report, Data, and so on).
- Current Filter:** filter currently assigned to the search results.
- Current Sort:** sort currently assigned to the search results.
- Current Summary:** summary currently assigned to the search results.
- Filtered Document Types:** document types, to which filters are applied in Advanced Search.
- Filtered Types:** types of filters applied (Annotated, Premined, Native, and so on).

PRINTING SEARCH RESULTS

When you submit a search, the [Document List page](#) appears, displaying documents that match your search criteria.

Using the [Views toolbar](#), in the upper left corner of the page, you can select the search view that you want to print the results in.

You can print search results in the following ways:

- From within MSCClient:** When viewing the search results on the [Document List](#), [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 the search results to a PDF file](#), then print them from Adobe Acrobat. To do so, in Adobe Acrobat, on the **File** menu, click **Print**.

EXPORTING SEARCH RESULTS TO PDF

In MSCClient, you can export search results to PDF (portable document format).



NOTES

Adobe Acrobat should be installed on your computer.



To export search results to PDF

1. On the [Document List](#), [Report List](#), [Report View](#), [Summary View](#) or [Data View](#) page, on the toolbar in the upper right corner of the page, click  to open the selected document 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.

EXPORTING SEARCH RESULTS TO TXT

In MSCClient, you can export search results to TXT (text format). All exporting is done via the Document List, Report List or Report View page.

To export search results to TXT

1. On the [Document List](#), or [Report List](#) page, on the toolbar in the upper right corner of the page, select documents or reports you want to export.
2. To open the selected document:
 - In the current window, click .
 - In a new window, click .
3. In the **Open** dialog box, select one of the following options:
 - Open with (select a program from the list)
 - Save file
4. Click **OK**.

SENDING SEARCH RESULTS

You can send the search results via e-mail to other Monarch Server users. When you send search results, the specified recipient receives an e-mail message, which contains a link and any comments you have made. When the recipient clicks the link, MSCClient is launched on their machine and the search results are displayed on the Document List page.

NOTE: Recipients can only view the search results if the system administrator has assigned the required document type to them.

To send search results

1. On the **Document List** (or any other view search results page, for example, Report View, Data View, etc.) click . The **Mail** dialog box opens.
2. Select users you want to send the search results to, by dragging their names from the **Users** pane to the **Send To** pane.
3. If you want to send search results to a user who is not listed in the **Users** pane, enter their e-mail address in the **E-mail** field, then click **Add** to add them to the **Send To** field.
4. To send a text comment with the e-mail, type it in the **Comments** field.
5. Click **Send** to send the search results to the specified recipient(s) (or click **Cancel** to close the window without sending the search).

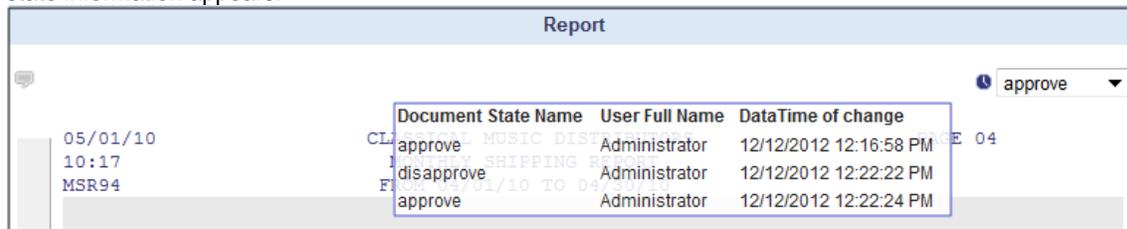
MANAGING DOCUMENT STATES

If document states are defined for a particular document type in MSAdmin, they are available in MSCClient. According to the assigned to you rights, you can

- View the document state information
- Set document states
- Edit document states

To view the document state information

- Move mouse pointer to the **Clock** image in the upper right corner of the report. The box displaying document state information appears.



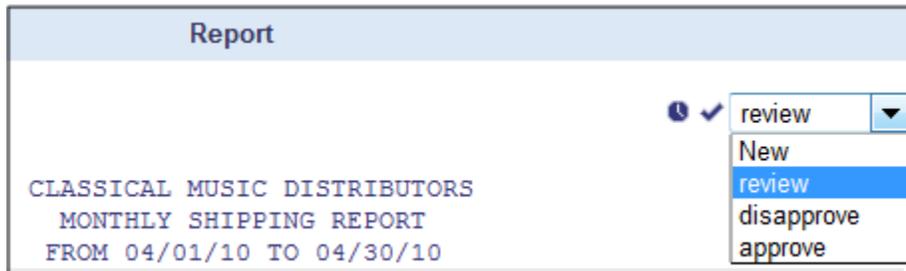
To set the document state

1. Select the necessary state from the drop-down list.
2. Click the check mark, to confirm selection.



NOTES

The **Document State** box appears dimmed after setting the state, if you don't have the right to edit states. The **Document State** box remains active, if you have the right to edit states.



To edit the document state

1. Select the necessary state from the drop-down list.
2. Click the check mark, to confirm selection.

SPECIFYING DYNAMIC FILTERS

To specify a dynamic filter

1. In the Customize section that is made visible by clicking , under the **Dynamic Filter** heading, click **+**. A row of fields will appear.
2. Select a Boolean operator (**AND** or **OR**) from the list. While the **AND** operator can be used to link search criteria of different index fields, the **OR** operator can only be used to link search criteria of the same index field.
3. Select an field from the list. The list contains fields that are used in the selected document types.
4. Select a relational operator: equal to (=), not equal to (<>), less than (<), greater than (>), less than or equal to (<=), greater than or equal to (>=), contains, ends with, starts with.
5. Enter a value in the box. To select a value from the list of available values, click the drop-down arrow on the right.
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**.

