Welcome

Module Overview

The Express User Interface (UI) module is a simple but powerful entry-level reporting interface that is embedded with some versions of Exact (and various OEM vendor) ERP / Back Office products. It is a client-side module that works in concert with a server-side module called the Real-time Data Integration Server (RDIS), which securely and efficiently retrieves information from your back office databases. The Express UI, combined with a rich set of pre-packaged "Business Intelligence (BI) View Templates", enables end users to "serve themselves" with both real-time and off-line information, quickly and with minimal training. Let's take a brief tour of how Express is used, and where it fits into the overall Business Intelligence suite.

Using Express UI

Express is typically launched directly from your back office menu system, simply by selecting one of the available BI View Templates. Once Express has been launched, the same (user security-trimmed) BI View template list present in the back office menu system is also available for selection within Express by pressing the first toolbar button (then double-clicking on the desired selection). In either case, Express retrieves the selected (empty) BI View template from the server's centralized "Object Repository", and presents the user with the "Refresh Wizard"—a simple 3-tab dialog which enables full end user runtime control over these critical elements, prior to refreshing the BI View:

- The particular database(s) from which the BI View will extract information,
- Fine-grained selection criteria, including multiple and/or select/omit conditions across any number of relevant dimensions, and
- Override control over available time frame selections

Consolidating information from multiple databases is as easy as selecting the desired database(s) on the first tab of the Refresh Wizard. Selection criteria may be established on the second tab by double-clicking on a specific dimension to access the "Content Filters" dialog, which allows for choosing the desired values from the database (just double-click on the dimension), or manually entering range or wildcard selection values for a selected dimension (click on the + button). These selections may then be saved to the file system as a portable filter file (.ptfl extension) and later retrieved from either the file system or the centralized Object Repository, prior to refresh. Note that users of the Administration UI module may upload standardized .ptfl files to the Object Repository for easy access by all users.

Clicking on the refresh button submits the request to RDIS, which generates the required SQL statement(s) and packetizes and streams the result set(s) directly from the database(s). At this point the user now has relevant, real-time information to view, explore, share, and use to make better decisions. At this point the user can do these types of things:

- Save the BI View to the file system as a .ptvw file, for later (online or off-line!) retrieval (using the "Open Existing View or File" toolbar button), or emailing to another user (using the File/E-mail option). The BI View is no longer just a blank template at this point—it contains real information.
- Select from among the pre-packaged "cube layouts" inside of the BI View (using the "View Browser" at the left of the screen, which is opened/closed via a toolbar button). Cube Layouts are different ways of looking at a dataset—for example, a sales-oriented BI View may contain a cube layout called "Item by Year-to-Date Margin $" and another cube layout called "Customer by Year-to-Date Revenue", amongst many others.
- Filter the information further based on observing particular values of interest. Continuing the example above, to review which customers are buying the most profitable items, highlight the top 10 most profitable items in the "Item by Year-to-Date Margin $" cube layout (they will be the first 10 in the list), right-click, and select "Filter Selected Items" from the menu. This will filter the cube inside of the BI View to only the 10 items of interested. Then select the "Customer by Year-to-Date Revenue" cube layout to review who has been buying those items. To focus specifically on recent history, click on the drop-down button on the Year/Month dimension, de-select all of the months via Ctl-Click, and select only the last 3 months.
- Lock a cube filter, so that it may be applied across different BI Views. This is done via the "Lock Cube Filter" toolbar button.

- Select from among the various pre-packaged graphs and formatted reports inside of the cube layouts. These selections will respect any cube filters you have established.
- Share information with other applications:
    - Export a selected report to .PDF or Excel by clicking on either the "Export as PDF" or "Export to Excel" toolbar button.
    - Copy a cube layout to the Windows Clipboard by clicking on the "Copy" toolbar button. This option will also take into account any current cube filters.
    - Export a cube layout to Excel by clicking on the "Export to Excel" toolbar button. This option will also take into account any current cube filters.

The Express UI is easily learned by actually using it against your own information. All of the toolbar buttons have fly-by descriptive names, and there is no way to corrupt a database or harm anything using this module. Users who read this overview and actively explore the Express UI are generally able to become productive by themselves or with a small amount of initial assistance from a knowledgeable colleague.

Express UI is just the start!

From an overall Business Intelligence capabilities perspective, the Express UI is meant to be any easy-to-use bridge from low-function, static report writers to sophisticated ad hoc analytics. All of the knowledge gained from using Express is leveraged when a user advances to a more capable interface, such as the Business User Plus or Power User. It is important to understand that Express UI is just the tip of the iceberg!

Every customer typically licenses at least one Power User, enabling these important customer-specific authoring capabilities (which can then be used by all Express users!):

- Create new Cube Layouts, Reports, and Graphs (and maintain existing ones)
- Create Named Cube Filters (fixed value lists or generic wildcard/range lists) and optionally attach them as defaults to Cube Layouts
- Enhance existing BI View Templates (e.g. add new calculated facts, new dimensions, new database facts)
- Create entirely new BI View Templates that combine arbitrary information across database tables and databases

Many customers also upgrade their more sophisticated users to at least the Business UI Plus module, which provides the first two authoring capabilities noted above, in addition to these personal productivity features (which are also present in the Power UI):

- Full slice and dice capabilities (drag and drop dimensions)
- One-click sorting by dimension or fact (to dynamically re-purpose existing cube layouts for ad hoc needs)

Customers who opt for the eDeployment publishing module typically also couple that with the Business UI module, which is similar to Business UI Plus, but is "off-line only" and does not provide live refresh.

This module overview has described how the Express UI is used, and how it fits into the rest of the Business Intelligence suite. Read on for more details, or just start using Express now!