

Omniscope User Guide

Omniscope User Guide

Learning to Use Omniscope

This User Guide is divided into sections, the contents of which are accessible using either the links below or the lower left-side User Guide navigational menu that also displays the sub-sections.

Questions? Always consult our [FAQs/Forums](#) [1] page first. Try searching for specific commands, terms or phrases using the search box at upper right to find all references in the Forums, on the site, this User Guide and the KnowledgeBase.

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1: Overview [5] - The introductory overview covers key Omniscope functionality and illustrates typical tasks in 10 steps; install Omniscope, prepare data, load/import data from a spreadsheet, check the data types, explore/check the data, display the details, add/change views, create report tabs, add links, and save the configured Omniscope files for distribution to others. The recommended **6-Phase approach with checklist** [37] sets out the sequence of steps in detail, and can be also used as the basis for training sessions.

2: Install & Activate [6] - Describes the Omniscope installation process on Windows. Details regarding administered desktop and network installation options, and installation on non-Windows operating systems, are covered in the [KnowledgeBase](#) [4].

3: Using IOK files [7] - Covers navigation of an example Omniscope file already prepared for you. It introduces the navigational icons/buttons on the Main Toolbar, as well as the basics of selecting and filtering using the Side Bar. It also provides links to documentation of the Main Toolbar command menus, which are primarily used for creating new Omniscope files, rather than exploring/navigating existing files prepared by others.

4: Using Views [8] - Links to the pages detailing the commands and options available for each of the different views in Omniscope. Also

provides an introduction to using the commands common to most View Toolbars within views. If you wish to go directly to the section relating to a specific view, click the links below (or visit the [Views Reference](#) [25] page).

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[50]

**To try these new views in development in version 2.5, go to Settings > Application-wide > Advanced > Show experimental features*

5: View Details [9] - Explains the options for displaying some or all the values associated with individual records or selected groups of records - the Details pop-window, the Side Bar details display options and the Details View. The highlighting function, which shows the position of selected records in all open views, is explained and illustrated. Automatic record cycling and slide show image displays that provide file recipients with automatic, unattended 'tours' of the data are also covered.

6: Queries & Subsets [10]- Introduces the related concepts of Named Queries and defined Data Subsets to generalise the concepts of data universes and the basket used in earlier versions. The Main Toolbar Named Queries menu options are introduced, as is the Data Subsets selector that appears on View Toolbars immediately to the right of the view name for all views.

7: Use Your Data [11] - Covers importing your own data into Omniscope to create and save IOK files for your own use and distribution to others. Explains importing data from spreadsheets and other types of data files, maintaining links to source data, editing your data and refreshing the data from or to linked sources. Also provides links to sections dealing with connecting directly to database tables/views.

8: Configure Data [12] - Outlines the four main steps to configuring a new Omniscope file; 1.) confirm data typing column order and settings, 2.) configure Sidebar display(s), 3.) configure opening views and 4.) modify the appearance (optional). Explains the useful and powerful **Data > Manage fields** dialog, together with Sidebar filter/query device configuration and use. Also covers the most common data management issues (format, layout and orientation) with links to more detail. Introduces each of the 16 available views, with links to more detailed documentation of the options available for each view (see also the [Views Reference](#) [25] section).

9: Main Toolbar [13]- This section documents the navigational functions located on the Main Toolbar, and introduces the command menus available on drop-down menus on the left side of the Main Toolbar (see also the [Commands Reference](#) [27] section).

Version 2.5: | [File](#) [55] | [Data](#) [56] | [Tab](#) [57] | [Layout](#) [58] | [Toolbars](#) [59] | [Settings](#) [60] | [Help](#) [61] |
(click links above to go directly to the [Commands Reference](#) page)

10: Controls & Side Bars [62] - Shows how to use the Controls drop-down menu on the Main Toolbar to reveal or hide the Side Bars and the Cycling Toolbar. Provides detail on configuring the filter/query devices displayed on the Side Bars with the Devices and Tools Side Bar drop-down menus, using the functions available on the filter/query devices, and the commands accessible by right-clicking on the devices. Also provides detail on using the Cycling Toolbar to set Record, Value and/or Report cycling options to animate your files on opening.

11: Create Reports [15] - Introduces the process of creating and modifying Reports Pages, the Reports Navigator, the importance of committing or reverting changes to Report Pages, how to exit Reports Mode and using various menus for managing all the Report Pages already configured in a given file.

12: Formula Fields [16] [16]- You can define the values in a new Formula column to be evaluated according to mathematical functions and logical expressions using the values in other columns. In addition to the same functions used in most spreadsheets, Omniscope also features powerful SUBSET functions that operate on entire data sets. This section introduces the use of Formula fields (columns) and provides links to more detailed sections on defining your own formulae and using Variables (assumed values used for sensitivity analysis) and the [Functions Guide](#) [29], which provides more detail on using the specialised SUBSET functions.

13: File Appearance [17] - Highlights a few of the more commonly used options for branding the overall appearance of a given file using Cover and Back information pages together with your own corner logos, etc. Options for adding your corporate identity to installations of Omniscope itself, simplifying display menus, and adding banner advertising displays to Omniscope files are also referenced.

14: Refreshing Data [18] - Explains options for refreshing data from linked sources, introduces the Automatic refresh option

, and provides some guidelines for editing data in Omniscope then exporting the changed data. This section also introduces options for linking Omniscope files to other Omniscope files (or even itself) as a linked data source, permitting many differently-configured distributed copies to be refreshed from the same Omniscope file, itself being refreshed directly on the server from the data warehouse. Also explains how to unlink and re-link Omniscope files from source data files.

15: Useful Tools [19] - Introduces some of the most commonly-used commands available on the Main Toolbar **Toolbars** and **Settings** menus; such as specifying the display mode for individual record-level details, and selecting Tooltips to display key values or images whenever individual or small groups of records are selected. Options for switching and editing languages are also explained.

16: Adding Links [20] - Explains the process for adding local links, using pre-configured links to free web services and creating custom web links launched by clicking on specific cells/values in your files.

17: Adding Images [21] - Explains the process for associating folders of images (image sets) with your files and referencing them for display in various views. Omniscope can associate more than one image with each record (row), and can associate more than one image set with a file, either embedded or for delivery via the web. If multiple images are available for some records, slide show mode can display a sequence of

these images for each record selected.

18: Using Maps [22] - Introduces the Map View and various ways of adding maps and geographic coordinates to your data sets.

19: Creating DataPlayers [23] - DataPlayers are exportable, data-bearing, interactive Flash 'dashboard' .SWF files which can be created, refreshed and exported from Omniscopes to web pages and documents such as PowerPoint, Excel, PDF ...with full interactivity. This section explains how to create, combine and export many different, highly-configurable DataPlayer view types using the DataPlayer View of Omniscopes.

20: File Security Options [24] - Omniscopes files can be saved with extensive file security options controlling who can open Omniscopes files, for how long and under what circumstances. 'Layered' security options are available for securing data against unauthorised copying (not even cut-and-paste) and for implementing highly-secure deployment options such as domain locking and/or 'walled gardens'.

21: Views Reference [25] - Summarises the available and experimental views still under development and provides links to the detailed section(s) documenting each view.

22: Commands Reference [27] - Summarises the Main Toolbar command menus and provides links to the section(s) for both version 2.5 and version 2.4.

23: Functions Guide [63] - Link to KnowledgeBase section documenting standard Omniscopes functions, the specialised SUBSET functions, and examples of expressions for performing common tasks with Formula fields.

24: Connector Overview [30] - Connectors are used to provide high-performance data import, refresh and synchronise features for data hosted on remote 'cloud computing' SaaS platforms, data base feeds or client-premise installed applications using Omniscopes as the local reporting/presentational interface. This section provides an overview of the web and direct connectors currently available (and some still classed as experimental features) for use with activated editions of Omniscopes.

Using Connectors:

25: Bloomberg Connector [26] - If Omniscopes is running on a computer with access to [Bloomberg](#) [64], Bloomberg fields added can be added and refreshed directly into the Omniscopes file, either on opening of on-demand using Refresh from Source (Ctrl+F5). This section documents the options for using the Bloomberg connector wizard to import and refresh Bloomberg data within Omniscopes files (not available in free Viewer).

26: Email Connector [32] - Connect and download e-mails using either POP3 or IMAP protocols.

27: Google Spreadsheets [33]- Connect to any Google spreadsheet and edit it online in the browser or off-line in Omniscopes. Changes will be synchronised between Omniscopes and Google Spreadsheets in real time. Permits collaborative compilation and maintenance of data sets delivered in branded, highly-visual Omniscopes files with the possibility of live refresh and banner ads inside the file.

28: Facebook [34] - Import your friends network from Facebook.

29: Google Analytics [35] - Import data directly from Google Analytics.

30: Website Mapper [36] - Crawl a website and visualise its structure, adding data from Google Analytics and other sources.

31: Salesforce Connectors [28]- Omniscopes is [integrated with Salesforce](#) [65] and the [Force.com](#) [66] cloud computing platform. If you have a Salesforce account and security token, you can go to **File > Open online source** and choose to open either a Report (read-only) or Data Object/Table directly from Salesforce. Using the direct connector, you can visualise, analyse, save offline, add/edit data and synchronise your changes with Salesforce. There is also a free web connector for Salesforce [listed on the AppExchange](#) [67]. Your Administrator can install a 'Visokio Reports' tab into your Salesforce accounts to enable pre-configured downloads of Reports and Data Objects/Tables that open in the free Viewer. Using an activated Omniscopes, you can also modify the default templates provided for each Report and Data Object/Table, and upload your customised files to the 'Visokio Reports' tab in Salesforce to modify the online DataPlayer displayed or provide alternative templates for future downloads. The free web connector can be installed in Group accounts, but the direct connector involves API access which Salesforce permits only to subscribers with Professional, Enterprise and Unlimited Editions.

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Overview

Getting started with Omniscopes

A very brief introduction to Omniscopes

Omniscopes free Viewer will open any Omniscopes .IOK file of any size, up to the [limits of your PC](#) [69]. Each new Viewer installation also includes a free 30-day trial of Omniscopes Professional. During the 30-day trial period, you can import your own data from spreadsheets and databases, and you can export data from any of the embedded or online demos as spreadsheet files to see how these files were configured from the raw data. You can also use the DataPlayer View to create exportable, interactive Flash DataPlayers for embedding in web-based 'dashboards' and common documents like PowerPoint, Excel and Adobe Acrobat .PDF. After the 30 day free trial expires, the installation reverts to being a free Viewer, so there is never a need to un-install.

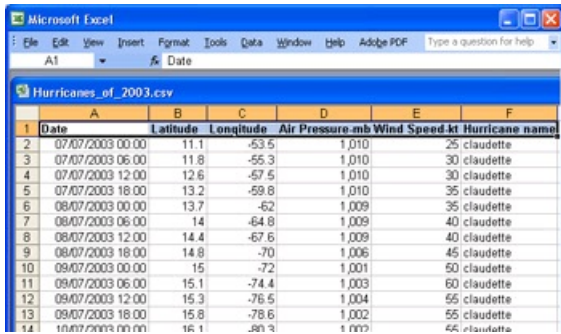
To see your data in Omniscopes:

Installation

If you don't yet have Omniscope installed, install the [free Viewer](#) [70]. The install sequence (for Windows) is [shown here](#) [71].

Select a data file

You can open tabular data sets such as spreadsheet files directly in Omniscope. A sample 6-column .CSV file for use with this Quick Start page is attached [here](#) [72]. Download the sample data file, or choose a different one containing your own data. Try to avoid any blank rows and merged cells. Check that your spreadsheet looks [like this](#). [73]

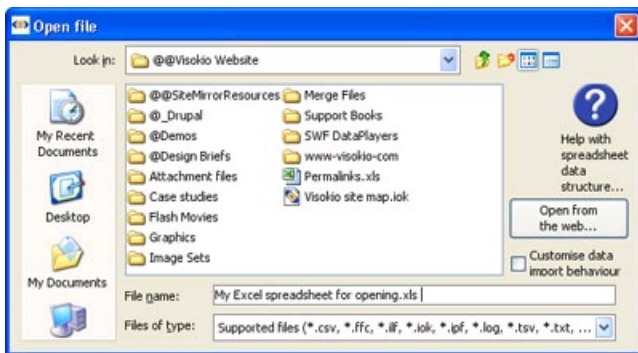


1	Date	Latitude	Longitude	Air Pressure-mb	Wind Speed-kt	Hurricane name
2	07/07/2003 00:00	11.1	-53.5	1,010	25	claudette
3	07/07/2003 06:00	11.8	-55.3	1,010	30	claudette
4	07/07/2003 12:00	12.6	-57.5	1,010	30	claudette
5	07/07/2003 18:00	13.2	-59.8	1,010	35	claudette
6	08/07/2003 00:00	13.7	-62	1,009	35	claudette
7	08/07/2003 06:00	14	-64.8	1,009	40	claudette
8	08/07/2003 12:00	14.4	-67.6	1,009	40	claudette
9	08/07/2003 18:00	14.8	-70	1,006	45	claudette
10	09/07/2003 00:00	15	-72	1,001	50	claudette
11	09/07/2003 06:00	15.1	-74.4	1,003	60	claudette
12	09/07/2003 12:00	15.3	-76.6	1,004	55	claudette
13	09/07/2003 18:00	15.8	-78.6	1,002	55	claudette
14	10/07/2003 00:00	16.1	-80.3	1,000	64	claudette

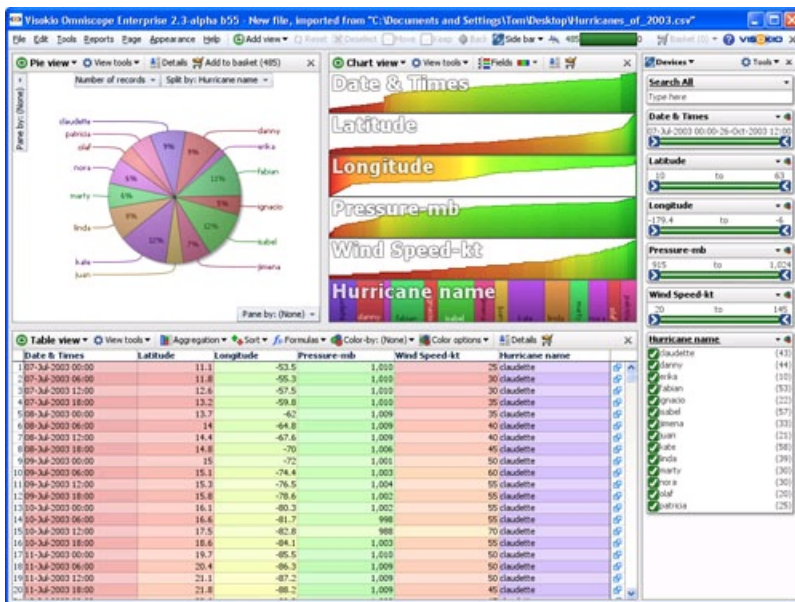
If you want to try duplicating one of the embedded or online demo files, and you are within your 30-day trial period, or already running an activated Edition, you can open any of the demo files and use **File > Export > Export files** and select the **Data** tab to save the data as a .CSV or other supported file type. You can then re-import the data using **File > Open file**, and compare with the embedded demo to see how the demo file looked before it was configured.

Start Omniscope, select & open any data file

Click **File > Open File** and point at the .CSV or other data file you wish to open.



Omniscope will open the file displaying three default views; a Table View, a Chart View and a Pie View.

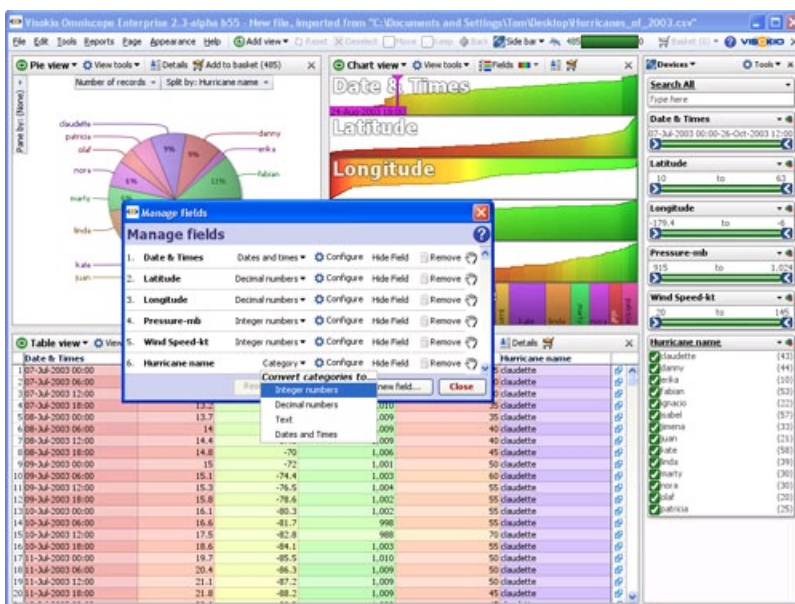


The Table View is most familiar, but the Chart View is very useful for gaining insight into the data at a glance.

For more detail, see [Using Your Own Data](#). [74]

Check Data Types

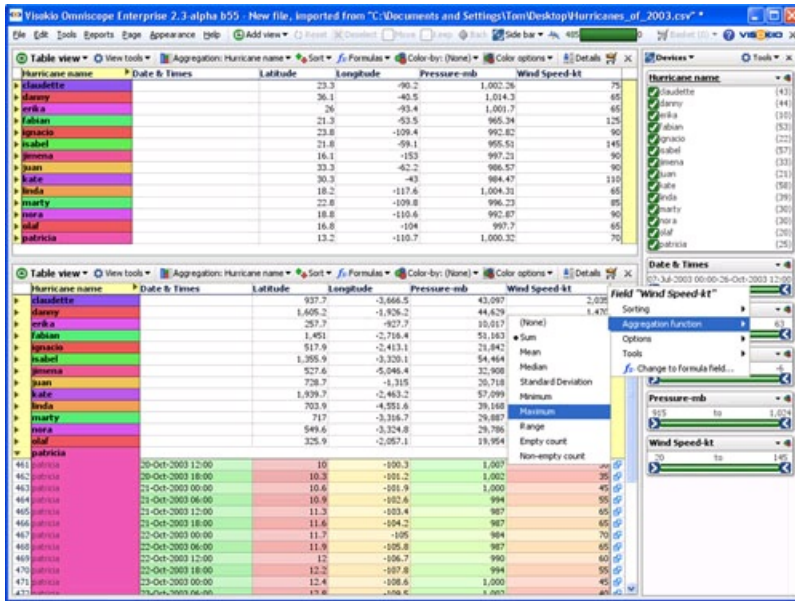
Omniscope examines the data in each column and makes some assumptions about the column's data type, which are not always optimal. When importing data for the first time, always check and (if required) modify the data typing (i.e. whether a column's data is typed Numbers, Dates and Times or Text). If there are only a limited number of different Text values, Omniscope will usually type the data as Category. To review and edit data typing, click on **Data > Manage Fields**.



Frequently, Omniscope assumes that identifying numbers should be treated as integer numbers. You should change the data type of all-numeric reference identifiers to 'Text'. Remove the separators in the number before converting to text using **Options > Formatting options: {untick} Show thousands separator**. Also, for some date and time fields you may be asked to clarify the date/time format used in your data before Omniscope can recognise it accurately as dates and times. For more detail on data typing options see **Data > Manage Fields** [75].

Explore & Check Data:

Each view has a **View Toolbar** that enables you to perform many operations on the display in that view. For example, in the Table View you can click on the column headers to sort each column in different directions. You can also check your data by using the Aggregation selector to aggregate the records by main categories, then right-clicking on each column header and selecting various aggregation functions, allowing you to see averages, minima, maxima, empty cells etc. for various categories, often detecting incorrect values.



[76]

Using the hurricane example file, close the Pie and Chart Views, and open a Table View. Click on the Aggregation command to aggregate all the observations over time by Hurricane Name. By default, all of the columns will show the sum of the observations, nonsensical in this case. Right-click on each column header, choose **Aggregation function** and display the median for the Longitude and Latitude columns, the mean (average) Pressure and the maximum Wind Speed. The example above shows two Table Views, the lower with the aggregation functions defaulting to Sum, and the upper showing the same data with the view configured to show meaningful results that can be used to spot errors in the data. From version 2.4, the Aggregation drop down menu on the View Toolbar can be used to set both the fields to aggregate on and the aggregation functions to apply to visible columns in the aggregated view.

For more detail, see [Using the Table View](#) [38]

Visual scrubbing with Chart View

Next open only the Chart View, which provides a horizontal overview of all the columns in the data set. In the Chart View, under **View Tools > All charts**, for each field (column) name you can decide how to graph the values in each column, e.g. histogram bars, pie charts, statistical summaries, etc. Use this analytical view to further scrub your data.

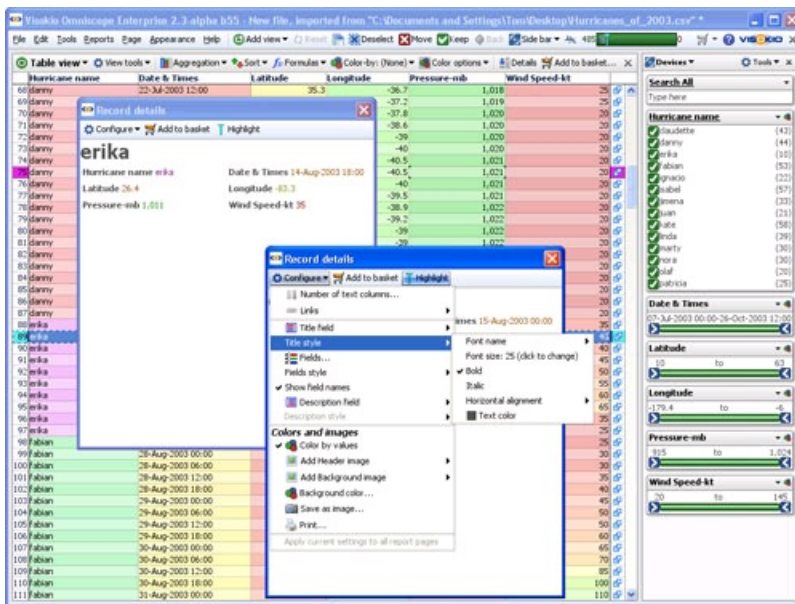


The right-click menu provides links to many other settings related to the selected field (column). You can re-order or hide fields that are not required by dragging or unticking them in the **Fields** drop-down pick list.

For more detail see [Using the Chart View](#) [39]

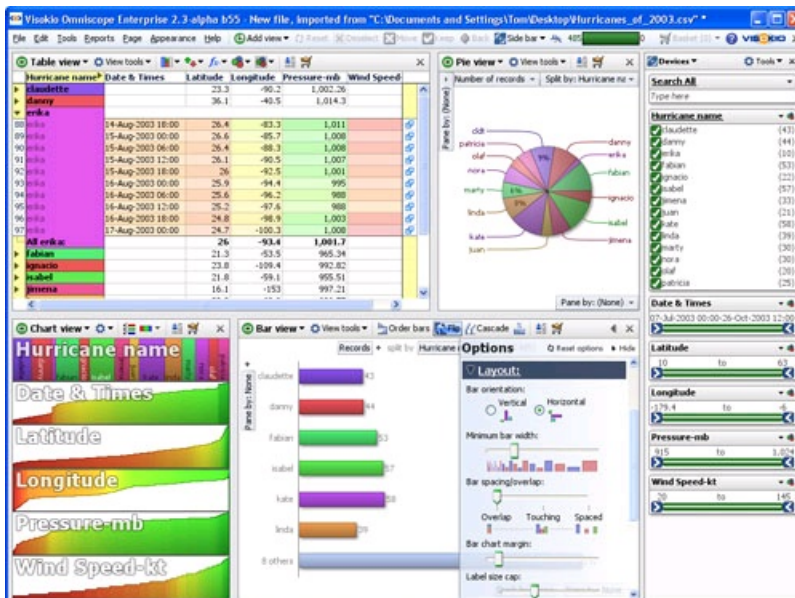
Display Details

To see the values of all the fields for a given record (row), in the Table View, double-click on the record (row) header (farthest left). A configurable Details pop-up window appears, showing the values for the selected record. You can configure the Details pop-up window extensively using the **Configure** menu.



Add Views

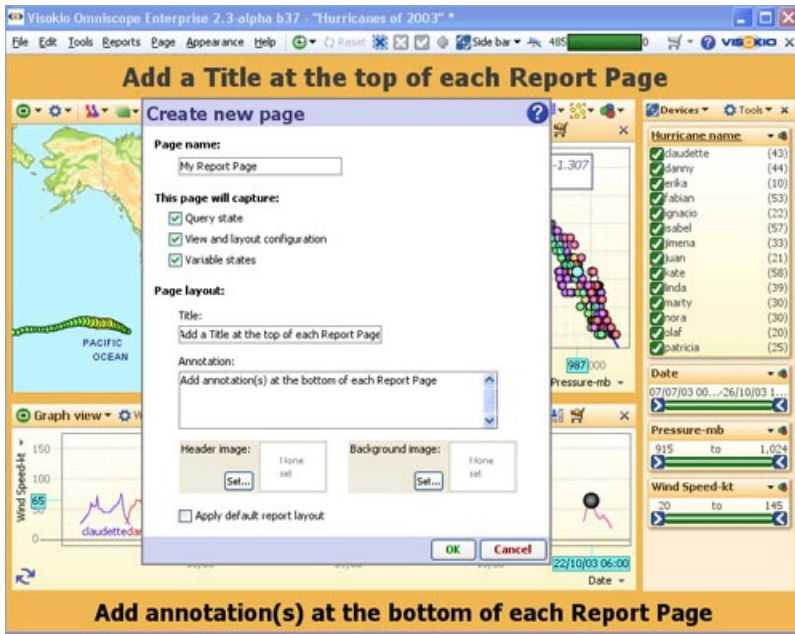
Omniscope has 12 different views that can be used to visualise and explore your data. Click on **Add View** in the Main Toolbar and try each of the views not already showing. Each view has its own Toolbar and pick lists for selecting which fields (columns) to display. The powerful Bar View has a tab that you pull from the left side to reveal all the options. When you have finished with a view window, click on the **[X]** in the upper right hand corner to close it.



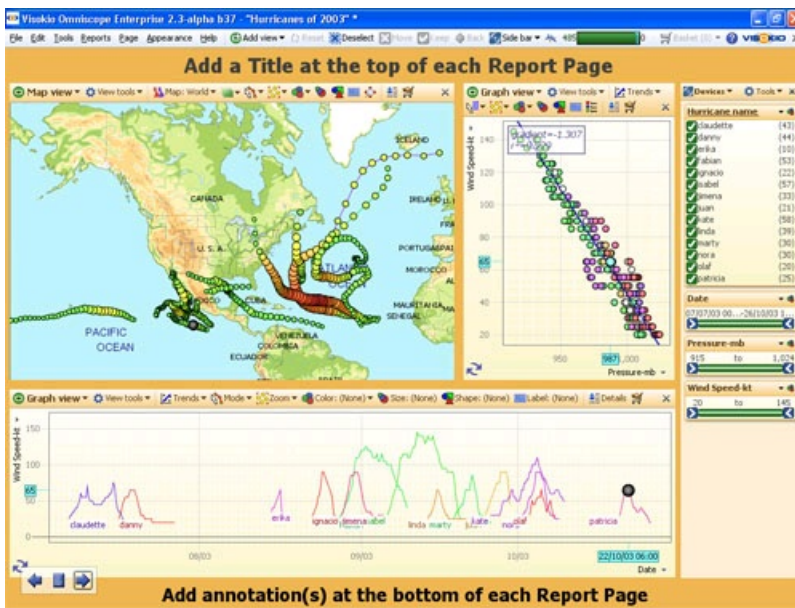
Create tabs

All users of your Omniscope file are not expected to know how to open views, set multiple filters etc. Instead, you decide the most important combinations of views, filter settings and messages to other users, and save them as persistent tabs, which can be considered report pages or simply separate workspaces. Tabs are preconfigured combinations of views, filter settings, formula variables and annotations. If you save an .IOK file in Reports Mode with a Report Page selected, it will open and navigate just like a slide show presentation.

To create a tab in your file, click on **Tab > New > From current layout** from the Main Toolbar.



You can also add page titles and annotations, insert logos and background images, etc. using the **Layout** menu. Once the page looks exactly like you want, click **Tab > Commit changes**. You can choose to hide your tab bar and show the "pages" in the side bar.



If you make further changes to a tab, always remember to click **Commit** to make them lasting. If you do not wish to change a tab after performing some operations on it, click **Revert** to return the Report Page to its configuration when you last committed or created it. This is useful when giving live presentations. There is also an optional floating tab navigator in the lower left-hand corner, which reveals itself when you hover your mouse (**Toolbars > Floating tab navigator**). For more detail, see [Creating and Managing Report Pages](#) [15].

Add links to related web pages and documents

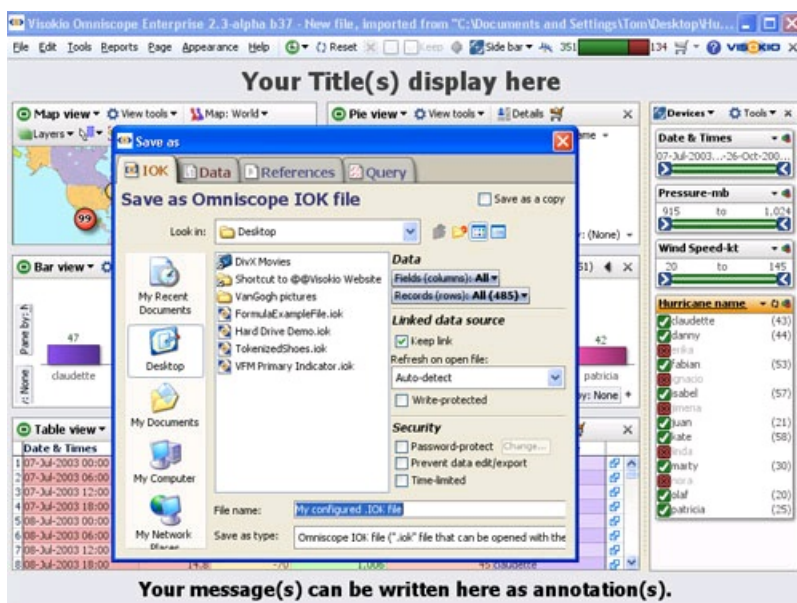
Omniscipe integrates with the Web by incorporating defined links based on your data. Values in your data are automatically transformed into links when users of your files click to display related web pages. The web pages can display either in the Web View of Omniscipe, or the users' default web browser. To configure your own web links or add links to local documents on your network, use the **Add links** wizard available from **Settings > Links > Add web** or **Add local link**.



Omniscope also includes pre-configured links to popular, free web services that accept a single string of text as an input, such as a Google, eBay or Wikipedia searches, or financial data on specific securities from Bloomberg, Reuters, Yahoo etc. Select **Settings > Links > Preconfigured links** to see the menu of currently available free web services.

Save for Distribution

Once configured, save your Omniscope file using various options for distribution. Go to **File > Save As** and you will be presented with the **Data Export** wizard set to save your file as IOK files. This wizard offers many options to save all or only selected subsets of your fields and/or records, plus the option to set file update/refresh options, and to protect your data from unauthorised access and copying.



Next Section: [Install & Activate](#) [6]

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Task Checklist

Task Check List & Training Outline

A step-by-step approach to configuring Omniscope files

Anyone can systematically configure Omniscope files following the 6-phase checklist outlined below. Most issues arise because essential steps like checking and changing default data typing assigned by Omniscope on import are not addressed before moving on to other tasks. Following the checklist below will enable you to achieve rapid results and make best use of Omniscope. This outline also serves as a useful guide

for structuring training sessions.

Import > Data Check > Analysis > Visualisation > Presentation > Publication

Phase 1. Import Data

Options for importing data into Omniscope include importing from data files, relational tables/reporting views created using SQL, some multi-dimensional 'cube' data structures (2.6+), and various remote-hosted or 'cloud' based data sources via connectors. These steps are documented in the sections of this User Guide on importing [data files](#) [77], using [database connections](#) [78], and [using connectors](#) [30]. More technical detail is available in the KnowledgeBase sections on supported [data file formats](#) [79] and examples of [database connections](#) [80] using ODBC and JDBC.

Phase 2. Data Check

The Data Check Phase emphasizes data completeness and correctness. In this phase, data typing assumptions made by Omniscope on import should be checked, columns expanded, collapsed or tokenized to facilitate end-user interaction with your file. Use Table View column sorting and the Chart View to examine extreme values in each column, address null (blank) and missing values, then add other information to the Omniscope file, such as image sets, maps and links to related web pages and web services.

In this phase, scrubbing view configurations (rather than presentational view settings and layouts) are used, normally working on a single tab entitled 'Data Set' or similar. This tab should reveal all data and filters (use both sidebars if necessary to see a the filter devices) in the Table/Chart View(s) without aggregations or groupings.

Note: it is good practise to always leave this 'Data Set' tab accessible as the final tab on the far right of the file tab set, providing an instant, credibility-enhancing view of the data at maximum granularity to any user who clicks on the tab.

Phase 3. Analysis

The Analysis (and formula definition) Phase focuses on optimising the working data set for its intended audience. Column re-naming should be used to shorten names and make them instantly meaningful to the end-user audience. Un-needed columns (especially empty or uniform-value columns) can be hidden or deleted, and the number of unique category values can be reduced, either via re-naming/consolidating values with data edits, or by adding formula columns that re-categorise records into fewer categories. Formulae can also be defined to transform imported data fields into more useful values and to detect alert conditions to be highlighted. If you use formulae to convert/reduce total category values, or to extract useful data fields from within text strings, your changes will be re-evaluated on every refresh.

You may need to duplicate certain columns so that they can be typed differently, providing different filtering options for users. At the end of this phase, all the values required to address the end-users' requirements should be in the file, and the single 'Data Set' tab should show all the columns, both data and formula, which have not been globally hidden. Finally, on a separate 'Analysis' tab, useful data subsets will be made referenceable as Named Queries, and Aggregation settings and formulae tested.

Phase 4. Visualisation

Omniscope provides a large and growing number of views, each of which is highly configurable. In the Visualisation Phase, you test each View on its own tab, seeking the best configuration(s) of each view for the points you want to make to your intended audience. You may create more than one variant of each view. Presentational use of Table View Grouping/Summary Row options are tested in this phase. Any views determined to be of limited value to the audience for a given data set can be hidden. The default opening settings for each view will be defined, and the panning and field selection drop-down menus edited so that only useful options are presented to the end user in each view.

At the end of this phase, you should have a tab for each view type you plan to use, with one or more variations of the view on each tab, perhaps some with Aggregation menu settings and specified display functions for aggregated values, including a second, more presentational version of the Table View with Aggregation, Grouping, and perhaps both.

Phase 5. Presentation

Unlike the first three Phases, where the mind-set was to reveal the data, the Presentation Phase takes a zero-based approach to file configuration, i.e. everything should be hidden unless it is needed on a specific tab to make a specific point or enable a particular end-user interaction. From this phase onward, the mind-set is simplification of the audience experience i.e. "less is more". Based on the most useful view configurations created in the previous Visualisation Phase, the objective in the Presentation Phase is to construct a multi-tabbed presentation where each tab is addressed to a specific audience and specific point on each tab. More tabs, each focused on one group or point to be made, is better than trying to put too much on one tab. The objective is to create a file that opens and navigates just like a slide presentation. View-specific visualisation tabs created in the previous Visualisation phase can now be deleted.

Phase 6. Publishing

In the final phase, we focus on options relating to how others will use the file. Refresh options, file security options, help screen authoring, branding options (opening screen, closing screen, banner ads, corner logos, etc.) and use of other options are addressed in the Publishing Phase.

Checklist: Data Check

Close all the default opening Views on the opening Tab, except for a Table View.

2-A Check data typing -

2-B Address null (blank) values -

2-C Expand, collapse or tokenize columns -

Note: Expanding and collapsing columns are data edits that will not survive a data refresh. If the changes are to be made persistent, they should be made in the source data.

2-D Look for aberrant values -

Note: Data deletions and corrections will not survive a data refresh. If the changes are to be made persistent across refreshes, the changes should also be made in the source data.

2-E Import image sets -

2-F Download/import maps -

2-G Define links -

Commit all changes **Tab > Commit changes for all** and Save (Ctrl+S) the file, preserving the link to the source data file if required.

Checklist: Analysis

Hide the Chart View (if open) and continue working in a single Table View in a single 'Data set' tab

3-A Perform merges - Use the Merge Wizard if additional data from other sources needs to be joined or concatenated. Before performing a join, test the uniqueness of join criteria columns using the **Table View: View Tools > Tools > Select duplicate records** command.

3-B Rename fields (columns) -

Use "\" in field names to introduce custom line breaks, which will appear in Table View column headers (assuming multi-line headers are enabled) and also in filter devices showing on the sidebar.

3-C Hide or delete fields (columns) - empty, uniform value and fields not needed by end users for filtering can be hidden or deleted. These actions will be re-performed on every file refresh. Values in hidden columns can be displayed in details and used in links.

3-D Define formula fields (columns) -

3-E Duplicate/re-format fields (columns) - sometimes it is useful to duplicate a data/formula column so that the columns can be typed two different ways to facilitate use of different filter types, often while allowing one of the columns to also be used as a splitting category. Sometimes, the format of Dates & Times needs to be changed so that the values in duplicate columns sort better as categories or otherwise better facilitate user interactions.

3-F Reveal both sidebars and order filter device display -

3-G Table View: Define Queries/subsets - In addition to the 'Data Set' tab already configured, create a new tab from the current layout and name it 'Analysis' or similar. Open a Table View within the new tab (both sidebars should still be revealed with all the relevant filters as they are in the Data Set tab. Move filter devices from the right to left sidebar by adding them to the left sidebar, they will be removed from the right sidebar automatically. On this new tab, use the sidebar filters to define some persistent Data Subsets by using **Main Toolbar: Queries > Create queries from filters**, then Reset, then choose another combination of filters and create another Named Query subset. If you have multiple unrelated data blocks in a single file, use this process to isolate each data block in a re-usable query setting.

3-H Table View: Define aggregations - use the Aggregate drop-down menu to define & check aggregations, specifying the aggregation functions to be applied in each column. For formula fields, consider whether it is appropriate to apply the formula to the aggregated values.

Commit all changes **Tab > Commit changes for all** and **File > Save** (Ctrl+S) the file, preserving the link to the source data file if required.

Checklist: Visualisation

In this phase, the focus is on making best use of the various views for visualisation and navigation.

4-B Table View: Create a new tab called 'Table View' which will be used to experiment with the presentational aspects of the Table View using Grouping and the various settings for the overall Summary Row.

Commit changes to the tab **Tab > Commit changes**

4-C Pie View: Define multiple pies with different combinations of Value and Split-by settings...experiment with horizontal and vertical panning, save best/most useful visualisations on tab called Pie Views or similar. Commit changes to the tab **Tab > Commit changes**

4-D

Commit all changes **Tab > Commit changes for all** and **File > Save** (Ctrl+S) the file, preserving the link to the source data if required.

Checklist: Presentation

Make sure that the opening tab is open, then commit all changes **Tab > Commit changes for all** and **File > Save** (Ctrl+S) the file, preserving the link to the source data if required.

Checklist: Publishing

Make sure that the opening tab is open, then commit all changes **Tab > Commit changes for all** and **File > Save** (Ctrl+S) the file, preserving the link to the source data if required.

Back to [Overview](#) [5]

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Installation/Activation

Installation & Activation for Windows

Step-by-step installation of Omniscope on Windows machines

Omniscope is a Java application, and the full installer provided on our [download page](#) [81] comes with a private version of Java included. There is only one installer file to download for all Editions of Omniscope. The installer includes a 30-day free trial of Omniscope Professional. On expiry of the initial 30-day trial, the installation will revert to a free Viewer, which never expires. No need to un-install ever.

Note: If you intend to install an Enterprise Edition with automated Scheduler and Generator capabilities, make sure to install on a machine that will not be turned off, and activate the installation from an account that will not log-off. See the Automation section of the KnowledgeBase for more information on installing an Enterprise Edition as a [Windows Service](#) [82] to provide always-on data refresh and other automation services.

Omniscope Installation (for Windows)

To install on Windows, visit our [download page](#) [81] and download the free Omniscope Viewer installer for Windows.

1. Click "Open" or "Save" when prompted.
2. If you choose "Save", the installer file OmniscopeInstaller.exe will be saved.
3. If you choose "Open", the installer wizard will launch automatically.
4. If you clicked "Save", find your OmniscopeInstaller.exe file on your computer
5. Double click on this installer file to run it



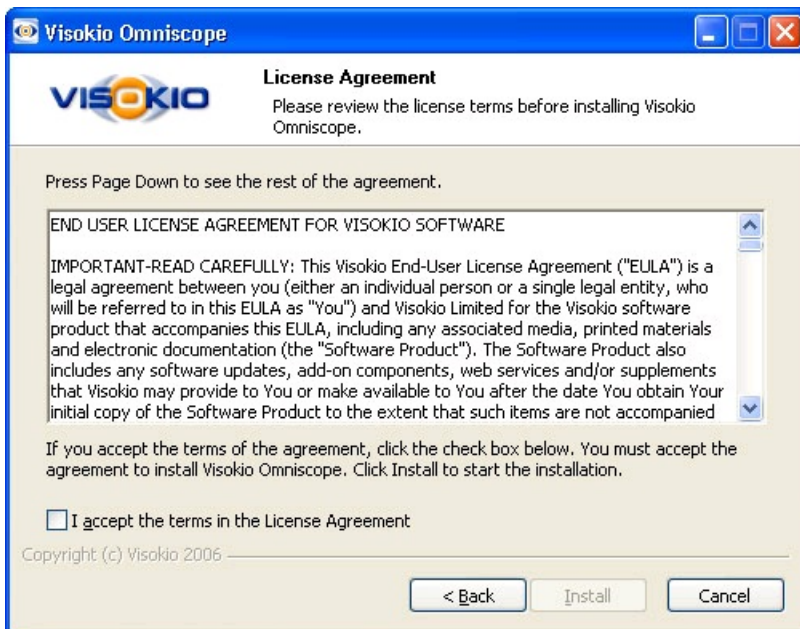
When the Installer launches, you will see the following security warning...just click Run...



The next screen is the set-up wizard, click Next>



The next screen asks you to accept our licensing agreement. More information on the terms of our licensing is [available here](#) [83]. Tick the "I accept" box and the Install > button to continue.



You will see an installation progress bar, a list of files being installed and then this screen: Click Finish with the Run Visokio Omniscopes box ticked.

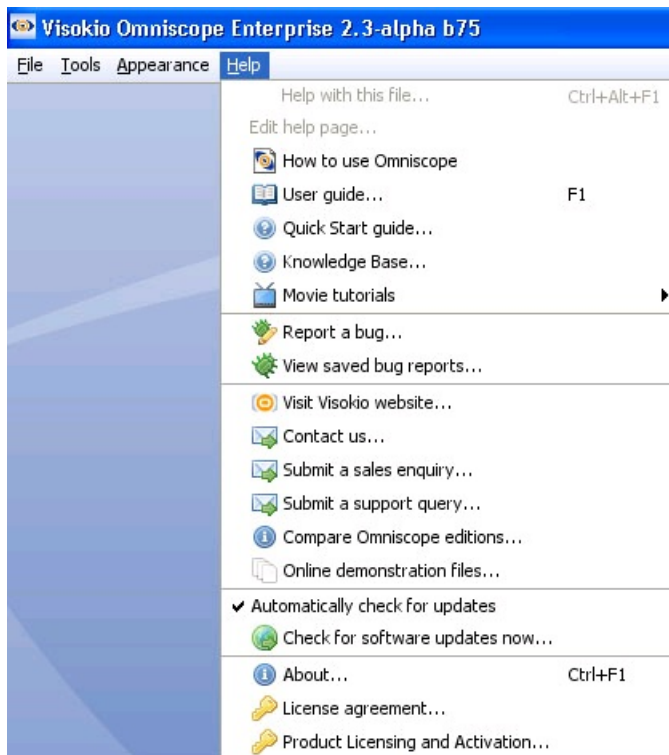


Unless you have previously licensed Omniscopes, your installation will open as a free Viewer, allowing you to open and navigate any Omniscopes .IOK file, such as the many embedded and [online demos](#). [84] In addition, all free Viewer installations come with a free 30-day trial of Omniscopes Professional, enabling you to make files with your own data. At the end of the trial period, unless activated the installation reverts to a general-purpose free Viewer...no need to uninstall.

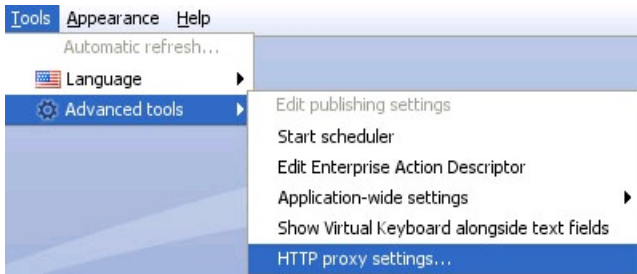


Keeping Omniscopes updated

By default, Omniscopes installs with the option to automatically check for updates ticked. Test that you have the latest version, and that your automatic update function is working by clicking **Help > Check for software updates now**.



If you have a problem contacting our update server, it may be that your machine is accessing the Internet via another machine known as a 'proxy server'. Due to limitations in Java, Omniscopes is sometimes not able to detect these settings automatically. They useful not just for updates, but also for Activation, bug reporting, etc.



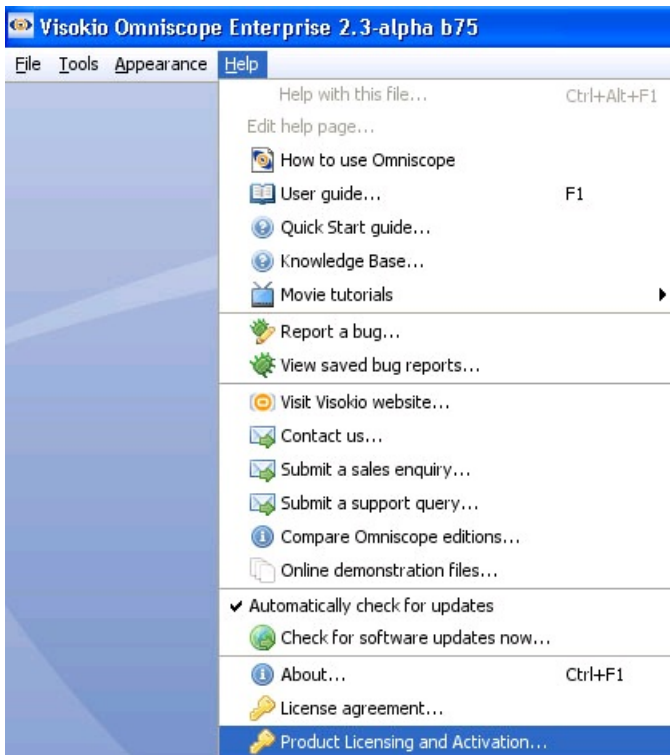
If your organisation is using a proxy server, you will probably have to ring your support person or network administrator to discover the settings Omniscope needs.



More information on [Proxy Settings](#) [85].

Activating and Upgrading Omniscope

If you have a license key to upgrade from the free Viewer to Omniscope Professional or Enterprise, or you are upgrading from Professional to Enterprise, you must click on **Help > Product licensing and activation** either activate (new install) or refresh (upgrades) your activation.



The Activation wizard will prompt you to enter your license key, which is a string of numbers like this:

WSE5-544X-X8T5-FB6Q

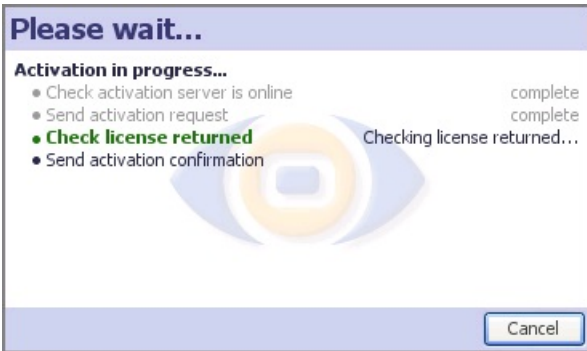
Contact us ^[86] in order to obtain a license key.

Online Activation

Start your free Viewer from the Desktop or the Start menu. Click **Help > Check for Software Updates Now** to ensure you have the latest version installed. Once you have installed the latest version, click on **Help > Product Licensing and Activation**. Enter your license key in the space provided.



Enter the license key and click **Submit**. If your machine has connectivity with our server, you should see a dialog like this...



If you see an error message relating to connectivity with our server, check to see that you are online, and revisit the Proxy Server settings if you are behind a Proxy Server. If online activation fails, you will be invited to use [browser-based activation](#) ^[87], described in our Knowledge Base. Otherwise, you should see an activation success confirmation like this:



At any time, you can see the licensing status of your installation by clicking on **Help > Product licensing and activation**. Every time you install a new version, you should refresh your activation to ensure you have access to all the latest features.



The **Help > About** (or press **F3**) information screen should also confirm your licensing status, and display your license key. The Edition you are running should also be displayed on the opening screen every time Omniscop starts.



The **Help > About** (or press **F3**) screen also reports the version of Java that Omniscop is using, which is usually a private version different from other versions of Java on your machine. For more information on Java, see our [KnowledgeBase](#) [4].

This completes the User Guide coverage of typical Windows installation and activation. If you have questions or experience problems, please visit the more detailed KnowledgeBase [Installation](#) [88] and [Activation](#) [89] sections.

Next section: [Using .IOM/.IOK files](#) [90]

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Using Side Bars

Using the Side Bars

Instant filtering query devices and tools

Side Bar Display

Whenever either Side Bar opens, there are three menus displayed at the top; the **Devices** drop-down menu, the **Tools** drop-down menu, and the right corner **[X]** to close the Side Bar. The first time the Side Bar opens, three configurable display options (**Reports, Search All, and Exclusions**) plus filter devices for all fields (columns) in the data set will be ticked and therefore visible on the Side Bar.