You can save this combination of search conditions, by clicking the **Save Filter** button. Next time when you search for documents, you can apply this filter, by selecting it from the drop-down list, and clicking the **Add Filter** button.

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 check box 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 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 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.

ANNOTATIONS AND NOTIFICATIONS

The following sections provide information about:

- ❑ [Annotations](#)
- ❑ [Search Notifications](#)
- ❑ [System Notifications](#)
- ❑ [Filing Notifications](#)

ADDING AN ANNOTATION TO A REPORT

You can add the following annotations to documents or reports:

- ❑ Report-level annotations that apply to the whole report.
- ❑ Page-level annotations that apply to a page of a report.
- ❑ Text-level annotations that apply to selected text of a report.

You can add annotations to documents, if your system administrator has granted you the **Create Annotation** privilege. If you have not been granted this privilege, you can still view annotations that have been assigned to you by other MSClient users.



NOTES

An administrator can forbid adding and deleting annotations by all users.

To add a report annotation

1. When viewing report search results on the [Report View page](#) (click  to do so), click  on the toolbar, in the upper left corner of the page. The **Report Annotation** dialog box is displayed.
2. In the **Annotation** field, type the message you want to attach to the report.
3. Click the **Role**, **Groups** and **Users** headings to expand hidden sections, where you can select the roles, groups and users you want the annotation to be visible to. To select a role, group or user, drag their name from the left pane to the right pane (in an appropriate section).
4. Click **Save** to save the annotation (or click **Cancel** to exit the **Report Annotation** dialog box without saving).



NOTES

If the annotation to the report is created, you can view its details on the

[Report View page](#) by pointing to the **Report Annotation** icon . If there is no annotation created to the report, the **Report Annotation** icon

is displayed as follows



To add a page annotation

1. When viewing document or report search results on the [Report View page](#) (click  to do so), right-click the  icon, placed in the top left corner of each page. The **Page Annotation** dialog box is displayed.
2. Click Create page annotation.
3. In the **Annotation** field, type the message you want to attach to the current page.
4. Click the **Role**, **Groups** and **Users** headings to expand hidden sections, where you can select the roles, groups and users you want the annotation to be visible to. To select a role, group or user, drag their name from the left pane to the right pane (in an appropriate section).
5. Click **Save** to save the annotation (or click **Cancel** to exit the **Page Annotation** dialog box without saving).

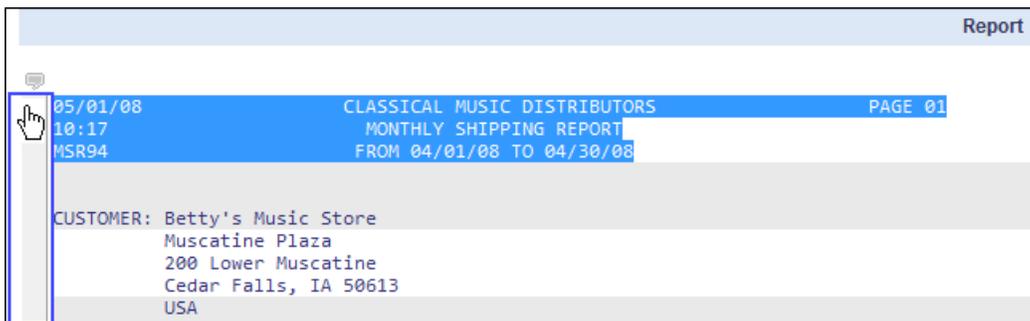


NOTES

If the annotation to the page is created, you can view its details on the [Report View page](#) by pointing to the **Page Annotation** icon . If there is no annotation created to the page, the **Page Annotation** icon is displayed as follows .

To add a text annotation to a document (or report)

1. When viewing document or report search results on the [Report View page](#) (click  to do so), select the text you want to attach the annotation to. You can select the text directly in the report or by using the left-column area:
 - a. With the left mouse button single-click to select current line.
 - b. Hold the button and drag down/up to highlight multiple lines.



2. Click the right mouse button, and select **Create select annotation** on the menu. The **Select Annotation** dialog box is displayed.
3. In the **Annotation** field, type the message you want to attach to the selected text.
4. Click the **Role**, **Groups** and **Users** headings to expand hidden sections, where you can select the roles, groups and users you want the annotation to be visible to. To select a role, group or user, drag their name from the left pane to the right pane (in an appropriate section).

5. To save the annotation, click **Save** (or click **Cancel** to exit the **Select Annotation** dialog box without saving).

VIEWING ANNOTATIONS

When a MSClient user [adds an annotation to a document](#), they specify the role members, group members and users to whom they want the annotation to be visible. Any user who subsequently views that document, and to whom the annotation has been assigned, will be able to view the text message.

- ❑ **Report Annotation:** When viewing report search results on the [Report View page](#), move the pointer over the  icon, in the upper left corner of the page. A pop-up window will appear displaying a text message, along with the author name, creation date and report name.
- ❑ **Page Annotation:** When viewing search results on the Report View page, move the pointer over the  icon in the top left corner of a page. A pop-up window will appear displaying a text message, along with the author name, creation date and report name.
- ❑ **Text Annotation:** When viewing search results on the Report View page, when you see a highlighted portion of text, pause your mouse pointer over it. A pop-up window will appear, displaying a text message, along with the author name, creation date and report name.

SEARCH NOTIFICATIONS

Search notifications are an automated way of notifying Monarch Server users via e-mail that a scheduled search has been run. Only authorized users of the Monarch Server system may receive search notifications.

A scheduled search runs at a certain time according to its specified execution frequency. Search notifications automatically trigger an e-mail to specified users, notifying them that the search has occurred, and providing a link to the resulting document list. Users may subscribe to permitted notifications from MSClient.

Search notifications are listed on the **Search Notifications** page, which you can use to [add](#), [edit](#), [remove](#), [subscribe to or unsubscribe](#) from notifications.

To display the **Search Notifications** page, click **Preferences** in the upper right corner of the page, and in the **Preferences** dialog box, select the **Search Notifications** tab.

To subscribe to a search notification, drag its name from the **Available Search Notifications** pane to the **Assigned Search Notifications** pane, and click **Save**.

To unsubscribe from a search notification, click  by its name, in the **Assigned Search Notifications** pane, and click **Save**.

Unlike [system notifications](#), search notifications are not predefined.



NOTES

You can only create, edit and delete notifications, if you have been granted **Create Notification** rights by your system administrator. If you have not been granted notification rights, however, and another Monarch Server user with notification rights assigns a notification to you, you can still select it (that is, turn it on) and be notified, when a search occurs.

The creator of the notification automatically receives the rights to the notification.



Adding a Search Notification

To add a search notification

1. In the upper right corner of the page, click **Preferences**.
2. In the **Preferences** dialog box, select the **Search Notifications** tab.
3. Click the **Add** button. The **Search Notification** page appears.

The Search Notification page contains the following items:

- **Search Notification Name box:** Enter a unique name for a notification.
- **Search Group drop-down list:** Select the search group that contains the search you want to apply a notification to.
- **Searches box:** Select the search that you want to apply a notification to. Available searches are determined by the search group you specified earlier.



NOTES

To search for a particular query type (part of) its name in the **Filter by** field, and click **Apply**.

- **Execution Frequency:** To [set the periodicity](#) of launching the notification, select an appropriate option and fill in additional fields that appear.
- **Save:** Click to save the new notification.
- **Clear:** Click to clear all the boxes.
- **Cancel:** Click to cancel the operation.
- Fill in the boxes of the page and click **Save**.



NOTES

At a specified time the search runs, and all users, who subscribed to the notification, receive an e-mail notification.

Editing a Search Notification

To edit a search notification

1. In the upper right corner of the page, click **Preferences**.
2. In the **Preferences** dialog box, select the **Search Notifications** tab.
3. Click  by the name of the task you want to edit.
4. The **Search Notification** page appears. For details about how to change its items, see [Adding a Search Notification](#).
5. Make the necessary changes and click **Save**.

Deleting a Search Notification

To delete a search notification

1. In the upper right corner of the page, click **Preferences**.
2. In the **Preferences** dialog box, select the **Search Notifications** tab.
3. To delete a search notification from the system, click  by its name.



NOTES

If you want to unsubscribe from a search notification, click  by its name, in the **Assigned Search Notifications** pane, and click **Save**.

Subscribing to a Search Notification

To subscribe to a search notification

1. In the upper right corner of the page, click **Preferences**.
2. In the **Preferences** dialog box, select the **Search Notifications** tab.
3. Drag a notification name from the Available Search Notifications pane to the Assigned Search Notifications pane.
4. Click **Save**.



NOTES

To unsubscribe from a search notification, click  by its name, in the **Assigned Search Notifications** pane, and click **Save**.

SYSTEM NOTIFICATIONS

System notifications are an automated way of notifying Monarch Server users via e-mail that a particular system event has occurred. Only authorized users of the Monarch Server system may receive notifications.

The events that trigger system notification are predefined and cannot be edited or deleted. Typically, these types of notifications are sent to system administrators who are monitoring the system. Users may select, which of the notifications are sent to them. Notifications may be sent to more than one user.

System notifications are listed on the **System Notifications** page.

To subscribe to a system notification

1. In the upper right corner of the page, click **Preferences**.
2. In the **Preferences** dialog box, select the **System Notifications** tab.
3. Drag appropriate items from the Available System Notifications pane to the **Assigned System Notifications** pane.

4. Click **Save**.



NOTES

To unsubscribe from a system notification, click  by its name, in the **Assigned System Notifications** pane, and click **Save**.