To configure or re-configure the Side Bar, click on the **Devices** drop-down menu on the upper left:



Except in a general Data Set page showing everything, you will probably not want filter devices for ALL the fields (columns) to be displayed on most pages. Some field values may not be relevant to the message or useful for selecting/filtering the displays on a given page. Use the **Devices** drop-down menu to Un-tick those fields to hide their filter devices. Use the drag hands at the right to move filter devices upwards or downwards to achieve the desired display on the Side Bar. You can also move the filter devices themselves into a new order by dragging and dropping them with the mouse upwards or downwards on the Side Bar.

The three configuration options at the top of the Devices list (**Reports**, **Search All** and **Exclusions**) will be displayed on the Side Bar only if you leave them ticked. Otherwise, untick these boxes and Report Page tabs will display across the top of the Main Toolbar (the default), Exclusions (Move and Keep with history) will show on the Main Toolbar (without history), and Search All will be available in the [Portal View](#) [91], when open.

Note: Side Bar settings are specific to each Reports Page, and must be changed page-by-page inside Reports Mode. Side Bar settings established outside Reports Mode (always hit Escape to make sure you are not working in a specific Report tab) will apply outside Reports Mode. If you create one or more Report Pages, you can either keep your existing Side Bar settings the same or change them to suit each Report Page. . More on creating [Reports Pages](#). [92]

Using Side Bar features

If you leave all three display configuration options ticked, the top of your Side Bar will look something like this:



Displaying **Exclusions** on the Side Bar has the advantage that you can expand the **Exclusions** device and monitor the history of your Moves and Keeps (see image below). This is especially useful when you are recording a power query sequence of Moves and Keeps to send to someone else as a query file for use with their copy of the file (see below for more on query files).

Displaying **Reports** on the Side Bar is useful when there are very few, or when there are many Reports Pages that need to be arranged in groupings.

Like **Search All** above, any Side Bar text filter can be expanded to reveal a virtual keyboard for text search entry, with ANY and ALL multi-term search options. Omniscope text search works like a search engine, on one, several or all fields (columns) simultaneously. In any text filter, if

you enter a single text string with no spaces, Omniscience will perform a prefix match, highlighting all records with text beginning with the search string. If you enter two text strings separated by a space and do not enclose them in "double quotes", you can search a field (column) of the data file for either one or both of the strings using the **ANY** or **ALL** search options. You can expand your search criteria to include values in other columns by simultaneously entering text strings in more than one filter device. To the right of each device you will see the hits in that column and at the top, in the barometer will show the combined record count.

Note: Omniscience does not yet support an **EXACT** match option, so searching for numbers and text can return records whose values are supersets of the search term, i.e. a search for '22 ' will also display 222, 223, etc. leaving you to select the final records manually.

Closing the Side Bar

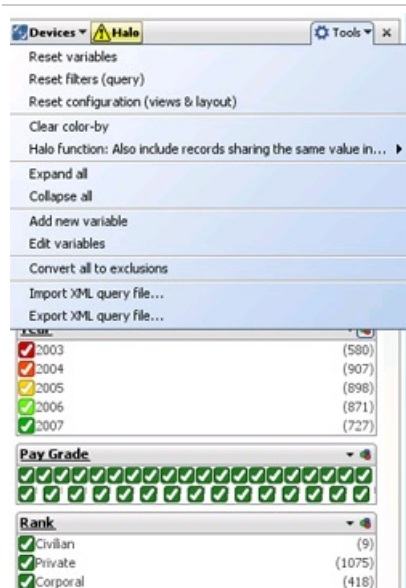
Notice that whenever a query device is actively filtering the data set, the device panel colour turns orange:



Closing the Side Bar with filters set will prompt a message either to reset all the filters, or to convert the query settings to Exclusions. If you wish to keep the same record set in the **IN** Universe with the Side Bar closed, you must choose **Convert to Exclusions**, which means that the filter settings will be translated to the equivalent **Moves** and **Keeps** that you can manage directly in the open views without the Side Bar.

Side Bar Tools Menu

The Side Bar **Tools** drop down menu displays commands that affect the data and/or all other Side Bar query devices. The first three of these are especially useful when managing the creation of Report Pages and using them in live presentations.



Reset variables- Variables are input values not contained in a column of the data set that you can include in formula fields to facilitate dynamic modelling and sensitivity analysis. When you specify a Variable, you define a minimum, maximum and a default value in the range. Each variable defined in a file can display a Side Bar slider enabling users to change the assumed value. Clicking on **Reset variables** returns all variables to their default values. For more on defining and using variables, see [Formulas & Variables](#) [93].

Reset filters (query)- Clears all filter settings and returns all records to the **IN** universe...does the same as the **Reset** on the Main Toolbar.

Reset configuration (views & layout)- returns the current view to a 'pristine' state, with all views closed and the Side Bar reset to opening default settings. Usually used to recover from confusing combinations of views and layout when constructing Report Pages.

Clear colour-by- each device has a small colour-by icon in the upper left. Clicking the device icon imposes the colouring scheme for that field (column) on all the open views that use colouring, like the Table View, the Tree View, etc. This command removes all overriding colouring

schemes that have been set in the Side Bar (but not those already specified in the individual View Toolbars)

Halo function: Also include records with the same value in: a powerful feature for managing groupings or clusters within a data set. Setting the Halo function changes filtering behaviour to include/maintain all records sharing a common value in the specified field (column). For more information, see [Using the Halo function](#). [94]

[94]

Expand all- expands all visible Side Bar devices

Collapse all- returns all Side Bar devices to their collapsed state (default on opening)

Add new variable- brings up the Add Variable wizard...see [Formulas & Variables](#) [93]

Edit variables- brings up the Edit Variable wizard...see [Formulas & Variables](#) [93]

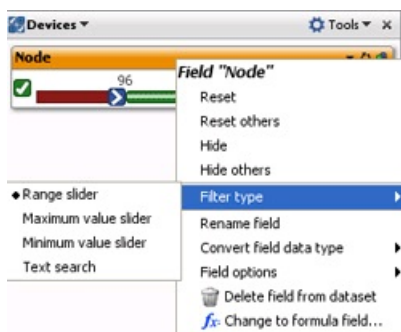
Convert all to exclusions- Converts the current settings of all query/filter devices into Exclusions (the results of Moves and Keeps), thereby setting the green **IN** universe independently of Side Bar settings...allows Side Bar devices to be reset and/or hidden without changing the current composition of the data universes.

Import XML query file- XML query files exported from Omniscope by one user, say a business user identifying data quality issues with specific records (e.g. corrections or suspicious data) can be imported by another Omniscope user, say the Database Administrator, who wants to view just the records at issue and decide whether to parse the XML file to import the corrections into the source database.

Export XML query file- Exports the current query settings as an XML text file which other Omniscope users can open to recreate the same display, assuming they have the same .IOK file version open.

Right-click device menus

Right-clicking on any device displays a series of options for resetting/hiding the device, and changing the filter type. Changing the filter type is sometimes necessary to facilitate user interaction. In the example shown below, the field 'Node' is an integer number field, displaying as a range slider (the default) and with the 'Include empty (null) values' box ticked. If it was better to have users search for a specific number by typing it in, we could change the filter type to Text search...without changing the data type to Text.



Below the **Filter Type** command are a series of commands for managing each field. These commands are the same as those accessible from the Main Toolbar **Data > Manage Fields** menu, and are [discussed here](#) [95].

Next: Using the [Halo Function](#) [96]

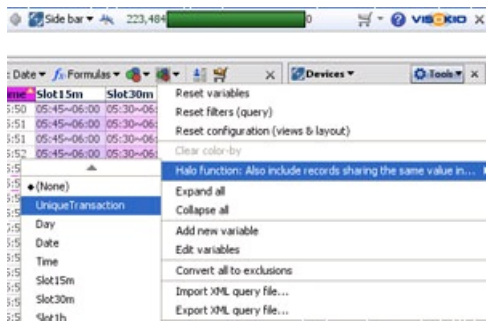
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Halo Function

Using the Halo Function

Advanced joint column filtering option

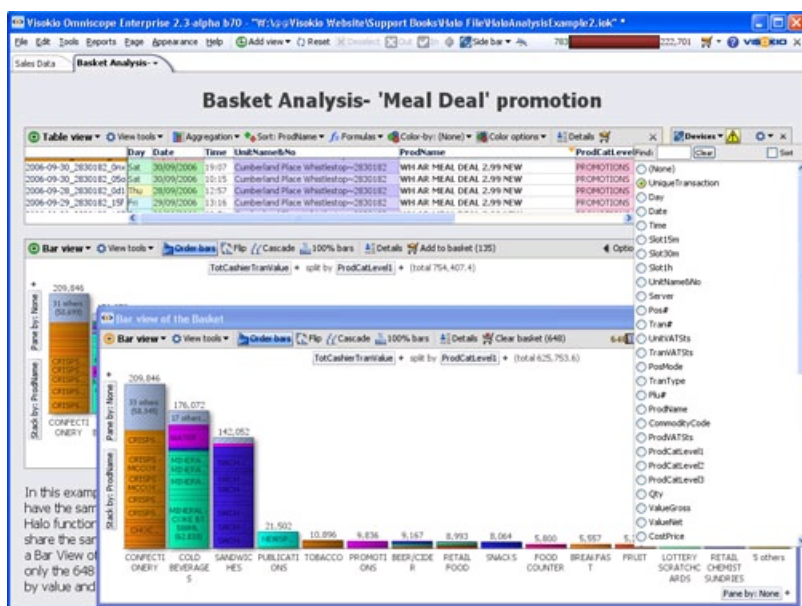
The Side Bar Tools menu includes an option to change filtering behaviour by activating the Halo function. This function changes filtering behaviour from the default to a modified form which preserves all records which share a specific value in a specified field in the IN universe, even if the value in the filters is not one of the selected values.



The Halo function is activated from the **Side Bar Tools > Halo** option, by changing the common value field (column) from (None) to one of the fields in the data set. Once the Halo function is activated, a yellow caution triangle appears on top of the Side Bar telling you that filtering behaviour is now in Halo mode.

The Omniscio Halo function is a powerful analytical tool already used extensively with retail point-of-sale (POS) data. The example below is based on [this file](#) [97]. The file contains POS data on 223,484 items purchased at a number of convenience store Units/POS positions over a month, in a wide range of categories. Items sharing the same UniqueTransaction number (first column text field) were bought at the same time.

On the top of the Side Bar, the Halo function has been set to include all records sharing the same value in the **Unique Transaction** field. This means that filtering for a particular item will carry with it all the items that were bought at the same time. Notice the yellow caution triangle that has appeared on top of the Side Bar.



In this example file, the Halo function is used to select all items which were bought together with a particular promotional item (i.e. they have the same unique transaction number). In the example file, we filter the **ProdName** column to select the 'meal deal' promotion. With the Halo function on, filtering on **ProdName** 'meal deal' returns not only the 'meal deal' transactions, but also all other 'haloed' items that share the same unique transaction numbers.

Try downloading the [example file](#) [97] and repeating the analysis for specific days of the week, time slots or outlets.

Next: [Cycling Options](#) [98]

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View/Filter files





Using Omniscope .IOK/.IOM files

Exploring files created by others

This section provides an introduction to 'navigating' or 'exploring' Omniscope .IOK/.IOM files that someone else has prepared and sent to you. This section uses an Everton British football club file as an example, which you should [download now](#) [99].

Omniscope files always open as last configured and saved. In the case of the Everton file, it has many columns that could be used for filters, so it has been configured to open with four views and both the right and left Side Bars open:



The following sections discuss the navigational features on the Omniscope Main Toolbar, and the use of Side Bar filters and other devices that help you navigate any .IOK file and select the records (rows) that you wish to see in detail.

Main Tool Bar Commands:





The left side of the Main Toolbar contains top level command menus useful for preparing .IOK files. These are not needed to navigate .IOK files already prepared by someone else with your needs in mind. More detail on these commands, which are not specific to using individual views, can be found on these pages:


- [File Menu](#) [100]- open, import, export, and save/print data files/images of files
- [Edit Menu](#) [101]- modify data types/display of columns, changes to the data set
- [Tools Menu](#) [102]- a wide range of settings/configuration options linked to the data
- [Reports Menu](#) [103]- prepare report pages as slides combining views, queries, images, maps, etc.
- [Page Menu](#) [104]- adding titles, annotations, logos and other formatting outside views


- [Appearance Menu](#) [105]- changing the look and feel of the file, outside pages and views
- [Help Menu](#)- [106] version updates, documentation, demos, licensing, bug reporting links etc.


To the right of the command menus, the Main Toolbar displays a number of useful icons/buttons that are used to aid exploration/navigation of the .IOK file:


 **Add View**- Used to add an additional View to the current display. In the demo, try adding a Details View to the display. To remove a View from the display, click on the **[X]** in the upper right hand corner. To change one View to another, click on the View name and select the View you want from the drop-down menu. In the demo, try changing the Map View to a Graph View.


 **Reset**- Omniscope files are flat tables of data, with records (rows) and fields (columns). One of the objectives of navigating an Omniscope file is to select and focus on only a certain subset of records (rows), rather than the whole universe of records in the file. The Reset button removes all of the filtering criteria you may have expressed, and returns the current display views to show all the records. It is very important to always reset your data before filtering, so that all qualifying records will be considered in your subsequent query.


 **Deselect**- Omniscope navigation depends on 4 basic operations: Select (or Deselect), Move, Keep, and Reset. Every view provides ways of selecting one or more records. In the demo, look at the Table View and under Player, click on the first picture (Richard Wright). His record is now selected, indicated by blue animated shading, and his record is now highlighted in other views. In the Graph View, for example, we can see from the blinking highlight that like most goalkeepers, he had no goals or assists. Now click the Deselect icon on the main Toolbar, and this record is not longer selected. Try selecting, then de-selecting other players, or groups of players. For example, in the demo Pie View, click on Republic of Ireland. This will select two goal-scoring players from Ireland. Be sure to click Deselect before moving on.




 **Move**- Selecting records is a precursor to deciding whether to Move these records **OUT** of further consideration. The Move Command moves all selected records **OUT** of consideration, where they stay until the display is Reset.


 **Keep**- the opposite of Move, the Keep command keeps only the selected records **IN** consideration, and moves all the other unselected records **OUT** of consideration.


 **Back**- like a browser, you can go back to the previous display at any time by pressing Back.


 **Show Side Bar**- clicking this icon gives you the option to show or hide the Side Bars on one or both sides of the current display. Uses of the Side Bar are explained in the next section.

 **FeatureFinder link**- used to export data sets to Omniscope's companion applications FeatureFinder Desktop or Web. Use these separate applications (or the Omniscope DataPlayer Studio plug-in available in version 2.4 and better) to convert your data (up to between 5-10,000 records, and possibly more, depending on content) into interactive Flash DataPlayers suitable for embedding in web pages and offline documents like PowerPoint, Acrobat .PDF, or Excel.

 **Barometer**- upon opening a file, it is useful to know how many records are in the data set. As you filter, it is useful to see how many records have been kept **IN** consideration, and how many moved **OUT**. The barometer is a visual gauge that shows the total, as well as the split between **IN** (green) and **OUT** (red). Click on the Republic of Ireland wedge of the Pie View in the demo. Notice how the barometer tells you that you have selected two players. Now click  Move. Notice how the barometer tells you that you have excluded two players...just because they were Irish? Since they were goal scorers, let's click  Reset and put them back on the team!

 **Basket**- the basket is a 'parking place' where you can put selected records, such that they will stay there even if you Reset the display. At any time, you can open the Basket and see the records you have placed there. In the demo, go to the Table View and select the Position 'Goalkeeper' instead of Richard or Wright. Notice that unlike a spreadsheet, the Barometer tells you that you have selected 3 Goalkeepers, not just Richard Wright. Now click the Basket, and choose 'Add selection to basket'. The record count in the Basket changes to 3. To view the contents of the Basket, click on the icon. We have just put all 3 of our Goalkeepers on the market! Let's re-consider...click on the drop-down arrow to the right of the basket, then click **Clear selection from basket**, or **Clear basket**. More on [Using the Basket](#) [107].

 **Help screen**- click on the help icon to see what the publisher or re-publisher of the file may have to say that will help you understand more about the file.

 **Publisher logo link**- if you are publishing or re-publishing a file, you can put your own logo here, and link it to your website.

Using Side Bars

Most Omniscope files contain pages with Side Bars showing on the right, the left or on both sides of the display. At any time, you can reveal and configure Side Bars to help you and your readers navigate a file. From Version 2.4, the display of Side Bars is controlled from the Main Toolbar **Controls** drop down menu. More information on configuring and using [Side Bars](#) [62] and using the **Controls** [14] drop-down.



In the Side Bar text device labelled Surname, type a letter. Notice how all views update to display only players whose surnames begin with that letter. Back-space or click Reset at the top to clear this and show all players again.

In the Side Bar category device labelled Position, click on the green tick boxes for Defender (it turns into a red 'X'), then Forward and then Midfielder. Now only Goalkeeper should have a green tick mark, and only the 3 goalkeepers on the team should be displayed. Click all the devices back to green or click Reset at the top to return to viewing all the players.

In the Date of Birth date/time query device, click on the left-most blue handle and drag the slider rightwards. Watch how the players displayed disappear, oldest first, until only the youngest player is visible. Return the slider to its original position or click the Reset button at the top to restore the experienced players to your team.

Do the same with the Height and Weight numerical sliders to determine who is the tallest and heaviest player...is it the same man? Remember to return/reset the sliders.

Hovering the mouse on a Side Bar query device reveals basic statistics on the values in this field/column...which may include explanatory field notes from the data set and .IOK file preparer about each field (column) of data.

Right-clicking on a Side Bar device reveals a wealth of options to change things, such as resetting all the other filters or even hiding the filter. To return all Side Bar filter settings to their original state, click Reset on the Main Toolbar.

Next section: [Using Views](#) [8]

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Using Views

Using Omniscope Views

Many different ways to display your data and related information on the web

Omniscope 2.4 currently offers 14 different views (version 2.5 has 17) to help you and recipients of your files analyse and illustrate the messages in your data. Omniscope views offer much more than just data visualisation and portable/exportable charting and presentation. Most views are complete data navigation environments enabling browsing, aggregation, analysis, filtering and drill-down to details. All views set to show the same data subset/named query e.g. 'Filtered data (IN)' update simultaneously to reflect filtering actions.

Some views are slightly different:

[Web View](#) [50], opens browser window(s) showing linked web pages and the results of web services associated with the data set.


[Content View](#) [51] (2.5+), displays free text commentary and links to web assets, including images and charts not referenced in the data set

[Dial View](#) [52] (2.5+), creates typical dashboard-style gauges to display filed (column) composition, progress and alert conditions, etc.

[Details View](#) [53], displays all (non-hidden) values for each single record, together with images and buttons/links connecting to related web pages/services.

[DataPlayer View](#) [54], allows anyone to create interactive Flash DataPlayers encapsulating the data in exportable 'dashboards' for documents and web pages.

Adding Views

The vertical **View Chooser** drop-down menu appears whenever you click  on the Main Toolbar, or when you click on a view icon to change an open window from one view to another. Each View is represented by its own icon:



For more on using each of the views, and the options available on their respective **View: View Toolbar > View tools** menus, see the [Views Reference](#) [109] page, or click on the view icons above or the names below to go directly to the discussion of each individual views:

- [Table](#) [110]
- [Chart](#) [111]
- [Pie](#) [112]
- [Bar](#) [113]
- [Graph](#) [114]
- [Tile](#) [115]
- [Pivot](#) [116]
- [Tree](#) [117]
- [Network](#) [46] (2.5)
- [Portal](#) [91]
- [Map](#) [118]
- [Venn](#) [49]
- [Web](#) [119]
- [Content](#) [51] (2.5)
- [Dial](#) [52] (2.5)
- [Details](#) [120]
- [DataPlayer](#) [54]
- [Text*](#)
- [Google Earth*](#)

*To see these experimental views (you will need to re-start your Omniscope for full effect):

Version 2.4: Tools > Advanced Tools > Application wide settings > Show experimental features;

Version 2.5: Settings > Advanced > Show experimental features.

Options for each view are generally available on the **View Toolbar**. Many of the commands available from the **View Toolbar > View Tools** drop-down menu are common to all views. Commands or options common to all (or most) views are documented here: [View Tools common commands](#) [121].

View Toolbars

Each View has a **View Toolbar**, which presents the features and options applicable to that View, including a **View Chooser**, **Data Sub-Set** selector, **Aggregation** options, a **View tools** drop-down menu, **Fields** (columns) picker and other options specific to each view. View Toolbars open and close at the top of each view window. All views and View Toolbars always open below the **Main Toolbar**, whose commands apply to all open views.

View Toolbars vary in appearance, since each View features different controls on the toolbar, but they typically look like this:



View chooser - switching or closing views

In the left corner of each View Toolbar is the View icon which identifies the view currently selected. Clicking this icon also reveals the vertical **View Chooser** drop-down from which you can change the view shown in that window. On the right-most end of all View Toolbars is the Close View icon, shown as a black **[X]**. Click this icon to close the view. You can always bring closed views (or new, additional views) back by clicking this icon on the Main Toolbar:

Queries & Subsets selector - defining the data subset in each view

By default, new views will open with the Data Subset selector set to 'Filtered data (IN)' meaning you're looking at all the records that meet the filtering criteria expressed on the Side Bar. You can change the Query/Subset of the data shown in the view using the drop-down selector. More on [Queries & Subsets](#) [10]

Aggregation menu - defining the aggregation of records in the view

Beginning with version 2.4, many Views include an Aggregation drop-down menu, used to define aggregated views of the data, together with the function to be applied when aggregating each field (column). Aggregation differs from the presentational Grouping options available only in the Table View. Unlike Grouping, the end user is not meant to 'unroll' or 'drill down' the defined aggregation to the lower level of granularity. User-interactive Grouping can be used in addition to Aggregation. For example, a file with each row defined as an observation for a given day can be aggregated by week, then grouped by month and year. In the resulting Table View, an end user would be able to unroll the groupings down to weeks, but to see the maximum granularity daily data, they would have to remove the Aggregation settings.

View Tools

Fields

Next section: [Viewing Details](#) [122]

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Displaying Details



Displaying Details and Highlighting

*with automatic cycling and image
slide shows...*

With the exception of the Table View, Omniscope views do not show the all the values associated with individual records (rows) or small groups of records. Once you have filtered down to a relatively small group of records of interest (using either Selection followed by Moves and Keeps, or Side Bar filter devices) you have several highly-configurable options for viewing some or all of the details for one or a group of selected records.

Details View and pop-up window for single records

If the Table View is open, and no Details View is open, selecting/double clicking on a row header (left-most part of a row) will display the details for that record- either as a separate pop-up window (the Details window) or as an embedded panel in the left or right Side Bar (you set this option from the Main Toolbar using the **Settings > This tab > Details** command).



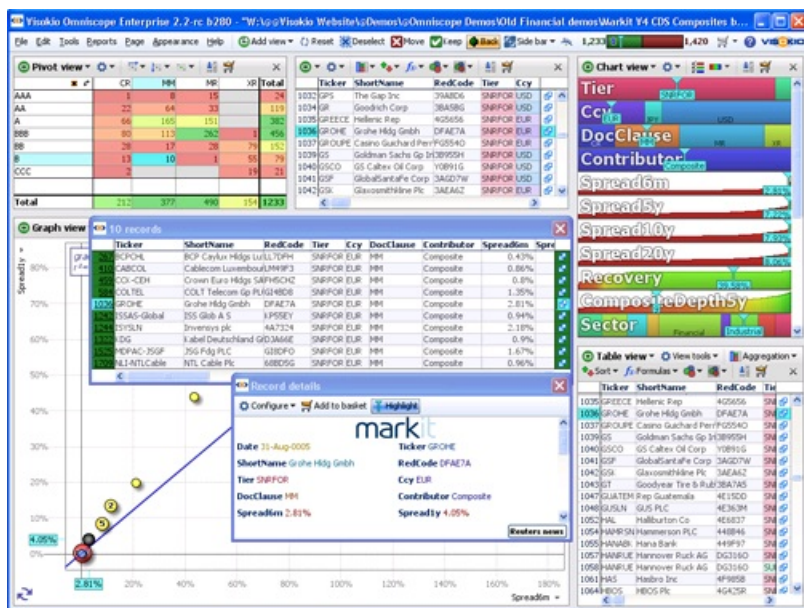
Whenever the Details View is open, clicking on row headers or links set to display details will display inside the Details View. Only if the Details View is closed will the Details pop-up window or embedded panel options display. Whenever the Details View is open, the settings for that view (columns to show, etc.) will be used. When the Details View is closed, the settings for the pop-up Details Window or embedded Side Bar panel

display will be used. Note that these settings are Report Page specific. If you wish to alter them in a given Report Page, you must open that page, make the changes and commit your changes to make them persistent.



Viewing Details for multiple records

Every **View Toolbar** has a **View Details** icon next to the Add to Basket icon on the right hand side. This command opens a tabular view of either the selected records in the view, or all data in the view, showing the fields set to be visible in the Table View, even if the Table View is not visible. The **View Details** option is like opening a temporary Table View. Like the Table View, double clicking on the row header, or on any underlined link set to open the Details Window/Side Bar panel, will display individual details for that record. You are always at most 2 clicks away from full details on any record using the **View Details** option on any **View Toolbar**, followed by clicking on the row header or details link in the View Details pop-up window.



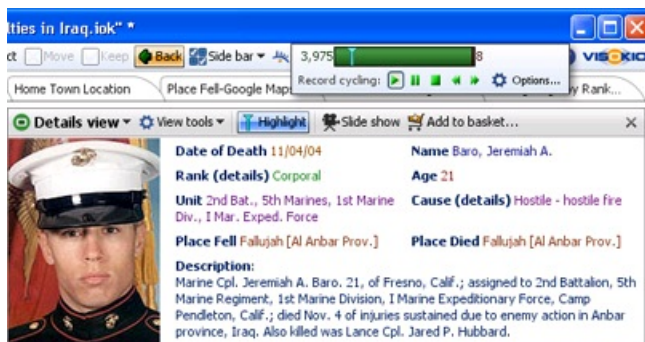
Warning: The fields (columns) displayed in the **View Details** pop-up table window are the same (and in the same order) as the settings governing the Table View. If you are in Reports Mode, you must configure a Table View (even if the Table View is not normally open on the Reports Page), in order to control the order of the visible fields in the **View Details** pop-up for that Reports Page. If you do not do this, the settings for the Table View at the time the Reports Page was created will be used. If you later change the settings for your working display Table View, the changes will not automatically be made in the Reports Pages unless you select **Apply these changes to all Table Views** and then explicitly elect to apply the same settings to all Reports Pages, or else you return to each Reports Page and change the Table View settings individually.

Highlighting

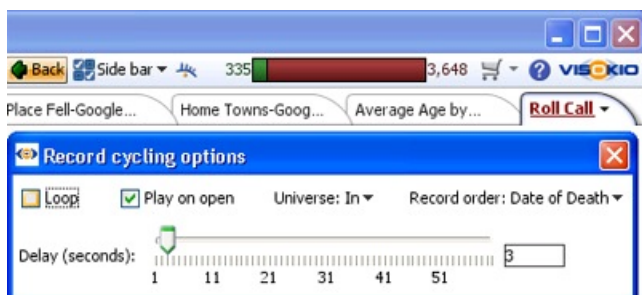
If **Settings > This tab > Brushing enabled** (the fading of unselected records) is not enabled, whenever a single record is selected, the position of that record is highlighted in aqua-blue in all open views, as shown above. Open Table Views will scroll to reveal the selected record. Use highlighting to see the positioning of a record in plots, such as the Graph and Chart Views, and read off values for various fields of the selected record in all open views. If you are using a colour-by setting on the Side Bar, highlighted rows will be partially highlighted, so that you can still discern the colour assigned to the highlighted record (row). You can turn this feature off by clearing the Highlight button on the view/pop-up toolbar.

Record Cycling

Hovering on the Main Toolbar barometer reveals the control panel for record cycling. Record cycling automatically steps through the records in the universe you select and displays the position of each record in all open views using highlighting. If you have a Details View open, or details windows showing on the Side Bars, then the details for each record (including any related images) will be displayed as cycling steps through. Cycling is turned on, paused, stopped, fast-forwarded and fast-reversed using the green control icons under the barometer.



Clicking on the **Options** button displays the record cycling configuration panel. Options available include **Loop**, which plays the cycle continuously once started; **Play on open**, which starts cycling automatically when the file is opened; **Universe**: which selects the data universe from which the records will be cycled for display; and **Record order** which sets the field used to order/sort the records to be displayed.



Warning: If you have global record cycling enabled, and you turn off the Highlighting option, the record cycling will stop. To re-start record cycling, hover your mouse on the barometer to expose the global automatic record cycling menu, and click on the green forward arrow to re-start.

Note: Version 2.4 has improved control of cycling options, see using the [Cycling Toolbar](#) [98]

Slide Shows

Most View Toolbars feature a **Slide show** option. This option is used in files with associated or embedded image sets to display the image(s) associated with each record in a special Slide show display window. This window can be any size and can be displayed on another monitor. Unlike record cycling with the details view, slide shows can show multiple images associated with each record using tokenized file names in the picture column. For more information, see [Tokenized data](#) [123]



From the View Toolbar, click on the **Slide show** icon to reveal the configuration options panel. Options available on this panel include:

- **Jump to record:** allows you to preview any record(s) by dragging the slider to the start point
- **Limit enlargement:** prevents over-enlargement of images to be displayed (to the detriment of the clarity of the image based on multiples of the size of the image available to the Omniscope file.
- **Sharpening:** this setting can be used to compensate for poor image quality, which could be due to enlargement
- **Transition time:** number of seconds between image displays (can be none)
- **Play Speed:** number of seconds each image is displayed
- **Match/set image background:** Controls the background displayed in the window together with the image.
- **Add to basket:** adds the record being displayed in the Slide show to the Basket. For more detail, see [Using the Basket](#) [107].
- **Loop:** repeats the slide show over and over again
- **Title Field name:** Specifies which field in the data set will be displayed together with the image(s)

For more information on configuring Details Windows and the Details View, see the [Using the Details View](#) [120] section of this User Guide.

Next: [Queries & Subsets](#) [10]_ [10]

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Queries & Subsets

Named Queries & Data Subsets

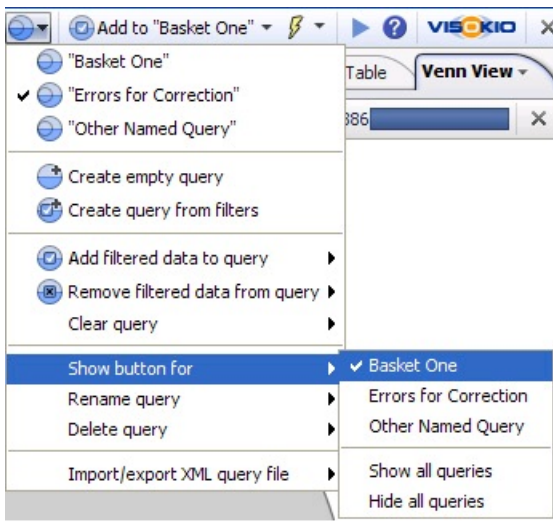
Creating Named Queries to define data subsets

Version 2.4:

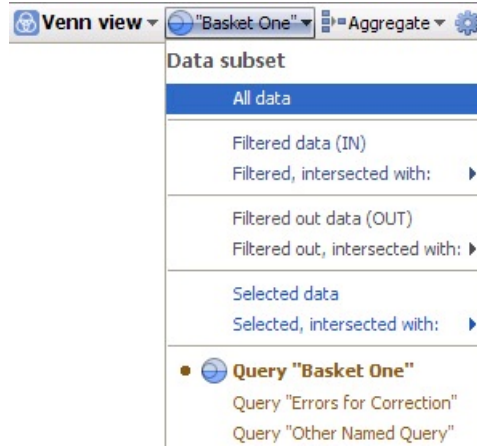
By default, Omniscope works with 4 defined sets of data; **ALL** data, filtered **IN** data, filtered **OUT** data and **Selected** data. Files open with **ALL** data in the filtered **IN** set, but via Side Bar filtering, or selection, moves & keeps, some records are transferred to the filtered **OUT** data subset as shown in the barometer. You can define additional subsets of data which can be displayed alone or in conjunction with the defined data sets/subsets using Named Queries.

The Named Queries drop-down menu is immediately right of the Barometer, and provides all the commands required to define and manage Named Queries, combinations of filter settings or record selections which define selected or filtered subsets of the file data expected to be used frequently in configuring the views in the file. In the example below, 3 Named Queries have been defined; 'Basket One', 'Errors for Correction' and 'Other Named Query'. At right, the example Venn View toolbar has been set to display the records contained in the Named Query 'Basket One'.

Each View Toolbar includes a Data Subset drop down



Each view toolbar includes a Data subset drop-down where you specify which of your defined Named Queries (in brown) should be displayed in the view:



Named Queries can be defined using either **Create empty query** or **Create query from filters**.

Create empty query- give the query you plan to populate a unique name for this file. The new query will appear at the top of the Named Queries drop-down list, and become a side menu option for commands such as **Clear**, **Rename** and **Delete Query**. The **Show button for** option places a button with the name of the selected Named Query/data subset on the Main Toolbar to the right of the Named Queries drop-down menu. These button(s) make it easier to manage adding or deleting selected/filtered **IN** records from multiple Named Queries. Once an empty query has been created, e.g. 'Basket One' or 'Errors for Correction' you can add filtered **IN** or **Selected** records to these queries at any time using **Add** or **Remove selected/filtered data to query** (if records are **Selected**, these records will be added/removed, if not, then the current contents of the Filtered **IN** subset will be added/removed to/from the Named Query you select from the sub-menu at right).

Create query from filters- this option lets you preserve the current pattern of filters set in the Side Bar as a Named Query. You can subsequently refine the data set *defined using Add or Remove selected/filtered data to query*.

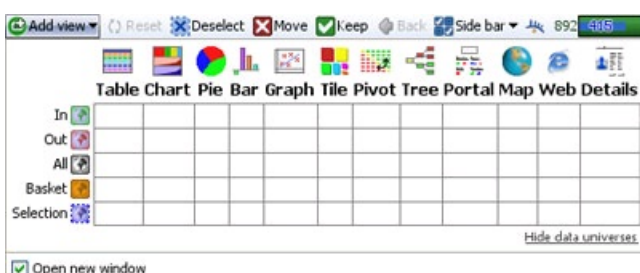
Import/export XML query file- the definition of any query in the file can be saved in XML file format and exchanged with others using the same Omniscope file. This is useful for example, for highlighting anomalies and errors in the data requiring correction.

Version 2.3 and previous:

When Omniscope filters records, where do the excluded records go? Don't worry...they are not deleted! Based on your input, Omniscope classifies each record (row) in a given file as being in one or more Data Universes:

- **Green 'IN' Universe**- records still under consideration
- **Red 'OUT' Universe**- records moved out, excluded from further consideration
- **Black 'ALL' Universe**- all records in the file/data set, regardless of queries/filters set
- **Gold 'BASKET' Universe**- records saved to the basket during the session
- **Blue 'SELECTION' Universe**- records selected at any given time

All of these Universes can be viewed at any time in any of the 12 available views in Omniscope. Click on **Add View** on the Main Toolbar, then select the **Show other data universes** option at lower right.



Tick the box representing any combination of Views and Universes to see the records (rows) currently in each universe in each view.

If you save an Omniscope file, the contents of the **IN** and **OUT** Universes will be preserved, and the file will open with the barometer showing the same **IN/OUT** split as when the file was last closed. However, the contents of the **BASKET** and **SELECTION** Universes will be re-set. Always remember to do something with the contents of your **BASKET** universe before you close the file, because this selection of records will not be there when you open the file again.

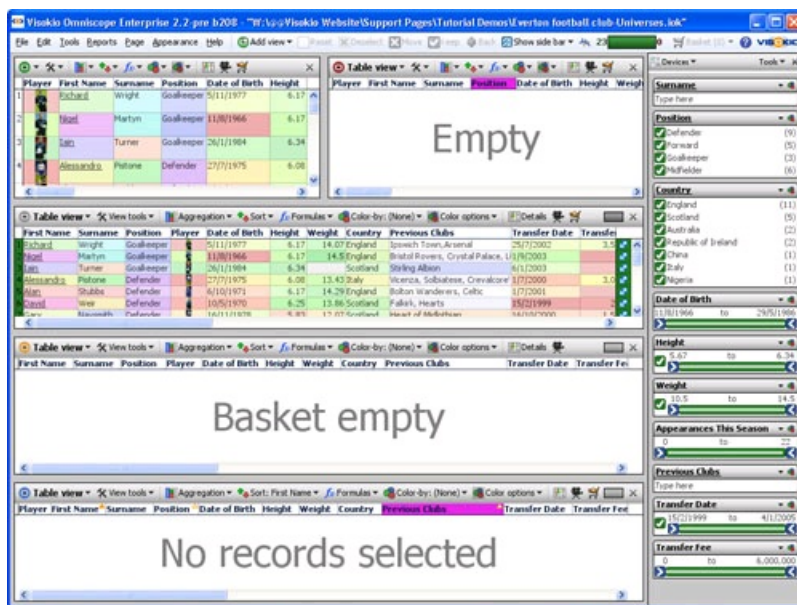
Let's explore the use of Data Universes in Omniscope, while re-visiting the filtering aspects of navigating .IOK files. Recall that there are 2 filtering approaches in Omniscope, which can be used interchangeably at any time, assuming at least one SideBar with instant filter/query devices is showing.:

1. Side Bar filter/query devices (known as instant query mode)
2. Select/Move/Keep sequences (known as power query mode)

In the Tutorial below, we will see in more detail the difference between single-step, 'instant' filtering using Side Bar filters/query devices, and multi-attribute, potentially multi-layered 'power' queries using Select/Move/Keep sequences. If you are viewing both the **IN** and the **OUT** universe, it is also possible to do dual-directional, multi-layer power queries...which are difficult, and sometimes even impossible to do programmatically!

Using Data Universes

For this tutorial, please download another, especially-configured version of the [Everton Football Universes \[124\]](#) file. This version of the Everton file has been configured to open with five Table Views, one for each Universe, and with only one Side Bar open:



The View icons on the far left of each View Toolbar are coloured to show which of the 5 Universes is being displayed in the view. In this demo, the upper left-hand Table View is showing the green **IN** Universe, all 23 players. The upper right-hand Table View is showing the red **OUT** Universe, currently empty because no players have been filtered out. The full-width black **ALL** Universe Table View in the middle will always show all players, regardless of filtering. The gold **BASKET** Universe Table View is showing 'Basket Empty', since no players have yet been placed in the Basket. Finally, the bottom blue **SELECTION** Table View is empty, indicating that no records are yet selected.

Using the Side Bar, type the letter 'B' into the top text query device labelled Surname. Notice how the right-hand green **IN** Table View changes to display only the 3 players whose surnames begin with B, and the left-hand red **OUT** Table View now displays the records for the 20 players whose surname does not begin with 'B'. A glance at the barometer confirms that the green **IN** Universe contains 3 players whose surnames begin with B, and the red **OUT** Universe contains 20 players whose surnames all begin with other letters. In the Side Bar, back-space over the letter 'B' to clear the Surname query device, which will Reset the file, since this was the only extant query/filter setting.

Notice that when using the Side Bar devices, the bottom Table View showing the **SELECTION** Universe did not show any records being selected, and that moving 20 players to the OUT Universe was instant.

Now let's try using Selection, which can be very useful for drilling-down and confirming details before deciding whether to execute a **Move** or **Keep** operation.

Go to the upper right green Table View showing the **IN** Universe, and click on the Position category Defender, which will display an animated highlight in blue. This means you have selected all the players who are Defenders, and their records will now appear in the bottom blue **SELECTION** Table View. A glance at the barometer will confirm that you have selected 9 Defenders out of the 23 on the team.

Let's say you want to take a closer look at the Defenders. On the main/top Omniscope Toolbar, click on the green check-marked icon labelled **Keep**. This will keep only Defenders in the green **IN** Universe and move all others to the red **OUT** Table View to the right. Notice that the **SELECTION** Table View has been cleared, pending you next selection.

Let's say you want to put all the English Defenders on the transfer market (don't ask...). In the Side Bar, using the 3rd device labelled Country, click on the category name England. Notice that all other nationalities are X-ed out and all non-English Defenders are moved to the red **OUT** universe, leaving only the 4 English Defenders remaining in the **IN** Universe. Now go to the green **IN** Table View Toolbar, and find the **Add to Basket** icon right-most on the toolbar. Click the **Add to Basket** icon, and notice that the gold Table View showing the **BASKET** Universe now shows the 4 English Defenders.

Click Reset on the Omniscope Main Toolbar. This will return all players to the **IN** Universe, and empty the **OUT** universe, but leaves the 4 English defenders in the Basket, as can be seen also on the top/main Omniscope Toolbar Basket icon to the right of the barometer.

Let's save the youngest English Defender for the future. In the gold Table View showing the 4 English Defenders currently in the **BASKET** Universe, click on the column header Date of Birth. This will set a primary sort (see the orange downward arrow appear in the column header) sorting the players in the basket from youngest to oldest. Double-click on the row header of the youngest player, Daniel Fox. This will display the details window pop-up for Daniel Fox. Now click **Remove from Basket** to remove Daniel's record from the basket.

To clear the **BASKET** Universe completely, click on the right-most **Clear basket** icon in the gold Table View Toolbar, or use the Omniscope Main Toolbar **Basket > Clear basket** command on the drop-down menu. More on [Using the Basket...](#) [107]

Next section: [Use Your Data](#) [74]

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Using the Basket

Using the Basket Universe

Warning - legacy documentation. This page applies to Omniscope 2.3 and earlier. From Omniscope 2.4, the basket universe has been superceded by [named queries](#) [10] which are far more powerful. The terminology "Data universes" has also been dropped. The Basket is no longer available in 2.4+.

Omniscope classifies every record in the data set as belonging to various 'data universes'. In addition to being in either the **IN** or **OUT** Universe, all records are always in the **ALL** universe. At any given time, any selected records are in the **SELECTION** universe. Clicking **Deselect**, or executing a power query using **Move** or **Keep** removes all records from the **SELECTION** universe and shifts records between the **IN** and **OUT** universes. Clicking **Reset** moves all records from the **OUT** universe back to the **IN** universe.

Version 2.3 and previous: Every View Toolbar (except the Web View) allows you to put all (or just one or more selected) records into the **BASKET** universe, building up a list of records in which you are particularly interested. The purpose of the **BASKET** universe is to allow you to collect a session-persistent subset of records (rows) that does not **Reset**. The Basket allows you to use many different Side Bar filter criteria or sequences of power queries to identify records of interest, placing each group of records in the **BASKET** for 'safekeeping' prior to executing a **Reset** and applying other filtering sequences or power queries to your data.

Although records in the **BASKET** are unaffected by **Resets**, the contents of the **BASKET** not saved on Exit. If you wish to save, share or reuse the contents of the **BASKET**, you must use the **Export or Import basket references (or images)** command options which appear on the View Toolbar whenever you are viewing the **BASKET** target universe:



References are the values in a field (column) that are unique, that is, there is only one reference value for each record (row). (You should always test for duplicate references using the Table View Tools **Tools > Select duplicate values** option)

Import basket references- if you or someone else using data with the same unique identifiers have previously saved a reference list as the single column of values in a .TXT file, you can re-create the contents of the **BASKET** in your current Omniscope session using this command

to import the external .TXT reference file. Omniscope will move all matching records (rows) into the **BASKET** universe automatically, and tell you if any references in the external file could not be matched.


Export basket references- typically, you use Side Bar filtering and power queries (together with geographic and image-based selection) to identify a sub-set of records on interest, and accumulate them in the **BASKET** universe. Before you exit, if you want to save (to share or re-use/re-create) the contents of the **BASKET**, you must use this command to export a .TXT file containing a list of the references currently in the **BASKET**.

Export basket images- Omniscope can be used to manage and select images grouped in folders (image sets) for web-sites, DataPlayers, and other uses. At any time, a selection of images in the **BASKET** can be exported as a new image folder using this command.

Export this view's data- used to export the entire contents of the **BASKET** universe in various file formats (.IOK/.IOM, .XLS, .CSV, .TSV, .XML, etc.) using the [Export Data wizard](#) [125].

Details View of the Basket

You can enable your users to browse the contents of the **BASKET** in any view(s), but given that they will have already selected these records and placed them in the basket for closer review, a free-floating instance of the Details View with the records navigation slider revealed can be the most effective.

To create a free-floating view, use  Add View command on the Main Toolbar with the **Open new window** option ticked. From the Details View Toolbar, choose **Show navigation controls** to display the arrows and slider navigation at the top, and untick the **Sync** option, since this view is for user review of the **BASKET** universe only. Add a title, use the **Links** option to add buttons for the action links at the bottom, then hide the View Toolbar and users will be able to interact with their baskets record-by-record using a floating window something like this:



Back to [Queries and Subsets](#) [10]

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Use Your Data

Using Your Data



Importing your data into Omniscope

Thus far, you have been learning how to navigate Omniscope. .IOK/.IOM files prepared by others. Now you are ready to start opening your own data in Omniscope, and configuring .IOK files for use by yourself and recipients of your files.

Omniscope imports tabular data (data in rows and columns) from spreadsheets and databases. The simplest way to get data into Omniscope is to open/import the data from a spreadsheet, such as an Excel .XLS file. All popular spreadsheets and databases allow exporting or saving as comma-separated values (.CSV) files. You can import .CSV files into Omniscope just like a spreadsheet, without the row limits imposed by spreadsheets. Tab separated values (.TSV) and some other common delimited text data file formats are also supported, as is .XML. You can also cut and paste tables of data directly into the Table View of Omniscope.

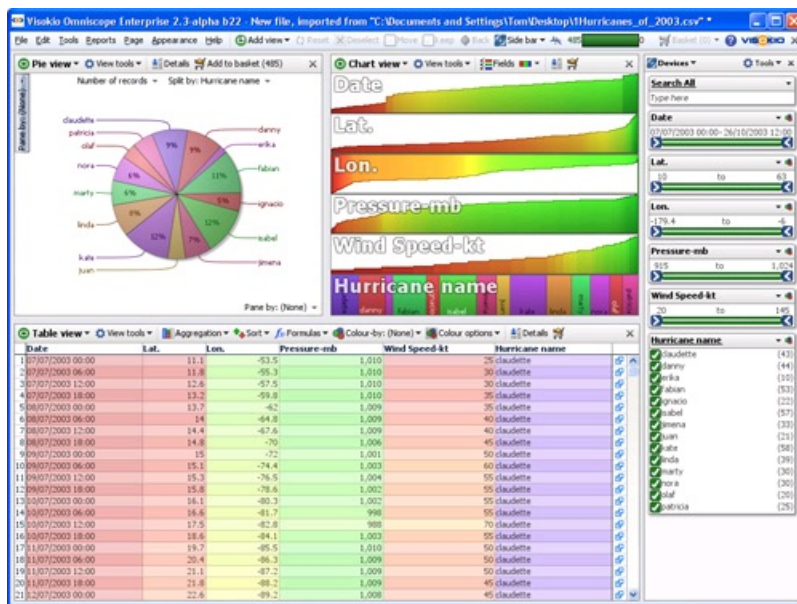
Opening/Importing Tabular Data

If you have both Excel and Omniscope installed, Omniscope can open data from native Excel .XLS files directly. Before opening a spreadsheet file in Omniscope, first check that the spreadsheet has a suitable tabular structure ([see example](#)). [126]

A sample 6-column .CSV data file containing repeated observations of location, air pressure and wind speed for a series of hurricanes over time is [available here](#). [127]

To open your spreadsheet data file in Omniscope, simply choose **File > Open file** from the Omniscope main menu, and browse to your .XLS or .CSV spreadsheet file. Omniscope will only import data from a single worksheet tab in a spreadsheet file. If you have a data set spread across more than one tab, you will need to start by opening/importing the data from each tab and saving it as a separate Omniscope file, then using the Merge Data wizard to combine them into a single Omniscope file. For more information, see [Using the Merge Data wizard](#). [128]

Opening/ and importing a new table of data in Omniscope creates a new .IOK/.IOM file, which by default opens with 3 views of the data; a Table View, a Chart View, and a Pie View (which will be displaying the record-count split of one of your columns of data):



For more detail on importing data files into Omniscope, see [Opening Datasets](#) [129]. Omniscope can be configured to open spreadsheets that vary somewhat from the simple structure using the options available in the [Open Data Set Wizard](#) [129]. Common issues related to data format, file layout and orientation are discussed in the [Data Management](#) [130] section. More detailed information on supported file formats and methods of dealing with common issues is also available in our Knowledge Base section on [Data File Import](#) [131].

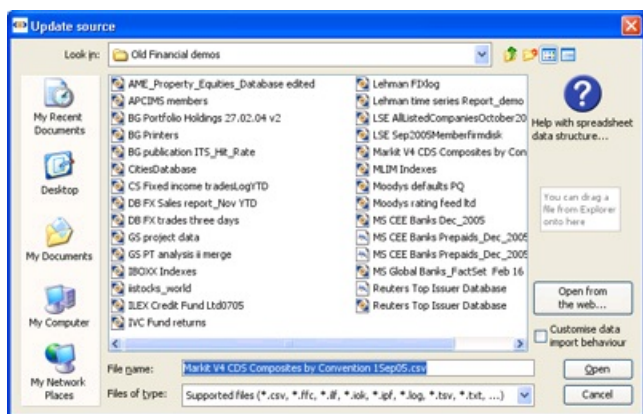
For more information on connecting directly to database tables/views instead of data files, see the section on [Connecting to Databases](#) [132].

Refreshing from Linked Sources

Maintaining links to data sources enables Omniscope files to be updated whenever the data in the original source file changes. This is especially useful when working with reporting views automatically extracted from central databases, or when a specific tab on a specific spreadsheet is being used to generate the source data. Every time a new view is generated and a new file produced, if it is saved to the same location with the same name, Omniscope will automatically detect the change on next opening and import the newest values. More on [Refreshing Data](#) [133].

Unlinking from/Re-linking to Source file

Every time a linked .IOK file is opened or closed, the user is given the option to unlink the file from its original source. It is also possible to re-establish a link to a source file using the command **Data > Edit source** and pointing at the data file again as before, which will preserve any field conversions and formulae applied to the previous source.



Editing and Saving back to Linked Sources

Upon opening an Excel spreadsheet or other supported tabular data file, you'll be working on a new, unsaved Omniscience .IOK file. When you save the Omniscience .IOK file, all the imported data (and any edits you may have made), together with the view configurations and layout settings will all be saved in the new .IOK file. In addition, by default, you will have established a 'pairing' or 'linked source' relationship between the Omniscience file and the original data source file. As long as the linked data source file remains in the same relative location, Omniscience will be aware of this 'linked source' file and its most recent version. If it changes, Omniscience will notice and offer to refresh the data from the linked source file.

If you make changes to the data in Omniscience, on closing the .IOK file, you will be asked if you want the changed data **Saved back to source** or whether you wish to **Unlink** the file from its source. If you chose to save your data edits back to source, the original spreadsheet will be replaced. Please note the following warnings about writing Omniscience files back to linked source spreadsheets:

Warning- Edit only one file at a time: If you make changes to both the Omniscience file and the linked source file, you risk not being able to preserve or "merge" both sets of edits

Warning- Multiple Worksheets: If your spreadsheet has more than one non-empty worksheet tabs, Omniscience will ask which of the tabbed worksheets you want to import from. However, if you edit this data in Omniscience, choose to preserve the link, and choose to save back to source, Omniscience will overwrite the entire multi-tabbed spreadsheet file with a single-worksheet spreadsheet.

Warning- Formulae and Formatting: All formulae, formatting and other non-tabular information in the source spreadsheet file are ignored on import, only the formula result value is imported. If you choose to maintain the link, and you chose to write back to source, you will overwrite your spreadsheet formulae with static data. Merged cells and other formatting, embedded graphs, etc. are ignored.

Warning: remember, saving back to source will overwrite the spreadsheet with a plain unformatted file of tabular data with only one worksheet.

Suggestion: If you have worksheets with macros and other report formatting, but wish to visualise, filter, edit and otherwise manage the source data in Omniscience, try using cut and paste to move the data from Omniscience onto the first tab of your spreadsheet, and move all the macros and formatting onto subsequent tabs referencing the required values from the first tab in the spreadsheet pasted from Omniscience.

For more technical information on data file formats supported and how best to open them, consult our [Knowledge Base](#) [131].

Next Section: [Configure Your Data](#) [134]

[User Guide Top](#) [108]

Configure Data



Configuring

Your Data

Make your data interesting...

Once your data has been opened and imported into Omniscope, there are four general steps to configuring how Omniscope displays your data for maximum impact, utility and ease of navigation.

1. Confirm data typing, default column order & settings
2. Configure Side Bars, show/hide filter devices
3. Configure opening views
4. Modify appearance (optional)

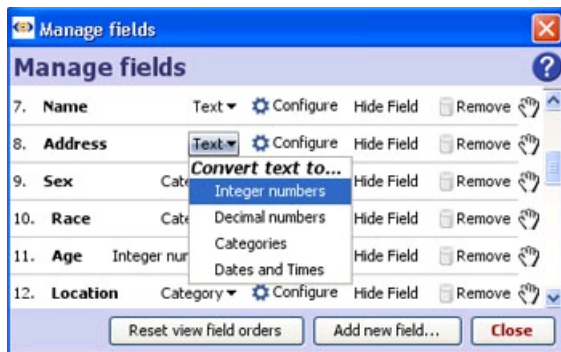
Suggestion: Remember to click **File > Save as** to start the process, and save your IOK file frequently as your configuration work progresses.

Data Typing & Column Order

Omniscope uses four Data Types to help it display the most appropriate filter/query devices and in many other ways. When importing new a new data set, Omniscope inspects all the values in each field (column), and sets an assumed Data Type for each field (column) to be one of five types:

- **Text**- character strings, and numbers used as codes, like identifying codes.
- **Category**- limited numbers of unique text words/values, like country names, colours, true/false fields etc.
- **Integer numbers**- whole numbers with no decimals.
- **Decimal numbers**- numbers used in calculations and percentages.
- **Dates & Times**- many different date and time formats occur in source data, most of which are recognised and converted automatically.

The first step in configuring your own data file is to confirm that Omniscope has correctly typed all the fields (columns) in your data. To do this, click on **Data > Manage Fields** to display the [Manage Fields](#) [75] dialog:



The **Data > Manage Fields** panel provides an overview of all the fields (columns) in a data set, their current Data Type settings, and allows you to **Change Data Types**, **Add**, **Rename** or further **Configure** a field, **Hide Fields** from all views, and **Remove** fields (columns) from the file. The drag handle 'hands' at the far right are used to grab and re-order the fields from the default import order, to a more useful 'master' order. Once you have the fields (columns) in the order you want, click on **Reset field orders** and the new order will become the starting point in each view you configure. You can make persistent changes to the field (column) order view by view, and in Report Pages, but whenever you return to **Data > Manage Fields > Reset view field orders**, the field (column) order in all views will be reset.

For more on adding, removing, hiding, renaming and converting field Data Types, see the section on [Managing Data](#) [130]

For a more detailed explanation of all the commands and options in the **Data > Manage Fields** dialog, see the Main Toolbar Commands section [Data > Manage Fields](#) [75].


Data formatting, layout and transposition issues

Data formatting, layout and transposition issues can arise for various reasons. [Date & time formats](#) [135] can sometimes not be imported automatically until you assist Omniscope by clarifying the format your date and time data is in. [International differences](#) [136] in data formatting may need to be . You may also want to use the ability of Omniscope to manage more than one value in a cell (e.g. to capture one-to-many

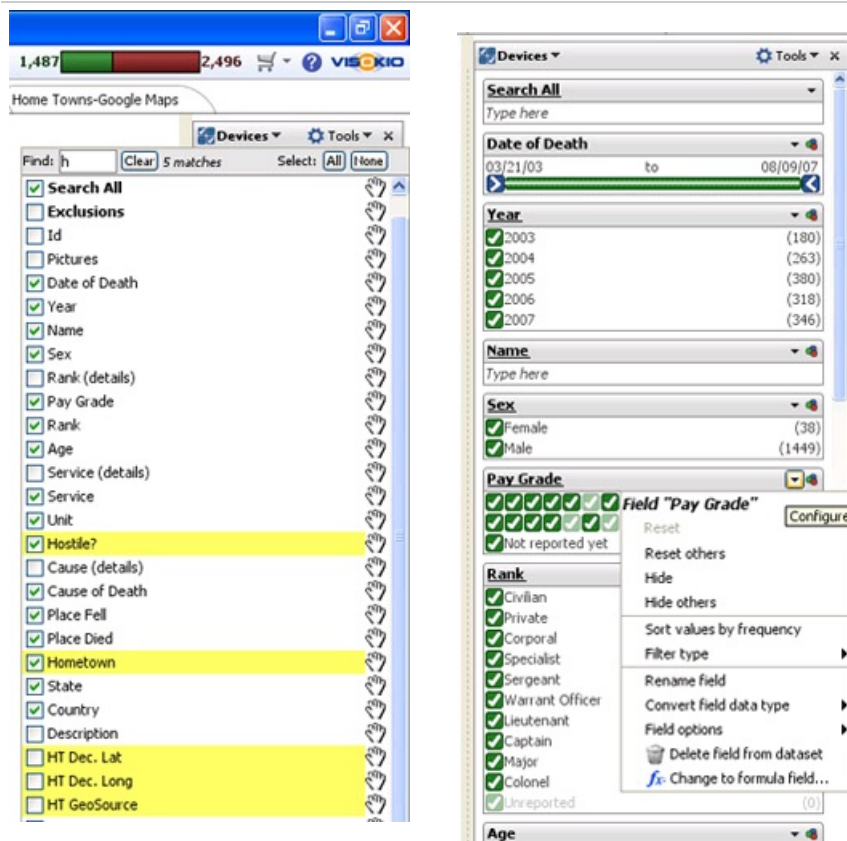
relationships) using [tokenized data fields](#) [123]. Omniscipe [time series](#) [137] data needs to be oriented 'vertically' with all the dates and values of repeated observations in columns (not rows). You can use the Omniscipe [De-pivot/Re-pivot functions](#) [138] to transpose (change the orientation) of some or all of your data.





For more detail on these and other data formatting, layout and orientation issues...see the [Managing Data](#) [130] section.

Configure Side Bars/Filter Devices

The default opening configuration includes an open right-hand Side Bar. If it is not visible, the  **Show side bar** icon on the Main Toolbar can be used to reveal one or both Side Bars.

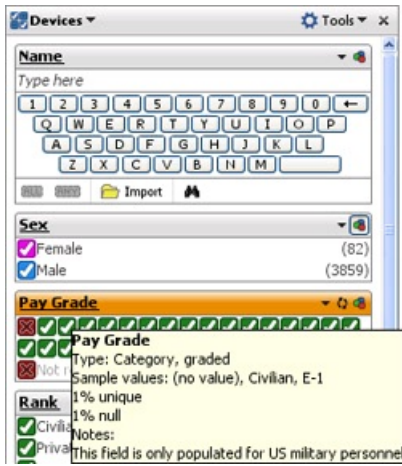
The Side Bars display filters/query devices, which can be used for instant filtering of records based on the values in a given field (column). By default, devices for all fields (columns) are visible. Many of these will not be useful for filtering, and should be hidden. Different combinations of devices can be shown on different Report Pages, using one or both Side Bars. To configure, re-order or show or hide devices on the Side Bar(s), click on the **Devices** drop-down at the upper left of the Side Bar:



The **Devices** drop-down menu begins with options to show or hide the Reports Panel (for more detail see [Creating and Managing Report Pages](#) [92]), the global **Search All** text search device (works like a search engine across the whole data set), an **Exclusions** device (places the  Move and  Keep buttons on the Side Bar when ticked), followed by all the fields (columns) in the data set. Unticking **Reports** and **Exclusions** options (Move & Keep buttons) removes them from the Side Bar (Reports will be shown as the default tabs, and the  Move and  Keep buttons will re-appear on the Main Toolbar as usual.)

Filter/query devices for fields that are not useful for filtering should be hidden by unticking the boxes under Devices. The order of the filters can be changed by dragging the 'hands' at the right up or down to re-order the devices. You can also drag and drop devices themselves up and down to re-order them on the Side Bar. If you have a large number of fields (columns) in your data set, use the search box to find the field you want to display devices for and drag them to the top...ticked and in the order you want the devices displayed from top to bottom on the Side Bar.

Right-clicking on a displayed filter/query device displays sub-menus containing many of the same commands as are available in [Data > Manage Fields](#) [75]. Devices displayed can also be expanded by clicking on the field (column) name. Text devices, for example, expand to reveal a keyboard and a bulk list import function for matching. Category fields expand to show the full list of categories. Hovering on a device shows information about the values in the field (column), including any Field Notes which you may have been entered to attribute sources or describe important limitations and assumptions in the data.



Although fields (columns) can be hidden in the various Omniscope views, hidden columns can still be used for filter/query devices. If you wish to use both the right and left Side Bars, please note that a device can only appear on one Side Bar at a time. Adding a field filter/query device to one Side Bar will remove it from the other. For more detail, see [Using Side Bars](#). [139]

Configuring Opening Views & Appearance

Omniscope has 12 different views, any or all of which can be used to bring your data to life. In [Creating and Managing Report Pages](#) [92], we will see how combinations of open views, filter and variable settings, plus explanatory title and annotation text can be saved as Report Pages. Report Pages you configure for your users will always be available on tabs above the Main Toolbar or on buttons in the Side Bar Reports Panel.

Regardless of which views you think are most appropriate, or which views you configure as persistent Report Pages, you should always look at you data and try to configure all the views. Any time the user exits Reports Mode, they can open or add any one of the 12 available views you have not hidden, and the default configuration of each individual view will be displayed. To learn how to hide views, see [Managing Appearance](#) [105].

You can discourage (but not prevent) users from exiting Reports Mode and opening and navigating views on their own. If you by close all views outside of Reports Mode, then return to the opening Report Page and save the file, any user exiting Reports Mode will see only a blank screen unless they start adding views. In general, however, you should assume that users of your file could eventually open any non-hidden views (and some will soon learn to un-hide those views as well). It is important for you as creator/publisher of the file to open each of the 12 views in turn, decide the best way to configure each view (or decide to hide the view) and then close each view looking as it should if and when it is ever opened.

Warning: Whenever you save your Omniscope file, all views will remember their last open configuration. File recipients will see these configurations if they exit Reports Mode and open and navigate any views you have not hidden. See [Creating and Managing Report Pages](#) [92], [Managing Appearance](#) [140] and [Help > Create/Edit Help page](#) [106] for discussion of the options most useful for authoring user help displays and managing the branding, layout and overall usability of your file.

Below, we briefly introduce configuration considerations for each of the 12 views currently available to make the most of your data. Details on configuring each view are covered in the [Views Reference](#) [109] section.

Table View:

The Table View shows the underlying data values by record (row) for selection, browsing and editing. It displays all non-hidden values with instant sorting, aggregation, and zooming views of related images. Many powerful data management features are available under View Tools, including tools for splitting/combining text strings across columns, checking for duplicates, specification of formulae to generate calculated columns, etc. The Aggregation menu allows grouping of records by field values and calculation of sums, means and other statistics based on the values in other columns.

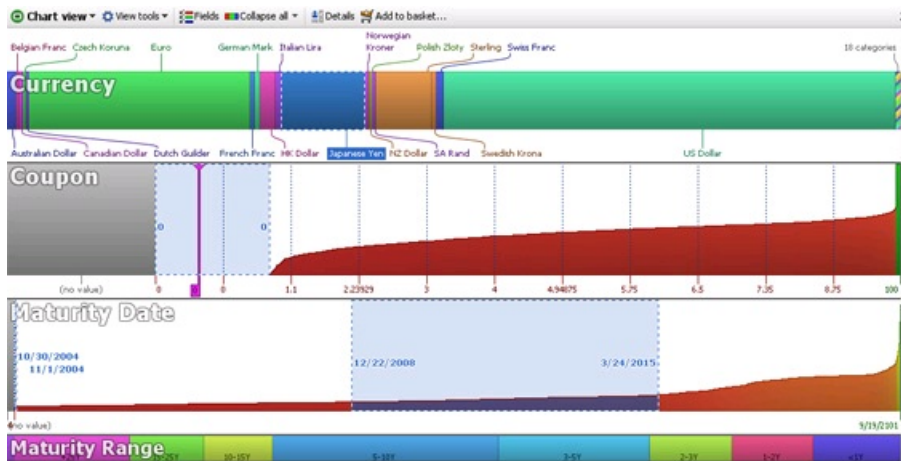
Name	Sex	Race	Age	Location	Organization	Location	Race	Sex	Name	Age	Years seniority	Sick days taken	Current salary	
Francisco Jans	Female	White	23	San Francisco	Specialist	All	Male			2	37.5	5	14	49,800
Jane Barrows	Female	White	23	San Francisco	Specialist	All	Male			2	37.5	5	14	49,800
Paula Spodman	Female	White	25	San Francisco	Specialist	All	Male			48	29.75	4.1	298	1,228,362
Paula Spodman	Female	White	25	San Francisco	Specialist	All	Male			48	29.75	4.1	298	1,228,362
Steven Stevens	Female	White	25	San Francisco	Specialist	All	Male			3	46	6	10	116,700
Michael Wilson	Linked to record details		27	San Francisco	Specialist	All	Male			3	45	6	10	115,700
David Jones	Female	White	28	San Francisco	Specialist	All	Male			3	45	6	10	115,700
Janet Davies	Female	White	29	San Francisco	Specialist	All	Male			1	53	19	5	46,000
Lynne Robinson	Female	White	29	San Francisco	Specialist	All	Male			1	53	19	5	46,000
Jane Adams	Female	White	31	San Francisco	Specialist	All	Male			1	53	19	5	46,000
Andrew Pile	Male	White	40	San Francisco	Manager	All	Male			3	51	14	40	99,000
Simon Dorrell	Male	White	48	San Francisco	Supervisor	All	Male			3	51	14	40	99,000
Mark Clewson	Male	White	57	San Francisco	Supervisor	All	Male			7	48.75	11.29	95	259,700
Bill Robertson	Male	White	67	San Francisco	Specialist	All	Male			7	48.75	11.29	95	259,700
Uma Owen	Female	White	79	San Francisco	Specialist	All	Male			3	51	14	40	99,000
Michael Williams	Female	White	25	Paris	Specialist	All	Female			16	27.94	4.44	68	390,600
Lynne Booth	Female	White	27	Paris	Specialist	All	Male			32	44.5	9.03	257	1,112,177
Mark Madeline	Male	White	29	Paris	Specialist	All	Male			32	44.5	9.03	257	1,112,177
						All				200	35.71	6.01	1,336	5,458,739

Start by clicking **Reset** on the Main Toolbar to reset your data (all records return to the green **IN** universe) and confirm the reset by looking at the (all green) barometer. Close all Views but the Table View. Decide which fields (columns), if any, you want hide from this view using **View**

Tools > Columns to show. Untick the names of any fields you wish to hide in this view only. Also, use the 'hands' at the right to drag field names up and down to set the field (column) order for this view only. Click and right-click on the column headers to experiment with aggregation and sorting options. You may also wish to try defining new Formula fields whose values are given by calculated formulae. For more detail, see the User Guide section [Using the Table View](#) [110].

Chart View:

The Chart View gives the most comprehensive overview of the contents and structure of your dataset; proportions, ranges, missing values, etc. are all revealed. The Chart View shows each of your columns of data using horizontal visualisation 'devices' for numbers/dates, categories, and text fields. Each chart view device shows the spread of values within each field (column). Missing values are shown with a grey background. Zero values will show with a white background. Clicking on a device will expand that device to show more detail. Right-clicking on a field reveals a rich set of options for further analysis. You can select multiple segments or ranges across multiple devices and execute power queries using the **Move** or **Keep** commands.



When preparing Omniscope IOK files for use by others, or when looking at an IOK file whose data has been imported for the first time or just refreshed, some 'quality-control' filtering of a file is required to ensure the data is correct and complete. Some people call this phase of preparing/evaluating a new/refreshed data set 'scrubbing'. The Chart View is a powerful view for reviewing, understanding and correcting large data sets.

Reset your data and close all but one view. Change the view to a Chart View, which is ideal for visual data scrubbing. Click on each of the horizontal devices representing each field (column). The device will expand. Look for inconsistencies, such as Text fields (signified by the alphabet motif on display) where the character count is too short or too long. Right-click on segmented multi-coloured Category devices to plot them as bars or pies. Look for erroneous spellings, which appear as small categories with one record. Select and keep suspicious records using the **Add to basket** option at the top right of the View Toolbar. Continuous values like numbers and dates are plotted...check the end point values. If a numeric device looks very white, right-click and select logarithmic rather than linear scaling to reduce the effect of a wide range of values. When you are ready, click on the Basket icon on the Main Toolbar to see your collection of suspicious records in detail. For more detail, see [Using the Chart View](#) [111].

Pie View:

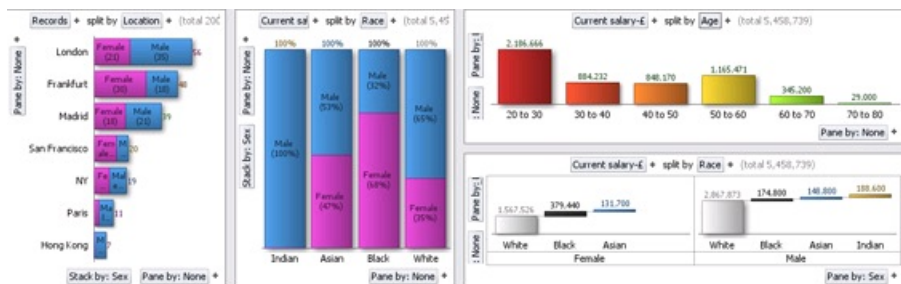
A familiar view, with single or multiple (paned) display modes and some new twists, including animated displays to aid legibility. Commonly used in report pages to show the composition of aggregates.



Click Reset to reset your data. Confirm the reset by looking at the barometer. Add a Pie View. Choose the field (column) that will be represented as 100% of the pie, then choose another category field to split the pie into wedges. Choose the most useful display and close the Pie View. For more detail, see [Using the Pie View](#) [112].

Bar View:

Displays bars stacked vertically or horizontally, in single or multiple (paned) configurations, mixing positive and negative values and with many other powerful options. The Bar View is used in most reports for comparing magnitudes and showing the composition of aggregates.



Click Reset to reset your data. Confirm the reset by looking at the barometer. Close all views but one and change that view to a single Bar View. At the top of the Bar View display window, use the drop-down field selector to select an amount to display (or number of records), and directly to the right, use the **Split-by** drop-down to select a field to use to divide the amount into bars. Try selecting various combinations of amount fields and Split by fields. Notice that the amount total/record count is shown to the right of the Split by drop down. Use the **Pane by** selectors at the bottom right or upper left to create multiple bar displays.

Once you have an informative display of bars, try using the first two icons on the View Toolbar, labelled **Flip** (changes the base of the bars between horizontal and vertical) and **Cascade** (plots the bars in ascending, staircase style). For more detail, see [Using the Bar View](#) [113].

Graph View:

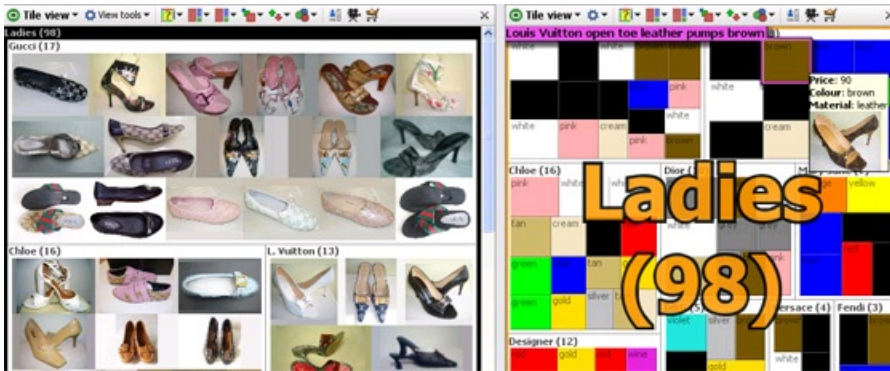
Creates highly-customisable scatter plots with options for colouring and sizing of markers and using marker aggregation to display record density. Automatically calculates correlations to find trends. Used to spot anomalies and for spatial selections of plotted data.



Click Reset to reset your data. Confirm the reset by looking at the barometer. Change the open view to a Graph View. Select which fields you wish to see graphed using the X-axis selector at bottom right and the Y-axis selector at upper left. Try graphing various quantities against each other, and using a time/date field (if you have one) as the X-axis. On the Graph View Toolbar, click on the **Trends** drop-down and tick 'show line of best fit' to see statistics on the relationship (if any) between the values in the fields you are graphing. Use the other View Toolbar drop-downs from left to right, starting with **Mode** (set to 'lasso select' and try encircling a group of points with the mouse), **Zoom** (move the X and Y sliders to expand the plots), **Colour**, **Size** and **Shape** all select other fields to use to modify the colour, sizing and shape of the markers on the plot. For more detail, see [Using the Graph View](#) [114].

Tile View:

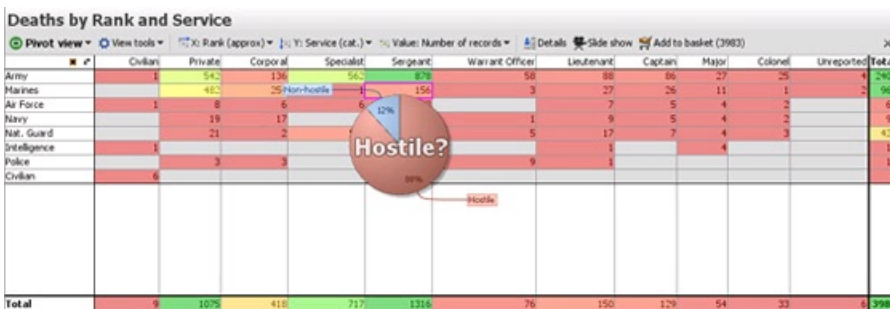
Used as a simple image browser or as a complex 'tree map', a tile representing every record shows its characteristics using size, order, colour and grouping. Used to display 'heat maps' and convey other image-based attributes of records. Enables selection of records based on related images in the data set.



Click Reset to reset your data. Confirm the reset by looking at the barometer. Change the open view to a Tile View. From the View Toolbar, select which column values you wish to represent as tiles in various groupings, with sizing and colour used to display variations. Using the **View Toolbar** drop-down field selectors, try changing the **Group**, **2nd Group**, **Size**, **Sort** and **Colour** fields, the groupings and the sizing and colouring options. For more detail, see [Using the Tile View](#) [115].

Pivot View:

Aggregates record data by two fields, applying various functions (record count, sum, mean, etc.) at the intersection of the visible fields. Tables can be sorted both ways, and display hover plots showing breakdowns of values in specific cells. Widely used in both analysis and reporting.



Click Reset to reset your data. Confirm the reset by looking at the barometer. Change or open new views to reveal multiple Pivot Views. Using the drop-down field selectors on the **View Toolbar**, choose different values for the X: (top) and Y: (side) displays. The cells show the number of records (rows) that share each X and Y value. Use the **Function** drop down to the right of the Y: to show the Sums, Means (averages) etc. Try the sorting by clicking on a given row and column. Clear the sorts by clicking the X in the upper left. Also try switching the axes using the switch arrow to the right of the clear sorts X in the upper left corner. For more detail, see [Using the Pivot View](#) [116].

Tree View:

Presents a hierarchical view of your data. You can change the structure of your hierarchy at any time by re-ordering the fields with your mouse. Useful for display and navigation of both pure hierarchies (like organisation charts and family trees), and comparative hierarchies present in the structure of most data sets.



Click Reset to reset your data. Confirm the reset by looking at the barometer. By default, the Tree View opens showing a few random categories from your data. On the **View Toolbar**, to the left of **View Tools** is a **Fields** drop-down selector. Click the selector, then un-tick all the field boxes to clear the display. Now select 2 related field boxes and the Tree View will display. Tick another box to add another field to the display. Click one of the boxes to see that branch of the tree. Click on the All box at the top of the tree to Reset, or use the Reset command on the **Main Toolbar**. You can change the order of the columns by dragging the column headers left or right. You can change the colouring of the tree by clicking the column header you wish to colour by. For more detail, see [Using the Tree View](#) [117].

Map View:

Omniscope allows you to plot coordinates on both online map services, such as Google Maps, or embedded zooming maps with multiple layers users can hide or reveal. Users can switch between mapping sources at any time. comes with a wide selection of maps which can be added into any file. Decimal coordinate columns are automatically plotted on maps or scanned images, allowing easy zooming, selection and editing.

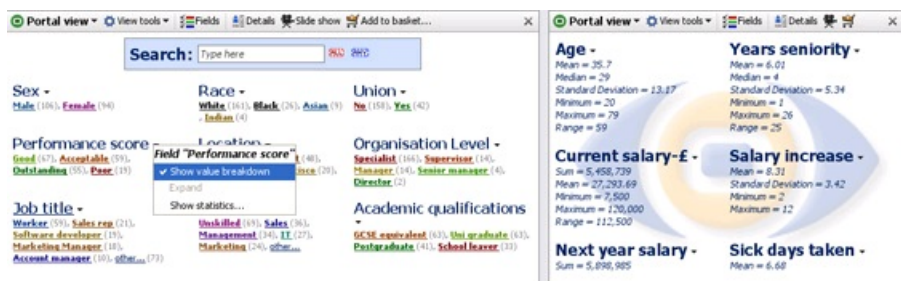


Opening the Map View for a given data file for the first time, you are offered the embedded world map as a backdrop and are asked to specify whether your existing data set already has coordinates. If your data already has decimal longitude/latitude coordinates, select **Use existing columns** and specify which ones they are. Your data should be plotted automatically. You can switch between Google Maps and the embedded world map. Once you have verified that all coordinates are correct, you can add more detailed country or city maps to the file from our [Maps Library](#) [141].

If you do not already have decimal coordinate columns, select "create new coordinate columns". There are many options for adding decimal coordinate values; 1.) using [merge files](#) [142] to import them automatically, 2.) [placing markers](#) [143] on embedded vector maps or the online Google Maps, and 3.) by using the Google Earth search engine to look up missing values, setting a place marker, then cutting-and-pasting the decimal coordinates into Omniscope. For more detail, see [Using the Map View](#) [118], and the Knowledge Base section on [Maps & Coordinates](#) [144].

Portal View:

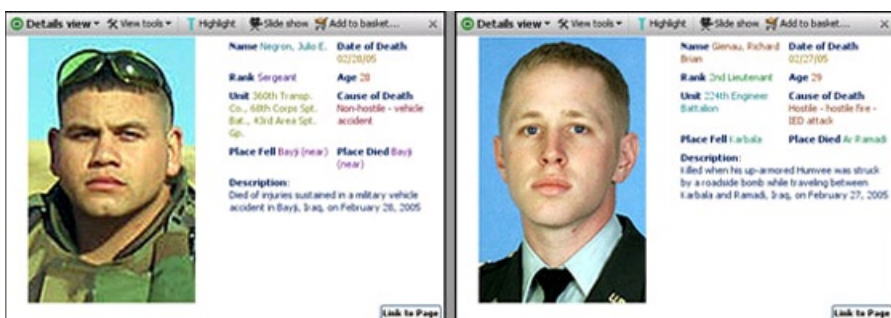
A familiar web-style interface allowing easy searching and browsing of data with a coloured, text-based field breakdown. Global search box combined with text-based selection enables rapid search. Can be configured to show record counts and re-group values dynamically as the number of records under consideration (via Moves and Keeps) is reduced.



Click Reset to return all records to the **IN** universe. Confirm the reset by looking at the barometer. Switch the open view to a Portal View. Add a Table View using Add View on the Main Toolbar. By default, the Portal View features a global Search Box (it can be hidden). Try typing terms in your data set into the global search box as you would an Internet search engine. In the barometer on the main Omniscope Toolbar you will see the number of 'hits', i.e. records that contain what you have entered, in whole or in part. Clicking on **Keep** will display only those records in the Table View, and update the Portal View display to reflect the breakdowns of only the records you have kept in the IN universe. Try clicking on several different items on the Portal View. The barometer shows the number of records that share all the values you have selected. If 'no matches' shows in the barometer, click again on selected values to deselect them. For more detail, see [Using the Portal View](#) [120].

Details View:

Whenever just one record is selected, the Details View (or a pop-up details window) displays data and images as configured. The Details view can also provide buttons/links to related content and services, or as an editable form for data correction and input.



Open a Table View and a Details View. If no record is selected in the Table View, the Details View will show all the values for the first record at the top of the Table View (depending on the Sorts which are applied in the Table View). Click on the row header of the second, or a subsequent record in the Table View and the details of that record will appear in the Details View. The Details View is highly configurable, with a drag-and-drop orientation bar and options to display related images. For more detail, see [Using the Details View](#) [145].

Web View:

Omniscope is totally web-aware, with built-in browser functionality. If you are online, any configured links to web pages related to the data file can be displayed in one or more Omniscope Web Views.



By default, upon opening a data file which has no web links configured and associated with the Web View, the Web View will display the Google home page. You can have multiple web views open at any time. Try creating a new, single record (row) Omniscope file containing the URLs of three major websites, then open 3 Web Views and associate them each with a different field (column) in your data. Each view should point to a different page.

Before you can use the Web View dynamically, you need to configure or add web links/services that relate to your data. Omniscope comes with a menu of preconfigured links that use field (column) values as inputs to the web service request, for example a Google or Wikipedia search on names in your file. By adding links to your data file, you can use the Web View to display web-based charts, detail, images, adverts, etc. related to the values in specific records selected by the users of your file. To configure links and web services, go to **Settings > Links** on the Main Toolbar (see [Adding Links](#) [146]).

For more detail, see [Using the Web View](#) [119].

Next section: [Using the Side Bars](#) [139]

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Manage Data

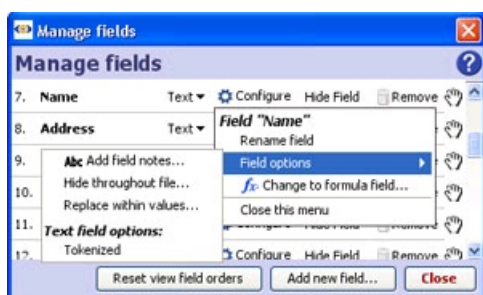
Managing Data

OmniScope easily imports tabular data, but making the most of the data in OmniScope sometimes requires modifying the names of the fields (columns), the layout (how data is arranged or divided across columns) or orientation (which are columns and which are rows) of the data in the OmniScope file. OmniScope offers many powerful data manipulation features to help you make these changes. These modifications are internal to OmniScope and some changes (such as re-naming and hiding) can survive refreshing from the original linked source. Other data modification operations must be repeated after each refresh if the source data layout or orientation cannot be changed.

Warning: OmniScope does not yet support partial refresh of only certain columns from linked data sources. If you add columns which are not present in the original linked data source (such as map coordinates or image references) to your OmniScope file, these columns will be lost or overwritten if you need to refresh from source. To preserve your added data, keep all columns not found in the source file in a separate merge file, with a common column of references so you can join the files together after each refresh. For more information, see [Refreshing Data](#) [133] and [Merging Data](#). [128]

Managing Fields (columns)

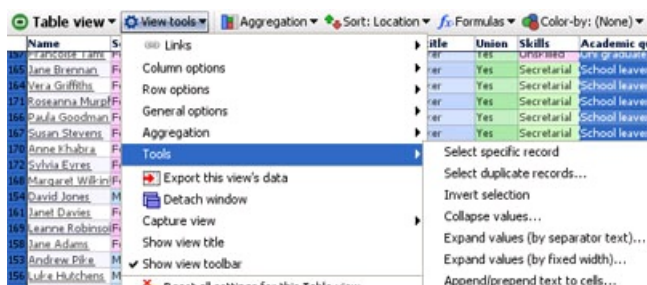
OmniScope permits you to add, remove, hide and rename fields (columns) and to convert field data types using the **Data > Manage fields** dialog. Database field names are often not self-explanatory, so renaming some fields is often a good idea, as is hiding columns you use, but not displayed to users of your file. Removing columns neither you nor your users will need will make your file smaller, but refreshing from source will restore the removed columns.



If you wish to replace a string of text in one or more columns with a different string, you can use the **Replace within values** option. If you want to calculate (and re-calculate) results in a column, perhaps applying additional logic tests, you can convert the column into a Formula field. For more information, see using [Data > Manage fields](#). [95]

Managing Values within fields

Data is imported from source may have either too much or too little information in each cell. If there is too much (first name, middle name and last name in the same cell), you may want to split the values from one column across several new columns. If there is too little (the first 4 digits of a post code in one column and the rest in another), you may wish to collapse the values in multiple columns into a single column. Sometimes, you may want to add a prefix or suffix to all the values in a column.



The Table View **Tools** sub-menu contains **Collapse values** (reduce to one column), two kinds of **Expand values** (spread across more than one column), and **Append/Prepend text to values** options which allow you to change the layout of your data across columns, or add defined prefixes or suffixes to values in selected columns. For more information, see [Using the Table View](#). [110]

International issues

When importing data by opening a .CSV or Excel .XLS file, OmniScope analyses the data in the file to determine how the data is arranged and which fields (columns) are most likely of data type Text, Numbers, or Dates & Times. The regional settings in your computer's operating system (Windows, or Mac, etc.) have a strong influence on this. For some combinations of settings and data formats, OmniScope cannot

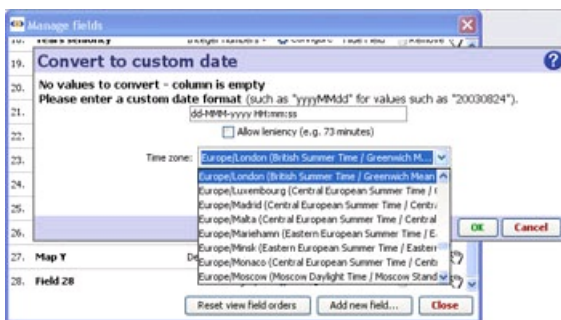
reliably detect the situation automatically.



If you find your data opens incorrectly and your fields are not correctly structured, your numbers have the wrong decimal place, etc. consult the **File > Open file... > Open Data Set** [129] wizard page, which contains options to help with some common issues. For more information, see [International issues](#) [136].

Specifying custom date formats

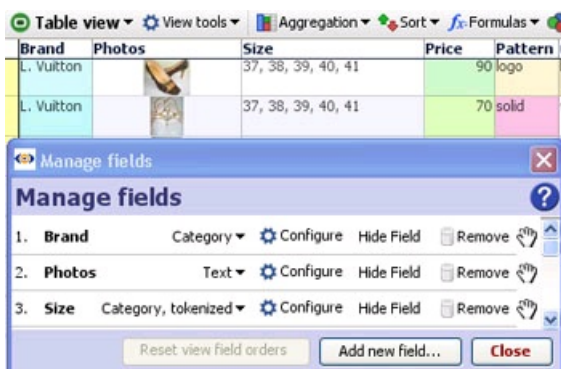
Omniscope supports Date & Time data typing. Most common Date & Time formats are recognised automatically on import. If you create a new date field (column), or Omniscope does not recognise the format in your imported data set, you may be asked to provide guidance on interpreting the format, and to specify how the imported values should be displayed. The **Date & Time** formatting wizard will appear, or can be accessed from the **Data > Manage Fields** dialog whenever changing a data type to Date & Time:



A date format is a sequence of case-sensitive characters describing the format of date/time values, not the dates themselves. For example, to show a dates such as "16-Mar-2002" you would specify the date format "dd-MMM-yyyy" in Omniscope. You can specify a wide range of formats, including days of week and time zones. For more detail and complete discussion of date and time formatting options, see [Dates & Times](#). [135]

Tokenized data- multiple values per cell

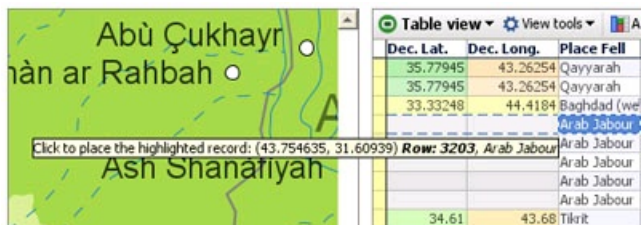
Sometimes, more than one value is associated with certain attributes of a record. For example, shoes can be available in more than one size, or you may have more than one image associated with a house (or whatever). Items available in more than one size, or with more than one associated image are examples of many-to-one relationships. Omniscope handles these kinds of relationships with a data subtype for Text and Category data fields called 'Tokenized'. In the example below, each record (row) is a pair of shoes, each of which is available in more than one size.



By declaring the field (column) 'Size' to be tokenized, we can enter more than one size in the cell, divided by commas (or any separator you choose). Users of this file can specify their shoe size, and Omniscope will show only those records available in that size. For more detail, see [Using Tokenized data](#) [123].

Adding map coordinates

There are currently three ways to add geographic decimal coordinate (longitude and latitude) columns to your data for map displays. One option is to locate your records in Omniscope using the free Visokio world, country and city maps- just place the markers manually to generate the coordinates automatically as shown below (see the tutorial on [Using Maps](#) [147]).



Alternatively, you can also look up missing coordinates using online sources such as Google Earth (and often Wikipedia), both of which can be integrated into Omniscope work flow as web services links. Just look up the missing values, then type or cut-and-paste them into Omniscope, copying the same values down for all the records in the same location.

If you have county or city names in your file, you can also merge geographic coordinate columns into your Omniscope data automatically using a [merge file](#). [142] To merge in coordinate columns for capital cities or geographic centres of countries, we supply a free **'By Countries'** [142] merge file containing these columns. We also supply a free **'By Cities'** [148] file containing coordinates for about 60,000 of the world's largest cities. Free merge files **'By Post codes'** [149] are available for the UK and the U.S., and an increasing number of other countries. Other free and licensed reference merge files may be available from other suppliers in future.

To learn more, see the User Guide section on [Using the Map View](#) [118], and the Knowledge Base sections on [Maps & Coordinates](#) [144].

Data Orientation- Time series [138]

Omniscope processes repeated observations of values over time in vertical columns, rather than horizontal rows often used in spreadsheets. In the example of a time series data layout below, we have various bonds, each with a reference ISIN identifier in the first column. We also have repeated observations of Dates and Values (Price/Yield) over time entered vertically down the Date and Values columns. Each record (row) in the data is therefore a separate observation of the Values (Price/Yield) on a given Date repeated over time 'vertically' in separate rows:



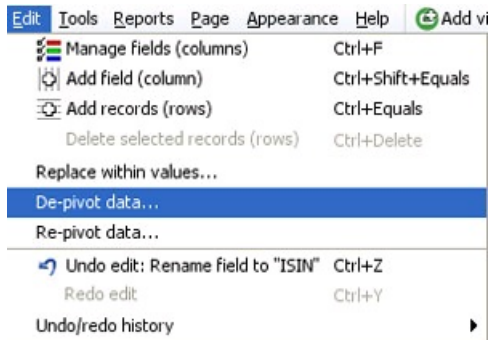
Time series data layout in Omniscope requires at least one field (column) with a natural order, such as Date, and one or more values columns 'Price', 'Yield', etc. for repeated observations of values that make up the time series. In addition, to have multiple curves on one graph, there should be a Category field (with less than about 200-250 unique values) which contains the names of each curve to be drawn. In this example, we have many observations, but only 9 individual ISINs (bonds), so the curves can be plotted by the Category 'ISIN' reference field as shown in the example above. Don't worry about the apparent repetition in the data values. Outside of the Table View, Omniscope will render this invisible to the users of your files. For more information, see [Displaying Time Series](#) .

If your data is arranged differently from the example above, (e.g. 'horizontally' with the dates as columns and each cell in the row representing

an observation over time) you may want to use the the tools available under **Data > De-/Re-Pivot** on the Main Toolbar to transform your data set to the correct 'vertical' orientation in Omniscope (see below).

Changing Data orientation using De-Pivot/Re-Pivot

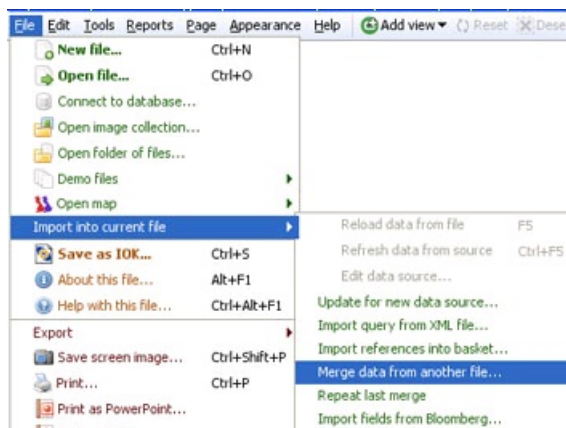
Omniscope provides powerful tools to change the orientation of the data from rows to columns, or from columns back to rows. This can be useful when working with data in Omniscope, and also to change the orientation of data being exported from Omniscope to other applications.



For more information, see [Using De/Re-Pivot](#) [138]

Merging Columns and Rows from other files

Omniscope enables you to assemble data sets from multiple sources by merging, adding either more columns or more rows to your Omniscope data sets. You can merge data from other .IOK files, or from .XLS, .CSV, .TSV data files, or from database views/tables using the [Merge Data](#) [128] wizard accessed from **Data > Merge** :



Merges can be either a **'Join'** where new columns are added to existing data using values from a common column (one to one, one to many or many to one relationship), or a **'Concatenate'** where new records are added to existing columns (column names must be the same). Joins can use multiple criteria, and you can choose to import non-matching records, etc. For more information, see [Using the Merge Data wizard](#) [128].

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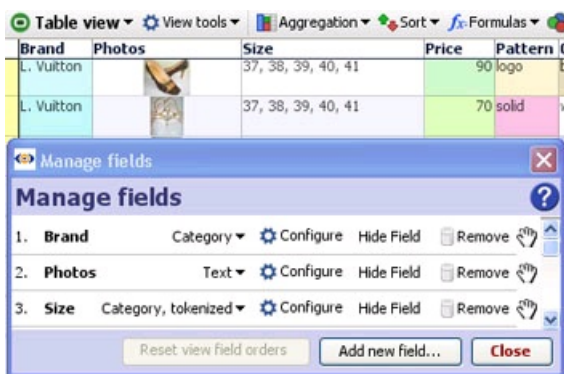
Tokenized Data

Tokenized Data

Sometimes, more than one value is associated with certain attributes of a record. For example, shoes can be available in more than one size, or you may have more than one image associated with with a house (or whatever). Shoe sizes and multiple images of a house are examples of many-to-one relationships. Omniscope handles these kinds of relationships using a data subtype for Text and Category fields (columns) called 'Tokenized'.

When you declare a Text or Category data type to be 'Tokenized,' it means each cell in a field can contain more than one value, i.e. multiple "tokens" separated by a character you decide. The default separator is a comma, but you can choose to use any thing: a space to separate words, or an unusual character such as a \ backslash if you need to use commas within your values.

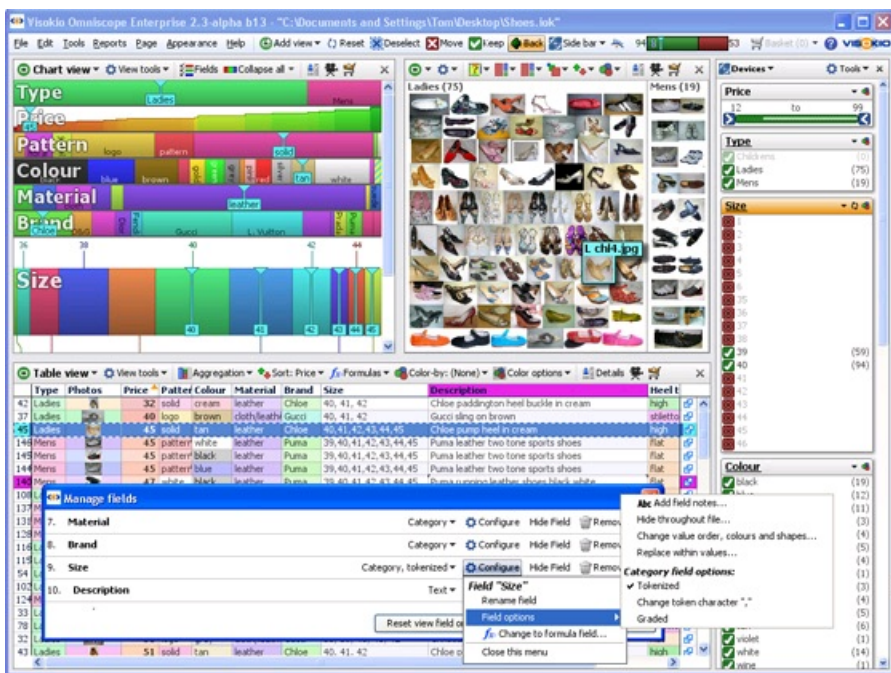
The example below (you can download a copy of this example file [here](#) [150]) is a shoe store data set. Each record (row) corresponds to a pair of shoes, and a 'Size' field containing size numbers in stock (38, 39, 40, 41 etc.). The 'Size' field has been declared a Category field since it contains only a few values, and since the size numbers will be treated as text, not numbers used for calculations.



Using **Data > Manage fields > Configure > Field options**, we have set the data sub-type of the 'Size' Category to be 'Tokenized Category' with the default comma separator dividing the values within the cells. We then check the data to ensure that each available shoe size is entered in the 'Size' column with a comma separator as shown in the Table View above.

We can quickly check that all values have been entered correctly in the Side Bar query device for 'Size', each size should appear separately. In the example below, the user has set filters to display only shoes available in sizes 39 and 40.

Notice that in the Chart View, the highlighting for a specific pair of shoes available in 39 or 40 (or both) still shows the full range of sizes available. This also affects other views that display breakdowns of Tokenized Categories, such as the Pie and Tile Views.



If there were multiple images for each pair of shoes, we would have done the same thing in the 'Photos' image references field (column), so that we could relate more than one image to each pair of shoes, and display the multiple images in the Slideshow window.

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Time Series

Time Series Data Layout

Omniscope makes use of repeated observations over time in vertical rows, rather than horizontal layouts often used in spreadsheets. To create a multi-line time series, in Omniscope, put your data in the following 'vertical' format:

	Company	Month	Price
1	A	Jan	460
2	A	Feb	447.75
3	A	Mar	413.5
4	A	Apr	421.5
13	B	Jan	495
14	B	Feb	483.75
15	B	Mar	479.25
16	B	Apr	508.5
25	C	Jan	727
26	C	Feb	730.5
27	C	Mar	738
28	C	Apr	730.5
37	D	Jan	846
38	D	Feb	875.5
39	D	Mar	809
40	D	Apr	808
49	E	Jan	525
50	E	Feb	520
51	E	Mar	530
52	E	Apr	558.75

In this example of a time series, we have 5 companies "A" to "E" with historic share prices for each month. Each record in the data file is a price/time point for a company.

The Company field contains Category values correlating to different lines in the time series. Let's call this our Category field.

The Month field contains Date and Time values representing the time part of the time series, along the X axis. Let's call this our Time field.

The Price field contains quantitative Decimal number values for the Y axis. Let's call this our Value field.

Don't worry about the vertical repetition in the data...this will be invisible in all views except the Table View and not evident in the time series reports you configure.

Check your data types- After importing your data, make sure the **Time** (here *Month*) and **Value** (here *Price*) fields are the correct format. They must be numeric (decimal or integer), or dates, shown by the red to green colour gradation. Also make sure the **Category** field is of type *Category*, shown by the variety of different colours. You can convert data from one type to the other by right-clicking the column header in the Table View and choosing **Convert field data type**.