Users may receive notifications for the following event types:

- FILING - Filing process completion events:** Sends an e-mail to the user whenever any filing process completes.
- FILING - Filing process - Database error events:** Sends an e-mail to the user whenever a database error occurs during a filing process.
- FILING - Filing process - Generic error events:** Sends an e-mail to the user whenever a non-specific error occurs during a filing process.
- FILING - Filing process - Disk off-line error events:** Sends an e-mail to the user whenever a disk offline error occurs during a filing process.
- FILING - Filing process - Not enough space error events:** Sends an e-mail to the user whenever insufficient space error is encountered during a filing process.
- FILING - Filing process - File system error events:** Sends an e-mail to the user whenever a file system error is encountered during a filing process.
- FILING - Filing process - No sub volume error events:** Sends an e-mail to the user whenever no sub-volume error is encountered during a filing process.
- MAINTENANCE - Maintenance process completion events:** Sends an e-mail to the user whenever any maintenance process completes.
- DISK_OFFLINE - Offline disk request events:** Sends an e-mail to the user whenever any offline disk request is issued.
- VOLUME_FULL - Volume full events:** Sends an e-mail to the user whenever a volume becomes full.
- VOLUME_ALMOST_FULL - Volume almost full events:** Sends an e-mail to the user whenever a volume has less than 2 x Storage Group size free.
- LAST_VOLUME - Last volume usage events:** Sends an e-mail to the user whenever documents begin to be archived in the last volume in a storage group.
- ONLY_ARCHIVE_REPORT - Working report request events:** Sends an e-mail to the user whenever a request is submitted to restore an archived report to a working state.
- FILE_OFFLINE - Offline file request events:** Sends an e-mail to the user whenever an offline file request is made.
- ERROR - All error events:** Sends an e-mail to the user whenever any process results in an error condition.
- WARNING - All warning events:** Sends an e-mail to the user whenever any process receives a warning.
- SEARCH - New search creation events:** Sends an e-mail to the user whenever a new search is created.

FILING NOTIFICATIONS

Filing notifications are an automated way of notifying Monarch Server users via e-mail that a filing event has occurred. Only authorized users of the Monarch Server system may receive filing notifications.

Filing notifications are listed on the **Filing Notifications** page, which you can use to [add](#), [edit](#), [remove](#), [subscribe to](#) or [unsubscribe](#) from notifications.

To display the **Filing Notifications** page, click **Preferences** in the upper right corner of the page, and in the **Preferences** dialog box, select the **Filing Notifications** tab.

To subscribe to a filing notification, drag its name from the **Available Filing Notifications** pane to the **Assigned Filing Notifications** pane, and click **Save**.

To unsubscribe from a filing notification, click  by its name, in the **Assigned Search Notifications** pane, and click **Save**.

Adding a Filing Notification

To add a filing notification

1. In the upper right corner of the page, click **Preferences**.
2. In the **Preferences** dialog box, select the **Filing Notifications** tab.
3. Click the **Add** button. The Filing Notification page appears.

The **Filing Notification** page contains the following items:

- **Filing Notification Name:** Enter a unique name of a new notification.
 - **Filing Description:** Optionally, enter any text defining the filing notification.
 - **Document Groups:** Select a document group that contains the document type you want to apply the notification to.
 - **Document Types:** Select the document types to be included in the filing notification definition, by dragging their names from the left pane to the right pane.
 - **Run immediate:** Select this check box to execute the filing notification immediately upon the filing completion event. Each filing notification will be sent as an individual e-mail.
 - **Execution Frequency:** These options become available if you have not selected the Run immediate check box. You can set the [frequency of executing](#) filing notifications.
 - **Save:** Saves a new or existing filing notification definition.
 - **Clear:** Clears all the boxes.
 - **Cancel:** Cancels the operation.
4. Fill in the boxes of the page, and click **Save**.

Editing a Filing Notification

To edit a filing notification

1. In the upper right corner of the page, click **Preferences**.
2. In the **Preferences** dialog box, select the **Filing Notifications** tab.
3. Click  by the name of the task you want to edit.
4. The Filing Notification page appears. For details about how to change its items refer to [Adding a Filing Notification](#).
5. Make the necessary changes and click **Save**.

Deleting a Filing Notification

To delete a filing notification

1. In the upper right corner of the page, click **Preferences**.
2. In the **Preferences** dialog box, select the **Filing Notifications** tab.
3. To delete a filing notification from the system, click  by its name.



NOTES

If you want to unsubscribe from a filing notification, click  by its name, in the **Assigned Filing Notifications** pane, and click **Save**.

Subscribing to a Filing Notification

To subscribe to a filing notification

1. In the upper right corner of the page, click **Preferences**.
2. In the **Preferences** dialog box, select the **Filing Notifications** tab.
3. Drag a notification name from the Available Filing Notifications pane to the Assigned Filing Notifications pane.
4. Click **Save**.



NOTES

To unsubscribe from a filing notification, click  by its name, in the **Assigned Filing Notifications** pane, and click **Save**.

OFFLINE PROCESSING

Tasks can be processed offline, if the requested data exceeds the size limit for a view type.

The following sections provide information about:

- ❑ [How to create offline tasks](#)
- ❑ [How to manage offline tasks](#)
- ❑ [How to display processing results](#)

CREATING OFFLINE PROCESSING TASK

If you create a data view, and the requested data exceeds the size limit for this view type, the task will be processed offline. A dialog box will appear, asking whether you want to process the request offline.

Enter the name of an offline task, and click **Process documents offline**.

Offline tasks will be processed based on the processing schedule, determined by the system administrator.

Links to Offline Tasks and their status will appear on the [My Home](#) tab.

MANAGING OFFLINE PROCESSING TASKS

Offline processing tasks are displayed on the [My Home page](#). The page displays offline tasks created by users, sorted by creation date (descending), and then by view type (ascending).

The **Offline Processing Tasks** pane contains the following columns:

- ❑ **Task Name:** Displays the task name.
- ❑ **Creation date:** Displays the date and time the task was created.
- ❑ **View Type:** Displays the view, from which the task was created.
The following views can be displayed: **Data**, **Summary**, **Excel**, **PRF**.
- ❑ **State:** Displays the state of the offline task. It can be one of the following: **Ready**, **Processing** or **Pending**.