My data goes the other way!

Sometimes source data is laid out horizontally when Omniscope would manage it better vertically (e.g. time series), and vice-versa. Sometimes data needs to be exported from Omniscope transposed to an orientation different from that used in Omniscope reports. To avoid the time consuming process of changing the orientation of data from horizontal to vertical (row becomes column) or vertical to horizontal (column becomes row), Omniscope has both a **De-pivot** and **Re-pivot** function. Use of these functions is discussed in more detail [here](#) [138].

For a continuation on displaying line graphs like time series, see the the Graph View section [displaying time series](#) [151].

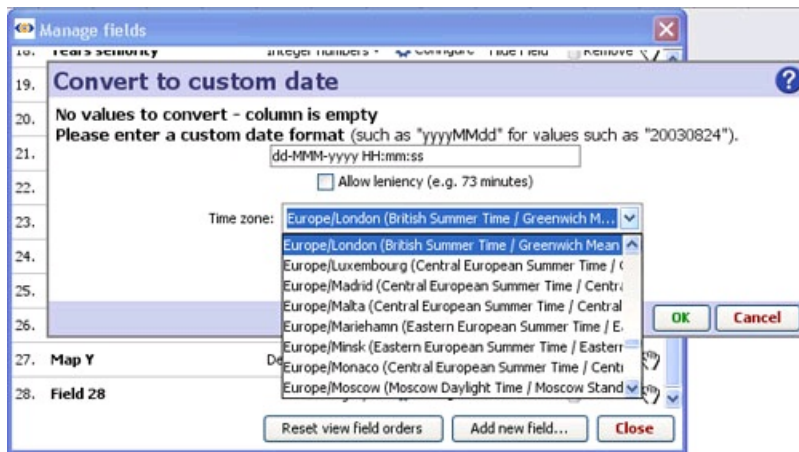
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Dates & Times

Working with Dates & Times

Omniscope supports Date & Time data typing. Most common Date & Time formats are recognised automatically on import, although Epoch/Unix format dates and times must be read in first as integers ([see below](#)) [152]. If you create a new field (column) typed Date & Time, or if Omniscope does not recognise the format your imported data is in, you may be asked to provide guidance on interpreting the format and to specify how the imported values should be displayed. The **Date & Time** formatting wizard will appear, or can be accessed from the **Data > Manage Fields** dialog whenever changing a data type to Date & Time:



Use the **Date & Time** formatting wizard if Omniscope needs help detecting the format of existing data, or to change a column's Date & Time display format to another. If you specify the time zone, it is important to specify the time zone and daylight-savings time settings of the database server recording the data, which may be different from your own. It is possible for server clocks not respecting daylight savings time to record data inconsistent with the time zone setting you have selected. You must also respect leap year dates, and not enter non-existent dates. Invalid times or dates will NOT be converted. (See below for further discussion of time zone and Daylight Savings Time-DST issues).

WARNING: When specifying date formats, make sure your data column is uniform. For example, if some cell values have Hours:Minutes:Seconds after the date, and you want to preserve this format in Omniscope, make sure that ALL cell values in that field have entries for Hours:Minutes:Seconds. If necessary, you can pad them out with all zero values like this: 00:00:00. Also, if you are using Date & Time fields as criteria for Omniscope merge file joins, make sure the fields are set to **exactly** the same format. If you intend to use AM/PM please make sure that your time is in 12 hour clock rather than in 24 hour clock format.

Help With Date Formatting

A date format is a sequence of **case-sensitive** characters describing the format of date/time values. For example, to show your dates as "16-Mar-2002" you would use the date format "dd-MMM-yyyy". You can use any punctuation, but letters must be in one of the valid patterns of characters listed below:

Symbol	Meaning	Examples	Notes
yyyy	Year	2002, 53, 1997, 500 BC	Literal year values, where "53" and "1066" will mean the years 53 and 1066 AD, and "200 BC" means the year 200 BC.
yy	Year	02, 53, 97	Two-digit years, with Y2K fix, where "53" and "10" will mean the years 1953 and 2010. Assumes any two-digit years fall within the last 80 years or next 20 years.
w	Week	1, 3, 52	Week in year
MMMM	Month	March, December	Full month name
MMM	Month	Mar, Dec	Abbreviated month name
MM	Month	03, 12	Two-digit month number, padded with zero
M	Month	3, 12	One- or two-digit month number, no padding
dd	Day of month	03, 16	Two-digit day in month, padded with zero
d	Day of month	3, 16	One- or two-digit day in month, no padding
EEEE	Weekday	Tuesday	Full name of day in week
EEE	Weekday	Tue	Abbreviated name of day in week
Symbol	Meaning	Examples	Notes
aa	AM/PM	AM, PM	Use aa for the AM/PM marker
HH	Hour (24)	00, 07, 15, 23	Hour of day in 24-hour clock, from 0 to 23, padded with zero
H	Hour (24)	0, 7, 15, 23	Hour of day in 24-hour clock, from 0 to 23, not padded

hh	Hour (12)	01, 07, 11, 12	Hour of day in 12-hour clock, from 1 to 12, padded with zero
h	Hour (12)	1, 7, 11, 12	Hour of day in 12-hour clock, from 1 to 12, not padded
mm	Minutes	00, 09, 23, 59	Minutes past the hour, padded with zero
m	Minutes	0, 9, 23, 59	Minutes past the hour, not padded
ss	Seconds	00, 09, 23, 59	Seconds, padded with zero
s	Seconds	0, 9, 23, 59	Seconds, not padded
SSS	Milliseconds	000, 009, 023, 595	Milliseconds, padded with zero
S	Milliseconds	0, 9, 23, 595	Milliseconds, not padded

Example patterns:

dd-MM-yy	for values like:	21-11-99	meaning 21-11-1999
yyyy.MM.dd	for values like:	2001.07.04	
yyyy.MM.dd HH:mm	for values like:	2001.07.04 23:55	
EEE h:mm a	for values like:	Sat 9:33 PM	

For a further information see the full [Java documentation](#) [153], including additional date pattern symbols such as "D" for "day of year".

Time Zone Issues

Databases record data using the time zone specified for that database. The database could be located anywhere in the world. In addition, the database may or may not reflect daylight savings time adjustments, even locally. If the data in the data set does not reflect daylight savings time, i.e. runs on GMT, and you select BST British summer time as a time zone for your data, Omniscope (and Java) will report invalid dates/times for some records. This occurs when daylight savings time adjustments 'skip over' one hour after midnight on specific dates. To fix this problem, you must isolate the offending times, and manually advance them by 1 hour.

Importing Epoch/UNIX/POSIX dates & times

Epoch (or UNIX or POSIX) time is a system for describing points in time, defined as the number of (milli) seconds elapsed since midnight Coordinated Universal Time (UTC) of January 1, 1970, not counting leap seconds. Omniscope will import dates and times in this format if they are first read in as integer numbers. Once your data is imported as integer, in **Data > Manage fields** change the data type to Date & Time and select the option at the bottom **Convert milliseconds since 1970 into dates**. Omniscope uses milliseconds, so if your data is in seconds, multiply the values by 1000 using a formula column, then specify the Date & Time display format you wish to use.

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Common Issues

Importing Data - Common Issues

Differences in formatting of data for presentation around the world can affect data import and display in Omniscope. Many international issues affecting data import have been addressed in recent versions, all of which are free upgrades. If you are experiencing problems with dates, thousands separators, etc., please ensure you are running version 2.2 or better.

Some common issues - e.g. importing international data formats

When importing data by opening a .CSV or Excel .XLS file, Omniscope analyses the data in the file to determine how the data is arranged and which fields (columns) are most likely of data type Text, Numbers, or Dates & Times. The regional settings in your computer's operating system (Windows, or Mac, etc.) have a strong influence on this operation. For some combinations of settings and data formats, Omniscope cannot reliably detect the situation automatically. If your data opens incorrectly and your fields are not correctly structured, numbers have the

wrong decimal place, etc. please consult the [File > Open file...Open Data Set \[77\]](#) wizard page, which contains options to help with some common issues further described below:

Data File delimiters - .CSV stands for "Comma Separated Values", which means the cells in each record (row) of the data table are separated by the comma character. However, if you are in a region that also uses the comma in numbers instead of the decimal point (e.g. several European countries, such as France), some versions of Excel create .CSV files that use a semicolon as the separator character. Sometimes these multi-column tables files are saved with a .CSV or even a .TXT extension. Omnisciope is unable to detect this situation automatically. If you open such a file in Omnisciope, your data will very clearly be wrong, with most columns appearing as text with semicolons. To avoid this problem, use the Data Import wizard **Customise data import** dialog to change the **Separator character** to a semicolon " ; " .

Note: this also works with 'pipe' "|" delimited files, but you must first change the file extension on the data file to .CSV, even though it is 'pipe' and not comma delimited.

Dates & Numbers - If you are running on Windows, when importing data that is in a delimited text format such as Excel .XLS, .CSV or .TSV (tab-separated values), Omnisciope will use your Windows Regional Settings to try to automatically recognise data. For example, for a PC with United States Regional Settings, Omnisciope will recognise "5/13/2005" as a date and "1,500.5" as a number. For some international users, however, this may not work as expected and the result will be an import of all columns as data type Text (shown in Omnisciope either as multi-coloured Category columns or white Text columns). If this occurs, you can usually manually convert fields (columns) containing numbers or dates and times using the [Data > Manage fields \[75\]](#) dialog. For more information on formatting dates and times and managing time zones, see the section on [Dates & Times \[154\]](#).

If you know your data has been formatted for a different region, change the *Locale* drop-down accordingly. For example, if you live in Germany but have received a .CSV from an American customer, you should choose "English (US)". If you find Omnisciope gets things wrong and your data is incorrectly recognised, you can disable auto-detection of dates and numbers by deselecting the two **Recognise...** check boxes on the [Open Data Set \[77\]](#) dialog. All fields will open as Category or Text data and their text values will be preserved. You can then use [Data > Manage fields \[75\]](#) to configure each field (column) as you would like it to display.

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Main Toolbar

Using the Main Toolbar

Navigation, filtering and command menus

Version 2.4:

The Omnisciope Main Toolbar contains both a series of drop-down command menus on the left and a selection of navigational command icons and functions used to explore and refresh .IOK/.IOM files to the right of the command menus. The command menu options are generally not needed to navigate Omnisciope .IOK/.IOM files prepared by others.



Immediately to the right of the Help command is the Add View drop down menu, used to add an additional view to the current display. To remove a view from the display, click on the **[X]** in the upper right hand corner of the view. To change a window from one view to another, click on the view name and select the view you want from the drop-down menu. If you want to add a view showing another data subset, you can select it using the Data Subset drop-down to the right of the view name in each View Toolbar. There is no upper limit on the number of views you can open in Omnisciope, but display screen size limitations encourage using multiple tabbed Report Pages to display different combinations of views, rather than crowding the working display with too many open views. More on creating [Report Pages \[15\]](#).



[Table View \[38\]](#)

[Chart View \[39\]](#)

| [File \[55\]](#) | [Edit \[155\]](#) | [Tools \[156\]](#) | [Reports \[157\]](#) | [Page \[158\]](#) | [Appearance \[159\]](#) | [Help \[61\]](#) |

The left side of the Main Toolbar contains all the top-level command menus. When no .IOK/.IOM data file is loaded, the Main Toolbar displays only the command menus.

File menu [55]: importing/refreshing, saving, exporting and printing data, maps and image sets.

Edit menu: [155] managing data columns (fields) and values within categories, adding new columns & rows and changing data orientation (de-pivot and re-pivot).

Tools menu: [156] enable auto-refresh, change languages, set details display options, define links, image sets and web services related to the file.

Reports menu: [157] create, modify and navigate Report pages.

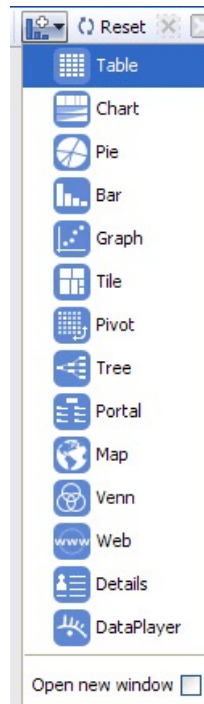
Page menu: [158] modify aspects of the workspace or current Report page.

Appearance menu: [159] add branding and modify/simplify most aspects of the colouring, look and feel of the file.

Help menu: [61] create file-specific help screen, access learning resources, send bug reports/suggestions, check for updates and licensing status (see [Installation/Activation](#) [6]).

Complete documentation of all the commands on these menus can be accessed from the [Commands Reference](#) [27] page or by following the links above.

Add View menu:



[Pie View](#) [40]

[Bar View](#) [41]

[Graph View](#) [42]

[Tile View](#) [43]

[Pivot View](#) [44]

[Tree View](#) [45]

[Portal View](#) [47]

[Map View](#) [48]

[Venn View](#) [49]


[Web View](#) [50]


[Details View](#) [53]


[DataPlayer View](#) [54]

Tick first to open new floating view window

Whenever an .IOK/.IOM data file is loaded, to the right of the command menus, the Main Toolbar also displays a selection of navigational command icons and functions used to explore and refresh .IOK/.IOM files:

 **Reset-** Omniscope files contain flat tables of structured data organised into records (rows) and fields (columns). Navigating an Omniscope file usually involves either setting Side Bar filters, or Selecting plus either Move or Keep operations to focus on only a certain data subset. The **Reset** button removes all of the filtering criteria you may have expressed, and returns the current display views to show all the records in the Filtered IN universe. It is very important to always **Reset** your data before filtering, so that all qualifying records will be considered in your subsequent query. Unless you configure them otherwise, Report Pages remember their queries/data subsets, so if you want a Report Page to open showing all the data, make sure to **Reset** all the filters and commit the changes before you save the file. Note: On the Side Bar filter devices it is possible to reset each filter individually, and if a Side Bar filter device is set to **Freeze**, that filter's settings will survive a global **Reset**.

 **Deselect-** Removes all records from the **Selected data** subset and greys-out the option to do **Move** or **Keep** operations on selected records. Omniscope power query filtering directly on views (as opposed to Side Bar filtering) involves 4 basic mouse operations: **Select** (or **Deselect**), followed by **Move** or **Keep**, and then perhaps a **Reset**. Every view provides ways of selecting one or more records using just the mouse. In most views, you can also **Deselect** by clicking again on one or more of the selected areas or groups of records. It is not necessary to use this global **Deselect** on the Main Toolbar unless you wish to clear all selections made simultaneously.

 **Move-** Selecting records is a precursor to deciding whether to **Move** the selected records, i.e. filtered **OUT** of further consideration. If you are working from a view of the filtered **IN** data subset, the grey **Move** command moves all selected records **OUT** of consideration, where they stay until they are returned or the display is **Reset**. The barometer will give you a preview of this on the left side, where selected **IN** records to be moved will be highlighted. If you are working from the filtered **OUT** data subset, the display will change the colour of the **Move** icon to **blue**, since moving records from the filtered **OUT** subset will return them to the filtered **IN** subset. The barometer will show you the selected **OUT** records highlighted on the right side. If you are working from a view set to display **ALL** Data, the barometer

will show you the effect of **Moves** and **Keeps**, but that specific view will not update as a result, since views showing **ALL** Data always display all records regardless of whether they are filtered **IN** or **OUT**.



Keep- the opposite of **Move**, the **Keep** command keeps only the selected records in the filtered **IN** subset, and moves all other unselected records to the filtered **OUT** subset. If you are working from a view displaying the filtered **OUT** subset, the **Keep** icon will change colour to grey, since the effect will be to **Keep** the selected records in the filtered **OUT** subset. If you are working from a view set to display **ALL** Data, the barometer will show you the effect of **Moves** and **Keeps**, but that specific view will not update as a result, since views showing **ALL** Data always display all records regardless of whether they are filtered **IN** or **OUT**.



Back- similar to a browser, if you have performed a filtering operation, you can go back to the previous query state(s) at any time by pressing the **Back** button.



Controls- this drop-down menu controls display of the two Side Bars, as well as the Cycling Toolbar. For more detail, see the **Controls** ^[14] subsection.



Barometer- this very useful indicator depicts the top level query state (records **IN** and **OUT**, with currently selected subsets counts) at any given time. In this example, the data set contains 4,886 total records (rows), of which 4,292 remain in the filtered **IN** subset, and 594 have been moved to the filtered **OUT** subset. In addition, 1,719 records have been selected, and the currently highlighted single record is among those selected. Always keep an eye on the barometer before initiating new filtering/queries to ensure that you have **Reset** (or gone **Back**) to the correct **IN** subset.



Queries- this drop-down menu is used to manage defined data subsets associated with Named Queries. Using this menu you can name empty queries (e.g "Basket" or "Errors") to collect records you add, or you can define complex queries as re-usable Named Queries using patterns of Side Bar filter settings. Each Named Query defined is added to the data subsets that can be displayed in most views. Detailed documentation of the use of the commands on this menu is [here](#) ^[10].



Auto-refresh settings- Omniscope files can have other Omniscope files as data sources. Activated Omniscope files can refresh the data in an open .IOK/.IOM file from the data in another .IOK/.IOM file accessible over a network. The Auto-refresh drop down menu is revealed by activating the Automatic refresh option from the [Tools menu](#) ^[156]. Once revealed, this menu allows all aspects of the refresh process to be configured, as described [here](#). ^[18] There is an option to display a Pause/Resume button (see below).



Pause/Resume (auto-refresh)- Auto-refresh settings options include displaying a **Pause/Resume** auto-refresh button on the Main Toolbar.



File-specific help screen- click on this help icon to see what the publisher or re-publisher of a given file may have written to help users understand more about the file. If you are configuring a file for others, the content of this screen may be composed from **Help > Edit Help screen**.



Corner logo- if you are publishing or re-publishing .IOK/.IOM files, you can replace this logo and link with your own. See **Appearance > Branding > Add Corner Logo** and **Set Publisher link** (for best results, use a logo 19 pixels high).



Close file- click here to close the .IOK/.IOM file currently open. Once the data file is closed, the screen will display the Omniscope opening desktop, which includes links to previously opened files, as well as learning resources, embedded demos and other useful resources.

Version 2.3:

The left side of the Main Toolbar contains all the top-level command menus. When no .IOK or .IOM data file is loaded, the Main Toolbar displays only the command menus. These commands are generally not needed to navigate an Omniscope .IOK/.IOM file prepared for you by someone else. Documentation of all the commands on these menus can be accessed from the [Commands Reference](#) ^[160] page or by following the links below:



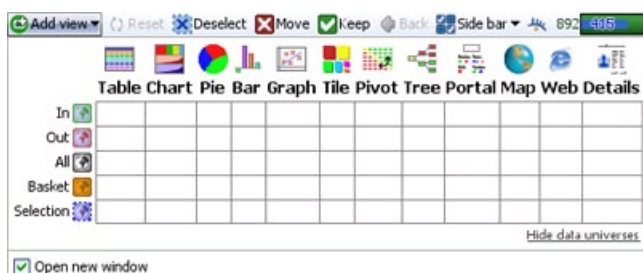
| [File](#) [100] | [Edit](#) [101] | [Tools](#) [102] | [Reports](#) [103] | [Page](#) [104] | [Appearance](#) [105] | [Help](#) [106] |

Main Toolbar navigational features

Whenever an .IOK/.IOM data file is loaded, to the right of the command menus, the Main Toolbar also displays a selection of navigational command icons and functions used to explore .IOK files:



Add View -Used to add an additional view to the current display. To remove a view from the display, click on the **[X]** in the upper right hand corner of the view. To change a window from one view to another, click on the view name and select the view you want from the drop-down menu. If you want to add a view showing another Universe, click on the **Show other data universes** option to display a grid of all views and universes. There is no upper limit on the number of views you can open in Omniscopes, but display screen size limitations encourage using multiple Report Pages to display different combinations of views, rather than crowding the working display with too many open views. More on creating [Report Pages](#) [92].



Reset- Omniscopes files are flat tables of data, with records (rows) and fields (columns). One of the objectives of navigating an Omniscopes file is to select and focus on only a certain subset of records (rows), rather than all the records in the file. The **Reset** button removes all of the filtering criteria you may have expressed, and returns the current display views to show all the records in the **IN** universe. It is very important to always reset your data before filtering, so that all qualifying records will be considered in your subsequent query. Unless you say otherwise, Report Pages remember their queries, so if you want a Report Page to open showing all the data, make sure to Reset the views and commit the changes before you save the file.


Deselect- Removes all records from the blue **SELECTION** universe, and greys-out the option to do **Move** or **Keep** operations on selected records. Omniscopes filtering using power queries depends on 4 basic operations: **Select** (or **Deselect**), followed by **Move** or **Keep**, and perhaps a **Reset**. Every view provides ways of selecting one or more records using just a mouse. In most views, you can also Deselect by clicking again on one or more of the selected areas or groups of records. It is not necessary to use the global **Deselect** on the Main Toolbar unless you wish to clear all selections.


Move- Selecting/deselecting records is a precursor to deciding whether to **Move** the selected records **OUT** of further consideration. If you are working in the **IN** universe, the Move command moves all selected records **OUT** of consideration, where they stay until the display is Reset. If you are working from the **OUT** Universe, the display will change the colour of the Move icon to green, since moving records from the **OUT** Universe will return them to the green **IN** Universe. If you are working from the black **ALL** universe, the display will change the Move button, substituting **OUT** for Move, signifying that moving records from the **ALL** Universe places them in the **OUT** Universe, if they are not already there. Remember that the black **ALL** Universe always contains all records and does not change.


Keep- the opposite of **Move**, if you are working in the **IN** Universe, the **Keep** command keeps only the selected records **IN** consideration, and moves all other unselected records **OUT** of consideration. If you are working from the **OUT** Universe, the display will change the colour of the Keep icon to red, since it will keep selected records in the **OUT** Universe and will return all others to the green **IN** Universe. If you are working from the black **ALL** Universe, the display will change the Keep button, substituting **IN** for Keep, signifying that keeping records from the **ALL** Universe places them in the **IN** Universe, if they are not already there. Remember that the black **ALL** Universe always contains all records and does not change.


Back- like a browser, you can go back to the previous display at any time by pressing Back.

Show Side Bar- clicking this icon gives you the option to show or hide the Side Bars on one or both sides of the current display. You can choose to display a Side Bar on the right, the left or both sides of the display. If you display both Side Bars, adding a device to one Side bar display will remove it from the other.

 **FeatureFinder link**- used to export data sets to Omniscope's companion applications FeatureFinder Desktop or Web. These separate applications (or the DataPlayer Studio plugin available in Omniscope 2.4) will convert your data into interactive Flash .SWF DataPlayers suitable for embedding in web pages and offline documents such as PowerPoint, Adobe Acrobat .PDFs, Excel etc. DataPlayers do not scale to more than about 5-10,000 typical records [161], so you may have to use Omniscope to divide your data set into smaller sets before exporting the data to convert as DataPlayers.

 **Barometer**- upon opening a file, it is useful to know how many records are in the data set. As you filter, it is useful to see how many records have been kept **IN** consideration, and how many moved **OUT**. The barometer is a visual gauge that shows the total, as well as the split between **IN** and **OUT** Universes. More on [Data Universes](#) [162]

 **Basket**- the basket is a 'parking place' where you can put selected records, such that they will stay there even if you Reset the display. At any time, you can open the Basket and see the records you have placed there.

 **Help screen**- click on the help icon to see what the publisher or re-publisher of the file may have to say that will help you understand more about the file.

 **Publisher logo/ link**-if you are publishing or re-publishing an .IOK file, you can put your own logo here, and link it to your website. See **Appearance > Branding > Add Corner Logo** and **Set Publisher link** (for best results, use a logo 19 pixels high).

Next section: [Using the Side Bars](#) [139]

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Controls

Controls- Displaying Side Bars and Cycling Controls

Make your files easier to filter and automate the display

From version 2.4, the Controls drop-down menu is located on the Main Toolbar to the left of the barometer.



Show right/left Side Bar- displays one or both Side Bars. By default, all filter Devices are initially displayed on the right side bar. To move filter Devices to the left Side Bar, open the left Side Bar and use the Devices drop down on the left Side Bar to tick which devices you want to move from the right to left Side Bar. [Using Side Bars](#) [62]

Auto-hide main toolbar- ticking this option will cause the Main Toolbar to retract for all Report Tabs and the workspace, unless the mouse is hovered above the Report tabs at the top of the screen. This is often useful when simplifying the page layout for live presentations. This option can also be set on an individual Report Page basis by unticking the **Show main toolbar** option at the bottom of the **Page menu** [158], then committing the change on each Report Page tab for which you do not want the Main Toolbar displayed.

Cycling toolbar- the Cycling Toolbar contains the setting for automatically cycling through Records, Values and Reports, introducing a degree of automation in the display of the data and images in the file. When set to **Hide**, the Cycling Toolbar will not display. The **Auto-show** option will enable display of the Cycling toolbar when the mouse hovers at the bottom of the screen. The **Show** option will display the Cycling Toolbar at all times. [Using the Cycling Toolbar](#) [98]

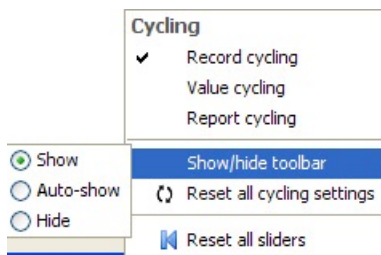
Next: [Using Side Bars](#) [62]

Cycling Options

Setting Cycling Options

Using record, value and report cycling

In progress...



Next: [Creating Report Tabs](#) [15]

Automatic Refresh

Automatic Refresh Options

Using the auto-refresh menu

In progress...

Report Tabs

Creating and Managing Report Tabs

One-click access to the most important displays and messages

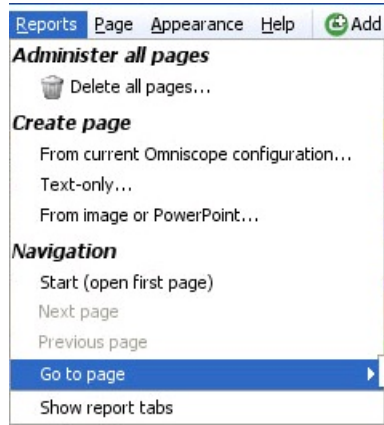
Any combination of views, settings, filters, titles and annotations can be saved as a persistent Report Tabs across the top of the Main Toolbar. Tab names can also be displayed as buttons from the Side Bar Reports panel. Any number of different Report Tabs can be configured, with individual or groups of Report Tabs addressing the needs of different audiences among the users of your files.

If you close and save an Omniscope file displaying a configured Report Tab, this file will open next time displaying the same Tab. Users of the file simply page through the interactive report page tabs just as they would a presentation slide show. If displayed, they can also use the forward and back screen arrows in the lower left corner Reports Navigator, or the right and left keyboard arrow keys (e.g. for live presentations) to page through their Report Tabs.

Below is a high-level introduction to report page tabs; how they are created, modified and navigated. More detailed documentation of the commands related to creating and managing Report Tabs is available under the Main Toolbar [Reports](#) [103] and [Page](#) [104] menu commands.

Creating Report Tabs

To create a Reports Tabs, click on **Reports** on the Main Toolbar and choose one of the three options available under the **Create Page** heading:

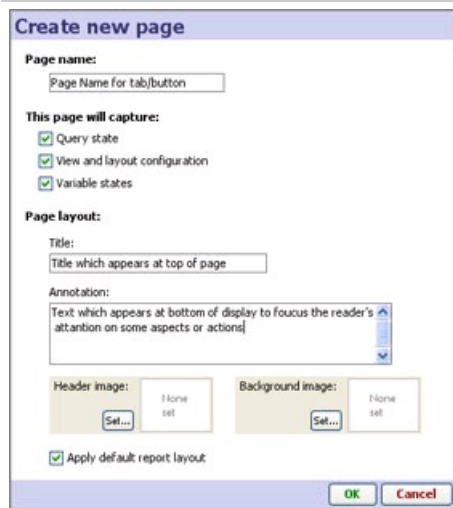


If you are currently displaying a combination of views, queries, variable settings, etc. that you would like to make persistent, choose **From current Omniscope configuration**. You will enter Reports Mode and all your current settings will be copied to create a new Report Page. In Reports Mode, any further changes you make will apply only to the open Report Page, and all subsequent changes must be **Committed** to become persistent (see below).

If you choose **Text only**, you will be presented with a dialog to create a typical formatted text presentation page, with up to 3 different images embedded. Note: embedding a centre image will move your text field to the bottom.

If you choose **From image or PowerPoint**, a file browse dialog will open to select either a large image file (for example a .JPG screenshot file exported from another Omniscope file) or an existing PowerPoint file, from which you can select slides to import as Report Pages.

If you choose to create the new page from the current Omniscope configuration, the **Create New Page wizard** will display like this:



Page name: this name appears on a report tab at the top of the display, or a button on the Side Bar Reports Panel if you provide access to Report Pages there.

Query State- preserves all filter settings and exclusions as persistent settings for the page

View and layout configuration- preserves the open views and layout
Variable states- if you have defined one or more assumption variables as part of formulae, this preserves the current value(s) of those variables as the opening value(s) for the page.

Title: the title text that will appear at the top of the page...you can edit this at any time

Annotation: explanatory text you enter that can be edited on the page at any time.

Header or Background Image- enables you to add logos and image backgrounds

Apply default report layout: If you leave this box ticked, Omniscope will hide the View Toolbars and increase the margins around the views for a cleaner display. If you wish to preserve the existing settings, untick this box.

Once configured and named, each pre-defined, persistent Report Page appears anytime the user clicks on the top report tab, or the button next to the Report Page name in the Side Bar Reports Panel, or uses the **Reports Navigator** menu, which appears faintly in the bottom left corner of the display in Reports Mode (see **Using the Reports Navigator** below).

Configure Report Pages

The Main Toolbar **Page** menu commands provide many options useful for creating self-explanatory Report Pages. The commands on this menu can be used to configure many aspects of the current display, whether that display will eventually be converted to a persistent Report Page or not. If you make changes to the current view using **Page** menu commands, then close and save the file, it will next open with those changes preserved in the current display.

	<p>Page menu commands can be used to:</p> <p>Reset layout- returns the current page layout to the default</p> <p>Remove all views- closes all views on the current page</p> <p>Page margin- sets the width of the space that is used to display titles, header images, annotation text etc. around the views on the page</p> <p>Add Background, Header and Centre images- allows you to add images, including faded background images to provide more branding and identity to your file</p> <p>Add, style or remove a Title- creates and styles an optional free text title at the top of the page in the margin</p> <p>Add, style or remove an Annotation- creates and styles an optional free text field that displays at the bottom of the view, unusually conveying the main message of each Report Page.</p>
--	---

You can also tick/untick the options to display or hide the Main Toolbar and the View Toolbars on open views of the page. Toolbars are usually hidden if Report Page users are not expected to access the options available on them. Even when hidden, the Main Toolbar comes back into view whenever the user hovers the mouse near the top of the display.

Page menu commands apply to each Report Page individually, and any changes must be Committed to become a persistent change, or Reverted to return the Report Page to its default configuration/layout. For options covering aspects of the look and feel of Report Pages that apply to more than one page, see the introduction to the [Appearance \[140\]](#) command menu.

Using the Reports Navigator

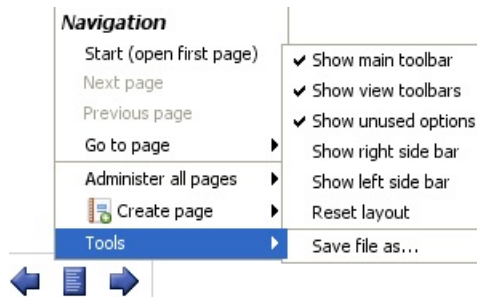
The **Reports Navigator** menu appears in the lower left-hand corner of the display whenever Omniscience is in **Reports Mode**, meaning displaying a persistent Report Page. The **Reports Navigator** is faint until you mouse over it, at which point it appears clearly, with forward and back arrows pointing to either side of a reports document icon. Clicking on the forward or back arrows cycles through all the Report Pages already configured in the file. The same list as can be seen in the Side Bar Reports (or some other name if you have renamed the Reports heading) panel and under the Main Toolbar **Reports Navigation** section.

Clicking on the **Reports Navigator** document icon at lower left reveals a menu listing a number of report navigation, creation, layout and reset options.

	<p>Start; Next; Previous; Go to page...used to cycle through the Reports Pages already configured in the file.</p> <p>Administer all pages sub-menu:</p> <p>Commit all modified pages- makes all changes which you have made to your Report Pages persistent</p> <p>Revert all modified pages- returns all Reports Pages to their last persistent configuration</p> <p>Delete all pages- deletes all Report Pages currently configured</p>
--	---

If the **Commit** and **Revert modifications** commands are solid, rather than greyed-out, it means that you have modified the current Report

Page and must now either overwrite the previous settings with the new ones (**Commit**) or return the report to its original look, leaving the original settings unchanged (**Revert**). If the name of the Report Page is showing in red on the top report tab, this also means that you should either Commit or Revert your changes. If you have chosen to show the Side Bar Reports panel, these buttons also show in the Side Bar under the current Report Page whenever changes have been made to the current page, and the report titles will show in red until changes are either Committed or Reverted.



Tools sub-menu: Tick or un-tick to Show or Hide various toolbars. Note that these changes apply to the current Report Page only, and only if the modifications are Committed to make them persistent.
Show/Hide main toolbar-same as above
Show/Hide view toolbars-same as above
Show/Hide unused options-used to simplify the display of certain view menus
Show/Hide right/left side bars-same as above

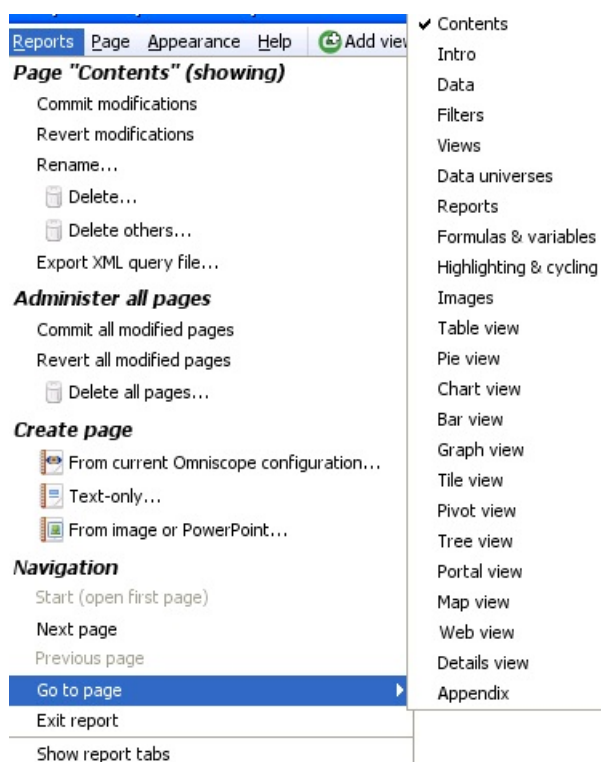
Reset Layout- returns the layout of the current Report Page to the default, with all the optional Show/Hide settings set to Show

Save file as... opens the Export file wizard [163] with the tab set to .IOK/.IOM files.

Exit Report: Exits from Reports Mode and the Report Navigator menu disappears. Remember that it is usually better to **Exit** Reports Mode if not modifying existing Reports Pages. You can also **Exit** Reports Mode from the Main Toolbar Reports menu (see below) or from the Side Bar Reports Panel if you are displaying reports there.

Managing Report Pages

Commands required to manage all configured Report Pages are available from the Main Toolbar **Reports** menu. In addition to many of the same commands as are available on the Reports Navigator menu, the Main Toolbar Reports menu includes commands such as **Commit** and **Revert all modified pages** that operate on all Report Pages simultaneously. When the **Reports** menu is opened, the title of the current Report Page is shown at the top in bold italics.



For more detail, see the sections documenting the Main Toolbar Report [103]s and Page [104] command menus

Organising Report Pages

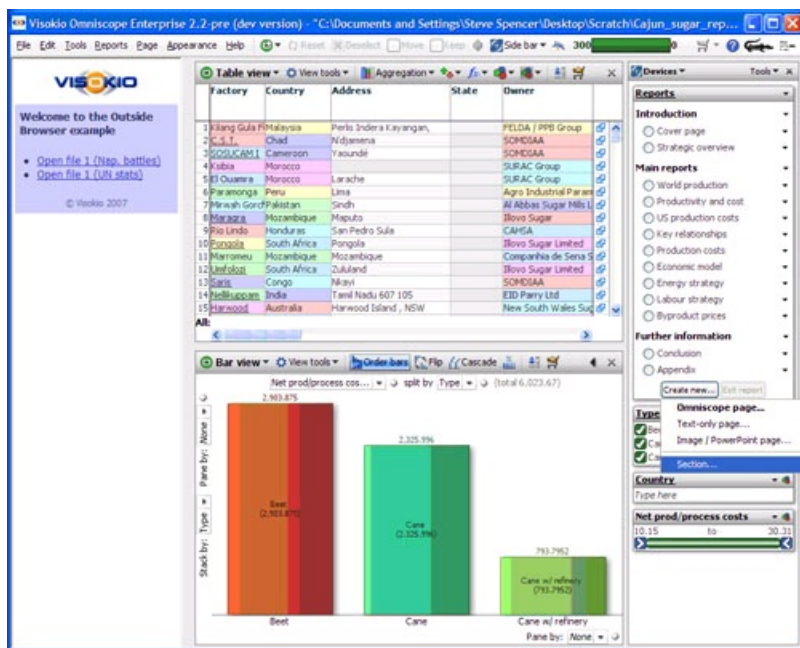
This refers to the functionality allowing Report Pages to be organised into named sections (or "groups"). To date, Report Page organisation has been implemented only in the Side Bar Reports Panel. To show the Reports panel, the right-hand Side Bar must be showing. However, the Side Bar Reports Panel is not displayed by default.

Use the **Side bar** **Side bar** button on the Main Toolbar to change this. Then, ensure the Reports Panel is ticked for display using the **Devices** drop-down on the Side Bar toolbar. When the Reports Panel is displayed, the Report Page tabs across the top of the display will disappear unless they have been explicitly shown. You can explicitly hide/show the Report Page tabs using the **Tab > Tab settings > Tab bar** option available from the Main Toolbar. For more information, see the [Appearance menu](#) [105] commands..

Adding and administering report sections

The Side Bar Reports Panel must be expanded to show the **Create new** button at the bottom of the panel. Expand/collapse each device by clicking its title. Click **Create new**, choose **Section** and enter the section name when prompted. Drag the sections and Report Page titles around to achieve the desired structure.

To manage existing section titles, click the black triangle on the right to show a drop-down menu, allowing you to rename or delete each section grouping.



Next: **Formula Fields** [164]

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[108]

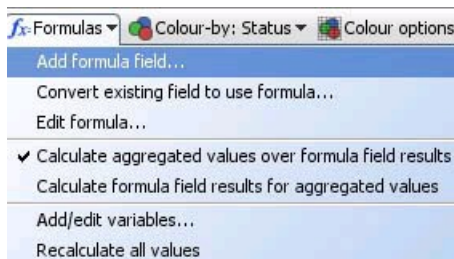
Formula Fields

Adding Formula Fields and Variables

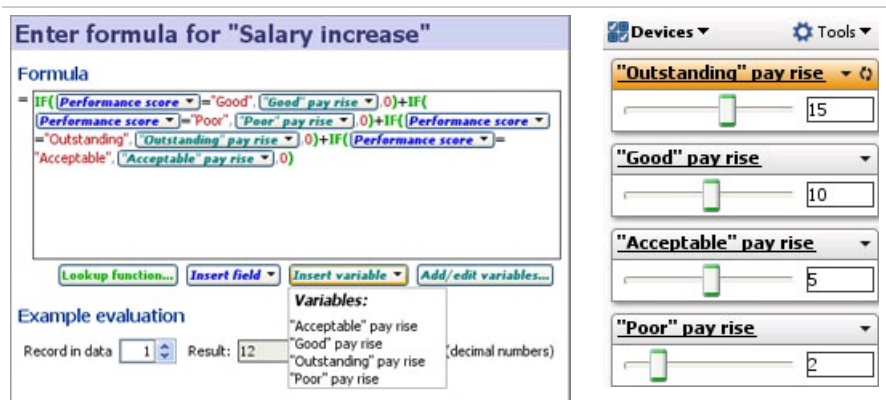
Defining calculated columns and modeling assumptions

Omniscope can calculate values based on values in other columns, using a standard menu of functions (same syntax as Excel) plus some additional Omniscope SUBSET functions. Omniscope formulae are expressed only in terms of columns, not using individual cells as with spreadsheets. You cannot define an Omniscope formula that depends on the value in a cell belonging to another record (row). Instead, you specify additional values called Variables, which are input assumptions, not values in the files (columns) of the data set. Variables can be a single value, but usually are expressed as a range of values with a minimum, maximum and default value (see **Add/Edit variables** below).

You add defined Formula Fields to your data sets using the Formulas drop-down menu available on the Table View Toolbar:



Add formula field- creates a new field (column) of values calculated as a function of the values found in other columns, together with any Variables whose ranges have been defined (see **Add/Edit Variables** below). You use the **Add formula field** wizard to define the calculation you want Omniscience to perform when populating the new column.



The **Add/Edit formula** field wizard displays a blank formula definition workspace (or the current formula definition, if any, for editing). You specify formulae by selecting columns, typing in arithmetic operators, selecting functions from the the functions list library, and Variable you have already defined (see below). If you make a mistake, backspace to remove it and try again. The functions list library contains all the standard spreadsheet functions (same syntax as Excel), plus special Omniscience SUBSET functions documented in the KnowledgeBase [Functions Guide](#) [63].

Add/Edit variables- Variables are values with ranges you define which are not contained in the data set, but are available to be used in Formula field calculations. Variables can take on a range of values, and if you reveal the corresponding Side Bar device, you and users of your files can use Side Bar sliders a check-boxes to 'flex' the model assumptions, performing real-time, multi-variate simulations and sensitivity analysis, with all views and totals updating automatically.

Complex formulas can be made easier to read if you add line breaks and spaces to space it out. In Omniscience 2.5, you can also add comments, using /* to begin a comment and */ to end a comment, like this: /* This is a comment */. Comments, line breaks and spaces have no effect on formulas.

For more detail on using the **Add/Edit formula** wizard to specify formula fields, and defining Variables for use in sensitivity analyses, see the section on [Formulas and Variables](#) [93] under the section on the [Table View](#) [110].

Next: [Managing Display Appearance](#) [140]

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Manage Appearance

Managing Display Appearance

Present your data and links with pride...

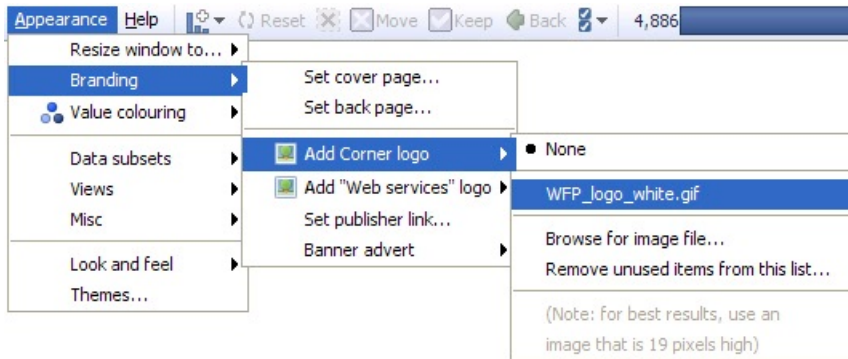
Deliver interactive, data-rich, visual reports in Omniscience rather than dull, complex spreadsheets or static, presentation slides. Omniscience

offers extensive options for branding your file, displaying advertising, focusing the end users' navigation options, and changing the layout, styles and colouring to match your organisation's standards for internal and external documents.

Commands affecting the display of a given file are found in the Main Toolbar **Settings** and **Layout** menus. In this section, we will introduce only two of the most commonly-used sets of options; **Branding** and **View restrictions**.

Settings > This file > Branding

{Omniscope Professional & Enterprise only} The **Branding** sub-menu provides options to configure either of two informational pop-up pages presented on opening and closing a given file. It also provides the option to change the corner logo display from 'Visokio' to a logo of your own (with a link back to your own page), and to display banner advertising images and links in your downloadable Omniscope files.



There are two informational pages you can configure:

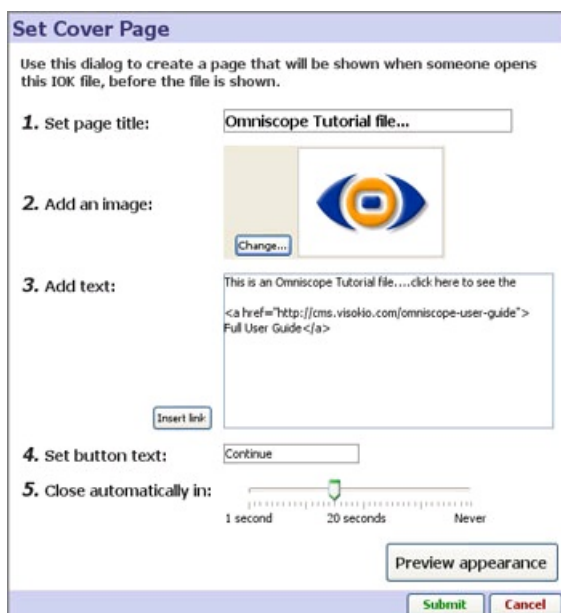
- The **Cover** page opens (and closes) before any working displays or Report Pages.
- The **Back** page displays when the file is closed, and is useful for reminders, acknowledgements and providing contact details relating to the file.

The **Add Corner logo**, **Add Web Services menu logo**, and **Set publisher link** options enable data publishers to further brand their files. The **Banner advert** sub-menu enables publishers to add advertising images and links to their files to fully integrate with the commercial aspects of their business. For more information, see [Appearance Menu](#) [105] and [Advertising Options](#). [165]

Note: The **Help** page and banner advertising displays are currently the same for the working display and all the Report Pages in the file, rather than configurable for each Report Page. This may change in future versions. To edit the file specific Help Page, see **Help > Create/Edit help page**.

Configuring Information Pages

Clicking on the option to configure a **Cover** and **Back** informational page launches a **Set Page** dialog that accepts 5 inputs from you. The dialogs used to create the **Cover** and **Back** informational pages are both similar to the one shown below:



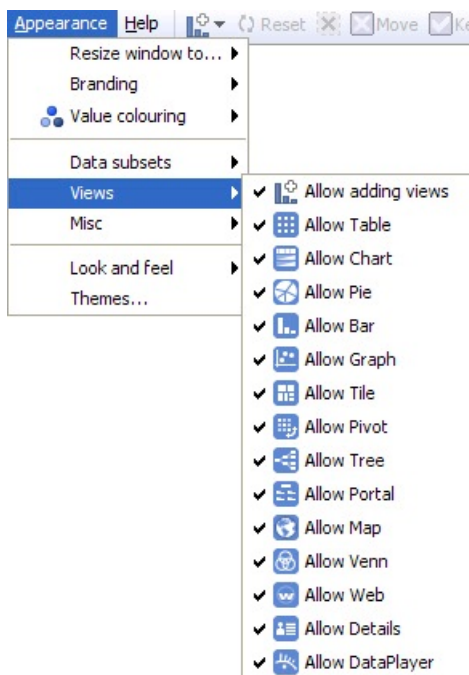
Note: Both information pages support some aspects of HTML text formatting, such as , <i> etc.

Suggestion: Use 'hard' returns to wrap your text for readability. Click 'Preview appearance' and then re-size the window by introducing hard returns to define the size and shape of information page. Click 'Submit' and the size, shape and text-wrapping of the information page will be preserved.

Note: Informational pages behave differently to the Help Page, which does not require hard returns and can be re-sized directly in preview mode.

Settings > This tab > Advanced tab settings > View restrictions

For any given data set, one or more of Omniscope's 14 different views may not be needed to best depict the data set and support user interaction. It may be that the data does not contain any fields (columns) useful to plot against other fields in the Graph View. Some files could have so many different unique Category values in different fields that the Tree View becomes slow to open and use. Whether for these or other reasons relating to simplifying the file, it is possible to hide selected views from the users' View Chooser menus by unticking the view on the list displayed under **Settings > This tab > Advanced tab settings > View restrictions:**



Styles

In addition to logos/background images and font selection, all the colours associated with an file can be managed using the options available under **Layout > Configure styles**. There is a library of style presets you can test from **Layout > Styles**. You can also create your own combination of corporate colours and save them as your own named style. More on [managing styles](#) [166]. You can also configure the colours used for data values using **Settings > This tab > Value colours**.

Learn more...

For a more complete discussion of all the available menu commands, see [Commands Reference](#) [27], in particular the [Layout Menu](#) [58].

Next section: [Refreshing data](#) [133]

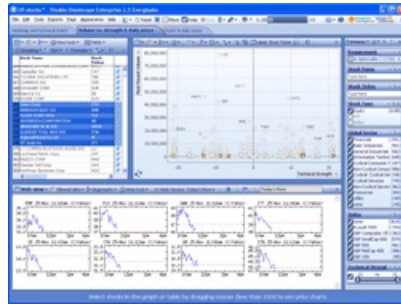
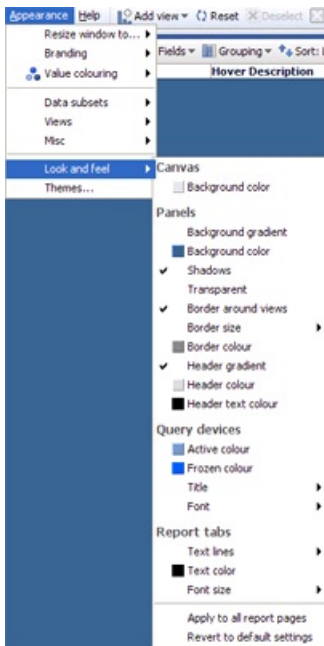
[User Guide Top](#) [108]

Managing Styles

Creating & managing styles

Controlling colours and presentation across files

Styles are combinations of display settings you can change under **Layout > Configure styles**. These settings control most of the visible aspects of each file, outside of the controls available within individual views. By default, a built-in style called Default is used for every file. A menu of alternative pre-defined styles is available **Layout > Styles**. You can see the different colouring effects by changing the style applied to the open file.



Ice Blue



Bordeaux



Forest

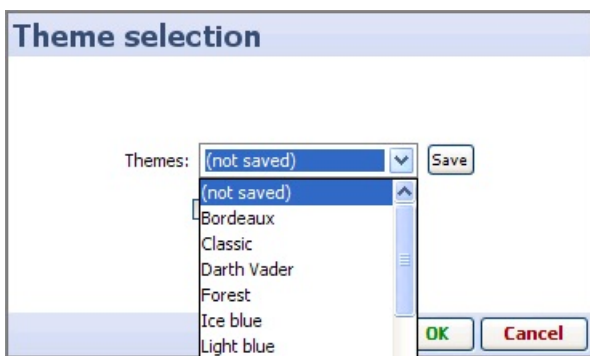


Darth Vader

Create a corporate style corresponding to your corporate colours and general style of presentation, using a combination of official logos, font settings, colours and effects, which you can define using **Layout > Configure styles**. Once you are satisfied with all the settings, name and save your official style preset and it will become a new option on your **Layout > Styles** menu. You can also copy this customised style preset to others in your organisation (see below), so that the official corporate preset is available in the same menu to everyone configuring files.

Customising, Saving, Exporting & Installing styles

If you change any settings relative to the current style preset, the Preset selection drop down will show that the new altered preset is not saved. Click Save to give a name to the newly-modified style preset and save it to your installation, from which it will be available for future use, and transferable in the form of an .XML file you can copy across machines.



The settings corresponding to the new style preset are saved in a local .XML file named {YourPresetName}.XML. Anyone who creates a new file from an existing file can use the same style preset, which is part of the file. However, anyone creating a new file will not have access to the custom corporate style unless it is first copied to their machine.

Currently, to make a style preset you have defined available to others, you need to find the file called {YourPresetName}.XML on your machine, send a copy of this file to others needing to originate (not view) files with his preset, and tell them the location on their machine to copy this file so that it will be available to them whenever they create a new Omniscopus file.

The location to find/copy the .XML style preset files varies by version of Omniscopus and your version of Windows, as described below:

Omniscopus version 2.4

Vista:
 C:\Users\UserName\AppData\Local\VirtualStore\Program Files\Visokio Omniscopus\UserThemes

Windows XP:

C:\Program Files\Visokio Omniscopus\UserThemes

Omniscope version 2.5

Windows Vista:

C:\Users\UserName\AppData\Local\Visokio\Omniscope\UserThemes

Windows XP:

C:\Documents and Settings\admin\Local Settings\Application Data\Visokio\Omniscope\UserThemes

Revealing Hidden System Files

If your system is set to hide system-related files and folders, you may not see the above locations until you change this setting:

1. Open the folder options in Windows:

Windows XP:

Open menu START > Settings > Control Panel > Folder options

Windows Vista:

Open menu START > Control Panel > Appearance and Personalisation > Folder options

2. Click on the View tab and enable the option 'Show hidden files and folders'.

Back to [Managing Appearance](#) [17]

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Update/Refresh Data

Data Refresh Options

Keeping your data up-to-date

Omniscope IOK files include a highly-compressed snapshot of all the data already imported. Access to the linked data source is NOT needed for you or others to view and explore data already in Omniscope. You can send an IOK file to a friend who does not have access to the original data files, and they will still be able to explore the full copy of the data in the Omniscope file. However, unless the IOK file has been created with a special Commercial Publishing license key, free Viewers cannot refresh the data in a file. A new IOK file needs to be created and distributed to users of the free Viewer whenever the data changes.

Activated versions of Omniscope, however, **can** refresh the data (and configuration) in distributed Omniscope files in various ways.

Refresh from linked data sources on file opening:

Omniscope files usually contain data imported from other data files or relational database reporting views being changed regularly. Omniscope remembers the location and format of the external data imported, which could be one or more Excel .XLS or other spreadsheet .CSV files, a database reporting view exported and saved as a .CSV or .TSV file, reporting views defined by any SQL statement that returns a table from relational tables from one (via ODBC) or more (via JDBC) relational databases, or a folder of files or images on an Internet server or your PC. Remembering its 'linked data source' enables Omniscope to refresh the data in IOK files on opening, whenever the source data has been changed. Upon opening, IOK files automatically detect (from the time stamps) that their data source(s) contain changed data. Depending on file refresh settings (see **File > Save As** dialog) the file either automatically refresh the data, or may ask the user if he/she want to refresh the data from source before displaying the Omniscope file. Moving the linked data source file(s) location relative to the Omniscope file will break the link. You can delete or restore any Omniscope file's link to external data sources at any time. When opened, the IOK file will automatically detect that its data source has been changed and will ask you if you want to refresh from the new source before opening. This refresh affects data only, not the overall configuration of the file.

Refresh direct from relational databases:

If Omniscope is unable to automatically detect changes to the external linked data source (for example, if the source is a database table being accessed via ODBC or JDBC [167] protocols), you can configure the file (via **File > Save As**) to always refresh on opening, or just manually refresh the file after opening by choosing **Data > Refresh from source**. If you have added Connector-based fields such as Bloomberg fields to your data set, and have access to Bloomberg on your PC, you can use **Data > Refresh Bloomberg data** to refresh these fields at any time. This refresh affects data only, not the overall configuration of the file.

Warning: Omniscope does not currently support partial refresh of data tables. Any Omniscope data (not Formula) columns **not** contained in the external linked source will be overwritten or lost if the Omniscope file is refreshed (Formula columns are re-calculated). If you have added data columns from sources other than the linked source, i.e. maintain a lot of local data in your working Omniscope file such as columns of

notes, or pasted copies of e-mail correspondence, or references to pictures or map coordinate references which are not in the linked data source, you must divide your working IOK file into two separate Omniscopes files prior to refreshing only the columns originating from the linked source. This is easy to do. Once you have refreshed the Omniscopes file containing only data columns from the external source, you can join both parts of the working file back together again. For more information on separating and joining IOK files, see the sections on the [Export Data Wizard](#) [125] and the [Import/Merge Data Wizard](#). [168]

Although any number of distributed Omniscopes files can refresh directly from the same relational database reporting views, all users need access rights for these views, and if the number of users becomes large relative to the load on the database, it may be better to link the database to one central copy of the Omniscopes file, and let distributed users refresh their copies remotely from that central IOK file, rather than directly from the database. In this configuration, the central Omniscopes file is acting as a highly scalable, visual and configurable 'data mart', but 'data mart' nonetheless.

Linking Omniscopes files to other Omniscopes files:

In addition to other types of data files, Omniscopes IOK files can be configured with other IOK files (including a copy of itself) as linked data sources. This option has the advantage that only the updated data set can be delivered to the distributed User Omniscopes, without changing what may have become personalised Omniscopes configuration(s) of Views, Filters, named Queries and Report Pages. A large-scale Source Omniscopes file running on an always-on server can serve as a 'data mart', providing the data source for a wide range of different end-user Omniscopes files refreshing from it. The central 'data mart' IOK file should in turn be refreshing itself via continuous, always-on access to reporting views drawn from your relational data warehouse or analytical 'staging' database.

Automatic refresh from live data sources

From version 2.3, you can now configure any number of desktop Omniscopes Professionals to automatically refresh their file data from a Source IOK file running elsewhere, over your local network or across the web. If the Source IOK file is in turn refreshing itself directly from the original source database view/table(s), this configuration provides a scalable, near real-time live data refresh solution. While distributed Users are working on their files, auto-refresh awaits a pause in their activity. Each time Users re-open their copy of the auto-refresh linked file, it either refreshes only the data, or returns to the file to the default opening configuration of the Source file, depending on settings. To allow Users to maintain their own individualised configurations and import only the latest data when working, use the **Refresh from linked data source**. Alternatively, auto-refresh can be configured to **Refresh by reloading IOK file** which returns the distributed copies to the default configuration on refresh.

For more information, see the Knowledge Base sections on [Integration](#) [169] and [Auto-Refresh](#) [170].

I can't refresh from source!

If your linked data source has moved or is inaccessible, Omniscopes will be unable to refresh from source. If you imported from a source file such as a .CSV or Excel .XLS spreadsheet, the linked source file must always remain in the same relative location compared to the IOK file. If you have moved either file independently, you can re-establish (re-locate) the source file by choosing **Data > Edit source**. If you imported directly from a database, check that the database server is started, and is accessible across your network if it is running on a different PC or server.

Making changes to source data

Exporting changes back to linked data files- be careful!

Omniscopes allows you to edit cells in the Table View, right clicking on the cell to edit cell data, and right-clicking row headers to add/remove records (rows). You can also add and remove fields (columns) using the **Data > Manage Fields**. When you have finished your edits, save your work in the IOK file as usual by choosing **File > Save**. If you originally imported from a linked data file (such as a .CSV or .XLS file), you may be asked if you also want to save back to source - i.e. to save your changes back to the linked source file. At any time, you can also manually save your edits back to the source file by choosing **File > Export > Export back to source**. {Professional & Enterprise Editions only}

Warning: Whenever you choose to save back to source the entire source data file will be completely overwritten with your latest edits from the Omniscopes file. If you have deleted fields, these will also be deleted in the source file (therefore usually better to just hide them). If your source file is an Excel XLS file, all formatting and formulae will be deleted as the export is only for cell data. If you have a multi-tab spreadsheet, all the other tabs will be lost.

Exporting changes directly back to relational databases- not supported

Omniscopes does not support saving changed data sets directly back into to database tables. If you need to save changes back to a database, collect your changed records in a Named Query (such as 'Errors for correction') then export a .CSV or .XML file containing the changed records, and perhaps a 'Comments' column explaining the changes. You or your database administrator can then use a database utility to import your changes directly into the transactional database table(s). For more detail, see [Queries & Subset](#). [10]

Unlinking/Re-linking to source data files

At any time, you can deliberately remove the persistent link between an IOK file and its linked data source by choosing **Unlink from source** from the **File > Export** menu, or by un-ticking the **Linked to source** check box when saving the IOK file using the **File > Save as** dialog.

Also, any time you are prompted to refresh from source or save back to source, there is always the option to click **Unlink** or **Skip** to prevent

overwriting the source file. You can also reconfigure the linked source file at any time by choosing **Data > Edit source** which will preserve any field conversions and formulae applied to the previous source.

Next section: [Useful tools](#) [171]

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Useful Tools

Introducing the Tools Menu

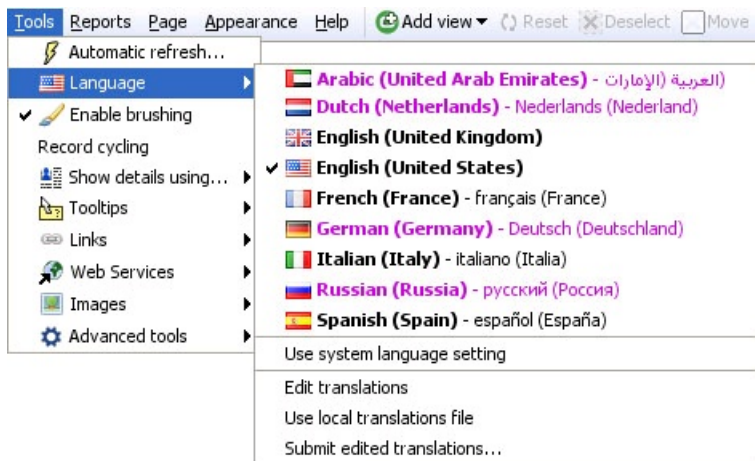


Useful tools for improving your files...

The Main Toolbar **Tools** drop-down menu provides access to a wide range of useful commands. In this section we will look at three of the most commonly-used sub-menu options accessed from the **Tools** drop-down menu:

Tools > Languages

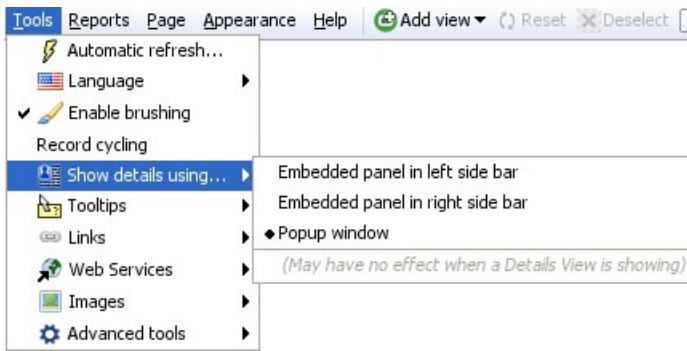
Select your preferred language for all Omniscope menus and dialogues. This will not change the language of your data, only the Omniscope commands. For detailed instructions on switching languages, see [Tools > Languages](#) [102].



If you would like to edit/modify the language translation files you use, see our Knowledge Base [Translation Guide](#). [172]

Tools > Show details using...

In addition to the [Details View](#) [120], Omniscope can display configurable record-level details as pop-up windows and embedded Side Bar panels. Open a Side Bars on your file and try each option for viewing details outside of the Details View.



More on [Viewing Details](#) [122] and [Adding Links](#) [146]

Tools > Tooltips

Tooltips are extra pop-up displays that appear on top of views whenever users hover their mouse on specific records, such as a single row in the Table View or single record dots plotted in a Graph View. You can select which fields are displayed in the pop-up Tooltips hover display. This is an extremely useful way to help users understand the key attributes of any record just by pointing with the mouse.



You should be selective displaying Tooltips, however. Trying to display too many fields in the Tooltips pop-up results in large, cluttered displays that obscure other important aspects of your reports.

The other commands located on the Tools menu are discussed in other sections:

- **Links**- discussed in the [Using Links](#) [146] section
- **Web Services**- discussed in the [Web Services](#) [173] section
- **Images**- discussed in the [Adding Images](#) [174] section
- **Advanced Tools**- discussed in the [Tools-Advanced Tools](#) [175]section

Next section: [Adding Links](#) [146]

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Adding Links

Adding and Using Links



Link to documents, other files and the web

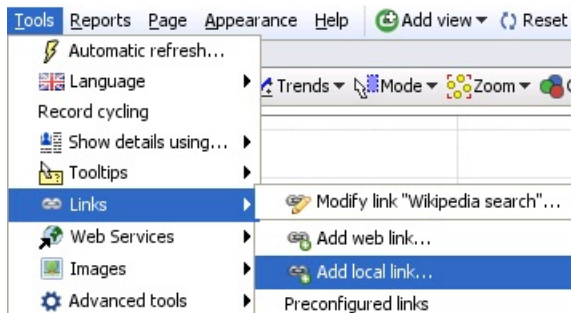
Links extend your file users' experience to include content not contained within the Omniscope IOK file itself. By adding links, anyone can integrate related external content (documents, files and web pages) into their IOK files, with one-click access via their local network, and the open web.

Links in Omniscope allow you to link a **single record** to some online content, optionally passing field values to the web server, allowing you to search for field values on external websites, for example.

If you need to post **multiple records** to a server, you need to use [Settings > Web Services](#) [176] instead.

The Add links wizards

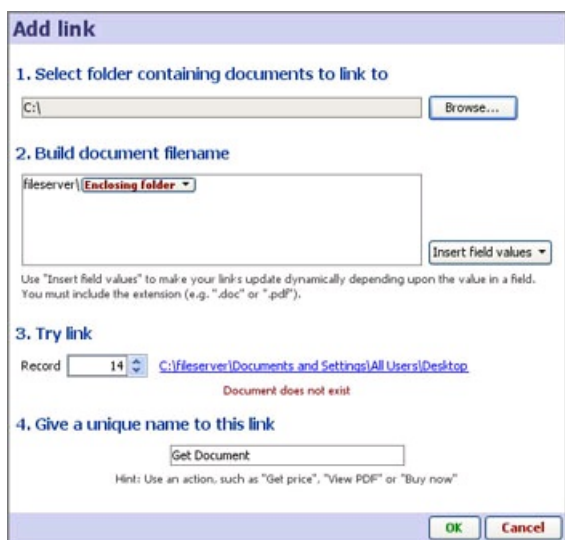
You specify links and make them available for use within your IOK file using the **Add web link**, **Add local link** and **Preconfigured links** dialogs available from [Settings > Links](#) menu on the Main Toolbar.



The **Add local link**, **Add web link** and **Preconfigured links** dialogs are simple to use and allow anyone to create dynamic local and web links combining text strings typed in just once (like a network file server/folder locations or web site domain names) with the values of fields contained in the .IOK file. The result is user-selected, dynamic, data-driven links that extend users' access to information dramatically.

Creating local links

File folders located on your machine (or on other machines accessible to you over your networks) can contain documents, images, audio and video clips, practically any kind of digital content related to your data. For example, you may store a folder of documents on a remote file server that users of your .IOK file may wish to consult. If you have a reference name for each document (or the enclosing folder for groups of documents), including this information as a column in your .IOK file will permit users of your file to link to the folder or specific documents, audio or video clips, etc. inside.



Using the **Add local link** wizard, you build up the link by:

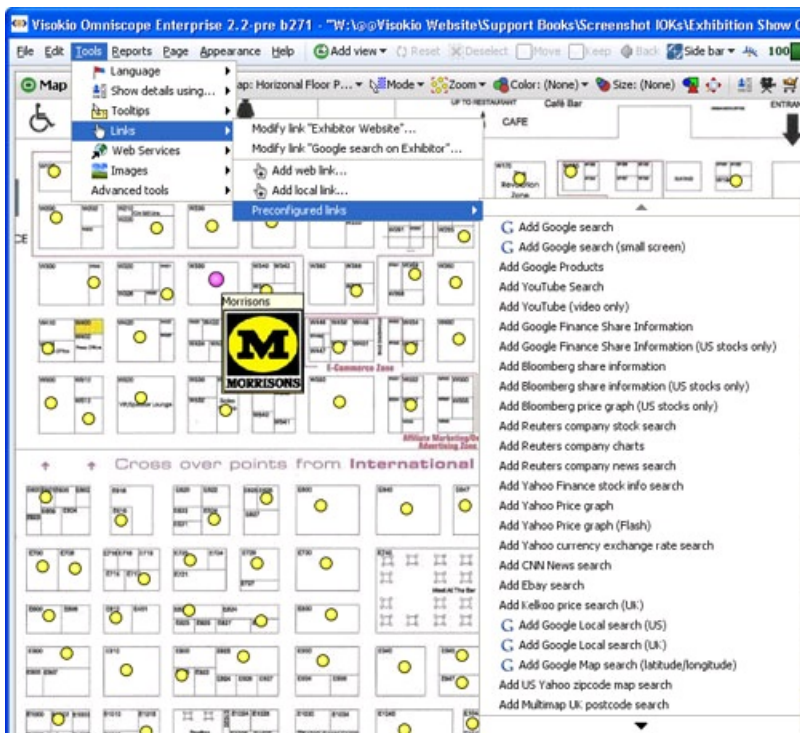
- 1.) Browsing to the network location containing the files you are linking to,
- 2.) Building the file name by adding in any text that does not change (e.g. 'fileserver' in the example above) and specifying each of the fields in your .IOK file containing values that will add specificity to the location/document/file the user will be linking to. To delete, backspace and try again. Once have have fully specified the link to an existing file/document,
- 3.) Try the link across a number of different records (in the example above, there was no document found)
- 4.) Name the link once you are sure that the link is correctly specified and working across the full range of records

Once the link is fully configured, it will appear with the name you have given it on all menus relating to links in the file. If you then assign the link to a field (column) in the data set, Omniscience will create an underlined link from all the values in that field that launches the link whenever the user clicks on a value in that field (column). You can associate local links with any field (column) and they can appear as action buttons/links in the Details View and pop-up displays.

For more information on how Omniscience builds links, please see [Absolute and relative links](#) [177].

Preconfigured links

There are many free reference and look-up services available on the web. Omniscience includes a library of preconfigured links you can use to extend the reach of the users of your file, eliminating the need for them to re-type what could be long and complex codes or foreign languages in order to access a service.



Free pages tend to expect a single string of text, i.e. a search term/string, a recognised identifying number like a stock ticker, CUSIP or ISIN (securities) or an ISBN number (books). If your data set includes fields (columns) that can be submitted to these or other web pages (see creating custom links below) you should consider configuring these links in your files. You can specify that the results be displayed in one or more Omniscio [Web Views](#) [119] or the user's default browser.

Add Ebay search

1. Choose field
 Item description

2. Try link
 Record No link defined

3. Give a unique name to this link

Hint: Use an action, such as "Get price", "View PDF" or "Buy now"

If you would like to offer other free preconfigured links to be added to the list included in Omniscio, or otherwise communicated to our users via our web site, please [contact us](#) [178].

Creating custom web links

Any resource available on the open web can be linked to an Omniscio IOK file using the **Add web link** dialog:



The **Add web link** wizard process is similar to building local links. Use the drop-down to specify the web protocol for the resource (usually http://) then type in the part of the URL/web address that is not contained in one of the fields in your data set. Next, select one or more fields from your data set, typing in any necessary separators like /, %20, etc. between the inserted fields. To delete, just backspace and try again.

Once you have configured a valid URL/web address, test the link by cycling through various record field values, and clicking on the displayed link. Once you are sure that it is working as you expect, give the link a name. The link will now be added to the list of links available in your file. In the same way as local links, you can associate web links with any field (column) and they can appear as action buttons/links in Details pop-ups and views. Web links can also be associated with Web Views by selecting the links from the list in the **Web View > View Toolbar > Links** drop-down. For more information, see [Using the Web View](#). [119]

Next section: [Add Images](#) [174]

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Adding Web Services

Adding Web Services in Omniscience

Omniscience allows you to define Web Services in your IOK file, which allow you to select some records and "post" them to a server, then view the resulting web page. You can either use preconfigured example web services, or enter the details of a server yourself.

Behind the scenes, Omniscience submits a POST to an HTTP server listing the record identifiers from a field of your choosing. Omniscience then displays the resulting web page, either in a separate browser or using the [Web View](#) [179].

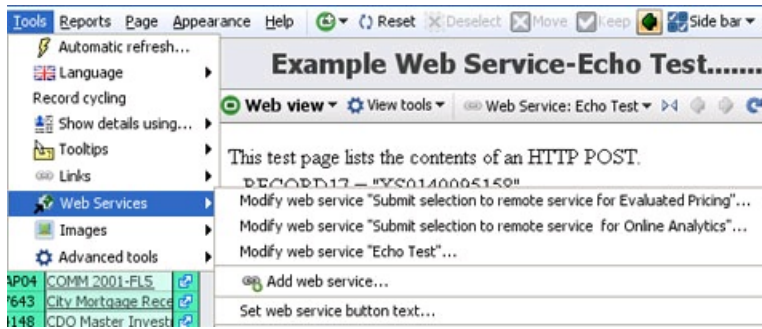
Omniscience as a universal web service 'hybrid' desktop/web client

Omniscience integrates with web services to offer a hybrid 'best of both worlds' combination of powerful desktop client/user interface with the ability to send user-selected or modified subsets of data (including user input data) back to remote servers for further processing. Corrections and updates can be sent back to the central data repository for refresh back into Omniscience, or remote server results can be immediately displayed using one or more [Web Views](#) [179] or the default browser on the users' machines.

Currently, Omniscience supports exporting to remote servers of any number of values (references) from a single field (column). You can define a formula field that collapses multiple user-changed fields into a single delimiter-separated column for posting back to the central data source. You can also write formulae files that return values read from remote web services. If you envisage a solution that requires posting a table of selected or modified values (more than one column) please [contact us](#). [86]

Defining Web Services within a file

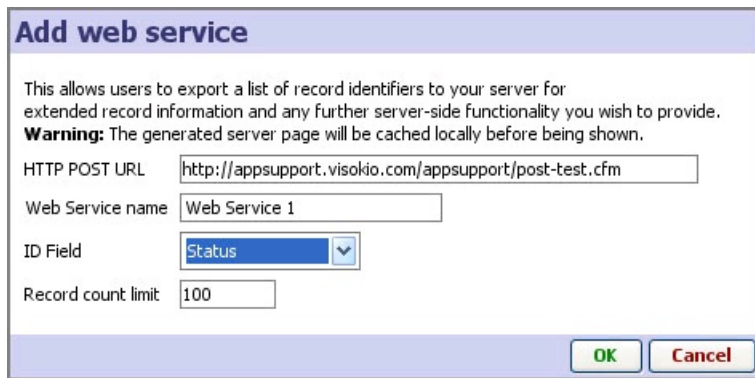
Web services that will be available from within each file are defined using the Main Toolbar **Settings > Web Services** dialog:



From the Main Toolbar, the **Settings > Web Services** menu offers the following options:

Modify Web Service- allows modification of all the parameters associated with any web service already configured in the file or remove the web service from the file. The parameters are the same as those shown below in the Add Web Service wizard: HTTP POST URL; Web Service name; ID field (the field (column) from which selected values should be exported) and the Record count limit, which sets the maximum on the number of values posted at a time.

Add Web Service- selecting the **Add web service** option opens the Web Service configuration wizard:



Add your own Web Service configuration to the file by supplying your own values for:

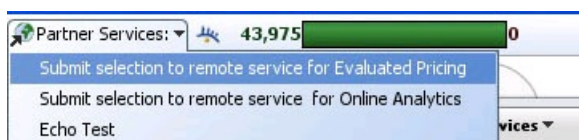
HTTP POST URL: the full URL of the server file/page responding to POSTS

Web Service name: Name you give that appears on the Omniscope Web Services menu. In the example above there are 3 names for 3 different services available from the file.

ID Field: the field (column) name in the Omniscope that contains the values to be exported to the Web service being configured. Can be different for each service

Record count limit: Can be any number of values, set to 100 by default

Omniscope includes a test web service that 'echos' whatever field (column) of values you choose to send. Try configuring this service using the URL given, with a name like Echo Test, and selecting a field in your data set. In one of the views in Omniscope, select less than 100 records, and in the Main Tool Bar, click on the 'Echo Test' web service. If you have not configured a Web View in Omniscope to display the results, the default browser will open and display the echo results. If you have configured a Web View to display the web service results, they will appear in that open Web View.



Set Web Service button text- Sets the display/hover value for the Web Services menu button...'Partner Services' in the example shown above.

For more discussion of options for building web-integrated data publishing solutions using Omniscope, consult our KnowledgeBase sections on [Web Integration](#) [180] and communicating with [Web Services](#). [181]

Adding Images



Adding Images

Thousands of pictures are worth millions of words...

Omniscope can be used to align a set of images in a folder with records (rows) relating to each image, such that the images associated with each record (row) can be displayed in various views:

- Table View (**View Tools > Column Options > Show images in cells**-select column),
- Tile View (**Tile View > Tile Contents > Show Images**-select image set), and the
- Details View/windows (**Details View > View Tools > Show > Images**).

Before you can display images, however, you must associate one or more folders of images with the .IOK file as named image sets. Preparation for this involves saving a set of images in a single folder with a consistent naming convention that matches the text values in one of the columns of your .IOK file (it may be a column included just to hold the names of the images).

To save you having to find a lot of pictures in order to try this, the example below will use an Omniscope embedded demo file 'Works of Van Gogh', and its associated high-resolution image set. To take this tutorial, first click on the link below to download a zipped folder containing the images for the "Works of Van Gogh" demo.

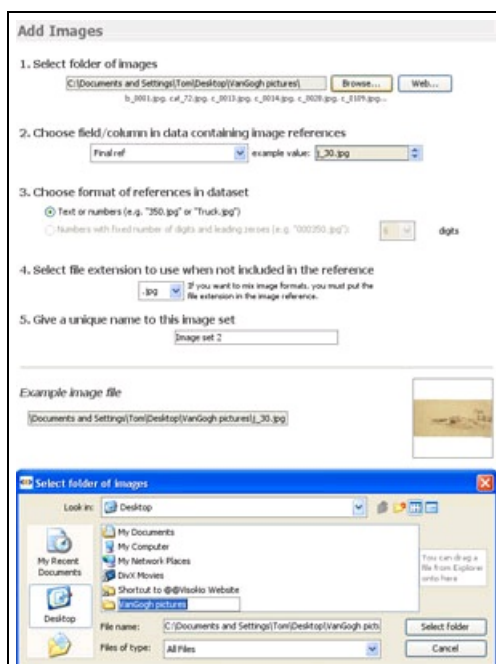
[Van Gogh Demo Image Set](#) [182]105.3 MB (about 4-5 minutes on broadband)

Note: this folder contains many high-resolution images, making the download quite large. In order to bundle the entire folder of images together, this is a .ZIP file; do not click 'Open', click 'Save'. Download and unzip the folder, and save the unzipped folder on your desktop. Once you have saved the unzipped folder of images, open Omniscope and click **Files > Demo files** and select 'Works of Van Gogh'.

Using the Add Images Wizard

The embedded version of the demo file does not have the associated image embedded in it. Go to **Settings > Images** and you will see there are two options for retrieving the images, an automated, online service, and the manual approach. For this tutorial, to gain experience using the **Add Images** wizard we will try adding the downloaded image set manually. Select **Add more images**.

The Add Images Wizard will launch:



1. Select Folder of images-Browse to the folder on your desktop containing the images and click select folder.

2. Choose field/column containing image references (the names of the image files)...in the Van Gogh demo this column is called 'Final Ref'. Select 'Final Ref' and you will see a sample image name displayed...in this case, a picture in the folder named J_30.jpg.

3. Choose format of references-Omniscope detects this automatically for demo files.


4. Select file extension to use...-this will show '.jpg' since all the images in the file already have this extension.

5. Give a unique name to this image set...change the suggestion

from 'Images Set 2' to 'My Downloaded Images'.

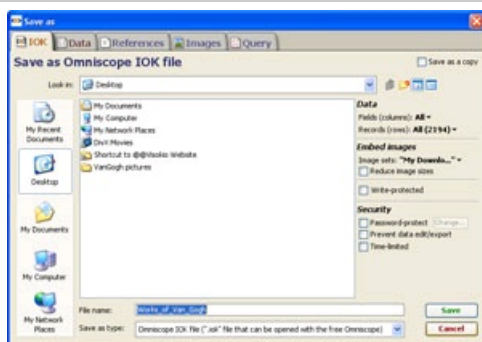
Check the example image at bottom right corner of the wizard and ensure that the correct image is displayed. Click OK to associate the named image set.

Viewing Images

To see your image set displayed, go to  Add View on the Main Toolbar and add a Tile View. On the Tile View toolbar, click on the [?] field (column) selector drop-down and select My Downloaded Images. You will see the images start to appear, but coloured. Go to the Colour selector to the right on the Tile View Toolbar and select 'none' to see the works coloured as van Gogh intended.

Saving reduced-size image sets reduce file size

If you have an activated Edition of Omniscope (Professional or Enterprise) you can experiment with saving the file with your downloaded images embedded. At the same time, you can see the trade-offs between file size and image clarity/resolution that results when you reduce the image size to reduce the size of the .IOK file. To save a version of your file click **File > Save as**. The Export File dialog will appear:



Note the commands available along the right hand side:

Data: used to select subsets of data to save in new file

Embed Images: If the image set must be available inside the .IOK file, you must embed the image set when you save the file. Select the image set you wish to embed. Recall, however, that these image files are hi-res images totalling over 100 MB. If you embed these images without reducing their size, the resulting .IOK file will also be about 100 MB in size, far too big to e-mail to friends!

Tick the box 'Reduce Image size'. Give the new version of the file you are saving with embedded images a name, such as Works of Van Gogh 200x150.iok. Click Save and you will see an image reduction dialog that enables you to reduce the size of the images to reduce file size, but at some cost in terms of image clarity.



Accepting the existing image sizes will result in a file of over 100 MB, so let's try reducing the dimensions of the pictures by 50%, to 200x150 (hence the name of the file we are saving). Change the maximum values to 200 wide and 150 high and click OK. Omniscope will save the file with reduced embedded images. The resulting file is about 14 MB, still large, but not bad for an entire art exhibition in a portable, searchable file!

Open the new version of file and close all the open Views except the Tile View, which should be configured to display the now embedded image set My Downloaded Images. On the Tile View Toolbar, select the movie camera **Slide show** icon to the left of the **Add to basket** icon far right. Click 'Start slide show' and choose full screen sub-option. Look at the image quality on your screen. If it is acceptable for the audience/screen resolutions you intend, consider reducing the images more to reduce the .IOK file size further. If the image quality full screen is not acceptable, you may have to reduce the maximum size of the images less (increasing the file size), or configure the views such that images are never displayed so large. To do this, repeat the steps above, and set larger maximums in the 'Reduce image size' box.

Next section: [Using Maps](#) [183]

Using Maps

Using Maps

Location, location & location

Omniscope allows you to use embedded vector maps that work offline, or online mapping services, such as Google Maps. Users can change from one zooming map background to the other within the Map View. Omniscope includes a wide selection of freely downloadable vector maps (world, county or city level) which can be downloaded automatically and added into any file. Coordinate data in your data set is automatically plotted on maps or scanned images, such as floor plans. Markers can also be placed manually and Omniscope will automatically capture the coordinates to your data set. For more information on freely downloadable maps and how to use them, please visit our [Maps Library](#) [184].

Map Views

Omniscope permits you to have multiple map views, using either vector maps (work offline) or Google Maps backdrops (work online only). The example below shows both vector and Google Maps being used to display the same coordinate data, visible in the Table View at the bottom (click image to see larger version in a separate window).



[185]

Map Views allow easy zooming, selection and filtering of records (rows) based on location. You can use mouse mode controls and zoom options to manage the display, and then select groups of records on which to perform **Move** or **Keep** power queries.

To learn more about navigating, selecting and filtering, see the User Guide section [Using the Map View](#) [48], and the KnowledgeBase sections on [Maps & Coordinates](#) [186].

Adding Maps

You can add embeddable vector maps to your local library and files from the **File > Open map** command, which is also accessible from the opening desktop **Tasks** menu. Downloading a map from our [Maps Library](#) [184] adds it to your local collection. If you use the map in a file shared with others, they do not have the map, it will be automatically downloaded for use in the file. It is also possible to embed maps in files if necessary.



You can use any type of scanned image as map- floor plans, sports fields, logistics and supply chain charts, etc. To learn how to calibrate coordinates for display on scanned images rather than map projections, see [Changing Projections](#) [187] in the Knowledge Base.

Adding geographic coordinates to your data

Every map defined in Omniscope requires you to specify two columns to contain the Longitude (X) and Latitude (Y) coordinate values used to plot the records (rows) on the map. There are currently three ways to add geographic decimal coordinate (longitude and latitude) column values to your data for map displays;

- 1.) Locate your records in Omniscope using the free [Visokio](#) world, country and city vector maps- just select each record in the table view and place the markers manually to generate the coordinates in new fields (columns) automatically (see the tutorial on [Using Maps](#) [188]);
- 2.) Look up missing coordinates using online sources for finding coordinates such as Google Earth (and often Wikipedia). In Google Earth, look up the missing places, set a placemark, then read off the placemark coordinate values, then type or cut-and-paste the two Longitude and Latitude values into Omniscope columns (see [Using Google Earth](#) [189]);
- 3.) Merge the columns into your Omniscope data automatically using a [merge file](#) [190]. To merge in coordinate columns for capital cities or geographic centres of countries, we supply free '[By Countries](#)' [190] merge file containing these columns. We also supply a free '[By Cities](#)' [191] merge file containing coordinates for about 60,000 of the world's largest cities. Free merge files '[By post code](#)' [192] are also available for the UK and the U.S., and a growing number of other countries as well. Other free and licensed reference merge files may be available from data vendors in future.

To learn more, see the User Guide section [Using the Map View](#) [48], and the Knowledge Base sections on [Maps & Coordinates](#) [186].

Next section: [Creating Flash DataPlayers](#) [23]

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Creating DataPlayers

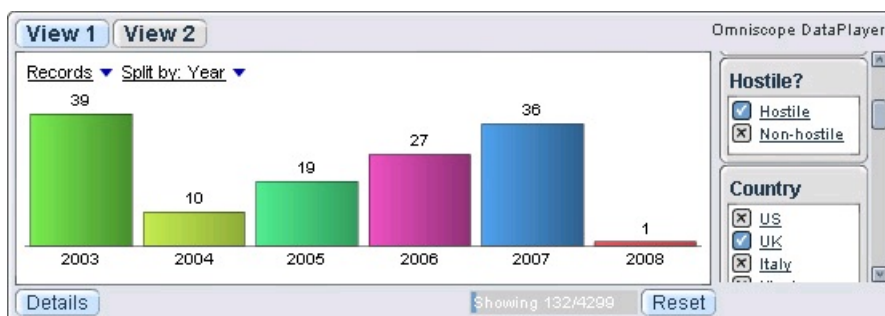
Creating Exportable Flash DataPlayers

The DataPlayer View is a combined viewer and workspace that enables anyone to create exportable, interactive files we call DataPlayers. Using the DataPlayer View, some or all of the data* in an .IOK/.IOM project file can be encapsulated in one or more Flash .SWF files combining the data, dynamic visualisations and query devices. DataPlayers can be embedded into offline documents (PowerPoint, Excel, Adobe Acrobat) and web pages with full interactivity. Flash is universally-accessible and does not require users to have the the Omniscope free Viewer installed to interact with and filter the data in real time. For more information and examples of live DataPlayers, consult the [DataPlayers](#) [193] section of the website.

*Due to limitations in Flash, DataPlayers can not yet be scaled up to include millions of rows as Omniscope .IOK/.IOM files can. Although the upper limit is increasing over time, it currently can be difficult to get good performance in DataPlayers with over about 15,000 rows. DataPlayer scalability and performance will be increased dramatically in future releases. For more information, see KnowledgeBase article on [DataPlayer scaling and performance](#) [194].

Adding a DataPlayer View

The DataPlayer View is opened like any other, using the Add View menu on the Main Toolbar, or by switching from another view. Ticking the option **Open in new window** at the bottom of the Add View menu will allow you to manage the DataPlayer window independently. It is good practise to create a separate reporting tab for the DataPlayer View, which aids in creating DataPlayers and refreshing them later on. Note that under the Appearance menu, you can choose either Tabbed (one view type per tab in the single DataPlayer file, or Simultaneous, multiple ('dashboard') views for a given DataPlayer.



Upon opening a DataPlayer View, Omniscope will attempt to generate a Bar View DataPlayer using the Filtered data (IN) data set.

WARNING: If you have more than 10-15,000 records in the filtered IN data set, current limitations in Flash may interfere with full rendering of the initial DataPlayer. It is best to first define either an Aggregation or a Named Query (or both) such that the number of records to be encapsulated in the DataPlayers is reduced to under about 15,000 depending on row count and data complexity.

The Side Bar filter devices and ordering settings showing when the DataPlayer View is opened are replicated in the DataPlayer filter panel which by default is on the right side of the DataPlayer. Once the initial Bar View DataPlayer is generated, you will notice the various interactive elements of the DataPlayer. Clicking on the filters in the side panel reduces the record count, as displayed in the barometer at the bottom. Clicking the Reset button restores all the records in the defined data set. Clicking on the details button displays (potentially aggregated) record level details (in an expandable table) which opens at record level to display all fields as configured.

Using the menu items available on the DataPlayer View Toolbar (see below), you can refine this opening DataPlayer, add other DataPlayer view types, and change the Omniscopes Side Bar filter settings to influence the filter panel generated in the DataPlayer(s) you are creating.

CAUTION: The DataPlayers displayed in the DataPlayer View are fully interactive, and thus it is possible to set filters, change selection drop-downs etc. just as end-users of the DataPlayer will. However, these changes are **NOT PERSISTENT**. The next time the DataPlayer View is opened and the DataPlayer re-generated, all settings will revert to the settings established in the View Toolbar settings menus, described briefly below and in detail in the [DataPlayer View](#) [54] reference section.

Refreshing the data in the Omniscopes file, then updating the DataPlayer View will create an updated Flash 'dashboard' file containing the latest data, which can be posted to the web or exported into existing documents, over-writing the previous versions.

DataPlayer View Toolbar overview

Like other View Toolbars, the DataPlayer View Toolbar displays many of the standard menus, such as the window View picker, Data Subset, Aggregate and View tools menus, but also various specialised drop-down menus containing options for adding and configuring DataPlayers. Given the scaling limitations of DataPlayers, it is sometimes necessary to define Named Queries and/or aggregations in the DataPlayer view to reduce the record count sufficiently to allow one or more DataPlayers to be generated.



In addition to the standard View Toolbar menu items, the specialised menus on the DataPlayer View Toolbar include:

- **Views** - used to add new view types (first default is Bar View) and specify the settings for generating, re-generating and refreshing the DataPlayer. Current DataPlayer view type options include:
 1. [Bar View](#) [195]- vertical or horizontal, with splits and stacking
 2. [Pie View](#) [196]- rotating or static
 3. [Graph View](#) [197] - scatter plots or time-series connected
 4. [Table View](#) [198] - sortable and expandable with defined columns and orders
 5. [Tile View](#) [199] - dynamic, for re-sizable 'heat-maps' that do not use fixed images in tiles
 6. [Tile View](#) [200] - static, for image mosaics using fixed-size thumbnail tile images (can be linked to full-sized Details images via web)
 7. [Map View](#) [201] - use embedded, downloadable vector (offline or online Google maps)
 8. [Details View](#) [202] - show record level details
- **Details** - settings relating to the Details displays in the DataPlayer, both single record and multi-record details
- **Appearance** - options to change the size and configuration of the DataPlayers
- **Save/export** - options for exporting DataPlayers created in Omniscopes to documents and/or web pages

This section is just a brief introduction to the process of creating and exporting interactive DataPlayers from defined data-subsets and filter settings in your Omniscopes files. More detail on all the myriad configuration options for all view types is available in the [Views Reference DataPlayer View section](#) [54].

Next section: [Connecting to remote data](#) [30]

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Printing

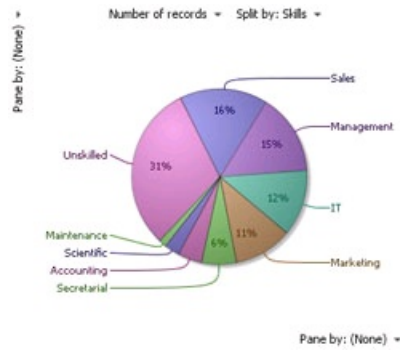
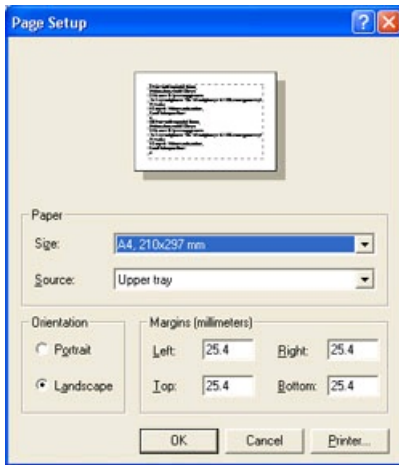
Printing Options

Omniscopes offers options to print from individual views, or at the level of the entire file. In addition to printing only one view, or the current page, it is also possible to print some or all of the Report Pages as PowerPoint or Adobe Acrobat files, with many options to show or hide various aspects of the Omniscopes display in the printed versions.

Printing individual views

Sometimes, you may wish to print a single view on a single piece of paper. All views offer this option from **View Tools > Capture Views > Print**. Right clicking on views with backgrounds, like the Pie and Graph views, also presents a view **Print** option.

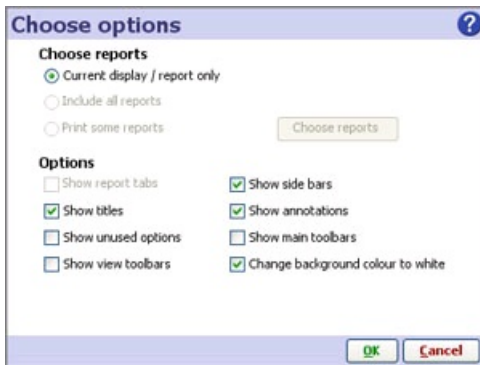
If you are running Windows, the individual view print option available from **Capture Views > Print** will launch the Windows Page Setup dialog enabling you to confirm the paper size, orientation and margins for the page you wish to print.



Note: When printing individual views, the view title does not print.

Printing one or more pages

Sometimes, you would like to print a paper copy of the entire page display, or multiple Report Pages, from Omniscope. On the Main Toolbar, **File > Print** opens a printing options dialog:



Choose reports:

Current display/report only- prints only the current page displayed in Omniscope (which may or may not be a Report Page)

Include all reports- prints only the Report Pages configured in the file.

Print some reports- allows you to choose which Report Pages you wish to print from a drop-down pick list

Display options:

Show report tabs- unless ticked, Report Page tabs are not printed

Show side bars- when ticked, Side Bars are printed on each page.

Show titles- when ticked, the page titles are printed (view titles are always printed when printing pages)

Show annotations- when ticked, prints the annotations below the views on each page

Show unused options- unless ticked, does not print aspects of the display relating to unused options, e.g. **Pane-by** menus are not displayed in views with no active panning.

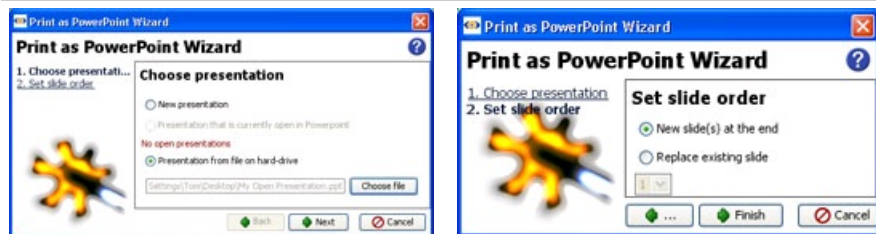
Show Main Toolbar- unless ticked, the Main Toolbar does not print

Show view toolbars- unless ticked, the View Toolbars do not print

Change background colour to white- when ticked, substitutes a white background when printing

Print as PowerPoint file

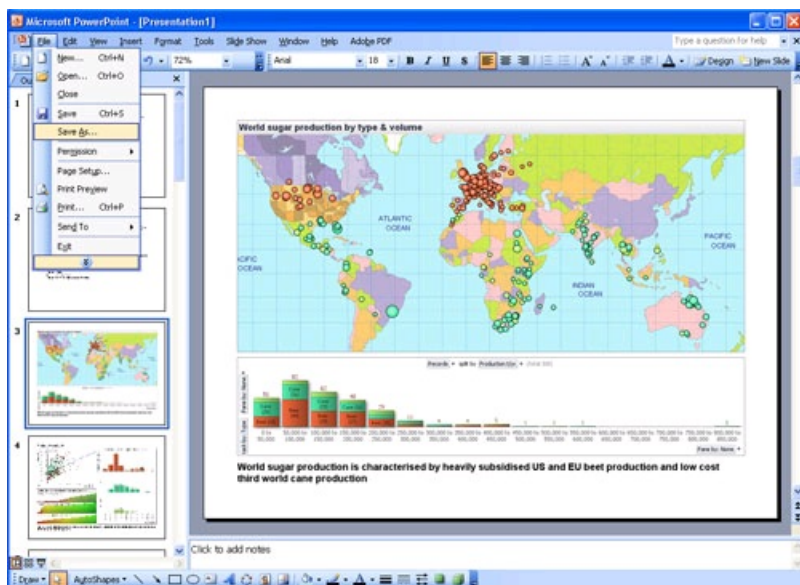
File > Print as PowerPoint launches the **Print Options** dialog described above. You can choose to print the current display, or some or all the Report Pages configured in your file. Click on OK and Omniscope processes the pages you have selected. When it finishes, Omniscope displays the Print as PowerPoint wizard:



If you want to create a new PowerPoint file, choose **New presentation**. If you already have your PowerPoint file open, choose it from the list of open presentations. Otherwise, browse to and open the PowerPoint file you wish to add pages to. If you are adding pages to an existing PowerPoint file, you are asked where to insert them:

Warning: If you specify **Replace existing slide**, make sure that the slide number chosen is a blank 'placeholder' slide or otherwise unneeded; it will be overwritten and all additional pages inserted behind it. Subsequent slides will not be overwritten.

Click on finish and Omniscope will open the PowerPoint file. If you wish to save or print this file, you can now do so from PowerPoint itself:

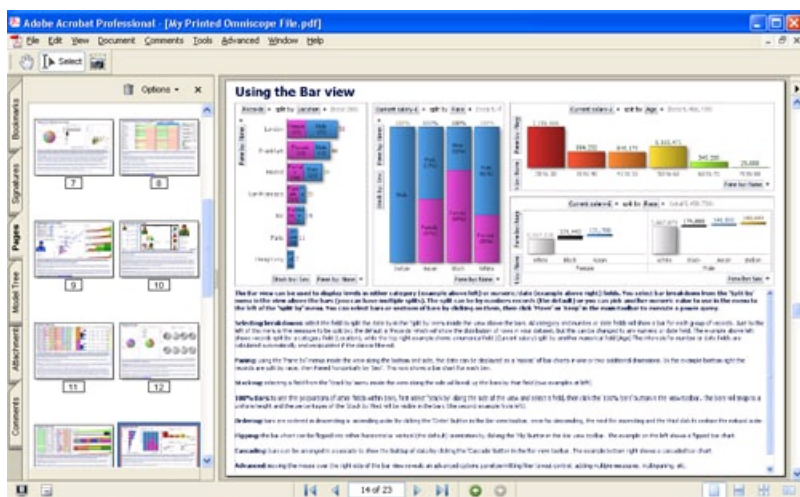


Print as .PDF (Adobe Acrobat file)

File > Print as PDF launches the Print Options dialog described above. You can choose to print the current display, or some or all the Report Pages configured in your file. Click on OK and Omniscope processes the pages you have selected. When it finishes, Omniscope displays the Print as PDF wizard:



Specify the new file name and location you want to save this file. Open the file to access the full range of options for managing .PDF files, including printing.