To view the results of the offline task, click its name.



NOTES

You can view results of tasks in the **Ready** state only.

To remove a task, select it by clicking anywhere on the row, and click . A dialog box will appear. Click **Delete** to confirm the operation.

DISPLAYING PROCESSING RESULTS

Processing results can be accessed in two ways:

- ❑ From the **Offline Processing** pane on the [My Home Page](#), by clicking an offline task name.
- ❑ From an e-mail notification.

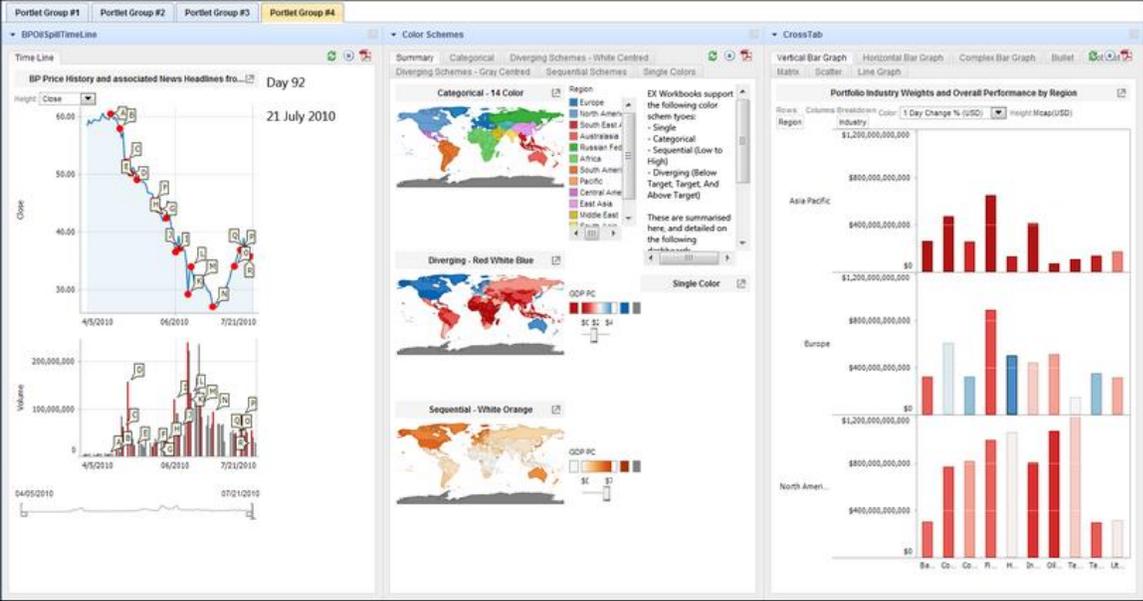
After opening an HTML page attached to an e-mail notification, you will be redirected to the login page of the Web Client. Then, the corresponding data view will be opened:

- ❑ **Displaying Tables and Summaries:** For the **Data** and **Summary View** types the data is shown inside the data frame of the Web Client on the corresponding view tab.
- ❑ **Displaying results of Excel and PRF types:** These results are shown inside the data frame of the Web Client on the corresponding view tab.
- ❑ **Displaying results of PDF type:** Results of the PDF type are shown inside a separate browser window.

PORTLETS

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

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



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.

CUSTOMIZING YOUR PREFERENCES

There are a number of settings that you can change to customize MSCClient.

You can specify:

- [Output settings](#)
- [Site style](#)
- [Password](#)

SPECIFYING OUTPUT SETTINGS

The **Output Settings** page is displayed when you click **Preferences** in the upper right corner of the MSCClient window. Use this page to specify output settings for MSCClient, such as a home page, document sort order, date format and so on.

The **Output Settings** page contains the following items:

Output Settings

- Home Page:** Select a home page from the list. The home page is the first page (or tab) to display when you log on to MSCClient. You can select from **My Home**, **Saved Views**, **Dashboards**, **Document Search**, or **Report Search**.
- Document Search page:** Select a Document Search page to be opened, when you click the **Document Search** tab. You can select either Simple Search or Advanced Search.
- Report Search page:** Select a Report Search page to be opened, when you click the **Report Search** tab. You can select from Reports List, Simple Search or Advanced Search.
- Document Sorting:** The document sort order determines the order in which documents are listed on the **Document List** page. Select one of the following options from the list:
 - **Document Name (Ascending, default sort order):** Sorts the documents in ascending order (that is, alphabetically or numerically from first to last) according to their names.
 - **Document Name (Descending):** Sorts the documents in descending order (that is, alphabetically or numerically from last to first) according to their names.
 - **Document Date (Ascending):** Sorts the documents in ascending order (that is, numerically from first to last) according to their dates.
 - **Document Date (Descending):** Sorts the documents in descending order (that is, numerically from last to first) according to their dates.
- Report Sorting:** The report sort order determines the order in which reports are listed on the Report List page. Select one of the following options from the list:
 - **Report Name (Ascending, default sort order):** Sorts the reports in ascending order (that is, alphabetically or numerically from first to last) according to their names.
 - **Report Name (Descending):** Sorts the reports in descending order (that is, alphabetically or numerically from last to first) according to their names.
 - **Report Date (Ascending):** Sorts the reports in ascending order (that is, numerically from first to last) according to their dates.