Back to [File Menu commands](#) [100]

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File Security Options

File Security Options

Setting file security options

Omniscope files are not only more compact and visually communicative than other report data files (e.g. spreadsheet files and web tables), they also have many more layers of security options to prevent unauthorised access to, and potential re-use of, the data within the files or web tables.

Most of these options are accessed from the **Save/Export** dialog, under the **IOK** tab, on the right in the **Security** section (with the exception of text scrambling under the **Data >** menu, and 'walled gardens' which are implemented via special groups of activation keys). Open the Save/Export dialog by choosing **File > Save as** or alternatively **File > Export > Export file(s)**. Some options are also available under **File > File security**.

Password protect files

Tick 'password protect' and enter a password to protect the file. If you have already set a password, the Change option will let you change it. Note that if you do not add additional layers of security, anyone with the password can open the file and save a copy with a new password, or none at all.

Prevent data save/export ("Owner-locked" in version 2.5)

This copy-protection feature prevents even cut-and-paste copying from Omniscope, as well as saving or exporting the data in any way. This is an all-or-nothing setting, designed primarily to prevent recipients of your file from extracting, modifying or plagiarising your data and Omniscope configuration. Only the Owner (i.e. the Omniscope installation that created the file) can be used to disable this setting. The Owner can also edit and save the file even with this setting enabled. Effectively, a file opened on a different PC with this setting enabled will operate in "view & explore" mode only; extracting data and/or saving changes will not be permitted, just as if you were opening the file in the free Viewer. This setting is only available in licensed installations, and not the free trial. This setting does *not* protect file B from being overwritten when opening file A, choosing *Save as* and saving over file B. In order to prevent overwrites, you should use operating system-level options such as setting the file as *Read only* in the Windows Explorer file properties.

Note: this setting was known as "Protect data from editing or copying" in earlier versions.

Write-protected ("Warning on save" in version 2.5)

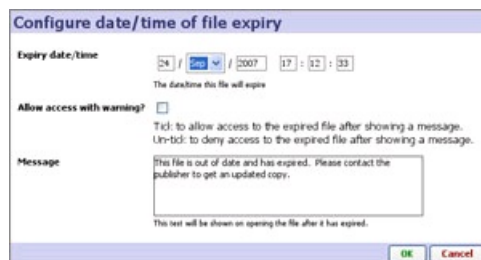
This option is a safeguard against accidentally saving changes to an important file. It is a little like the "lock" slider on a removable disk. While the option is turned on, you will be warned if you try to save the file.

As with *Prevent data save/export*, this option does *not* protect file B from being overwritten when opening file A, choosing *Save as* and saving over file B. To prevent this, you should use operating system-level options such as *Read only* in the Windows Explorer file

properties. Omniscope's *Write-protect* option merely warns you if you inadvertently press Ctrl+S while an important file is open.

Time-limited files (Enterprise Edition only)

This option can be used to ensure that stale, un-refreshed copies of files are not used. Ticking this option displays a settings dialog which enables you to specify the exact date/time the file will expire, whether or not an external Internet time-check will be required (if so, the file will not work offline), an option to specify an "out-of-date please refresh" notice yet still allow access, and the message to display if recipients try to open an expired file.



For time limiting to be enforceable, you must also tick "Prevent data save/export" (see above).

Domain Locking (Enterprise Edition only)

Domain locking is a powerful and effective access-restriction and revenue protection feature. Omniscope .IOK/.IOM files are normally free-standing and easily transferred (by e-mail, posting/downloading from blogs and websites, etc.). Adding domain-locking to an .IOK/.IOM file imposes the restriction that the file must be opened directly from the originating (generally password-protected and secure) website. This option enables organisations to restrict access to current employees with valid web credentials, and enables commercial data publishers to ensure that only current subscribers have access to their data, and ensures that potentially stale, unrefreshed copies of files saved locally will not open. More information on [Using domain locking](#) [203].

For domain locking to be enforceable, you must also tick "Prevent data save/export" (see above).

'Walled gardens' (Enterprise Edition only)

The option to designate a group of specific Omniscope installations able to create and share files only within the group is referred to as a 'walled garden'. Those Omniscope installations which are members of the group are defined by specifically-created activation keys. Files created by installations within in 'walled gardens' can be set to open only in other Omniscope installations activated by keys from the same 'walled garden' list. Privileges for each installation can be set individually to Read-only or Read/Write/Create capabilities for 'walled garden' and non-'walled-garden' .IOK files. Installations can belong to more than one 'walled garden', with different privileges in each 'walled garden'. For more information on implementing Omniscope in high-security settings, please [contact us](#) [86].

Text Scrambling (new in version 2.5)

Introduced in version 2.5 in **Data > Scramble**, this feature permits text column values to be 'scrambled' such that the text values cannot be read. This security feature is initially intended to permit us to assist you with files containing confidential information, but will be further developed to support selective scrambling for out-sourcing some aspects of workflow and data quality while maintaining some columns of data, e.g. names on the payroll, credit card numbers, etc. in scrambled format.

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Domain Locking

Domain-locking to control access

Domain-locking is a powerful and effective file security and revenue protection feature. Whereas Omniscope files are normally free-standing and easily transferred (by e-mail, posting/downloading from blogs and websites, etc.), domain-locked .IOK/.IOM files have the restriction that they must be opened directly from the originating website, meaning that the user opening the file must have a current, valid User ID and Password for the site.

The domain-locking option enables commercial publishers to require that anyone trying to open their files must be logged in to their website, and ensures that stale copies of files cannot be saved locally. Sensitive corporate data can be protected such that once the users web credentials are revoked, they can no longer open or refresh Omniscope files locked to secure domains. If a user attempts to open a downloaded, forwarded or locally-saved copy of a domain-locked file, Omniscope will not permit this and displays this notice:

File could not be opened

File must be accessed directly from the website it originated from, and download is **not permitted**. Only the creator of this file can open it without this restriction.

Applying Domain Locking

In order to domain-lock a particular file please follow the steps listed below.

Using Omniscope 2.4:

1. Open the file you want to domain-lock
2. Go to **Tools > Advanced tools > Edit publishing settings**
3. In the Publisher details tab enter all the relevant information
4. Click the *File protection* tab, click on *Tie to website* and enter domain restriction (see below).
5. Save the file and post it to the server

Using Omniscope 2.5:

1. Open the file you want to domain-lock.
2. Click on **File > Save as**
3. Click the *Domain-locked* check box
4. Define/enter the domain restriction (see below).
5. Save the file and post it to the server

Defining the domain restriction

The domain restriction is a text string that specifies the top-level domain of the website you want to lock the file to. Do not enter the full web address; anything beyond just the domain will not work. For example, if you were to enter the domain "visokio.com", this would restrict the IOK file so it would only open from URLs such as:

"http://visokio.com/any/aaa/bbb/ccc/file.iok"

"http://www.visokio.com/any/path/to/file.iok"

"http://www2.visokio.com/file.iok"

If you were to enter "subdomain.visokio.com", this would restrict the .IOK/.IOM file so it would only open from URLs such as:

"http://subdomain.visokio.com/any/aaa/bbb/ccc/file.iok"

"http://www.subdomain.visokio.com/any/path/to/file.iok"

"http://www2.subdomain.visokio.com/file.iok"

Linking to domain-locked files

If you create a link directly to the domain-locked .IOK/.IOM file, this will not work, because the user's web browser downloads the file to a temporary location before starting Omniscope and opening the local copy.

You can test that domain locking is working by starting Omniscope and choosing *Open from the web* from the *Open file* dialog, then pasting the full URL to the .IOK/.IOM file such as "http://visokio.com/any/aaa/bbb/ccc/file.iok".

To create a smoother experience for the user, it is best to create a Visokio .ILF file on the server which references the domain-locked IOK/IOM file as follows:

- In Notepad, paste the full URL of the IOK/IOM file on the server into a blank text file
- Save as "filename.ILF", and upload to the server.
- Create a link to this .ILF file in the page content, instead of linking directly to the .IOK/.IOM file.
- Test by clicking this .ILF link in the browser...it should download the .ILF file to a temporary file and start Omniscope, which opens the ILF file and then the domain-locked IOK/IOM file directly from the server.

Example:

Here is a working example of domain-locking a file, testing the lock, than using an .ILF file link to provide access from HTML pages.

Note: this demo visokio.com domain hasn't been password protected. Your domain generally will be password-protected.

 [Bond Prices Demo file](#) [204]

- This file is not domain-locked, therefore a locally-saved copy will open.

[Bond Prices Demo file - domain-locked](#) [205]

- This file is domain-locked to the visokio.com domain. If a locally-saved copy is opened, user will see the error message above.

Testing the domain-locked locked-status:

- To open a domain-locked file from a location other than the page it is locked to, start Omniscop and choose **File > Open File > Open from the web**, then paste the full URL of the file:

http://www.visokio.com/files/Resources/OUGuide/453_FileSecurity/Bond_prices_domain_locked.iok [205]

Best practice is to link the user to the file via an .ILF file constructed as described above:

Click [here](#) [206] to download the .ILF file pointing to the domain-locked file.

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Views Reference

Views Reference

Making the most of all the views

Omniscop version 2.5 offers 16 different views. More views are always under development. You can preview/test experimental views at any time by enabling experimental features on your installation. To enable experimental features:

Version 2.4: **Tools > Advanced Tools > Application wide settings > Show experimental features**

Version 2.5: **Settings > Advanced > Show experimental features**

(then re-start your Omniscop).

[View Toolbar](#) [207] - View Toolbar commands and options common to all views

[38]



Table View [38] - see all of your data in rows and columns, with aggregation options, grouping for sub-totals, formulae and variables for modelling, and a wide range of powerful data editing tools. [208]

[38]



Chart View [39] - horizontal visualisations of data values in your columns, a powerful view for querying ranges and spotting errors your data.

[39]



Pie View [40] - show splits/proportions of values in category, number and date fields, with panning for multiple pies per view.

[40]



Bar View [41] - display relative levels in multiple category, numeric or data fields using horizontal, vertical, stacked, cascaded and proportional bars.

[41]



Graph View [42] - identify relationships between columns with scatter plots or time series [151], using statistical analysis to identify trends, outliers and exceptions.

[42]



Tile View [43] - Show each record as a re-sizable tile or image, useful for 'heat maps', image catalogues and much more.

[43]



Pivot View [44] - displays summary values (sums, means, counts, etc.) at intersections of selected category columns.

[44]



Tree View [45] - show pure (one record per node) and comparative hierarchies as dynamic, filterable, multi-level 'trees' (replaced by Network View in 2.5+)

[45]



Network View [46] - depict both grouped hierarchies and relational networks either dual field or specified multi-field relationships. Grouped networks can be used to visualise almost any type of data set, while a relational network can be used whenever there is a common relationship between the rows. (new in 2.5)

[46]



Portal View [47] - text search plus dynamic filtering of categories, numbers and dates and statistical summaries of the target universe.

[47]



Map View [48] - geo-spatial positioning of records, with embedded or web-based maps enabling selection, filtering, and connected markers. [209]

[48]



Venn View [49] - See the overlaps between up to 5 pre-defined subsets of the data ('named queries') corresponding to the filter settings or selections in place at the time you save or add to the named query.

[49]



Web View [50] - use multiple web views to display multiple web pages, and exchange data with remote web services. [176]

[50]



Content View [51] - place formatted text annotations with embedded images and formulas in this view window located anywhere on the page. (new in 2.5)



Dial View [52] - adds dial and meter type visualisations with defined alerts and zones for high-impact dashboards. (new in 2.5)



Details View [53] - see some or all the displayed attributes of each record, with associated image(s) and links.

[53]



DataPlayer View [54] - provides the tools required to format some or all of the data for export as interactive Flash DataPlayers [193].

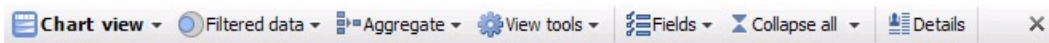
[54]

View Toolbars

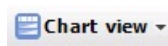
View Toolbar Commands


This section covers the **View Toolbar** commands which are common to all views. Documentation for view-specific commands on the View Toolbar > View Tools menus of each view are discussed view-by-view in the [Views Reference](#) [25] section.

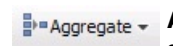
View Toolbars common features/options

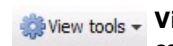



Every View has a View Toolbar at the top. The **View** chooser, **Data Subset** query selector, **Aggregation** options, **View Tools**, **Fields** chooser, show **Details** and **[X] Close View** button at the far right end are present on most **View Toolbars**. Exceptions: Details View only shows the details for a single record, the Web and Content Views.

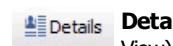
 **View Chooser** - the selected view name and icon always appear at the far left of the View Toolbar. Click on the drop-down View Chooser to change the view displayed in the window.


 **Data Subset** - the data set or filtered/defined subset to be displayed is selected here. By default, the **Filtered data (IN)** subset is selected. If no filters are set, this will be the same as **All Data**. If you have defined [Named Queries](#) [10], they will be added to the bottom of this menu in each view.

 **Aggregation** - most views enable you to select various options for defining and visualising aggregated data sets, and specifying the functions to be applied to each field (column) in the aggregated displays. For more detail, see the section on [Aggregation & Grouping](#).

 **View Tools** - drop-down menu present on all **View Toolbars**, but most of the commands on this menu differ by view. The commands which are common to almost all views are discussed below. View-specific commands are discussed in the section on [using each view](#).

 **Fields** - you can choose the fields (columns) displayed or hidden, and the order in which the columns are displayed on a view window-basis. Use the 'All' or 'None' buttons to show or hide all columns, and change the order by dragging the 'hands' up or down to order the columns.

 **Details** - This button, next to right-most in all View Toolbars, displays a pop-up table (with the same settings as the Table View) showing all records currently visible in the view. If you have made an active selection before clicking on Details, you will be asked if you want to display only the selected records. The first column in the pop-up table will have underlined values, which are links to the individual records. Click on the underlined record to display that single record in a Details window. Alternatively, double-click the row number ("row header") to see the details for a record. For more detail, see [Viewing Details](#). [9]

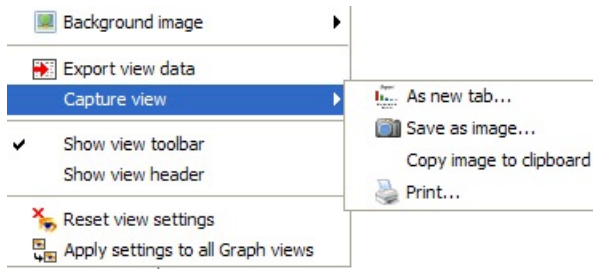
 **Close View** - clicking on this icon will close each individual view. You can re-open/return to a given view at any time using the **Add View** chooser drop-down from the Main Toolbar:



View Toolbar > View Tools - commands common to all views

This discussion of the **View Toolbar > View tools** drop-down menu covers only those commands common to all or most views. Most of the commands under View Tools are specific to each view. These commands are discussed in the sections on each view, accessible for the links on the [Views Reference](#) [25] page.

The bottom-most section of commands in the **View Tools** drop-down menu is the same for all views:



Background image - see discussion below

Export view data - takes you to the **Export Data** wizard (also accessible from the Main Toolbar **File > Export > Export files** menu). Opening the **Export Data** wizard using the **View Toolbar > View Tools > Export view data** command pre-selects the data set of the current view as the set/subset of data to be exported. The **Export Data** wizard allows you to add or remove fields from the file to be exported, set the column order to match the view and to decide which export file format to use, either .IOK or .CSV or Excel .XLS for spreadsheets, or .XML for other applications). For more information, see the [Export Files dialog](#). [125]

Capture view - provides 4 options for capturing the visible aspects of each individual view:

- **As new tab** - this option creates a new report tab in the Omniscope file containing the view as it currently appears
- **Save as image** - places all visible aspects of the view into a .JPG image file you can save, (or save to your clipboard) ready for pasting into any image-capable application such as PowerPoint, Excel, Word, Photoshop, etc. To paste into PowerPoint, for example, click Save as image then switch to PowerPoint and right-click in the location you want to put the snapshot image. Select Paste from the PowerPoint context menu and an image of the Omniscope view will appear on top of the PowerPoint slide.
- **Copy image to clipboard** - places all visible aspects of the view in a .JPG image in your clipboard, ready for pasting into any image-capable application.
- **Print** - launches the Print Options menu for managing printing the visible aspects of the view. For more information see [Print Options](#) [210].

Show view toolbar - this option determines whether the View Toolbar is revealed or hidden. When creating report tabs, for example, it is often desirable to hide the View Toolbar if users do not need to alter the view settings. If you have saved the tab in default format the View Toolbar will be hidden...to reveal it for just one one view, say a Web View, tick this option.

Show view header - this option reveals an editable text title space above the View Toolbar each view

Reset view settings - allows you to reinstate the default settings for the view if you have changed the row heights, field order, etc.

Apply these settings to all {view name} views- extends the settings you have configured for the view to all other views of the same kind. For example, if you have set a particular column order for a Table View, this command copies the settings to all other Table Views you have configured thus far. If you have configured Table Views in saved report tabs, you will be asked if you want to change those settings as well.

Add Background Image

The Pie, Bar, Graph, Portal and Details View Toolbar menus also contain the option to specify an image to be shown as a background to the view.

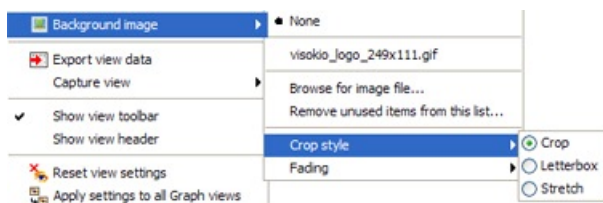


Image files such as logos, etc. of any size in .JPG or GIF format can be added as background, sized to fit using the Crop, Letterbox or Stretch options, then faded to create an unobtrusive backdrop for selected views. For more on working with background images, see the section on the [Layout Menu](#) [58].

Next section: [Table View](#) [38] or back to [Views Reference](#) [25]

Table View

Using the Table View

The Table View displays your tabular data as it was imported into Omniscope from a spreadsheet tab or a database view/table. The Table View shows the underlying data values by row and column cells for selection, sorting and editing. Double or right-clicking on a cell allows you to edit the contents, and you can import large tables of data from other sources by cutting and pasting the data into the Table View. The Table View displays colour-coded values with instant aggregation and sorting, plus displays of zooming views of images associated with the data set.

Like spreadsheets, you can specify formula fields (columns) calculated according to formulae you specify using values in other fields (columns). Each record (row) also has a links menu on the row footer (far right end of the row) enabling you to insert dynamically-generated local and web links, or select from a menu of pre-configured links to free web services. Use the **View Tools** menu commands to check for duplicates, expand and collapse text values into more or fewer columns, and many other data management and correction tasks.

Name	Sex	Race	Age	Location	Organisation Level	Job title	Uni
186 Victoria Burden	Female	White	20	Frankfurt	Specialist	Worker	Yes
179 Mike Hall	Male	White	21	Frankfurt	Specialist	Senior Lab ted	No
7 Jackie Brown	Female	Black	22	Frankfurt	Specialist	Accountant	No
100 Janice McAvoy	Female	White	22	Frankfurt	Specialist	marketing ma	No
51 Joanna Timms	Female	White	23	Frankfurt	Specialist	Tea lady	No
77 Caroline Lazaros	Female	Black	23	Frankfurt	Specialist	Sales rep	No
103 Elizabeth Steinbl	Female	White	23	Frankfurt	Specialist	Marketing tral	No
104 Beverley Ingran	Female	White	23	Frankfurt	Specialist	Marketing tral	No
191 Sally Hope	Female	White	23	Frankfurt	Specialist	Worker	Yes
195 Mione Mavin	Female	Black	23	Frankfurt	Specialist	Worker	Yes
8 Clare Soley	Female	White	24	Frankfurt	Specialist	Bookkeeper	No
74 Yasmin Jaffa	Female	Black	24	Frankfurt	Specialist	Sales rep	No
193 Steve Stickleford	Male	White	24	Frankfurt	Supervisor	Shift supervisr	No
48 Janet Prosser	Female	Black	25	Frankfurt	Specialist	Receptionist	No
52 Mione Hawkins	Female	White	25	Frankfurt	Specialist	Tea lady	No
78 Jane Miller	Female	White	25	Frankfurt	Specialist	Sales rep	No
79 Suzanne Burgor	Female	White	25	Frankfurt	Specialist	Sales rep	No
187 Terry Benton	Male	White	25	Frankfurt	Specialist	Worker	Yes
196 Jenny Brenton	Female	White	25	Frankfurt	Specialist	Worker	Yes

Location	Race	Sex	Name	Age	Years senior	Sick days tak	Current salary	
Frankfurt	White							
Frankfurt	White	Female		23	27.17	3.7	4.78	23,382
Frankfurt	White	Male		14	35.14	5.29	9.07	32,695
Frankfurt	All White			37	30.19	4.3	6.41	26,906
Frankfurt	Black							
Frankfurt	Black	Female		7	25.29	2.57	4.86	20,007
Frankfurt	Black	Male		2	30.5	5	6.5	21,500
Frankfurt	All Black			9	26.44	3.11	5.22	20,339
Frankfurt	Asian							
Frankfurt	Asian	Male		2	37.5	5	7	24,900
Frankfurt	All Asia			2	37.5	5	7	24,900
Frankfurt	All Asia			48	29.79	4.1	6.21	25,591
Hong Kong	White							
Hong Kong	White	Male		3	46	6	3.33	38,567
Hong Kong	All White			3	45	6	3.33	38,567
Hong Kong	Black							
Hong Kong	Black	Male		1	53	19	5	46,000
All:				200	35.7	6.01	6.68	27,294

The Table View is highly-configurable, enabling you to drag columns to re-order. To hide (not delete) a field (column), right-click on the column header, select the **Tools** sub-menu, and select **Hide from this view**. The **Reset all settings for this Table View** command at the bottom of the **View Tools** menu restores all columns to the view, resets the column order to the original import order, and clears all record sorts, aggregations and colouring options. It does not affect Formula field or variable declarations.

View Controls- Column, Row Header and Cell menus

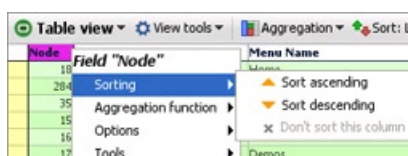
The Table View control menus are available via left and right-clicks on the column and row headers, and right clicking on individual cells. These menus are discussed below.

Column Header left-click

Left clicking on column headers places a primary sort on the data set using the values in that column, and clicking again reverses the sort direction. Small orange triangles pointing up or down indicate that an ascending or descending sort has been set using the values in a column. The primary sort column triangle is solid orange, the other secondary sorts are unfilled. To see or clear sorts that have been set, use the **Sorted Fields by Priority drop-down** on the **View Toolbar** (see below).

Column Header right-click: Sorting sub-menu

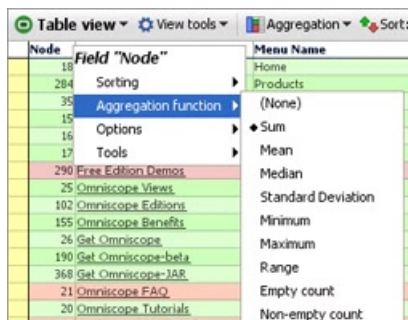
Sorting sets the primary sort for the display ascending/descending on values in the field (column). You can remove a sort on this menu, or change the order or direction of sorts. To see and manage all sorts, use the **Sorted Fields by Priority drop-down** on the **View Toolbar** (see below).



Column Header right-click: Aggregation function sub-menu

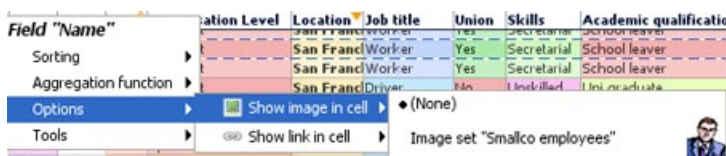
Aggregation function- When you have Aggregation set, the function to be applied to the record (row) values taken collectively for each field (column) can be different field by field. The aggregation functions available on each column header sub-menu will depend on the data type of the field (column). For example, text columns minimum and maximum values are based on character counts. Note: Range gives the

difference between the minimum and maximum values in the field. (See **Table View > View Toolbar > Aggregation** below for more on configuring aggregation.)



Column Header right-click: Options sub-menu

Options- You can choose to display related image sets in any column, or to display configured links, either to the details display of the record, or another link you have configured using the **Settings > Links** wizard on the Main Toolbar.

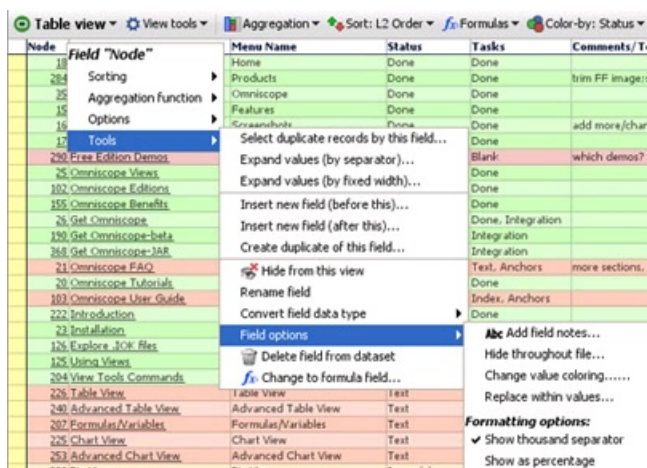


Show image in cell allows you to insert an image into each cell of a column, regardless of the value in that cell. Choose from the list of image sets which you have previously configured using **Settings > Images** wizard on the Main Toolbar. Multiple image sets can be displayed this way since several columns can show different or the same images.

Show link in cell this option will display a sub-menu of links to display when the value in the column cell is clicked. You can link the values in any column to either the Details display, or other links which have been configured for the file using **Settings > Links** wizard on the Main Toolbar. You can link the values in more than one cell to the same link, or the Details display.

Column Header right-click: Tools sub-menu

Tools- these column header sub-menu options mirror those available in the bottom section of the **View Tools** drop-down menu (documented in the **View Tools** section below). Some of these options (**Hide**, **Rename**, **Convert field data type**, **Field options**, etc.) mirror those available in **Data > Manage Fields** on the Main Toolbar documented [here](#) [101].



Warning: When using the **Expand values** commands, you need to create new, blank columns adjacent to the column being expanded to receive the separated values. If you do not, you will be warned about values in the adjacent columns being overwritten. Create new blank target columns and drag them into position to the right of the column to be expanded using **Data > Manage Fields > Add new field** (at the bottom). See more discussion of using the expand and collapse commands under **View Tools** commands below.

Warning: Be careful when converting the field data type, as this will delete all non-compatible cell values in the field (e.g. text values will be

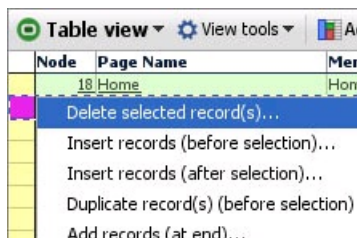
deleted from a field converted to number field). see more discussion of changing field data types in **Data > Manage Fields** [101] menu section.

Change to formula field- changes a non-formula field to a formula field. Any values in the column will be replaced by calculated results.

Convert to static values- changes a formula field with calculated values to an input column with static values, which you can overwrite. All formula logic will be lost.

Row Header right-click

The rectangular space at the far left of each row is called the row header. Left clicking on the row header selects the row, such that you can apply power query filtering operations like Move or Keep to exclude or focus on that record (row). Double-clicking on the row header brings up the Details display. Right-clicking on the row header displays a menu of options for managing the rows in the data set:



Note: If you have sorting or aggregations set, you may not see new blank rows where you expect them. Often it is best to clear all sorts and aggregations when adding or deleting rows.

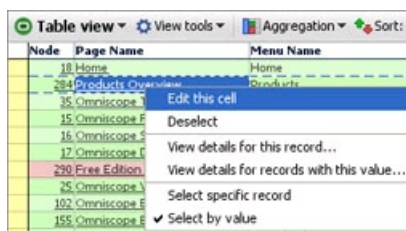
Row Footer left/right click

The rectangular space at the far right of each row is called the row footer. Left or right-clicking on the row footer displays a Links menu which allows you to follow or define additional links using the **Add web or local links** wizards also accessible from **Settings > Links** on the Main Toolbar.



Cell Right-click

Right-clicking on an individual cell displays a selection and viewing options sub-menu:



Edit this cell- is the same as double clicking on the cell to place the cursor inside the cell.

Deselect- removes this record from the selection set. This is not the same as the global **Deselect** on the the Main Toolbar which removes all records from the selection set.

View details for this record- displays the individual record Details for the selected record.

View details for records with this value- launches the pop-up table view containing all records which share the same value in the cell. The pop-up table view will be configured the same as the Table View you clicked on in terms of column order, columns displayed etc.

Select specific record- Use carefully!...when ticked, this changes the selection behaviour to select records one at a time, rather than based on common values. If this option is ticked IT APPLIES TO ALL fields (columns). When ticked, the Main Toolbar barometer will only show 1 record selected at a time, unless you drag the mouse to select contiguous records. Resetting the the Table View returns this setting to the default **Select by value**.

Select by value- the default behavior...if you select a cell, all records that share the same value in that cell are selected, as shown in the Main Toolbar barometer in blue. You can then execute power queries such as Moves and Keeps on the selected records.

View Toolbar Menu

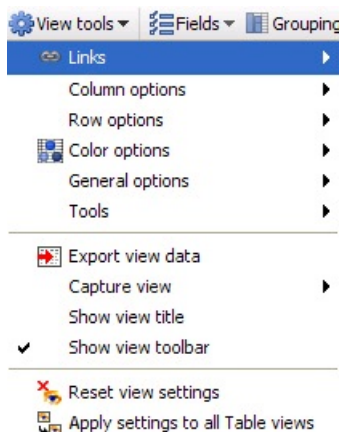
The Table View Toolbar contains 5 view specific drop down menus; **View Tools, Aggregation, Sort, Formulas, Colour-by: and Colour Options** in addition to the **View Chooser** and the **Show Details, Add to Basket** and **[X] Close window** icons common to all views:



Each of these sections is documented below:

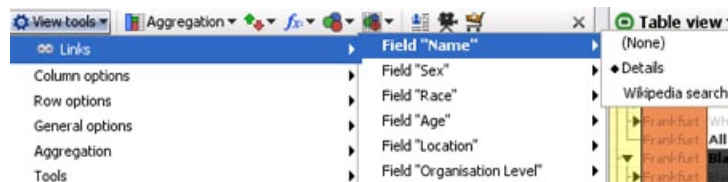
View Tools Menu

The Table View tools menu has six sub-menus; **Links, Column Option, Row Options, General Options, Aggregation and Tools**. The sections below document the commands and options available under each of these sub-menus.



Links sub-menu

The **Links** sub-menu enables you to select which, if any, links will be associated with clicking on the values in the cells of each field (column) in the Table View.

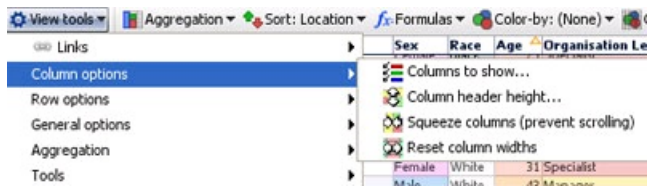


Fields already associated with links will show on the drop down list in bold, and their values underlined in the cells of the Table View to indicate a live link.

No links (None) is the default for all fields except the first column on first opening, which is set to Details (which you can change). Any number of different fields can be linked to the Details display. All other links which you have configured for the file (using the **Settings > Links** menu on the Main Toolbar) will show on the pick list, available for association with any of the fields in the data set.

Column options sub-menu

The **Column options** sub-menu enables you to choose which fields (columns) will be shown or hidden (not deleted), and the order in which they will be displayed for that particular Table View (global column order for the file is set at import, but can be changed using **Data > Manage fields** on the Main Toolbar).



Columns to show- reveals a list of all fields which are ticked (showing) or unticked (hidden) in this Table View. Tick or untick the check boxes to show or hide columns and/or drag the hands up or down to change the order of columns. You can also click and drag the column headers sideways to reorder the columns, and you can hide columns by right-clicking the column header, then selecting **Tools > Hide from this view**. **Suggestion**: use the ALL or NONE buttons at the top right of the Columns pick list to reset the columns displayed quickly.

Column header height- allows you to add more lines to column headers to accommodate longer names on narrower columns.

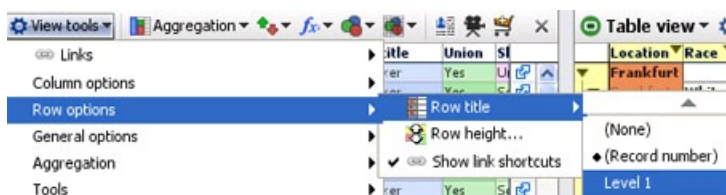
Squeeze columns (prevent scrolling)- turns the column header text vertical (if necessary) and narrows all the columns/cells to display in the window available with a minimum of horizontal scrolling. Cell values are concatenated by default, but full cell contents will show as the mouse hovers over the cell.

Reset column widths- (not shown when **Squeeze columns** is ticked)- resets the display of the columns on display based on the space available and number of columns being displayed. Columns can be widened or narrowed by dragging the edges of the column headers. This command provides a reset to defaults.

Note: The settings that you make for a given Table View will not be applied to the Show details pop-up table unless you also choose **Apply these settings to all Table Views**.

Row options sub-menu

The **Row options** sub-menu is used to manage the display of records (rows)



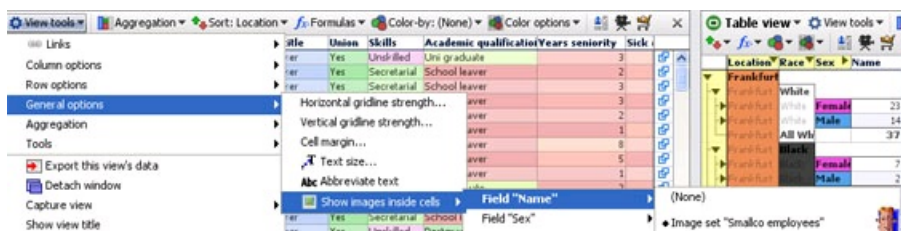
Row title- can be used to select a value to display in the row header. The default is the record number assigned by Omniscope, but if there is a more meaningful identifier in the data set, you can choose to display it instead. Alternatively, you can choose (None) and the row header will be narrow and blank.

Row height- used to increase the number of lines in a row. The default is one, but if you wish to display images in cells, you may want to increase the number of lines using the slider. Display an image in one column, then increase the row height and width of the column. The images will expand to fill the space and the text will wrap.

Show link shortcuts- by default, shortcuts to the various configured links are accessible from an icon on the row footer at the far right of each row. Unticking this option hides the row footer, which may not be needed by file users and frees up a small amount of horizontal space.

General options sub-menu

The **General options** sub-menu contains options related to cell display.



Horizontal/Vertical gridline strength- removes or emboldens the lines defining the rows, columns and cells.

Cell margin- increases the white space around the edges of the cells from the default of none, to as much as 10 pixels. Can improve legibility, especially if used in conjunction with increased text size (see below)

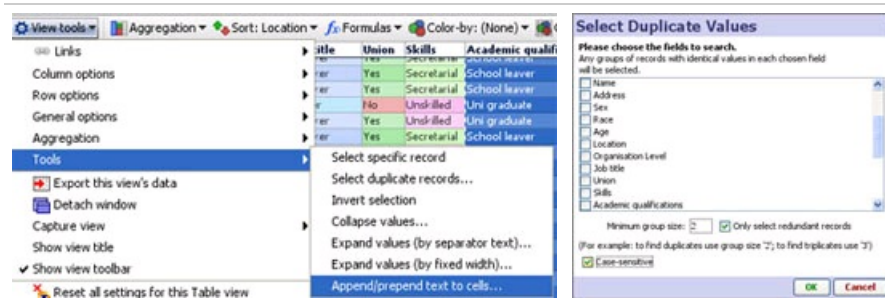
Text Size- increases the size of the font used in the headers and cells of this Table View.

Abbreviate text- allows you to turn on and off cell text abbreviation. Abbreviation is useful when cells contain long text.. making columns too wide. With abbreviation turned on, you will still see what the cell contains in a much smaller space. Abbreviation is turned on by default.

Show images inside cells- allows you to chose an associated image set to display as a zooming image in a particular field (column). Note: the images will obscure the underlying values, so it is best to use a column containing the image references, which are often cryptic image file names, or else a blank column added specifically for the purpose of displaying the images.

Tools sub-menu

The **Tools** sub-menu provides some powerful functions to manage the format and layout and otherwise improve the quality of your data sets.



Select specific record- turns off the default common value-based selection i.e. clicking on any cell selects only the record that contains that cell rather than all the records sharing that value in the field (column). This makes the table behave a bit more like a spreadsheet and enables you to select rows to **Move**, **Keep** or **Add to the Basket** individually.

Select duplicate records- displays the **Select Duplicate Values** wizard that for selected fields, isolates all records that have more than one identical value elsewhere in that field (also works for multiple fields). This is useful for eliminating duplicate records in large datasets. The **Select Duplicate Values** wizard allows you to select which fields to check for duplicates, or triplicates etc. If you select more than one field (column) then records duplicated in either column (but necessarily both) will be selected.

Minimum group size: use the value of 2 to detect duplicates (or triplicates); use the value 3 to detect triplicates but not duplicates

Only select redundant records- once processing is completed, the default is to leave all rows containing duplicates (or higher) selected. If you tick this option, the first duplicated record will not be selected, so that you can you can perform Moves to eliminate only the redundant records, and Add to Baskets to create correction files.

Case sensitive- requires duplicated values to match case in order to be considered duplicates.

Invert selection- If you have selected a complex pattern of records, and wish to quickly select all other records not currently selected, use this command.

Collapse values- used to combine some of all of the values currently in more than one column into a single column, with a space or some other separator you specify in between the values. You must have selected a range of columns and rows to collapse before clicking on this command. Used to reduce column count and to create tokenized fields, which contain more than one value per cell and are used to capture many-to-one relationships in tabular data. For more information, see [Tokenized Data](#) [123].

Note: You cannot select a group of columns using the column headers. To select all or part of a range of columns, select the first cell in the first column, then drag the mouse across to the right to select more columns and downward to select more rows. If you need to select many more rows than are visible, hold the Shift key and use the vertical scroll bar to bring the bottom right hand cell of your range into view. Click on that cell with the Shift key still depressed and the entire rectangle of columns and rows will be selected.

Expand values (by separator text)- used to replace a single column of data containing compound elements (e.g. First and Last Name with a space between) with multiple columns each containing a single element, such as First Name Column and Last Name Column. Before using this command, you must select the compound (separated value) column you wish to expand and create new blank column(s) adjacent to the right of that column. Be sure to select the entire column to be expanded using the Shift + scroll down method to ensure you have selected all the way to the bottom of the column- assuming the expansion should include all the cells in the column. Click on the command and you will be asked to specify the text separator defining the elements to be expanded, such as a blank space, which must be entered.

Note: create the new, blank columns using the **Data > Manage Fields > Add new field** button (at the bottom) then drag the new column into place below (right of) the column to be expanded, making sure to tick the new column in the **Columns to show** list of you are in Reports Mode. The existing column will be used for the first element, so to split two elements you need only add one new column.

Expand values (by fixed width)- used to break a single column of data into more than one column based on defined break points you set using the **Expand Values** wizard:

Expand values

Click the table to add or remove break points

A	B	C
3	2	5
+0.	19	140.46
-0.	19	140.46
8.7	32	209
-3.	6.0	95.4
8.7	32	209
-3.	6.0	95.4
+0.	19	140.46
-3.	6.0	95.4
+0.	19	140.46

Before using this command, you must select the column of values you wish to expand and create sufficient new blank column(s) adjacent to the right of that column. Be sure to select the entire column to be expanded using the Shift + scroll down method to ensure you have selected the column all the way to the bottom - assuming the expansion should include all the cells in the column.

Append/prepend to cells- used to add specified characters before or after the existing values in the cells.

Note: sometimes when exporting numeric identifiers with leading zeros to Excel, such as Bloomberg Excel spreadsheets using SEDOLs, Excel does not recognise the incoming values as text and drops the leading zero, rendering the identifier incomplete. To stop this, use the Prepend function to add a text character such as an apostrophe ' in front of the numeric identifiers to force Excel to treat the values as text.

View Tools: Aggregation settings

The **Aggregation** sub-menu controls the display when aggregation is set for a given Table View. Aggregation groups rows together based on common values. You specify the fields (columns) on which aggregation is based in sequence. For example, if you have a data set in which each record (row) is a person, you might choose a Table View display which aggregates the rows first by Location, and then by the values in other fields, like Race or Sex (grouping the males and females in each location). You set the aggregation sequence using the **Aggregation** pick list on the **View Toolbar**. If you have more than one aggregation set, use the hands to drag aggregated fields into the order in which you want the aggregations presented top to bottom = from left to right.

Note: Many different aggregation functions are available, and they can be different for each column. Right-click on the column header to see which aggregation function is specified for each column in the Table View.

Location	Race	Age	Years seniority	Sick
Frankfurt	White	23	27.17	3.7
Frankfurt	White	14	35.14	5.29
Frankfurt	All White, F	37	30.19	4.3
Frankfurt	Black	7	25.29	2.57
Frankfurt	Black	2	30.5	5
Frankfurt	All Black, F	9	26.44	3.11
Frankfurt	Asian			5
Frankfurt	Asian			5
Frankfurt	All Asian, F			4.1
All Frankfurt:				
Hong Kong	White			6
Hong Kong	White			6
Hong Kong	All White, Hong K			6
Hong Kong	Black			6
All:		200	35.71	6.01

Expandable tree- when ticked, displays a navigational 'tree' in the far left row header. Clicking on the black triangular arrows either expands or collapses the view of the rows at a particular level of aggregation.

Show summary rows for each level- when ticked, displays a summary row for each aggregated set of rows. The summary row calculates a value based on the function you select in each column by right-clicking on the column header and selecting the aggregation function to be used for that column.

...at the top- when ticked, displays the summary row for each set of aggregated rows at the top of the grouping rather than at the bottom

Show overall summary row- when ticked, shows a summary row for all rows, using the function specified for each column by right-clicking on the column header and selecting the aggregation function to be used for that column.

...as frozen summary row- when ticked, keeps the overall summary row visible at the bottom of the Table View window.

Export aggregated data... creates a new .IOK file where the rows reflect the values selected for aggregated rows in the source file.

View Tools: Sort Selection

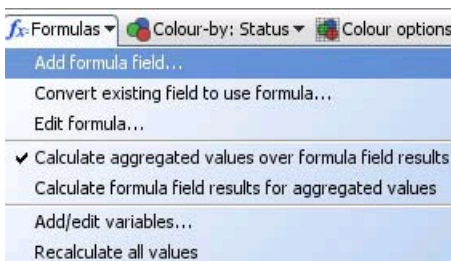
Sorting for each Table View is set using the **Sort** drop-down menu. Tick the check box of any field to sort the table by this field. Click the orange arrow next to each field name to reverse the direction of the sort. Drag the hands next to each field to change the order of primary, secondary and subsequent sorts.



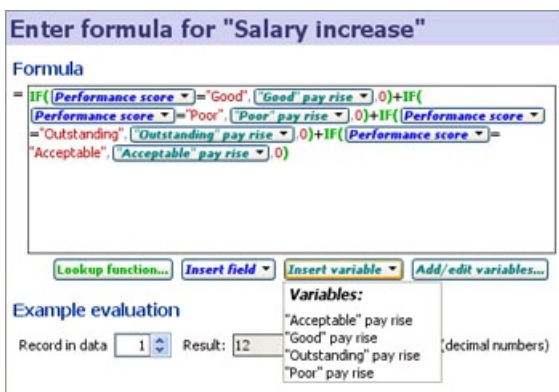
Use the **Clear all sorts** button to remove all sorts from this Table View. Note: It is common to set sorts accidentally by clicking on column headers. Always keep an eye on the **Sort:** field to ensure you have not inadvertently added a primary sort at the top of the list. If you have, simply untick the unwanted sort on this list and it will be removed...no need to use **Clear all sorts**.

View Tools: Add Formulae/Variables

Omniscope can calculate values based on values in other columns, using a standard menu of functions (plus some additional Visokio DATASET functions) and the same syntax as Excel.



Add formula field- creates a new field (column) of values calculated as a function of the values found in other columns, together with any variables whose ranges have been defined (see discussion of variables below). Use the **Add formula field** wizard to define the calculation you want Omniscope to perform when populating the new column. For more detail on using the **Add formula wizard**, see the section on [Formulas and Variables](#) [93].



Convert existing field to use formula- use this command to substitute any values that may be in an existing column with calculated values based on a formula you specify using the **Add formula field** wizard.

Edit formula- allows you to select the already-defined formula you want to edit, and displays the current formula definition in the **Add/Edit formula field** wizard for editing. Formulae are specified by selecting columns and typing in arithmetic operators and selecting functions from the the functions library. The functions library contains all the standard spreadsheet functions, plus special Visokio DATASET functions documented in the [Functions Guide](#) [211]. For more detail on using the **Edit formula wizard**, see the section on [Formulas and Variables](#) [93].

Formula calculations and aggregation options (see below) can interact. The precedence settings determine (for each Table View) whether the fields with formulae defined are calculated at individual record level, then aggregated, or aggregated first:

Calculate aggregated values over formula field results- the default behaviour (aggregation of row values happens after formulae are

calculated)

Calculate formula field results for aggregated values- this option changes the precedence of the calculations, such that a formula such as $=[USD\ Volume] / [Deal\ Count]$ in an aggregated table using aggregation function Sum, is evaluated as $Sum(USD\ Volume) / Sum(Deal\ Count)$ for the aggregate rows. Notice that with this option set, two "sum" concepts at play: inside a formula, SUM(Column A, Column B, Column C...) calculates the SUM of multiple fields within the same row. In the aggregated table, the aggregation function Sum calculates the vertical sum of all record values within the same field (column) in the aggregated row.

Add/Edit variables: Variables are input assumptions (not fields in the data set) you define by setting a default value and specified upper and lower ranges. Variables are used as flexible input assumption values so that dynamic sensitivity analyses and real-time modelling options will be available to users of the file. If you define Variables, the input values can be set by devices which appear on the Side Bar. These sliders must be visible (ticked in the Devices drop-down menu on the Side Bar) in order for you and your users to 'flex' the assumptions by adjusting the current value of the Variable(s). Any Variable(s) whose current value is different from the default will show an orange device panel, the same as for set filter device panels. For more detail on defining and using variables, see the section on [Formulas & Variables](#) [93].

Energy source	Type	Production t/yr	Output/input ratio	Prod costs-labor	Prod costs-others	Prod costs-total	Process costs-transport	Process costs-energy	Process costs-other	Process costs-total
Hydro	Cane	556,500	21.0	4.12	8.18	12.30	1.23	2.6	5.7	9.4
Fuel	Cane	190,000	10.0	4.15	8.18	12.33	1.10	3.6	4.8	9.5
Fuel	Beet	144,000	36.0	3.88	9.25	13.13	2.65	3.7	6.3	12.6
Natural Gas	Cane	330,000	15.0	3.90	7.67	11.57	1.43	4.5	5.7	11.6
Hydro	Beet	275,000	19.0	3.67	9.78	13.45	2.21	3.0	7.3	12.6
Hydro	Beet	172,800	32.0	3.87	10.70	14.57	2.34	2.7	7.1	12.1
Natural Gas	Cane	165,000	7.5	4.20	6.20	10.40	1.70	4.0	8.2	13.9
Fuel	Beet	99,000	33.0	3.60	10.70	14.30	2.12	3.7	6.8	12.6
Fuel	Beet	170,000	34.0	4.03	10.90	14.93	1.93	3.8	6.5	12.2
Fuel	Beet	186,550	29.7	4.12	11.10	15.22	2.17	3.6	6.6	12.3
Natural Gas	Beet	343,800	38.2	3.89	11.60	15.49	1.98	4.4	5.8	12.2
Fuel	Beet	293,600	36.7	3.79	11.83	15.62	2.45	4.2	5.6	12.2
Fuel	Beet	415,000	44.6	3.79	11.23	15.02	2.31	3.6	7.0	12.9
Fuel	Beet	225,000	38.1	3.99	12.30	16.29	1.88	3.8	6.0	11.7
Natural Gas	Beet	258,750	34.5	3.82	10.98	14.80	2.54	4.7	6.1	13.3
Fuel	Beet	188,600	41.0	3.97	11.90	15.87	2.39	4.0	5.9	12.3
Hydro	Beet	245,000	36.6	3.53	11.27	14.80	2.90	2.4	8.1	13.4
Fuel	Beet	225,000	38.1	3.67	11.08	14.75	1.90	4.1	7.6	13.5
Natural Gas	Beet	442,800	36.9	3.71	10.88	14.59	2.25	4.3	7.2	13.8
		6,341,800	25.2	3.97	9.91	13.88	2.27	3.7	7.2	13.2

Devices Tools

Cajun energy source

Fuel

Natural gas

Oil price \$/bbl

84.285

Cajun labor cost/hr

6.25

Molasses price cent

1.5

Country

United States (29)

View Tools: Colour-by selection

Colour-by: {Field Name} or (None): This drop down menu allows you to select the field (column) by which to colour the rows in the Table View. If you select a field, it overrides the default colouring based on field data type (white for text fields, ranges from red (low) to green (high) for numeric fields, etc.) to colouring that defines records by the value and assigned colours of any any field (column) you select. You can set the colour associated with each category in the field (column) using **Data > Manage Fields > Configure > Field Options > Change value order, colours and shapes**. You can also access the **Field Options** command from the Column Header right-click Tools sub-menu shown above.

View Tools: Colour Options menu

The **Colour Options** sub-menu is used to change the colouring behaviour of each Table View.

Colour options

Show colour in...

Aggregation group cells

Aggregated value cells

Granular record cells

Alternate row colour variation...

Text contrast...