- **Report Date (Descending):** Sorts the reports in descending order (that is, numerically from last to first) according to their dates.
- ❑ **Maximum Search Result Documents:** Specify the maximum number of documents to be listed on the Document List page.
 - **Use old style for search results:** Select this check box if you want the search results to be displayed in the format of Monarch BI Enterprise Server v5.2.
 - **Display all document/report results:** Select this check box to display all document/report results on a single page.
 - **Allow multiple Document Type selection in Simple Search:** By default you can select only one document type on the Simple Search page. This check box allows selecting several document types, for compatibility with previous versions of the Monarch Server system.
 - **Reuse last search query conditions:** Select this check box, if you want the system to remember the dates specified for Simple or Advanced Document/Report Search and to display them when you return to the search page.
 - **Show query info in toolbar:** Select this check box, if you want to enable the query info toolbar and see it when viewing documents/reports.
 - **Close the pop-up views toolbar on mouse over:** Select this check box, if you want the **Views** toolbar to disappear when the mouse pointer is moved away from it.
 - **Direct view on single result on Reports List:** Select this check box to enable direct opening of the report view when clicking its name. This is valid for if the user has the rights only for one type of report view.
- ❑ **Excel Output:** Use XLSX Excel spreadsheet format: Select this check box to use the XLSX format for Excel output.



NOTES

This format requires Office 2007 installed on the client computer.



- ❑ **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

- ❑ **Date Format:** Select one of the following options to specify a date format for your searches:
 - mm/dd/yyyy: Select to use the month/day/year date format in searches.
 - dd/mm/yyyy: Select to use the day/month/year date format in searches.

- ❑ **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.

E-mail

- ❑ **Mail address:** Specify the e-mail address.

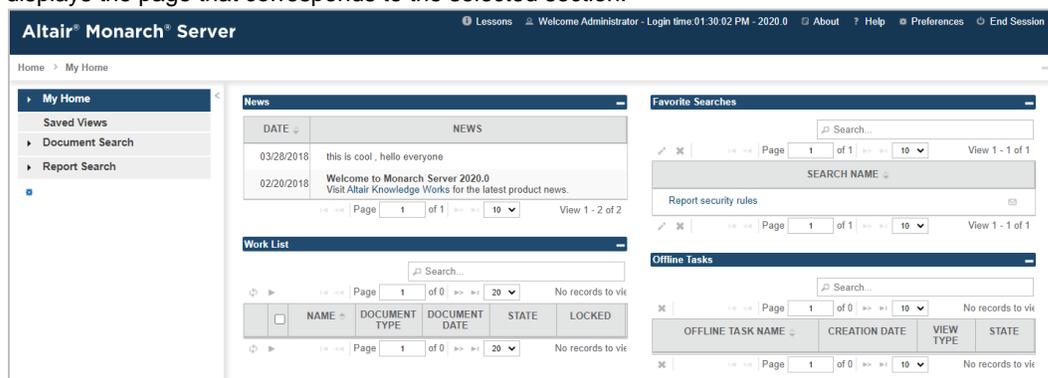
When you made your changes

- ❑ **Save:** Click to save the current output settings.
- ❑ **Clear:** Click to cancel any changes you have made to the output settings.
- ❑ **Close:** Click to close the window.

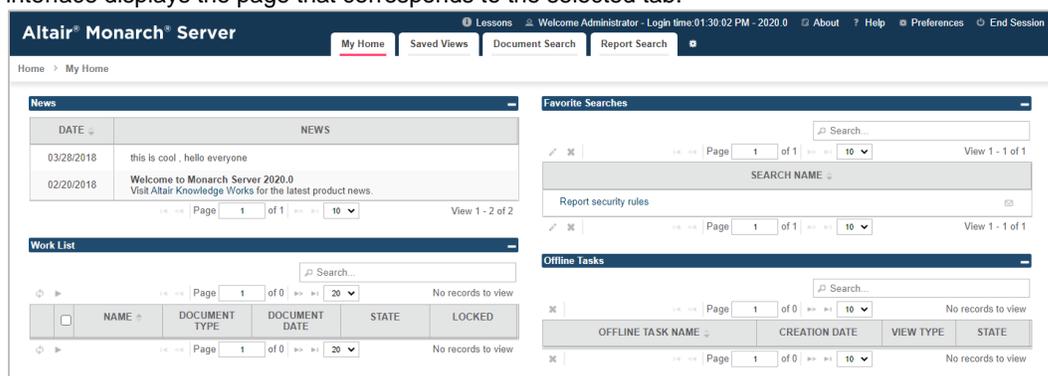
SPECIFYING A SITE STYLE

The MSClient interface can be displayed in two different modes or styles:

- ❑ **Tree-based:** This site style vertically divides the MSClient interface into two halves or panes. The left pane contains the Navigation Tree, which provides links to the various sections of the application, while the right pane displays the page that corresponds to the selected section.



- ❑ **Tab-based:** This site style horizontally divides the MSClient interface. The top portion of the tab-based interface contains tabs, which provide access to the sections of the application. The bottom portion of the tab-based interface displays the page that corresponds to the selected tab.



To specify a site style

1. Click **Preferences** in the upper right corner of the page, to display the Output Settings page.
2. Select the **Site Style** tab at the top of the page.
3. Select either **Tab-based** or **Tree-based**.