Aggregation group cells- colours the aggregation headers at the left of tables with aggregations set based on the colours assigned to the categories being aggregated.

Aggregated value cells- colours the calculated rows containing aggregate values based on the specified functions by column differently from the colouring of the underlying unaggregated records, the values of which are displayed whenever the expandable tree arrows at left are used to expand an aggregated row.

Granular record cells- if you find even the unaggregated cell colouring distracting, and want to return to black and white, untick this option to turn colouring off altogether.

Alternate row colour variation- to increase legibility, Omniscope alternates the intensity of colouring in alternating rows. You can strengthen or weaken this effect using the slider displayed by this command.

Text contrast- you can modify the intensity of the text display to suit your display and lighting/presentation conditions

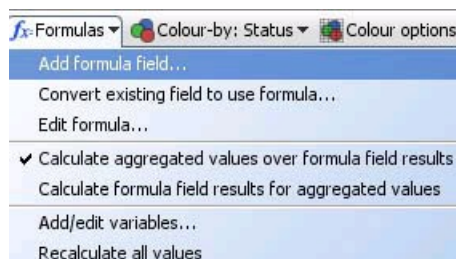
Back to [Using Views](#) [212] or [Views Reference](#) [109]

Formulas & Variables

Table View: Defining Formulae and Variables

Omniscope enables you to specify Formula fields (columns) with calculated values derived from the values found in other columns. Using the **Add/Edit Formula** wizard, you specify the formula used to calculate the values in Formula fields. Omniscope does not currently allow you to specify individual cell formulae, or use formulae that reference individual cells in a data set. Omniscope uses Variables for input assumptions (rather than values contained in individual cells in the data set) with specified default values and upper and lower ranges. Variables are used for making dynamic sensitivity analyses and real-time modelling options available to any user of the file (see below).

Note: Formula fields (columns) can be defined from the **Formulas** menu on the Table View Toolbar:

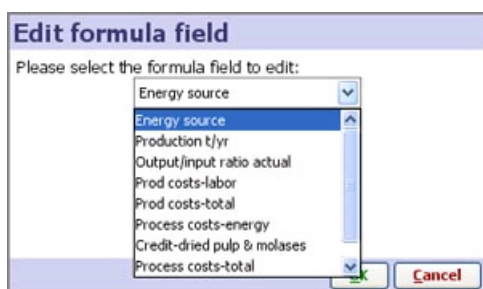


(You can also use **Data > Manage Fields** to add a new field, name it, set the data type etc., then click **Configure > Change to formula field** to launch the **Add/Edit Formula** wizard and specify the formula you want applied to define the values).

Add formula field- creates a new field (column) of values calculated as a function of the values found in other columns, together with any Variables whose ranges have been defined. Use the **Add formula field** wizard to define the logical tests and calculations you want Omniscope to perform when populating the new column (see Defining Formulae and Variables below)

Convert existing field to use formula- use this command to substitute any values that may be in an existing column with calculated values based on a formula you specify using the **Add formula field** wizard. Note you will be warned about losing any values in the column when they are substituted with calculated values.

Edit formula- allows you to select the already-defined formula you want to edit, and displays the current formula definition in the **Edit formula field** wizard for editing.



Add/Edit Formula wizard- (see section below) allows you to specify and edit formulae by selecting existing columns and defined variables, then typing in arithmetic operators and/or selecting standard functions from a library. The functions library contains all the standard spreadsheet functions, plus special Visokio DATASET functions documented in the [Functions Guide](#) [211].

Precedence Settings- Formula calculations and aggregation options (see below) can interact. The precedence settings below determine (for each Table View) whether fields with formulae defined are calculated at individual record level, or at an aggregated record level:

Calculate aggregated values over formula field results- the default behaviour (aggregation of row values happens after formulae are calculated)

Calculate formula field results for aggregated values- this option changes the precedence of the calculations, such that a formula such as $\text{=[USD Volume]} / \text{[Deal Count]}$ in an aggregated table using aggregation function Sum, is evaluated as $\text{Sum(USD Volume)} / \text{Sum(Deal Count)}$ for the aggregate rows. Notice that with this option set, there are two "sum" concepts at play: inside a formula, SUM (Column A, Column B, Column C...) calculates the SUM of multiple fields within the same row. In the aggregated table, the aggregation function Sum calculates the vertical sum of all record values within the same field (column) in the aggregated row. Note: some of the Visokio DATASET functions will not work with aggregated table rows in this mode. If you use this option, and you have aggregated table rows and are using certain DATASET functions, you will see "error" in the aggregated cells of any formulae using the unsupported functions. For more information on using the Visokio DATASET functions, see the [Functions Guide](#) [211] in our Knowledge Base.

Add/Edit variables: Variables are input assumptions (not fields in the data set) you define by setting a default value and specified upper and lower ranges. Variables are used as flexible assumption values (as opposed to factual/historic values in the data set) for making dynamic sensitivity analyses and real-time modelling options available to users of the file. The current value used in formulae containing variables are modified from the initial default using the Side Bar sliders corresponding to each variable. These sliders must be visible (ticked in the Devices drop-down menu on the Side Bar) in order for you and your users to 'flex' the assumptions by adjusting the current value of the variable. Any variable whose current value is different from the default will show an orange Side Bar slider device, the same as a set filter device..

Using Add/Edit Formulae

The **Add/Edit Formula** wizard provides a visual workspace for defining the values in Formula fields (columns). You define the formulae in terms of the values in other fields, any Variables you have defined and extensive library of standard and specialised functions. The example below shows a formula for calculating staff salary increases based on performance scores using a conditional **IF** statement to test a field text value and apply the corresponding Variables:

The example above is taken from the embedded demo file *Human Resources, Report Tab: Salary cost analysis*. The data set includes a column called 'Performance score' with 4 values; "Acceptable", "Good", "Outstanding" and "Poor". The formula above uses nested **IF** functions (in green) and compares the value in the field 'Performance score' (in blue), with typed in test values (enclosed in double quotes) reflecting the names of the Variables already defined, such as "Good" (in red). If the values match, i.e. an employee's value in the 'Performance score' column is "Good", then they will receive the pay rise defined by the Variable 'Good Pay rise' (since all the other **IF** comparisons will fail and the other parts of the expression will be zero). The Variable 'Good pay rise' has a default value (10) and a range. Each Variable defined also has an associated Side Bar device. If you reveal the Variables on the Side Bar, users of the file can perform real-time modelling and sensitivity analysis just by changing the assumed values using the sliders (see above right).

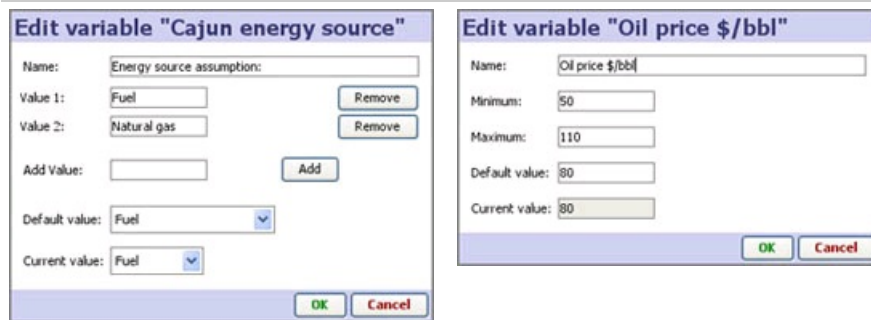
Defining variables

Omniscope permits extremely powerful modelling with multiple sensitivity analyses in real-time. Let's look at another example of a formula that uses a different type of Variable. In the example below (taken from the embedded demo presentation 'Cajun Sugar report', where each record is a sugar refinery), the **IF** function is used to test the 'Energy source' column value. Only if the value equals "Fuel", is the assumption Variable 'Oil Price' used to adjust the energy costs.

You must define Variables before they can be used in expressions defining the values in Formula fields. Click on **Add/Edit variables** and you will be asked to specify one of 5 types of Variable, each of which has a Side Bar device and other rules associated with it:

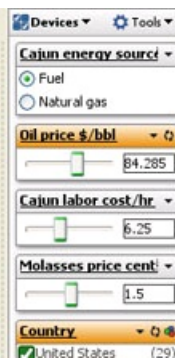
- Integer slider- used when the values must be whole numbers, for example, 'head count'

- Decimal slider- used when values can be any number, such as 'oil price'
- Numeric choice- used when testing for a number, such as 'customer priority no' (1, 2 or 3)
- Text choice- used to change values, like "High" "Medium" and "Low" especially for conditional testing: = IF(Variable= "High", then do this...)
- True/False choice- used to change assumptions from one scenario "True" to another "False"



Depending on the type of Variable you are specifying, you will be asked to define one or more allowable values, or a range of values with a minimum, maximum and default. If you display the Side Bar devices associated with key input/assumption Variables, users can easily change any or all assumptions and see the calculated quantities and graphic visualisations updated in real time.

Energy source	Type	Production t/yr	Output/input ratio	Prod costs-labor	Prod costs-others	Prod costs-total	Process costs-transport	Process costs-energy	Process costs-other	Process costs-total
Hydro	Cane	556,500	21.0	4.12	8.18	12.30	1.23	2.6	5.7	9.4
Fuel	Cane	190,000	10.0	4.15	8.18	12.33	1.10	3.6	4.8	9.5
Fuel	Beet	144,000	36.0	3.88	9.25	13.13	2.65	3.7	6.3	12.6
Natural Gas	Cane	330,000	15.0	3.90	7.67	11.57	1.43	4.5	5.7	11.6
Hydro	Beet	275,000	19.0	3.67	9.78	13.45	2.21	3.0	7.3	12.6
Hydro	Beet	172,800	32.0	3.87	10.70	14.57	2.34	2.7	7.1	12.1
Natural Gas	Cane	165,000	7.5	4.20	6.20	10.40	1.70	4.0	8.2	13.9
Fuel	Beet	99,000	33.0	3.60	10.70	14.30	2.12	3.7	6.8	12.6
Fuel	Beet	170,000	34.0	4.03	10.90	14.93	1.93	3.8	6.5	12.2
Fuel	Beet	186,550	28.7	4.12	11.10	15.22	2.17	3.6	6.6	12.3
Natural Gas	Beet	343,800	38.2	3.89	11.60	15.49	1.98	4.4	5.8	12.2
Fuel	Beet	293,600	36.7	3.79	11.83	15.62	2.45	4.2	5.6	12.2
Fuel	Beet	415,000	44.6	3.79	11.23	15.02	2.31	3.6	7.0	12.9
Fuel	Beet	225,000	39.1	3.99	12.30	16.29	1.88	3.8	6.8	11.7
Natural Gas	Beet	258,750	34.5	3.82	10.98	14.80	2.54	4.7	6.1	13.3
Fuel	Beet	188,600	41.0	3.97	11.90	15.87	2.39	4.0	5.9	12.3
Hydro	Beet	245,000	36.6	3.53	11.27	14.80	2.90	2.4	8.1	13.4
Fuel	Beet	225,000	38.1	3.67	11.08	14.75	1.90	4.1	7.6	13.5
Natural Gas	Beet	442,800	36.9	3.71	10.88	14.59	2.25	4.3	7.2	13.8
		6,341,800	25.2	3.97	9.91	13.88	2.27	3.7	7.2	13.2



To specify different values for Variables, you can use the sliders, or you can type one or more combinations of values directly into the Side Bar. In the example above, notice that the 'Energy source' assumption for one refinery can be changed, and other cost assumptions changed simultaneously. The lack of orange shading on the Side Bar device tells us that the 'Energy source' = "Fuel" assumption is the default. However, the oil price assumption slider is not set to the default value and is therefore shaded orange. If you save this non-default scenario as a Report Page, that Report Page will always open with this mix of default and non-default values- unless you untick the **Variable states** option under **This page will capture:** in the Create Page dialog. If you do untick this option, the Report Page will always open with the default values set for all Variables. The user can of course change them at any time.

Note: notice above that all the calculated Formula columns display blue headers in the Table View.

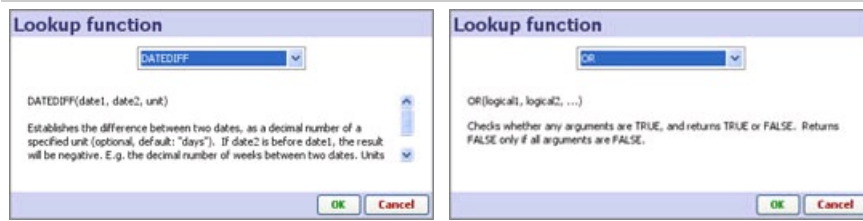
Functions List

Omniscope contains an extensive list of standard and specialised functions you can use to define Formula fields. In addition to the standard functions (with the same syntax) found in spreadsheets like Excel, Omniscope also contains a library of powerful DATASET functions that operate on one or more columns and can define the subset of data for which calculations should be done based on values in other columns.



Each function is documented briefly in the functions list. For more detailed documentation of the specialised Visokio DATASET functions, consult

our [Functions Guide](#) [211].



If you have questions about how to define formulae for specific tasks, consult the Knowledge Base [Useful Formulae](#) [213] section. If you would like to propose additional functions you would find helpful, please post your ideas in the [Forums](#) [214] page.

Back to [Using the Table View](#) [110]

[User Guide Top](#) [108]

Chart View

Using the Chart View

The Chart View gives the most comprehensive overview of the contents and structure of your data sets. In one display, the entire composition of the file is revealed, enabling you to see relative proportions, ranges, gaps in the data, etc.

The Chart View shows all the fields (columns) in the data set as horizontal visualisation bar devices, with continuous values like numbers and dates/times plotted smallest to largest, and category values divided into different coloured segments. Text values are shown in devices coloured in 'alphabet soup' where the vertical height indicates the number of characters in each text string. Null/blank values are shown as grey segments. Remember that nulls/blanks are not the same as zero values. Zero values will display as a single coloured line at the bottom of a numeric bar device with a white, rather than grey background. In the example below, the field Coupon is numeric and contains both null and zero values. All of the zero values are selected and one is highlighted:



There are three types of Chart View field (column) visualisation bar devices, each shown in the example below:

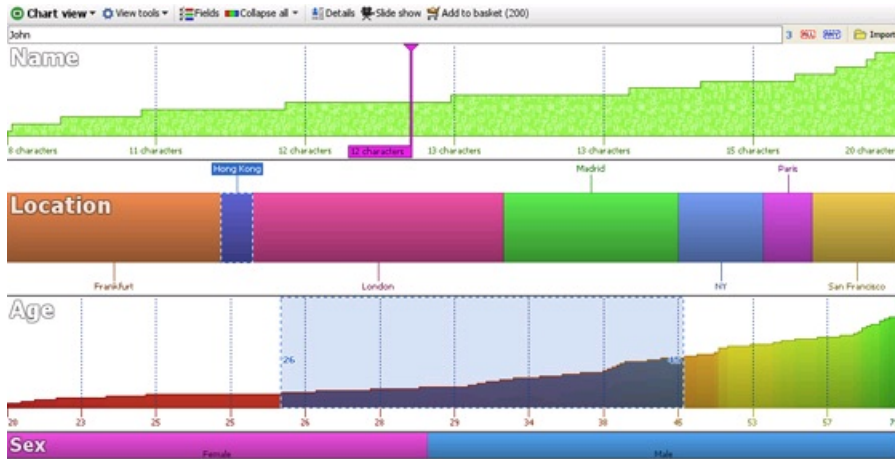
Text devices for text entries with many different values, such as names, comments etc. the Text visualisation bar devices show a 'staircase' curve based on the number of characters in each value in ascending order left to right. Selection inside Text devices is done in one of two ways; either by text input (keywords- the default) or by clicking and dragging. Right-clicking inside a Text visualisation device will display a menu with the option to set Selection to clicking and dragging. Using this setting, you can select suspicious text records based on blank values, or character counts longer or shorter than you would expect for your identification codes, etc. In the example below, the field 'Name' below displays as a Text device. If we select based on keywords, we can enter 'John' at upper left. Notice at the far right of the device that we found 3 'hits' on the name 'John' when entered in the search/filter box at left. Alternatively, if we set selection to clicking and dragging, we could select all the names with less than, say 11 characters using the mouse.

Category devices fields with a limited number (by default, less than 100) of unique values contain text, but Omniscope will also type them as Category fields. Category visualisation bar devices show the proportions of each category in the segmented (or banded) horizontal bar. Each

Category value is automatically assigned a different colour, which is the also default for other views. Selection inside Category devices is done by clicking on the bar segment(s) or on the segment labels as required. Clicking on a selection a second time de-selects that segment. The Main Toolbar 'Deselect' button will clear all segments. The field (column) Location displays below as a Category device, with 'Hong Kong' selected.

Number devices for numbers, currencies and dates. Numeric visualisation bar devices display the range of values as curves in ascending order from left to right. Selection inside Number devices is done by clicking and dragging to the desired range of values. Multiple ranges can be selected. Right-clicking in the device will display a menu with the command to 'Enter Selection Range' which will allow you to specify exactly the range you wish to select. The field (column) Age displays as a Number device below, with the range of ages 25 to 45 selected.

Note: it is currently not possible to change the font used for labelling in the Chart View.



If you click on a collapsed Chart View field (column) device, such as the Sex field device above, it will expand to reveal labels for that field and collapse any other open devices. The second and subsequent clicks within that visualisation device will select groups of records. Clicking on another visualisation device will collapse the previous one, but any selection(s) made will remain and be visible in navy blue with moving dotted lines. The barometer on the Main Toolbar will show how many records have been selected across any number of devices.

Right-click Device menu

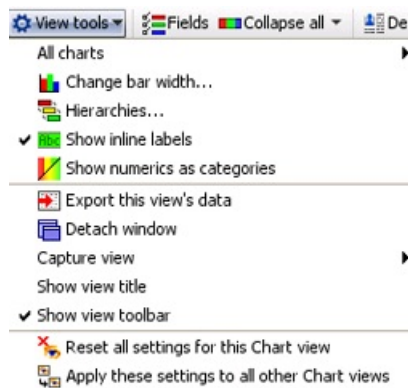
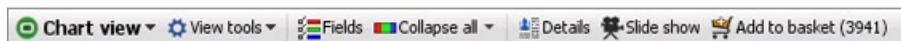
If you right-click on a device, the device menu will appear, as shown below:

<p>Field "Category"</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Collapsed <input type="checkbox"/> Expanded <input type="checkbox"/> Bar chart <input type="checkbox"/> Pie chart <p>Selection</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Select by clicking and dragging <input type="checkbox"/> Select by searching for keywords <p>Ordering</p> <ul style="list-style-type: none"> <input type="checkbox"/> By size (frequency) <input checked="" type="checkbox"/> By value <p>Options</p> <ul style="list-style-type: none"> <input type="checkbox"/> Hide from this view Rename field Convert field data type Field options <input type="checkbox"/> Delete field from dataset <input type="checkbox"/> Change to formula field... <p>Display and Print</p> <ul style="list-style-type: none"> <input type="checkbox"/> Save as image... Copy image to clipboard <input type="checkbox"/> Print... 	<p>Field "current field"- 4 options for displaying the field device:</p> <p>Collapsed- device displays in collapsed state</p> <p>Expanded- device displays in expanded state</p> <p>Statistics- device displays in expanded Statistics/Analysis mode</p> <p>Histogram- device displays in expanded Histogram/Bar Chart mode</p> <p>Numeric Scaling- Linear / Log scale sets the scaling of continuous plots of number/date fields. If extreme values in the field 'flatten' the lower values in the display, switch the scaling to Logarithmic to minimise the effect of the extreme values.</p> <p>Selection-right-clicking on a numeric field will reveal three options:</p> <p>Select by clicking and dragging- Switch to this selection mode to select records in text fields (columns) based on blanks or character counts which are within a specific range. Very useful for looking at suspiciously short or long text fields.</p> <p>Select by searching for keywords- Searches for matching text records like a search engine. Type the characters sought into the box at the top of any Text device. A preview barometer will appear in the device showing the hit rate as each character is entered. A misspelling will be instantly apparent as the number of hits will drop to zero.</p> <p>Enter selection range- Selects numeric values between a lower and upper limit you can enter directly as numbers.</p>
--	---

Note: The preview barometer count in the Text device may differ from the count in the Main Toolbar Barometer because the Text device barometer shows only the hits IN THAT FIELD, while the Main Toolbar Barometer shows the combined result of all selections across all devices.

Options, Display and Print- these commands are common to all views and documented in the sections on [Data > Manage Fields](#) [75] and [View Tools](#) [121].

Chart View Toolbar Options

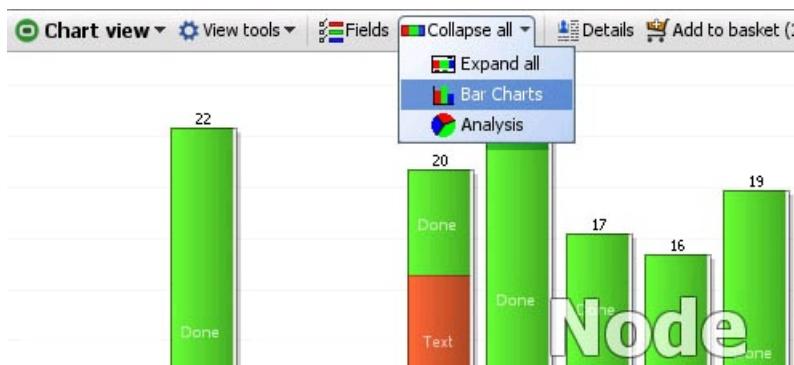


All charts- displays a list of all fields (columns) visible in the Chart View, with the same menu as the device right-click menu (see above)
Change bar width- controls the width of the bars shown in Histogram mode
Hierarchies- Use to create hierarchies by merging two or more devices into one; each field appears only when a configurable number of categories are visible in the parent field (eg. combining a Region and Country field so that only Regions are visible until you are down to two regions, at which point the Countries show instead). See more on creating hierarchies below.
Show inline labels- turns on or off category labels in the collapsed devices. With this turned off, labels will still appear when a device is clicked to open it.
Show numerics as categories- changes the way number fields look by replacing the curves with category bands.

The rest of the commands shown above are common to all **View Tools** menus and are [documented here](#) [121]

Fields- used to choose which devices will be visible (ticked) or hidden (unticked). Also used to set the display order from top to bottom. Untick any fields you want to hide (you can bring them back later). Using the hands at the right of the menu, drag the fields in the menu upwards and downwards until you have them in the desired display order.

Collapse All- The Collapse All button on the Chart View Toolbar returns all expanded devices to their collapsed state. Clicking the small drop-down arrow next to Collapse all accesses a menu from which you can choose Expand All, Bar Charts or Analysis display modes.

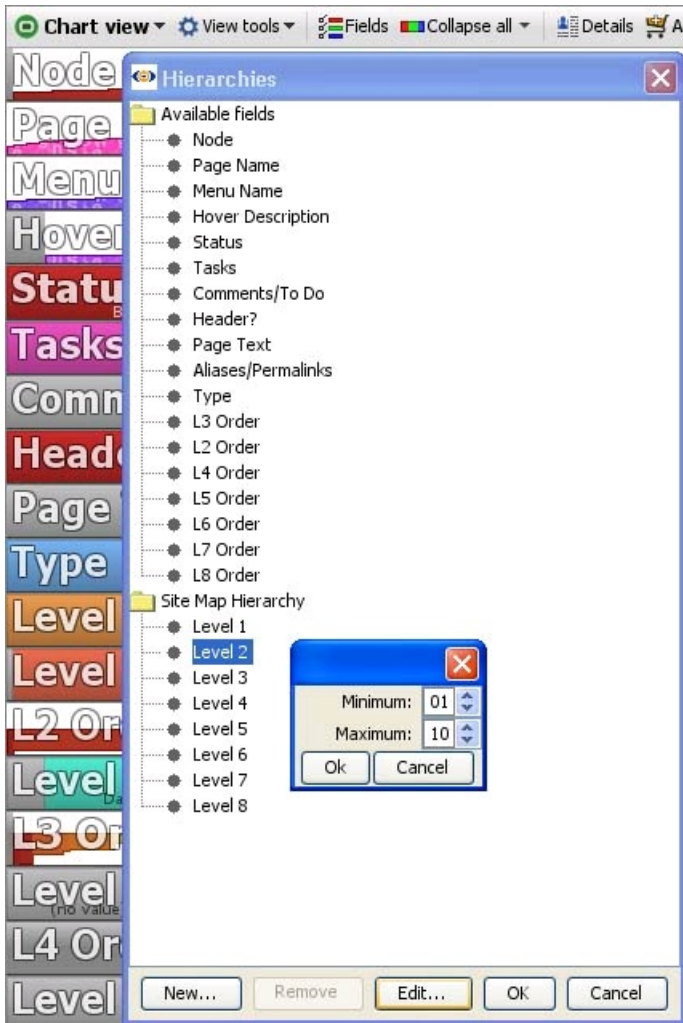


These menu items expand all the Chart View devices to one of their four possible display modes. For Number fields, Bar Chart mode creates a histogram for numerical fields with bands of values displayed both horizontally and vertically. Analysis mode shows a larger version of the plotted curve as well as key statistics on the numerical distribution. These statistics naturally update every time a query is executed. For Category fields, Bar Chart mode shows just that, while Analysis mode shows all the Category fields as pie charts. Selections of records can be made from all display modes directly with the mouse. Text fields do not display differently in Bar or Analysis display modes.

Creating Hierarchies

Categories which naturally 'nest' inside others, like Regions, Countries and Cities, can be combined in a hierarchy called, for example "Location". If records from more than one Region are in the **IN** Universe, the Chart View will display the Regionals in a new device called Location. Once only a single Region is selected, the Location Bar will 'drill down' and show the Countries in that region. If only one country is selected, Location will show only the cities in that country.

Creating a new hierarchy is easy...just give it a name, "Site Map Hierarchy" in the example below...then drag the fields (columns) comprising the hierarchy underneath in the order they belong.



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Pie View

Using the Pie View

The Pie View shows a proportional breakdown of your data, either categories, or numeric. The default on opening for the first time is to show the breakdown by number of records. You can select the field to display and the field to use to split the pie into segments by using the view controls. If your data set has both positive and negative values, you can specify which to plot. You cannot plot both positive and negative values on the same pie, but you can use two Pie Views side-by-side for this purpose. If you must show both positive and negative values in relation to each other, use the [Bar View \[113\]](#).

You can select subsets of the data set on the pies, then execute Moves and Keeps. You can also pane the Pie View vertically, horizontally, or both to obtain multi-pie views, as shown at right in the example below.



Pie View Controls

Field selector- shows all the fields whose values can be divided into segments. The default is to display the number of records divided by the field chosen in the adjacent **Split-by** drop down. You can choose a text field (column) to display, but if you do, the breakdown will be by number of characters in the text string values.

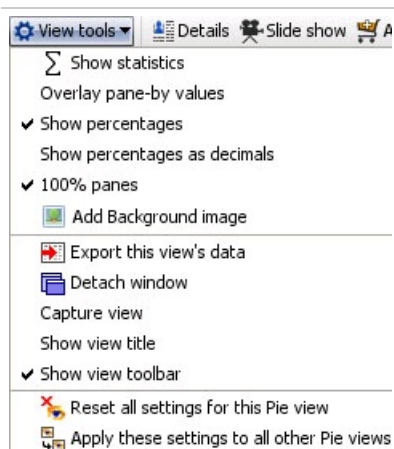
Split by- click on the 'Split by' drop down to choose a field to use to create segments within the pie(s).

Pane by- panning means displaying more than one pie chart within the display, horizontally, vertically, or both as shown in the example above right. **Pane by** field (column) selectors in the upper left and lower right of the Pie View display enable you to select criteria for generating multiple pies within the same Pie View. This is not the same as using two different Pie View windows.

When panning, you can use the **100% panes** option in the **View tools** menu (see below) so that each of the multiple pies shows a breakdown totalling 100%. Use panning sparingly...if there is not enough space around each pie, Omniscopie will not be able to display the labels, as shown in the example above.

Pie View Tools

The **View tools** drop-down menu offers a number of options



Show statistics- when ticked, displays a translucent statistics panel, the content of which can be configured using a side menu accessed from the top of the panel. (see below)

Overlay pane-by values- only shows when panning is active. When ticked, displays a label on top of each pie in the panning arrangement

Change number of bands- only shows when a splitting by a continuous value. Slider increases the number of intervals/segments in the pie.

Show percentages (as decimals)- when ticked, replaces the values in the segments with percentages of the total. In panning arrangements, these percentages will not sum to 100% unless the 100% panes option is also ticked (see below).

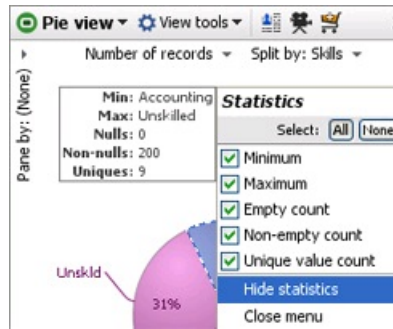
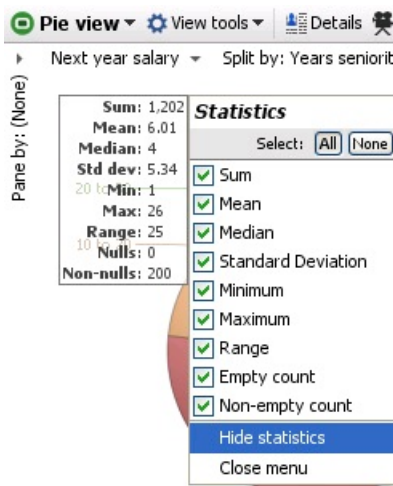
100% panes- only shows when panning is active. When ticked, calculates percentages for each individual pie to sum to 100%. Has no effect if **Show percentages (as decimals)** is not also ticked.

Add background image- provides the option to provide a faded image as a backdrop. See [Page Menu](#) [104] for details.

The rest of the commands on the **View tools** menu are common to all views and are documented in the section on [View Tools](#) [121]

Pie View statistics panel

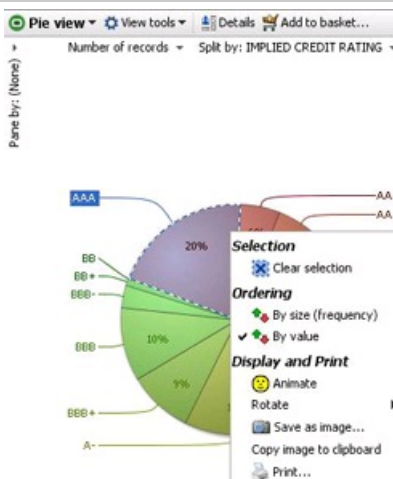
The statistics panel display can be configured using the drop-down menu accessed from the upper right corner of the panel.



If the field (column) displayed is numeric, there will be more types of statistics available. If the field is a category field, summations, means, etc. will not be available.

Pie View right-click menu

Right-clicking anywhere on the Pie View window displays a menu of options to modify or export the display:



Selection options:

Clear selection- clears the current selection in the Pie View

Ordering options:

By size (frequency)- when ticked, orders the segments of each pie in descending order of record count

By value- when ticked, orders the segments of each pie in descending order of selected value.

Display options:

Animate-starts the pie spinning slowly, such that the labels display more legibly. In panning arrangements, right click on each pane to start spinning for each pie.

Rotate- turns each pie up to 360 degrees to re-orient it, usually to display labels or important segments more legibly. Does not spin the pie as does **Animate**

Copy and Print options:

Save as image or **Copy image to clipboard**- saves or pastes an image of the Pie View display (.JPG, .GIF, .PNG or .BMP depending on Java version) into another document.

Print- launches the Print wizard common to all views and documented in [View Tools](#) [121]

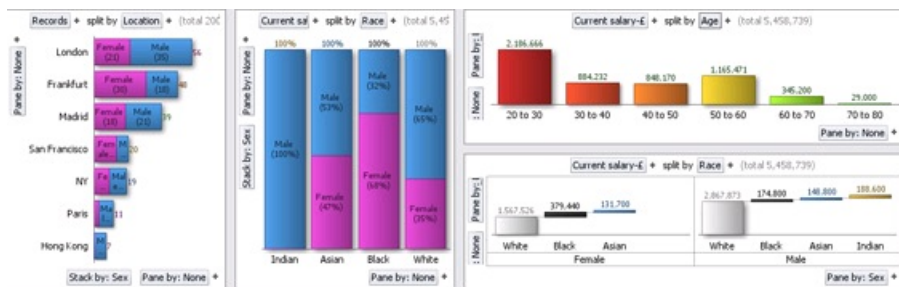
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Bar View

Using the Bar View

The Bar View is one of the most flexible views. It can be used to display either Category, Date and Time or Numeric data and calculated values like sums and averages. Both positive and negative numeric data can be compared in the same view. Bars can be displayed vertically or horizontally, and you can configure one or more splits (breakdowns) of selected values, with sub-breakdowns within the bars (stacked bars) and panning to create multiple displays in a single window.



All segments displayed in the Bar View are selectable, and can be used for power queries using the **Move** and **Keep** commands located on the Main Tool Bar.

Bar View Toolbar

In addition to the **View Chooser** and the **View Tools** drop-down menu, the **View Toolbar** contains a series of options for modifying how the bars display; **Order bars**, **Flip**, **Cascade**, **100% bars**, **Normalise panes**, and **Swap panes**, plus the **Show details**, **Slide show** and **Add to Basket** commands common to all views and documented under [View Toolbar commands](#) [121].



View Tools- in the Bar View, all the view-specific commands are located on an **Options** pull-out menu accessible from this menu, and also accessible from the < arrow on the **View Toolbar** just left of the **[X]** close view command. All **View Tools** commands in the Bar View other than the link to **Options** (see below) are common to all other views and [documented here](#). [121]

Order bars- sorts the bars in order of the values displayed, clicking again reverses the sort order, and again removes the sort.

Flip- changes the layout between horizontal and vertical bars

Cascade- displays the bars on a rising, progressive 'stair-step' base, rather than a single level.

100% Bars- normalises the height of each bar so that proportional differences in the stacked sub-segments inside each bar can be compared across the bars.

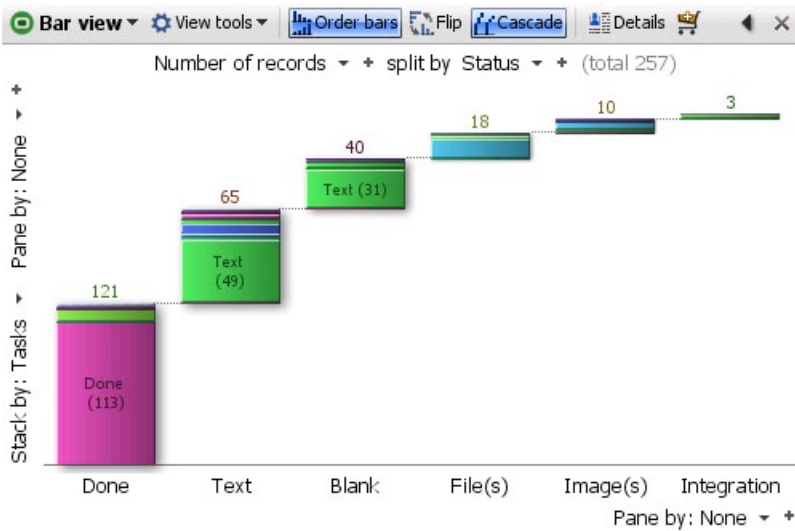
Normalise panes- normalises the height of the tallest bars in each pane, so that big differences in the absolute numbers do not minimise the height of the bars in some panes.

Swap panes- changes between horizontal and vertical panning.

See the **Options** sections below for more detail on the configuration options available.

Bar View Controls

Controls within the Bar View are located around the edges of the view. The **Value** and **Split by** menus are at the top, with **Stack by** and vertical **Pane-by** commands along the left side, and horizontal **Pane-by** menu at the bottom. Bar View configuration options are so numerous they have been put on a series of 6 drop-down menus accessed from a pull-out **Options** tab that appears whenever you hover your mouse along the right side of the display window.



Value/+ Add field Selector- left-most above the display, this drop-down menu allows you to select the quantity to be represented in bars. The default is the number of records, but you can change or add to the value field(s) being shown from this drop-down menu. You can toggle the field pick list to show all fields, numeric fields only or date fields only. Clicking on the '+' after the selector allows you to add another field as a quantity to display as an additional, separate bar next to the bar representing the first quantity. If you want to show the composition of each bar using the **Stack-by** option menu at left, you may want to select the 100% option to normalise the height of all the bars such that the stacked segments show comparable proportions. You can also specify the fields/values to represent on the **Options > Measures** menu (see below), which also offers additional sub-menus to specify the function being applied (sum, mean, standard deviation, etc.).

Split by/+Field Selector- drop-down menu allows you to specify one or more category, numeric, date or text fields to define how to break down the fields being plotted. You can also specify one or more fields to break down the values displayed using the **Options > Breakdown** menu (see below). Note: **Split by** selections are applied before **Pane by** selections.

Stack by Field Selector- (left side)- specifies the field to be displayed inside of each bar to create a 'stacked' bar chart. You can also access this command using the **Options > Breakdown** menu (see below).

Pane by/+ Add another Selectors- (left side & bottom)- panning creates separate sub-windows within a single display, which can be used to further break down the bars being displayed. You can also access these commands from the **Options > Panning** menu (see below). Note: **Pane by** selections are applied after **Split by** selections.

Options Tab Menu

The Options tab menu contains 6 sub-menus; **Measures, Breakdown, Panning, Ordering & alignment, Layout** and **Style**.

Options > Measures

The **Measures** sub-menu is used to specify the values to represent as bars. In the example below, the Age and Seniority of employees is being plotted. Both of these are Numeric fields measured in the same units, years, so we use the Function sub-menu to specify that we want to plot the Mean (average) of the Ages and the median (most common value) for Seniority.



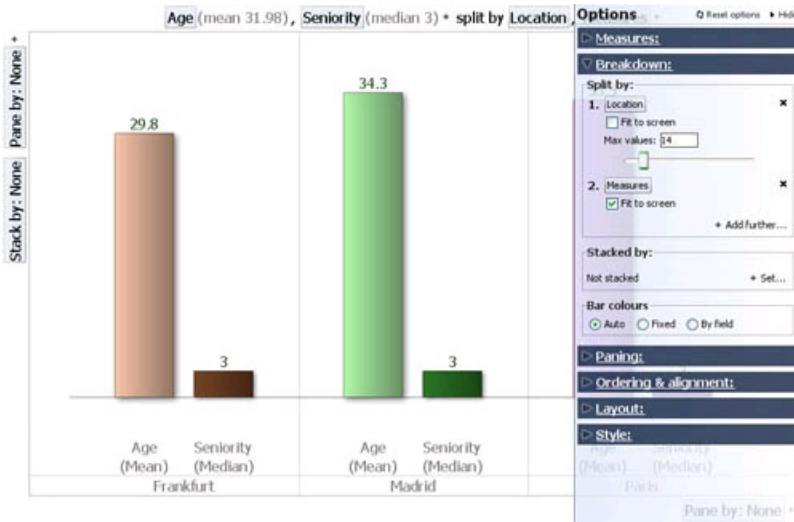
Value+ Add further fields- same as the field selector at the top left of the view, the **Options** dialog offers more options to specify functions, etc.

Function- only visible if you select numeric value fields (other than the Record count default). In the example above, the functions sub-menu is used to select average for the Ages (the sum would not be meaningful). The mean (average) age of the workers will not be weighted by the values in another field, so the Weighted option is not ticked. For the Seniority field, the median value, rather than the mean, will be displayed. There are no negative numbers in the Age or Seniority fields, so we will not need the Absolute value function either.

Measures on the same scale- since both values being plotted are in comparable units (years), we tick this option.

Options > Breakdown

The **Breakdown** sub-menu allows you to plot additional bars by splitting the display according to other fields (columns) in the data set. In the example below, we split the display of average age and median seniority of employees by location.



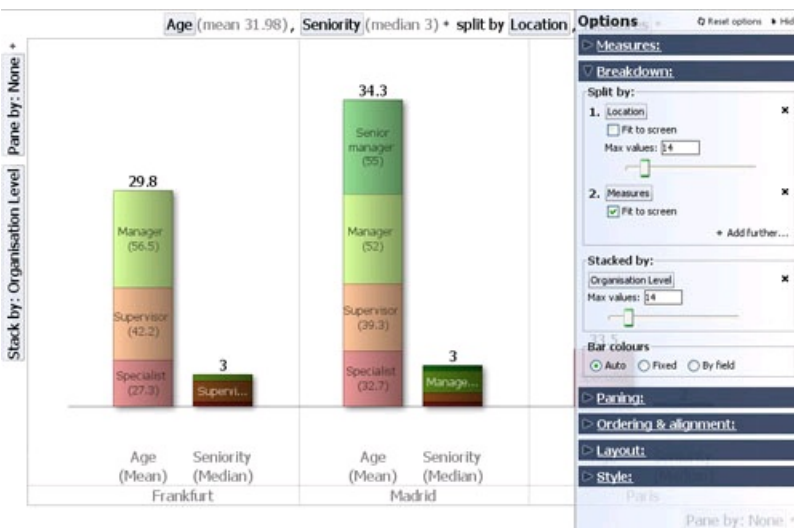
Split by: same as the field selector at the top of the display, the **Options** dialog offers additional options to control how the increased number of bars is displayed. If you choose a **Split-by** field with numerous values, you are also given a choice of displaying a bar for each value, grouping the splits into ranges (histogram), or grouping the bars by sign (positive or negative).

+Add further splits... allows you to specify further fields to sub-divide the bars by

Fit to screen- tick this option if you want all bars to display in the view window, no matter how compressed the width of the bars.

Max values- use this slider to manage the number of bars displayed individually. If the total number of bars is more than the viewable maximum, the remainder of the bars will be shown aggregated into an 'Others' grouping. The 'Others' grouping will be disaggregated only if filtering reduces the number of bars to be displayed to less than the maximum.

Stacked by: same as the field selector on the left, you can select only one field to display inside the bars, and you cannot mix positive and negative values.



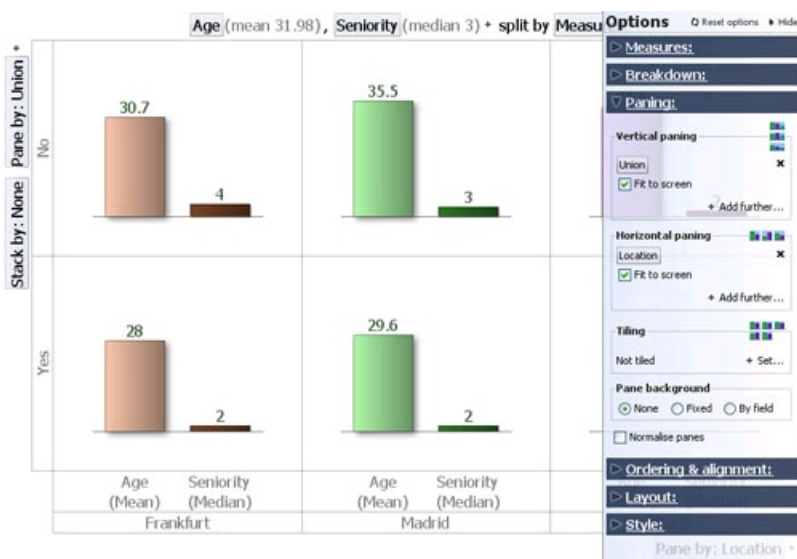
Max values- use this slider to manage the number of stacked segments displayed individually. If the total number of stacked segments is more than the viewable maximum, the remainder of the segments will be shown aggregated into an 'Others' grouping. The 'Others' grouping will be disaggregated only if filtering reduces the number of stacked segments to be displayed to less than the maximum.

Bar colours- use these options to control the colouring of the bars and bar segments.

- **Auto**- uses the default colours assigned to each category, including for stacked sub-segments. Using this option, if you decide to display a stacked chart using **Stack by: 'Sex'**, the sub-segments of each bar labelled 'Male' and 'Female' would display as blue and pink, (not the colour assigned to the field represented by the entire bar) and all bars would be displayed as a combination of blue and pink.
- **Fixed**- assigns a uniform, fixed colour to all bars, which you can select using the colour chooser that appears when you select this option.
- **By field**- colours each bar (including the stacked sub-segments) a single colour corresponding to the field being plotted. Using this option, if you decide to display a stacked chart using **Stack by: 'Sex'**, the sub-segments labelled 'Male' and 'Female' would not be coloured blue and pink as with **Auto**. Instead, each bar would be a different, but uniform colour corresponding to the field being plotted.

Options > Paning

The **Paning** sub-menu is used to further sub-divide the display vertically, horizontally, or both. **Paning** sub-divisions are applied after **Split-by** selections. In the example below, the view display has been paned vertically based on the values in the Union membership field (column), which contains the values 'Yes' or 'No' for each employee. The resulting bar chart display indicates that Union members in this organisation are on average younger and most commonly less senior than non-union members, in both locations, London and Madrid.



Vertical paning- same as the selector on left of display window, however the **Options** dialog offers more controls over how many panes to display unaggregated y if the number of values to panes by is large relative to the space available. To see all panes unaggregated, tick **Fit to screen**.

Horizontal paning- same as the selector on the bottom of display window, however the **Options** dialog offers more controls over how many panes to display unaggregated. Notice in the example above that the **Split-by: 'Location'** choice has been replaced by a horizontal **Pane-by: 'Location'** setting (faintly visible under the Options dialog panel at lower right). To see all panes unaggregated, tick **Fit to screen**. Note: **Pane-by** selections are applied after **Split-by** selections.

Tiling- adds multiple plots within each pane, showing the values further sub-divided. In the example below, we have left the display paned horizontally by 'Location' (values= Frankfurt, Madrid, etc.) and vertically by 'Union Membership' (values= 'Yes' and 'No'), and added **Tiling by Sex** (values: 'Male' in light and dark blue and 'Female' in light and dark pink):



Note: **Split-by** and **Pane-by** choices are applied before **Tiling**. To see the values represented by the bars in each sub-plot (cluster) within the panes, hover on the bar with your mouse and the values are displayed in the Tooltip.

Pane background- use this command to set the background colour of the panes, which can be all the same or different.

- **None**- sets the pane backgrounds to the default colour, usually white
- **Fixed**- when ticked, displays a colour chooser allowing you to select a different background colour for the panes. In the example above, the background colour has been set to grey.
- **By field**- when ticked, allows you to pick the colours associated with the values in any field, including the **Tile-by** field, such that different panes have different background colours.

Normalise panes- typically used in conjunction with stacking, sets the height of the (first) bars in all panes to be the same, regardless of their relative magnitudes, so that the proportions of the sub-segments representing the **Stack-by** values will be comparable across panes.

Options > Ordering & Alignment

The **Ordering & alignment** sub-menu allows you to control the relative positioning of bars both within and across panes. The example below has the same settings as the one above, except that **Order bar** and **Order vertical panes** options are ticked, and the ordering is now set to 'Ascending'. Notice that in example below, the bars representing median seniority and average age have now changed positions, and that the Union='Yes' panes are now on top of the Union='No' panes:



Order bars- sorts the bars within panes/tiles in either Ascending or Descending order. In the example above, the bars are in comparable Years units and the lower value, median Seniority, is displayed before the higher value, average Age. Changing the sort order to Descending will reverse the order of the bars within the panes/tiles. Behaviour of this option can be influenced by the Alignment settings (see Alignment below).

Order stacks- whenever a **Stack-by** field is specified ('None' is specified in the example above), ticking this option will sort the sub-segments within each bar in either ascending or descending order.

Order horizontal panes- when ticked, this option will order the panes horizontally, Ascending or Descending, based on the ranking of the values. In the example above, this option is not ticked. Behaviour of this option can be influenced by the Alignment settings (see Alignment below).

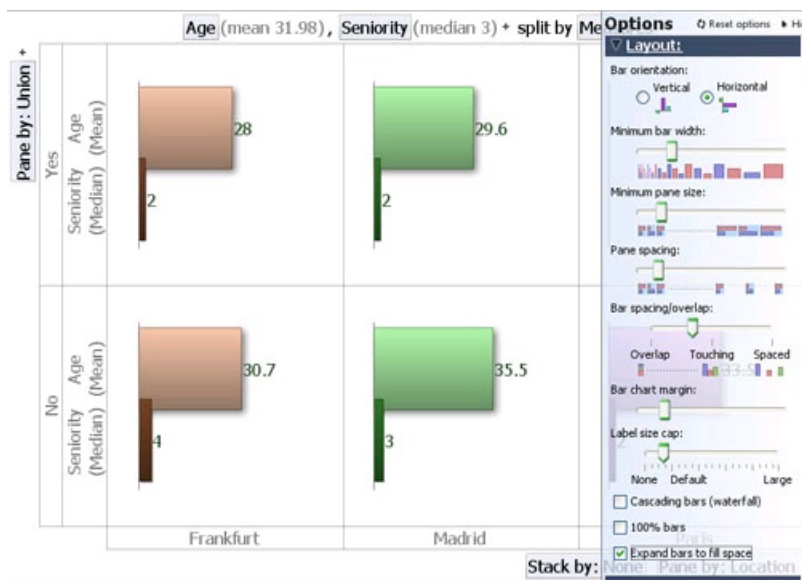
Order vertical panes- when ticked, this option will order the panes vertically, Ascending or Descending, based on the ranking of the values. In the example above, this option is ticked, and the Union='Yes' vertical panes are displayed above the Union='No' vertical panes. Behaviour of this option can be influenced by the Alignment settings (see Alignment below).

Alignment: comparison of bars across panes is facilitated by keeping the bars in a consistent order, especially looking vertically for a vertical bar orientation and looking horizontally for a horizontal bar orientation (see **Options > Layout > Bar orientation** below).