4. Click **Save**. The change will be applied immediately.



NOTES

The simpler way to toggle between site styles is to use the  icon (**Switch to Tab-based/Tree-based site style**) as shown on the figures above.



CHANGING YOUR PASSWORD

Once your system administrator has provided you with a login name and password, you can login to MSClient 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**.

TROUBLESHOOTING

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

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

TROUBLESHOOTING SEARCHES

Occasionally, a search will fail to retrieve any documents, or the documents that it retrieves may not match your search criteria. This section lists possible causes of unsuccessful searches and suggests solutions.

Empty Search Sets

Empty search sets (that is, searches that find no matching documents) can occur for a number of reasons, the most common one is errors made during the search configuration. When a search fails, the first step is to check the search criteria for any obvious errors. For example, you could try doing the following:

- ❑ Make sure you selected the correct document group and document type for the record(s) you are looking for.
- ❑ When specifying your search criteria, if you manually entered any index values, make sure they are spelled correctly.
- ❑ Make sure the date range (if specified) is valid.

If you still cannot locate an error in the search criteria, these additional steps may help:

- ❑ To eliminate the possibility of using an incorrect index value, rather than typing it manually on the Simple or



Advanced Search page, click  and select a value using the [Keyword Lookup](#) dialog box.

- ❑ If your search criteria contain multiple index values of different index fields, make sure you used the AND Boolean operator to join them. (The OR operator cannot be used to join search phrases that contain different index fields. See [Using Boolean operators](#) for more information.)
- ❑ If your search criteria contain multiple index values of the same index field, and you linked them with the equal to (=) relational operator, make sure you used the OR Boolean operator. For example, the following search criteria would be invalid: Customer Name = Betty's Music Store AND Customer Name = Big Shanty Music. If you replace the AND operator with OR operator, however, the search criteria is valid.
- ❑ To ensure that the date search span covers the time frame selected, limit or expand the date scope.
- ❑ Use upper and lower limits for date and numeric index values. This will help to limit the number of documents you retrieve.

Incorrect Document Retrieved

This error may occur if your browser reads a locally cached page instead of retrieving the latest one from the Web server. Although expiration information is applied to each page, browsers do not always adhere to it. To solve this problem, your browser's cache setting must be changed.

To change Microsoft Internet Explorer cache setting

1. In Internet Explorer (version 5 or later), on the **Tools** menu, select **Internet Options**.

2. On the **General** tab of the **Internet Options** dialog box, under the **Browsing history** heading, click the **Settings** button.
3. In the Temporary Internet Files and History Settings dialog box, select the Every time I visit the webpage option, and click OK.
4. Click **OK** to close the **Internet Options** dialog box.



NOTES

You may have to restart Internet Explorer for the new cache settings to be applied.

ERROR MESSAGES

Occasionally, you may receive an error message while using MSClient. The errors you are most likely to encounter are listed below, along with explanations of their causes and potential solutions.

- No records to view.**
This message appears when the search you submitted fails to retrieve any documents. There are a number of reasons why this may occur. See [Troubleshooting Searches](#) for more information.
- Your selection has native or offline documents, which cannot be viewed.**
This message is displayed, when you attempt to view search results containing native or offline documents.

To view offline documents, you need to contact your system administrator. Click  on the toolbar, in the upper right corner of the page, to open the **Request** dialog box, allowing to send a request for offline documents to the system administrator. In the displayed list of documents, select the documents you want to view, then click **Submit**. An e-mail is sent to your system administrator to notify them of your request.

To view native documents, click  on the **Views** toolbar, in the upper left corner of the page. Click the document name to display it in the browser, or click **Download** to save a copy on your computer.

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](#).

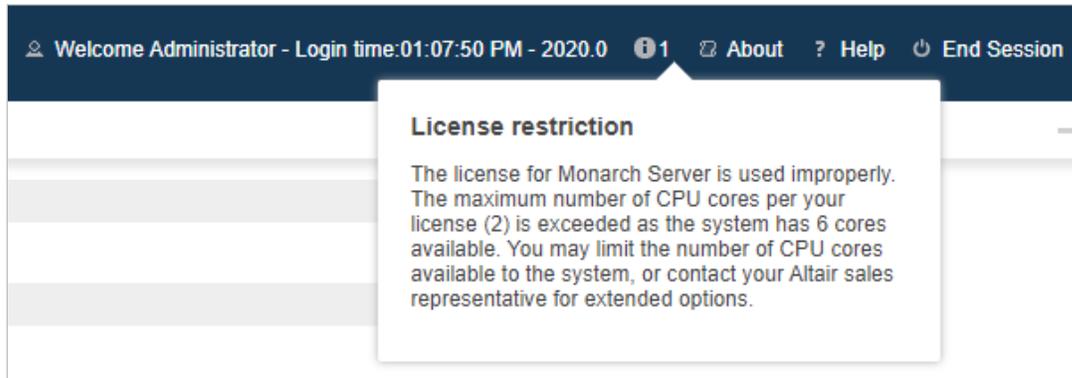
Before Contacting Technical Support

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.”

A notification of your license restriction also appears on top of the main page of the Monarch Server Administrator.



How to Receive Help

- Access the [Altair Community](#).
- Email Altair Support at dasupport@altair.com.
- Call Altair Support (Monday–Friday).

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

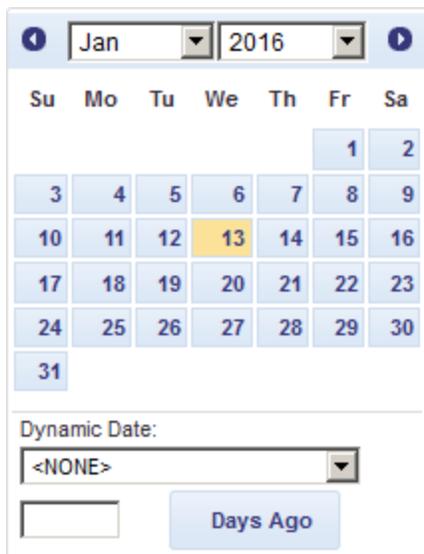
This section provides information about:

- [Calendar Window](#)
- [Consolidated View](#)
- [Execution Frequency](#)
- [Keyword Lookup](#)
- [Page Navigation](#)

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. The calendar grid has the 13th highlighted in yellow. Below the calendar, there is a 'Dynamic Date' dropdown menu with '<NONE>' selected. To the right of the dropdown is an empty input field 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 .

CONSOLIDATED VIEW

The **Consolidated View** dialog box displays Report/Page/Select annotations and allows to find and print them.

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

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

- Report Annotations:** Click the heading to expand a hidden section, listing all existing report annotations for selected documents.
- Page Annotations:** Click the heading to expand a hidden section, listing all existing page annotations for selected documents.
- Select Annotations:** Click the heading to expand a hidden section, listing all existing select annotations for selected documents.
- Find:** To search for an annotation, type the annotation text (or part of it) or the attached file name, and click Go. Annotations containing the text or the attached file name will be displayed in the box below.
- Page:** When you select an annotation from one of the above mentioned sections, this field displays the page number of this annotation.
- Author:** Displays the author name of the selected annotation.
- Creation Date:** Displays the creation date of the selected annotation.
- Report Name:** Displays the name of a report, containing the selected annotation.
- Text:** Displays the text of the selected page annotation.
- Attached files:** Displays the attached files of the selected annotation.
- Go to:** Click to open the report view on the page, containing the selected annotation.
- Print all annotations:** Click to display the full information about all available annotations in a separate window.
- Print report:** Click to generate a PDF file with annotations in the specified page range.



NOTES

Specify the page range in the Range for Converting dialog box, which opens after you click **Print Report**.

- Print page:** Click to print the page of the selected annotation in the PDF format.
- Close:** Click to close the **Consolidated View** dialog box.

EXECUTION FREQUENCY

Execution frequency (or run time) specifies both how often a process will run (for example, once, hourly, daily, etc.) and when it will be launched. You specify execution frequency when subscribing to notifications.

The options in the Execution Frequency pane allow you to set periodicity of launching the current process. An administrator can set the following options:

- One Time:** Select this option, if you want to launch the current process only once.
 - **At:** Set the time, when current process will be launched, in the **HH:MM** format.
 - **on (MM/dd/yyyy):** Set the date, when the current process will be launched. On clicking the field, the [calendar](#) appears.
- Hourly:** Select this option, if you want to launch the current process at the specified hour or hours.
 - **At... minute(s) of Every hour:** Set the time, when the current process will be launched, in the **MM** format.
- Daily:** Select this option, if you want to launch the current process in a specified number of days.
 - **Every ... day(s):** Set the number of days, after which the current process will recur.
 - **At:** Set the time, when the current process will be launched, in the **HH:MM** format.
- Weekly:** Select this option, if you want to launch the current process weekly.
 - **Recur every:** Set the number of weeks, after which the current process will recur.
 - **Select corresponding days of week.**
 - **At:** Set the time, when the current process will be launched, in the **HH:MM** format.
- Monthly:** Select this option, if you want to launch the current process monthly. For this:
 - Select the day, when to perform the process:
 - ◆ If you select the first option, set the number of days in the box.
 - ◆ If you select the second option, select **First, Second, Third, Fourth** or **Last** from the first list, and the day of week from the second list.
 - Select the month, when to perform the action.
 - ◆ If you select the **of every n Month** option, set the number of month in the box.
 - ◆ If you select the **of selected months** option, select the appropriate month check box .
 - In the **At** check box set the time, when the current process will be launched, in the **HH:MM** format.

KEYWORD LOOKUP DIALOG BOX

Use the **Keyword Lookup** dialog box to specify an index value for your search criteria. This dialog box is displayed,

when you click the  icon next to a value field on the [Simple Search page](#), or [Advanced Search page](#).

The **Keyword Lookup** dialog box displays the list of available index values for the specified index field. Click an item to select it, then click **Select**.

You can customize the list in the following ways:

- To sort the list in ascending or descending order (alphabetically or numerically), use the  icons.
- To navigate between pages, type a page number in the **Page** box, 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, or 50) from the Items per Page drop-down list.
- ❑ To search for a specific value:
 - a. Select an option from the **Search** drop-down box (the following options are available: equal, begins with, ends with, contains).
 - b. Type an appropriate value in the adjacent box.
 - c. Click **Search**. Items satisfying the search criteria will be displayed on the list.

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

Portal: [Contact Altair](#)

US: + 1.800.445.3311

International: + 1.978.441.2200

SUPPORT CONTACT INFORMATION

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

Email: dasupport@altair.com

US: +1 800.988.4739

Canada: +1 978.275.8350

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