- **None-** when selected, the alignment setting does not have any influence and bar order within and across panes is determined strictly by the data and the **Order bars** Ascending/Descending option (see above).
- **By visual Axis-** when selected, bars are kept aligned in the same order as the bars above and below them
- **Always-** when selected, bar order is also maintained across panes to the left and right

Options > Layout

The **Layout** sub-menu is used to manage the appearance of each Bar View display. Most of the visual aspects , such as orientation, width and spacing of the bars, etc. can be managed from this dialog. In the example below, we have changed the bar orientation to horizontal, increased the minimum bar width and reduced the bar spacing to slightly overlap the bars:



Bar orientation- changes the bars between vertical and horizontal directionality. Note that in vertical orientation, the **Stack-by** field selector moves from the left side to the bottom of the display

Minimum bar width- changes the minimum width of each bar in order to display more or fewer bars

Minimum pane size- changes the minimum width/height of panes in order to display more or less panes

Pane spacing- changes pane margin/spacing allocating more or less space in the pane to the bars.

Cluster spacing- {being revised}

Bar spacing/overlap- changes the space between the bars, which can overlap (see above), touch or be spaced apart

Bar chart margin- changes the margin space around the outer edges of the display

Label size cap- sets the maximum length of the labels, which can cause them to wrap or display vertically to save space. **Warning:** Setting **Label size cap** to 'None' (meaning no label) will suppress labels display completely. Start with the **Label size cap** set to 'Large' and reduce...working in conjunction with **Style/Font Size** (see below).

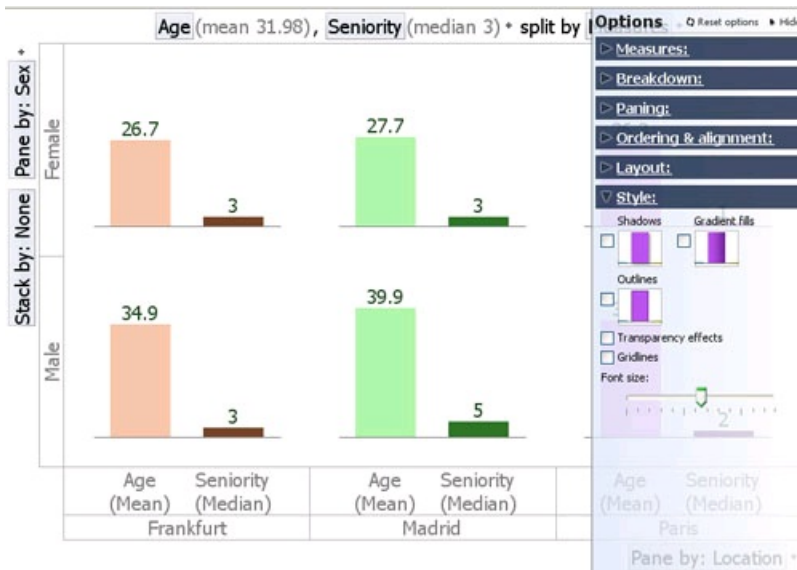
Cascading bars (waterfall)- same as the option on the Toolbar, displays the bars on a rising, progressive 'stair-step' base, rather than a single level.

100% Bars- same as the option on the Toolbar, normalises the height of each bar so that proportional differences in the stacked sub-segments inside each bar are comparable across the bars.

Expand bars to fill space- sets the bar widths so as to use all available space after allowing for settings governing margins, spacings, maximum bars and panes to show disaggregated, etc.

Options > Style

The **Style** sub-menu allows you control the visual effects applied to the individual bars. In general, we suggest that you use the default effects for best visualisation. Turning off the defaults will display the bars with no visual effects:



Shadows- adds a shadow effect to the side of each bar

Gradient fills- varies the colouring of each bar to give the impression of a more solid, reflective surface

Outlines- draws a solid border around each bar

Transparency effects- {being revised}

Gridlines- unchecking this option will remove the border lines between panes

Font size- allows you to increase or decrease the label font size for best legibility

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Pivot View

Using the Pivot View

The Pivot View is used to display aggregated or summarised values at the intersections of fields (columns) in your datasets. Only Category fields are available on the drop-down menus, so if you want to create a pivot on a Text field, you should first convert it to a Category field, assuming there are not too many discrete values. See [Data > Manage Fields](#) [95] for more detail on changing data typing and limits on the number of Category values. Note: Pivot Views using Dates and Times and Numeric columns may be supported in future.

When you open a Pivot View and define two Category columns, Omniscope creates a pivot (intersection grid of summary values) using the Sum of the number of records in two Category fields by default. You can easily change the Category fields to be displayed on the horizontal (**X:**) and vertical (**Y:**) axes using the View Toolbar options. At any time, you can exchange the (**X:**) and (**Y:**) axes by clicking on the curved arrow at the corner to the left of the horizontal titles.

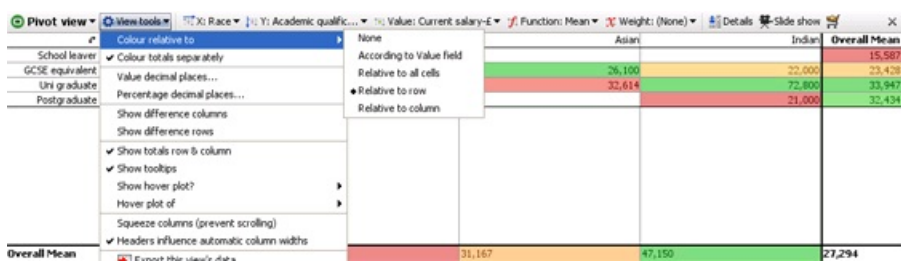
	Civilian	Private	Corporal	Specialist	Sergeant	Major	Colonel	Overall Mean
Army	41	21.56	24.15	23.99	29.5	39.52	43.36	26.31
Marines		21.23	22.4	46	28.53	37.82	39	23.41
Air Force	30	21.12	26.83	29.5	32.72	37.5	49.5	30.8
Navy		22.37	25.82		32.92	41.25	44	30.44
Nat. Guard		23.71	36.5	24.93	33.97	41	46.33	30.4
Intelligence	51				38.25	42.25		39.6
Police		35.33	30.67		29			37.94
Civilian	46.17							46.17
Overall Mean	44.33	21.5	23.3	23.95	30.3	39.46	43.91	26.32

Value: The default value for the cells in the Pivot View is the sum of the records, so each cell will display the number of data points. You can change the value displayed to another field using the **Value:** drop-down menu. Depending on the type of field you select, a **Function:** menu will appear, allowing you to choose whether to display the sum, the mean, or some other transformation of the data points in each cell. Note: the Range function displays the difference between the maximum and minimum values in the cell. The example above shows the average age of military casualties by service branch and rank. If you choose a function such as mean, a **Weight:** menu will appear, allowing you to specify another field to calculate weighted averages of the values in each cell.

You can select one or more cells to perform **Moves** and **Keeps**, but only on selections of all cells in one row or column at a time. You can sort the rows and the columns simultaneously; click the row or column header once to sort descending and again to sort ascending. The sorted column and/or row headers will turn orange to indicate sort(s) have been set. Clear your sorts using the **[X]** button that appears to the left of the switch axes curved arrow when sorts are set.

View Toolbar Commands

The Pivot View tools drop-down menu provides some options to change the display.



Colour relative to-

None- removes all coloring from cells

According to value field- applies the colouring range specified for the Value field (column) to display in the cells. The colouring range settings (start, middle, end, etc). are those defined for the **Value:** field in **Data > Manage Fields > Configure > Field Options > Change Value colouring**. This option will apply the absolute colors for the entire range of values, so applying it to calculated means and medians will not result in enough colour dispersion across the cells.

Relative to all cells- this option applies the colour range specified for the **Value:** field relative to the range of values appearing in the cells. Use this option to maximise dispersion of colours across reduced value ranges in all cells, typical of means and medians for example.

Relative to row- this option applies the **Value:** field colour range relative to the values in each row

Relative to column- this option applies the **Value:** field colour range relative to the values in each column

Colour totals separately- unticking this option changes the colouring scheme to include Overall totals columns values.

Value decimal places- use slider to set the number of decimal places to display from absolute values

Percentage decimal places- use slider to set number of decimal places displayed for percentage values

Show difference columns- when ticked, displays the differences between adjacent columns in a separate column (see below)

Show difference rows- when ticked, displays the differences between adjacent rows in a separate row



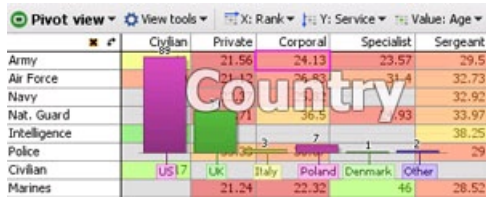
Show difference as- (Percentage; Value; or Both)- allows you to select how the values in difference columns and rows are displayed

Show totals row & column- the Overall or Total columns at the bottom and far right of the view can be hidden by unticking this option

Show tooltips- temporary displays of record counts and other underlying cell information on mouse hover can be hidden by unticking this option. Note: Pivot Table tooltips are summaries of the values underlying each cell, not the record-level tooltips configured under **Main Toolbar > Settings > Tooltips**.

Show hover plot- (None; Bar; or Pie)- a temporary graphical breakdown of the contents of a cell can be configured, either a Pie or a Bar chart display.

Hover plot of- (field list-Category & Numeric data types)- if a graphical cell hover display is selected, an additional option to specify the value to be plotted appears. In the example below, a Bar chart plotting the field Country has been configured. Hovering on the intersection cell Service:Army & Rank:Corporal, displays a Bar Chart of Countries losing one or more Army Corporals (average age: 24.13 years) plotted as vertical bars in descending order:



Squeeze columns (prevent scrolling)- keeps the column widths set to a distance that permits all columns to be seen/selected without horizontal scrolling of the view. Combined with row and column colouring options, this can convert the Pivot Table into a type of 'heat map' encompassing a large number of cells at a glance.

Headers influence automatic column widths- when ticked, re-sizing one column header re-sizes all of the other column headers to match.

The remaining commands on the **View tools** drop-down are common to all views and are documented [here](#) [121].

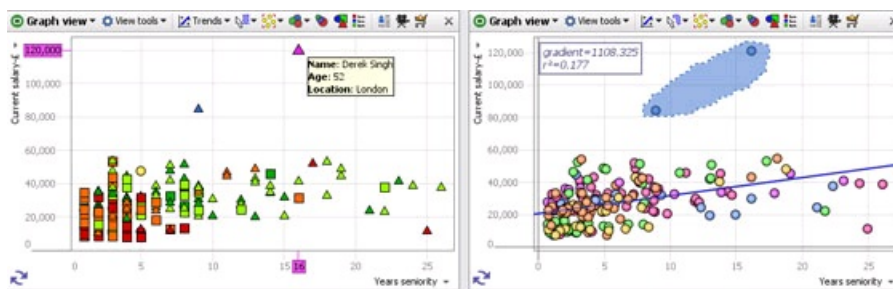
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Graph View

Using the Graph View

The Graph View (or scatter plot) is ideal for finding and illustrating relationships in the data. In addition to plotting two selected fields (columns) on the familiar orthogonal Cartesian axes, X (horizontal) and Y (vertical), you can colour, size and shape the markers to represent multiple dimensions in the data set. Markers can be aggregated to group data points for large data sets, or displaced slightly to make coincident points distinct and selectable. Powerful statistical analysis is available, and various selection and display modes can be chosen to suit any combination of fields plotted.



Graph View Controls

Axis Selectors (X and Y)- use these pick list menus on the left side and bottom of the window to choose appropriate fields (columns) to plot on the X and Y axes. Only numeric, date and category fields will be present in the pick list. Text fields cannot be plotted unless the values are converted to categories and ideally given a meaningful sort order using **Data > Manage Fields**. Use the **Sort** option to sort the available fields alphabetically and the **Find/Clear** tool to select from long field lists. Note: hiding fields (columns) from the axis selector lists is not currently supported.

Switch Axes- the double arrow at the lower left of the plot exchanges the X and Y fields

Graph View Toolbar

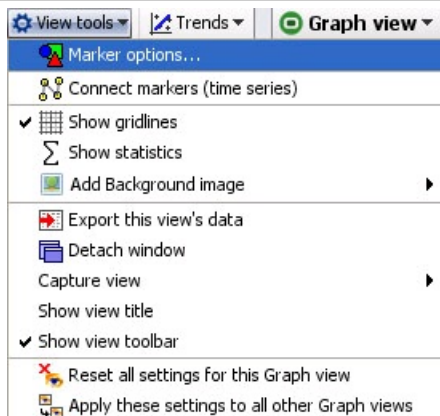
The Graph View Toolbar features a **View Tools** drop-down menu, plus **Trends, Mode, Zoom, Colour, Size and Shape** options:



Each of these Graph View Toolbar elements is discussed below

Graph View > View Tools

The **Graph View > View Tools** drop-down menu includes various options for changing the display:



Marker options- see discussion of sub-menu below

Connect markers- see discussion of sub-menu below

Show gridlines- turns grid lines in background on or off

Show statistics- displays the statistics relating to the X and Y axis fields, as selected from the drop-down pick list.

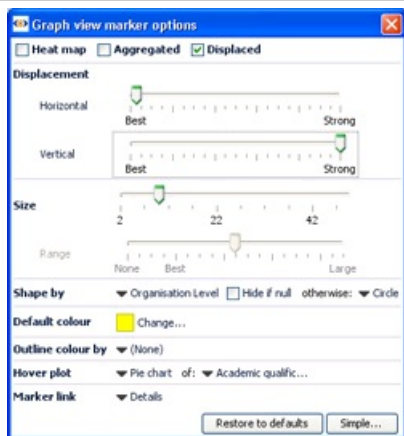
Add background image- click to browse to an image to set as a faded background for the graph. Does not obscure gridlines. Useful for putting logos and branding into the display. The same option is available in the Pie, Bar and Details View and is fully documented [here](#). [104]

The other **Graph View > View Tools** commands are common to all views and fully documented [here](#). [121]

Marker options sub-menu

Marker Options- click to launch the Marker options sub-menu, which has both Simple and Advanced display modes:

Marker Options: Heat Map; Aggregated or Displaced- tick one to select from 3 different ways of displaying plotted points in each Graph View:



Heat Map- shows density plot of records on the grid. Useful for plotting very large numbers of records that overlap a great deal.

Aggregated- (default for data sets over 100 records) combines overlapping markers into larger markers showing the number of records aggregated. Useful when you have overlapping records and need to see the density, similar to the Heat Map. Note: Display on the markers of sums and other functions calculated from fields in the records aggregated is not currently supported.

Displaced- used if you have many exactly overlapping markers and want to convey a visual representation of the density of underlying records. When ticked, the markers will be slightly offset to show a dense cloud, rather than overlapping exactly despite identical values.

Displacement- changes the amount of displacement vertically and horizontally to improve access to data points for selection and linking.

Size slider- changes the absolute scale for marker sizing to increase or decrease all marker sizes

Range slider- (greyed-out unless the **Size** option is set to a field) changes the magnitude of relative sizing (see **Size** below)

Shape by: selects the field (column) whose values will determine the shapes plotted (same as **Shape:** toolbar pick list below) with additional options to specify the display of markers of records which are null (blank, not zero) in the selected **Shape by** field. In Simple mode, the Default shape to use when no Shape-by field has been chosen can be set.

Default colour- selects the default colour of markers when no other colouring options are set.

Outline colour by: adds an outline of another colour, based on another field. For example, if Sex is used, this command would put a blue

outline on the dots representing males and a pink outline on the dots representing females- assuming that you have assigned the those colours to the values 'Male' and 'Female'.

Hover plot- sets a pop-up display of either a pie or a bar chart whenever the user hovers on a marker, aggregated or not. When set, you can select the field (column) to be charted using the pick list at right, which is otherwise greyed-out.

Marker link- selects a link to display when markers are clicked (one record only). Pick either (None), Details, or one of the links already configured in the file using the **Settings > Links** wizard accessed from the Main Toolbar.

Connect markers sub-menu

Connect Markers (time series)- clicking this option expands the **View Tools** menu to display additional options used to configure connected series, usually time series. In order to display one or more time series curves, the data set should contain at least one field (column) for a date, and one or more columns for values that make up the time series. To display multiple curves in one graph, there should also be a category field (with relatively few unique values) containing the names of each curve to be drawn.

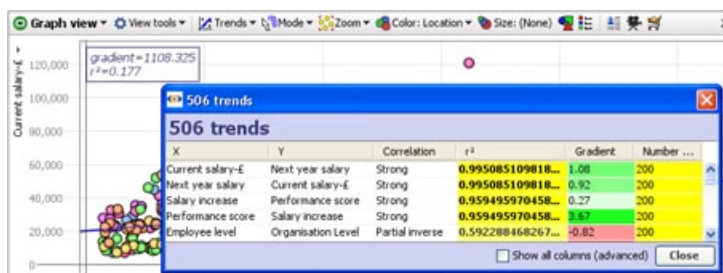
Note: if your time series data is not in 'vertical' Omniscope layout (with the repeated observations vertical in a column) but instead in a pivoted 'horizontal' table (dates as columns and one row for each curve's values), you can use the **Data > De-pivot** the data option on the Main Toolbar to change the layout. For more on how to lay out your data for display as time series, see [Data Layout-Time Series](#) [137].

Once your data layout is correct, to display the curves, switch the X axis to the date field, and the Y axis to the value you want to graph, then select **Connect markers (time series)**. **Warning**: to see multiple lines, you must use the **Show line for each...** option and select a Category field that distinguishes the lines you want to separate. The additional time series sub-menu options allow you to show the markers along the curves, change the curve thickness, display the curve names, smooth the curves, etc. For more detail, see [Displaying Time Series](#) [215].

[121]

Trends

The **Trends** option menu enables you to access powerful statistical analysis of your data set, and to display the most significant relationships.



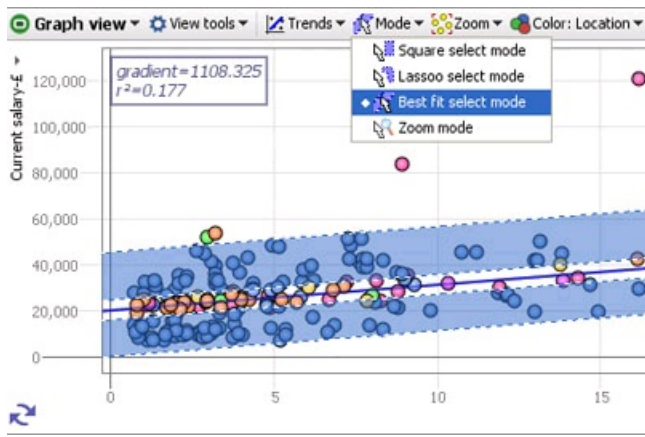
Clicking on this menu reveals two options:

Show line of best fit-plots a blue line of regression 'best fit' through the data points with the R-squared (measure of correlation) and gradient values displayed in the top left corner.

Find trends-analyses and sorts all correlations and other advanced statistics across all columns in the data set. Click to calculate the first 100 best fits between all possible axes. These will show in a pop-up window with R-squared for each axis pairing. Clicking on a pairing in the window will load the corresponding graph into the view. To see all standard calculations for all potential X/Y axis pairs. tick the Show all columns (advanced) option.

Mode

The **Mode** options menu enables you to choose how to navigate and select points and groups of points on the display. You can define one or more selection areas/shapes in order to exclude or isolate records using **Move** and **Keep** power query commands on the Main Toolbar. You can also use the mouse in navigational mode to define and explore specific zones in the display in maximum detail.



Square select mode- the mouse defines one or more rectangular selection area(s)

Lasso select mode- the mouse defines one or more free-form shaped selection area(s)

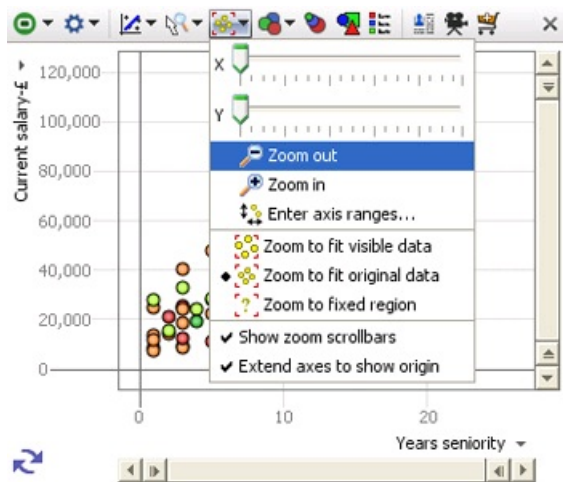
Best fit select mode- the mouse defines selection areas along the line of best fit. Useful for selecting data points inside/outside of confidence intervals in distributions.

Zoom mode- a navigational mode, the mouse defines a rectangular zone and the display zooms to show only that area. Holding the right mouse button down in zoom mode and moving the mouse up and down will zoom in and out continuously

Pan mode- (only visible when zoomed in manually) a navigational mode, the mouse 'hand' cursor is used to 'grab' the screen and move it to frame the desired area.

Zoom

The **Zoom** options menu provides fine-grained control over the magnification of the display, and they way the display adapts to power queries and Side Bar filtering which change the distribution of the data points being displayed. Unless disabled (see below) when zooming, zoom bars will appear along the vertical and horizontal axes, which can be moved or stretched to display desired area on-screen.



X zoom slider; Y zoom slider; Zoom out/in- used to expand the view along the right/left 'X' or up/down 'Y' axis, or to magnify (zoom in) or de-magnify (zoom out) the display.

The zooming options below are used to define how the display updates, with no manual zooming active

Zoom to fit visible data- display sizes to show only the points still in the target universe

Zoom to fit original data- display sizes to show the range of all the data in the data set

Zoom to fixed region- allows you to define a region of interest with the mouse, to which the display will revert, regardless of the data points in the target universe.

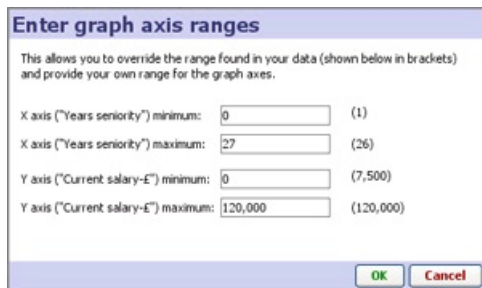
Note: the target universe for a given view is indicated by the colour of the view icon, green means **IN** universe, gold means **BASKET**, etc. For more detail, see [Data Universes](#) [1.62].

Show zoom scrollbars- when ticked, zoom scrollbars are visible even if the display is not zoomed, When unticked, the zoom scrollbars only show when zooming is active.

WARNING: any manual navigation will take the display out of the default **Zoom to fit visible data** mode in favour of the **Zoom to fixed region**. You must manually change the setting in the **Zoom** menu to restore a default view of all the data in the target universe.

Extend axes to show origin- when ticked, the display is altered to make the 0,0 point where the axes cross visible in the display, regardless of the range of values in the fields (columns)

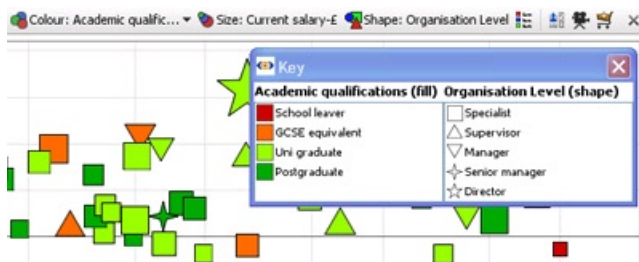
Enter axis ranges- used to define the range to be displayed numerically, based on the maxima and minima reported for the selected fields



Depending on the size settings for the markers, you may need to 'pad' these ranges up or down somewhat to accommodate the marker sizing and achieve the optimal display.

Colour (& Key)

The **Colour** pick-list menu allows you to select the field to be used to colour the markers. If no colour is specified, a single uniform default colour is used (which can be changed (see above)). If you set a fill colour field, the Key display automatically appears showing the values and associated colours for that field (column).



Note: At any time you can change the colours assigned to the values in a given field (column) using **Data > Manage Fields > Configure > Field Options > Change value order, colours and shapes**.

Size

The **Size** options pick list menu allows you to select the field used to calculate relative sizing of the markers in the display, regardless of the shape or the default size setting. The extent of the sizing effect is controlled by the **Size** and **Range sliders** available on the advanced **Marker Options** sub-menu.

Shape (& Key)

The **Shape** options pick list allows you to specify which field (if any) you would like to use to determine the shape of the marker to use on the plot. If you pick a field to shape by, the Key display automatically appears to the right. You can also set the Shape-by field in the Marker options sub-menu, as well as specify the treatment of null values in the plots.

Note: At any time you can change the colours assigned to the values in a given field (column) using **Data > Manage Fields > Configure > Field Options > Change value order, colours and shapes**.

The remaining Graph View Toolbar commands are common to all views and are documented [here](#) [212]

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Time Series

Graph View: Displaying Time Series

This section guides you through using the **Connect markers (time series)** options available in an expandable section of the **View Tools** menu of the Graph View (download the sample file used to illustrate this section [here](#) [216]).

Data Orientation for Time Series

Omniscope manages repeated observations of values over time in vertical columns, rather than horizontal rows often used for time series in spreadsheets. To create a multi-line time series as shown below, first put your data in the following 'vertical' orientation:



	ISIN-Bond Identifier	Date	Country	Price	Yield
570	GR0007833599	16/08/2006	GR	121.085	4.359839
342	GR1107833321	16/08/2006	GR	103.105	4.061524
228	GR1117833333	16/08/2006	GR	107.32	3.855828
798	FR0007833554	16/08/2006	FR	95.905	4.126
684	FR0007833558	16/08/2006	FR	144.835	4.042

In the above example of a time series data layout for Omniscope, we have various bonds, each with an ISIN identifier, and each issued by one of various countries (GR, FR etc.). We also have repeated observations of Price and Yield over time entered vertically down the columns. Each record (row) in the data file is therefore a separate observation of price and yield which are repeated over time 'vertically' in separate rows


Time series data layout in Omniscope requires at least one field (column) with a natural order, such as Date, and one or more values columns 'Price', 'Yield', etc. for repeated observations of values that make up the time series. In addition, to display multiple curves on one graph, there should be a Category field (with less than about 200-250 unique values) referencing each curve to be drawn. In this example, we have many observations, but only 9 unique ISINs (individual bonds) so the curves can be plotted by the Category 'ISIN' reference field as shown in the example below. Don't worry about the apparent repetition in the data values, outside of the Table View, Omniscope will render the duplication invisible to you and the users of your files.

If your data is arranged differently from the example above, (e.g. 'horizontally' with the dates as columns and each cell in the row representing an observation over time) you may want to use the tools available under **Data > De-/Re-Pivot** on the Main Toolbar to transform your data set to the correct 'vertical' orientation in Omniscope. More on [Using De/Re-pivot](#) [138].

Checking your data types: After importing and correcting the layout of your data, go to **Data > Manage Fields** [95] and make sure the Time (here Date) and Observation (here Price, Yield etc.) fields (columns) have the correct data typing. They must be typed Numeric (decimal or integer), or Dates & Times. Also make sure that any fields you want to use to distinguish lines (here the ISIN Bond Identifier number) are declared of type Category. You can convert data types using the **Data > Manage Fields** dialog or by right-clicking the column header in the Table View and choosing **Tools > Convert field data type**.

Prepare the Graph View

Once you are sure that your data layout and field (column) data typing is correct, add a Graph View and configure the axes:

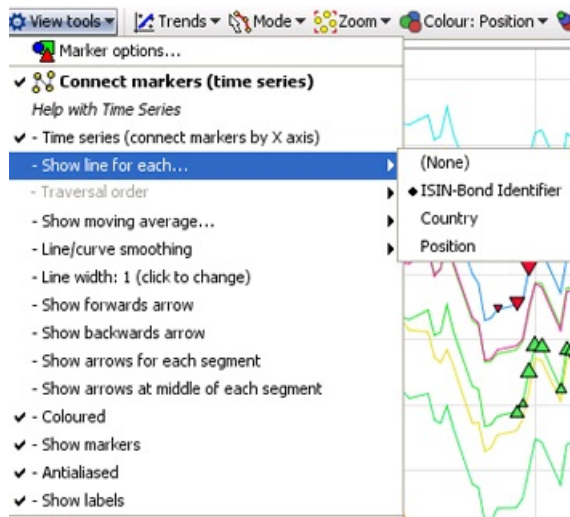
1. Add a Graph View using the  **Add view** button on the Main Toolbar
2. In the Graph View, select a Value (here 'Yield') field for the Y axis
3. In the Graph View, select the Time (here 'Date') field for the X axis

You will see an un-connected scatter plot of markers representing your time series data points. In the **View Tools** drop-down menu, tick **Connect markers (time series)**. A number of new options should appear on an expandable sub-menu below this command on the **View Tools** menu.

WARNING: This option will be unavailable if the Graph View has been configured with **Displaced** (randomly offset) markers. Open the **Marker options** dialog above on the **View Tools** menu and confirm that the **Displaced** option is not ticked.

Connecting markers (time series)

At this point, the display will change from unconnected scatter to connected plot, but with many heavy black lines in a jumble. The expanded sub-menu includes a number of commands used to manage the display of connected markers:



Time series (connect markers by X axis)- when ticked, automatically uses the field (column) selected for the X horizontal axis(here Date) to provide the traversal order, the order in which the dots are connected. This is the most common setting for time series. When this option is ticked, the **Traversal order** option below is greyed-out.

Show a line for each- used to define how many discrete lines will be plotted. Choose the Category field (here ISIN Bond Reference) that defines each set of observations to plot. The black lines will then be replaced by a number of coloured lines corresponding to each of the category values. If your data set does not include observations for multiple categories, leave **Show a line for each** with "(None)" selected to display a single black line.

Traversal Order (showing an omni-directional path) By unticking **Time series (connect markers by X axis)**, you can choose to draw the lines in a different order than dictated by the X axis. If you are plotting data based on criteria other than time, configure the Traversal order field appropriately.

Show moving average: None; Simple & Exponential If you have many data points in each time series, you may wish to try showing a moving average, by choosing Simple, Exponential or other data smoothing options on the sub-menu.

Line/curve smoothing- By default, lines are turned into curves while preserving data points. In other words, curves are drawn between the data points. Depending on your data, this may be inappropriate. You can disable this using the Line/curve smoothing sub-menu. Alternatively, a second form of curve smoothing is provided, which does not pass through the data points. Untick **Curves pass through vertex points** to use this option. Both forms of smoothing can be adjusted for amount of smoothing using the Smoothing amount option.

Line width-By default, lines are shown 2 pixels thick. Use the slider to change this any value between 1 and 25 pixels.

Arrows: Show forward arrow; backward arrow; arrows for each segment; middle of each segment-adds different kinds of directional arrow heads to the line segments displayed

Coloured- By default, if you have multiple lines displayed, these are coloured according to the values in the Category field. You can disable this and show only black lines by deselecting this option.

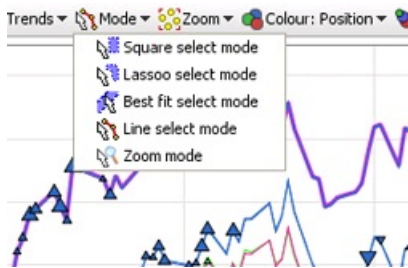
Show markers- Hides or reveals the markers within the plotted lines (to resize markers, see **Marker Options** on the **View Tools** menu

Anti-aliased- Smooths the way the line is displayed

Show labels- By default, text labels will be shown beside each line if you have multiple lines. By de-selecting **Show labels**, these will only be shown as you move the mouse pointer over a line.

Making line selections

When **Connect markers (time series)** is enabled and lines are showing, the **Line select mode** becomes available from the Modes drop-down. Select this mode, and the mouse pointer will change to show that you are in Line select mode. Move the mouse pointer over a line, and it will become highlighted.



There are two ways to select records in Line select mode:

1. **Select by clicking**- Click to select the entire line, all points of which will become highlighted. All underlying records will be selected, which you can confirm by consulting the selection preview blue bar inside the Barometer on the Main Toolbar. Click on another line to select that as well, and watch your selection grow in the Barometer. Click on any selected line again to de-select that line.
2. **Select by dragging**- Click and drag the mouse pointer across a region of the graph. As you drag, a dashed rectangular region will be shown. When the region contains part of a line, that line becomes highlighted. Release the mouse, and all lines intersected by your mouse-drawn rectangle will be selected.

Stuck? Reset the Graph View

If you have made too many configuration changes and can't figure out how to get back, you can reset all settings for the current Graph View, returning to a plain default view with no marker connection settings enabled. From the bottom of the **View Tools** menu, choose **Reset all settings for this Graph view**.

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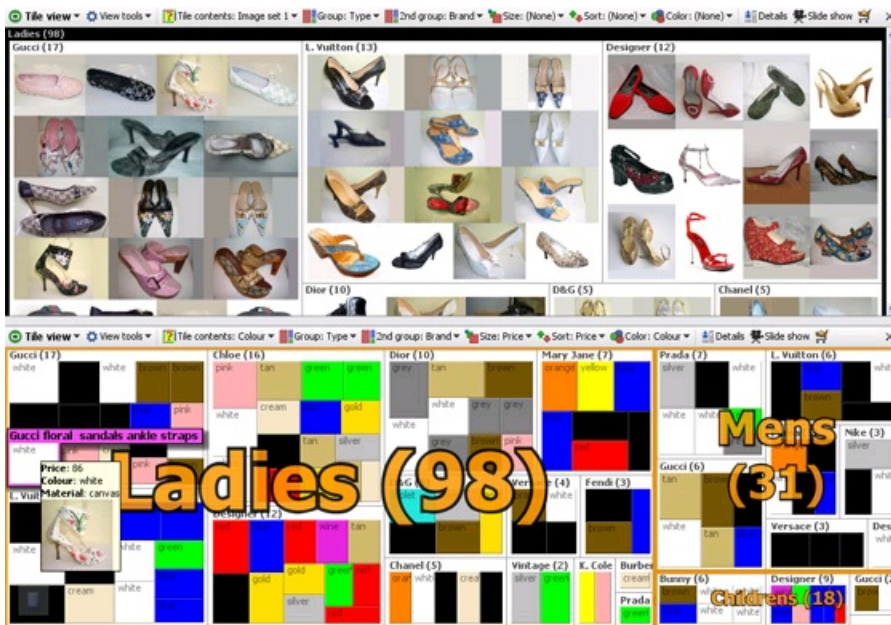
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Tile View

Using the Tile View

The Tile View represents each record in the data set as a rectangular tile, which can be grouped, sized, sorted and coloured to display relationships, anomalies and outliers in the data. Tiles can be either image tiles displaying images associated with each record, or solid tiles displaying text and coloured and sized to represent various attributes of each record. The Tile View can be used as an image browser (see [Open Image Set](#) [217]), but it is also a powerful 'heatmap' (treemap) for representing data visually along multiple dimensions. Moving the mouse over the tiles reveals the title for the record. By default, clicking on the tile selects the corresponding record. Double-clicking on the tile brings up the details display.

The example below shows two Tile Views displaying the same collection of shoes. The Tile View on top is set to display an associated image set (the shoe pictures) as tile contents. Note the vertical scroll bar on the right, as the pictures have been up-sized from the default so that not all will display in the open view. The second Tile View below is showing the same collection of shoes using solid tiles coloured to match the colour of each pair of shoes and sized in relation to price:



Tile View controls

The Tile View is controlled using six configuration options located across the **View Toolbar**:

Tile Contents: this drop-down menu provides the option to display either data values as solid, text containing tiles, or associated image sets as picture tiles. If you select a data field, the value of that field will display inside the tile representing each record. If you select an image set, it will display the name of the image file on tile select/hover unless you change the ungrouped tile title to the contents of another field (see below).

Group: arranges the tiles into groups by any field. In the example above, the shoes are grouped first by Type: Ladies, Mens and Children's.

2nd Group: within the first grouping, arranges the tiles into sub-groups by the value in the specified field. In the example above, shoes are grouped secondarily by Brand/Designer.

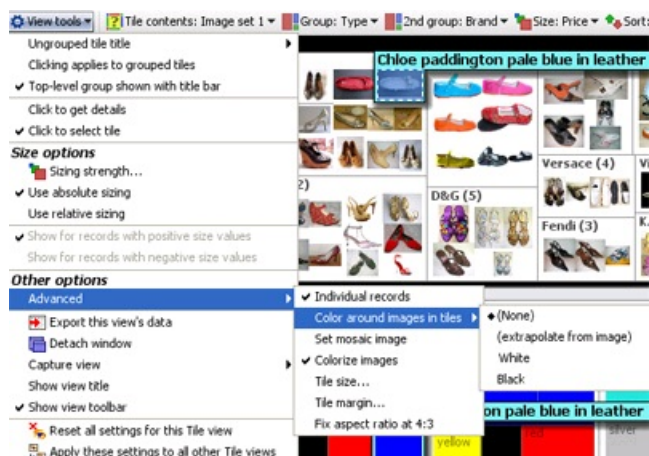
Size: varies the size of each tile in proportion to the value in the specified field. Can be used with both image and solid tiles. In the example above, the solid colour tiles are sized in proportion to Price.

Sort: Sorts the tiles vertically by another field, such as Price.

Colour: determines which field value is used to colour the tile, and can be used with image tiles as a semi-transparent overlay. In the example above, Omniscope recognised and automatically applied the colours to match the all the values in the Shoe Colour field, except for cream, which was set manually. For more on assigning colours to specific values in a given field, see [Data > Manage Fields](#) [95].

Tile View > View Tools options

The Tile View Tools drop-down menu contains several options to change the display and selection behaviour in the view.



Ungrouped tile title- use this option to specify the value to be displayed on hover/selection instead of the value associated with the tile

contents display value. In the example above, the Description text is showing, rather than the file name of the associated image file, which is sometimes not informative.

Clicking applies to grouped tiles- when ticked, this option enables you to select entire groupings, rather than individual tiles.

Top-level group shown with title bar- when ticked, this option displays the field by which the top-level grouping is defined as a nested title as shown in the examples above. When unticked, the title of the primary grouping field is displayed as a large orange text overlay on top of the primary grouped tiles, as shown in the lower Tile View example above.

Click to get details- when ticked, a single left click displays the details window for that record

Click to select tile- when ticked, a single left click selects that record

Size Options

Sizing strength- this option is used to tune the sizing on a scale of -100% through 0 to +100%. The default is 100%, which means that the sizing calculation uses the default. Lowering the value to 0 eliminates all sizing, and further reducing it to -100% inverts the sizing, so that lower values get larger sizing.

Use absolute sizing- this option calculates the sizing of all tiles based on the entire dataset, and keeps them sized this way regardless of the sub-set of records in the open view.

Use relative sizing- this option re-calculates the sizing of the tiles based only on the records in the open view. Use this setting to accentuate small differences and counter the tendency of increasingly similar records to be sized similarly as the range of interest narrows.

Show for records with positive/negative values- the Tile View can be used either with all positive values being displayed, or all negative values being displayed, but not both. Use two open Tile Views like the example above to show both positive and negative values, or use the Bar View.

Advanced menu:

Individual records- ticked by default, if the chosen tile contents field is a number or date, unticking this option will aggregate values into ranges and show the tiles for ranges, rather than the individual values per record.

Show image for first token only- if your file has a tokenised image set (multiple images per record), by default the Tile View will show only the first image associated with the record. Untick this option to show all the images associated with the record.

Colour around images in tiles- the relationship between the height and width (aspect ratio) of pictures inside image sets is often not uniform, or does not match the shape of the Tile View display. Omniscope creates blank spaces between the pictures to fill the gaps. This option controls the colour of the background fill; none, extrapolate from image (estimated from the colours on the edge of the pictures), black or white.

Set mosaic image- used to create an effect in which a large high-contrast picture is re-created using many smaller images related to records in the data set. Cannot be used with grouping, sizing or sorting enabled.

Colourise images- when ticked, allows semi-transparent colour overlays to cover the entire image tile. When unticked, only the border fill space is colourised according to the values of the files selected in **Colour:** on the **View Toolbar**

Tile size- used to over-ride the default tile sizing which tried to ensure that all tiles display in the open Tile View without scrolling. If you increase the tile size, scroll bars will be added to the view as required. Relative or absolute sizing options are not affected.

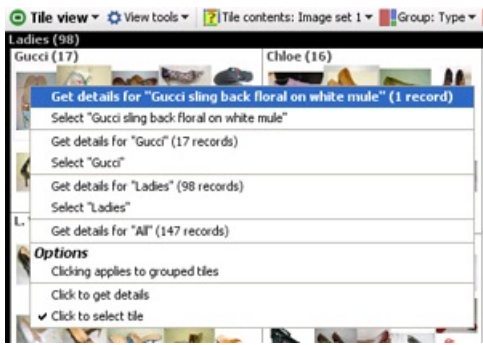
Use grid layout- only shows when sizing is not active. Changes the allocation of space within groupings to make tile size uniform within each group.

Tile margin- used to increase the amount of background space displayed around the edges of the tiles. Colour around images settings are not affected

Fix aspect ratio at 4:3- used to make image collections appear more uniform and minimise distortion of images with 4:3 aspect ratio.

Tile View right-click menu options

Right-clicking on a tile brings up a detailed selection menu where you can specify exactly the records you seek, and change the settings for the view.



The commands available on the right-click menu under Options are the same as those available in the View Tools menu

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Tree View

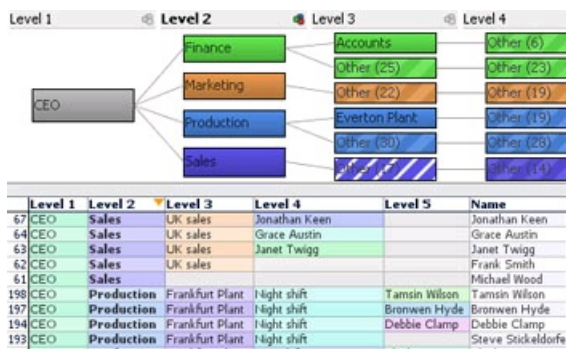
Using the Tree View

The Tree View is used to present and navigate structured, tabular data hierarchically. Two kinds of 'tree' hierarchies can be created and managed in Omniscope: **Pure** and **Comparative**. Pure hierarchies have one unique record at each node (point on the tree) and the child nodes are also unique. Examples of Pure hierarchies are organisation charts and genealogical 'family trees', where each record is a person, or web site 'maps', where each record is a page on the site (to see an example, download the .IOK file version of our site map with Google Analytics data included (coming soon)). Comparative hierarchies have clusters of records at each node, and each record is reproduced in its parent. Almost any data set can be represented as a Comparative hierarchy, including also Pure hierarchies.



Configuring Comparative hierarchies- By default, Omniscope will display data sets as Comparative hierarchies, like the right-hand view in the example above. In the right-hand view, each box (node) represents a groups of employees sharing specified Category values. To create a Comparative hierarchy display like this, it suffices to have some Category fields in the data such as Age, Sex, Location, etc. Select the Category fields you want to display using the **Fields** drop-down menu on the **View Toolbar**. Click on a node (box) to isolate its children, then click on the underlined node name to show the Details pop-up for the record(s) at that node. Notice that you are selecting, rather than filtering, so the Reset command may not be available. To display all nodes (boxes) again, click on the very top level node (box) in the tree, or else use the **Deselect** command on the Main Toolbar.

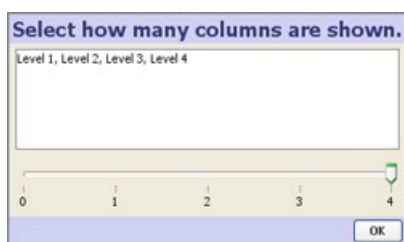
Configuring Pure hierarchies: The left hand view in the example above is a Pure hierarchy, where each box (node) represents a level in the tree relative to all the other employees. To display and navigate a pure hierarchy, like the left-hand view in the example above, requires that your data include a number of cascaded levels, as illustrated in the combined Table and Tree view image below showing the data organised by levels; Level 1, Level 2... to Level 5.



This is a data 'cascade' or 'waterfall', where the first node record (the CEO) is identified by placing the record in the first level 'Level 1' with blanks in all the other levels. The value 'CEO' also appears in Level 1 for all other records too, since they are all children of this node. In Level 2, the Sales Director (Michael Wood) appears once with blanks downstream for himself. All the Sales staff reporting to him also have 'Sales' in Level 2. This 'waterfall' of levels and blanks defines the structure of the Pure hierarchy.

The full data set is in two parts; the input 'Level' fields that determine the structure of the tree (who works for who, who is a parent and who is a child, etc.), and the comparative fields (age, salary, hair colour, birthday etc.) that capture attributes of each person. For data sets that have this dual content, the Tree View can be navigated as a Pure hierarchy, while still permitting querying on comparative attributes. In Pure hierarchy mode, the Tree View can be used most effectively in parallel with other views that can be used to query the comparative attributes, while the Tree View updates to show which individuals share the queried attributes and their position in the structure.

To display a Pure hierarchy in the Tree view, first show only the Level fields in the desired order, then click **Pure Hierarchy** in the **View Tools** drop-down menu on the **View Toolbar**. Omniscope will switch the tree to Pure mode, and there will be only one record in each node. A slider dialog will appear, allowing you to specify how many columns from left to right have been used to define the tree:



At any time, you can change a Pure hierarchy display back to a Comparative hierarchy. To switch back to Pure hierarchy again you must again indicate the extent of the columns that define the structure of the tree using the dialog above. More help configuring data layout for both Pure and Comparative hierarchies is available in this [tutorial file](#) [218].

Tree View controls

Selection is done by clicking on a node (box). When a node is selected, its branch is selected and the box expands to show links to **Show details** pop-ups. All nodes on non-selected branches are faded (unless **AutoHide** is 'On', in which case they are hidden). In Pure mode, selected nodes will exhibit details about one individual, rather than the downstream records, although the selection is still of the branch including all downstream nodes. For example, you can select the whole Finance department branch, but drill down from the top departmental node (box) directly to details about the Finance Director, without displaying the records for the whole department, as would occur in a Comparative hierarchy display.

In Comparative hierarchy, you can click and drag the headers above each node to change the order of the fields, but the order of the levels in Pure hierarchies are fixed in the data and cannot be changed this way. Clicking on the header above a node will colour the tree downstream from that point. When there are too many branches to display, the boxes will group into 'Other' nodes that will expand again whenever there is space to display the individual branches.

Selected nodes/branches can be 'pruned' and restored using power queries with the **Move**, **Keep** and **Reset** commands on the Main Toolbar. Note: When **AutoHide** is on, branches which are not selected are hidden, rather than faded. If you have not yet executed a **Move** or a **Keep** command, all the records are still in the target universe. To display all the nodes/branches in the tree again, you must use the **Deselect**, not the **Reset** command (which may be greyed out) on the Main Toolbar, or click on the very top node of the tree.

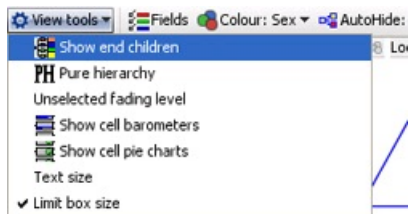
Tree View Toolbar

The Tree View **Toolbar** contains the **View Tools** drop-down menu, the **Fields** drop-down pick list, **Colour** field chooser and the **AutoHide** On/Off option. Other commands available on the **View Toolbar** are common to all views and documented [here](#). [121]

Fields- hide or show additional fields in the tree. In a Comparative hierarchy, you can also use this menu to arrange the display order by dragging fields up or down using the drag handles.

Colour- overrides any header-selected colouring and colours the nodes/branches by any other field chosen from a drop down menu

AutoHide- when 'On', fully hides (rather than fades) non-selected branches when one branch is selected in the tree



Show end children- {deprecated}

Pure/Comparative hierarchy- used to switch between Pure and Comparative hierarchy displays (see above).

Unselected fading level- sets the degree of fading for unselected branches/nodes whenever **AutoHide** is Off.

Show cell barometers- shows/hides an optional display of bar-type indicators within the boxes showing the proportion of records contained on the branches below.



Show cell pie charts- shows/hides an optional display of pie chart indicators within the boxes showing the proportion of records contained on the branches below.

Text size- increases/decreases the size of the text within the nodes (dense trees will benefit from a smaller text size).

Limit box size- only displayed for Comparative hierarchies, allows you to choose between setting all box heights the same, or having upstream boxes taller than downstream. Box width is not affected.

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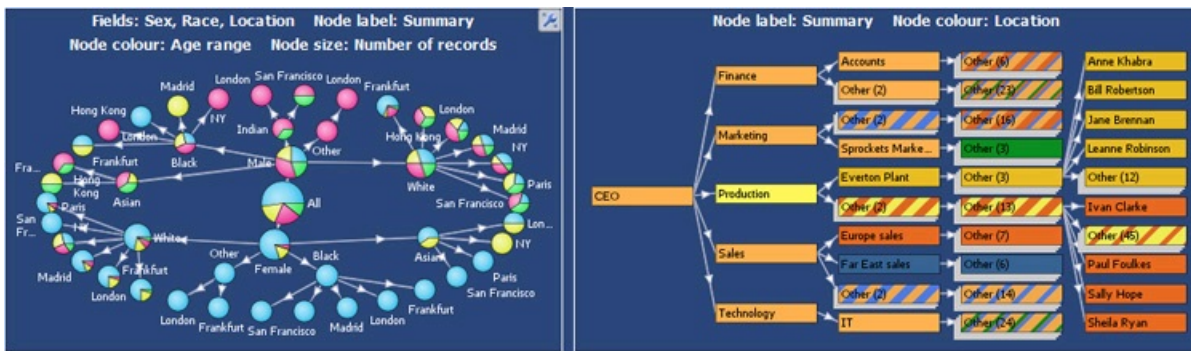
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Network View

Using the Network View

Note: this is a new view in version 2.5; this page is still under development

The Network View creates a virtual network of interconnecting nodes in your machines' memory to help visualise relationships in your dataset. Each node within a network represents a data subset and lines connecting the nodes indicate the relationships between these subsets. You can use one of many inbuilt layout algorithms to position the nodes within the view, or use your mouse to move the node arrangement around to create a custom layout best suited to your data.



Setting the network type

When you first open a new Network View you will be asked to select a network type. The network type determines how the network will be built based on the relationships in your data set. There can be more than one network type used for a given data set using multiple Network Views.

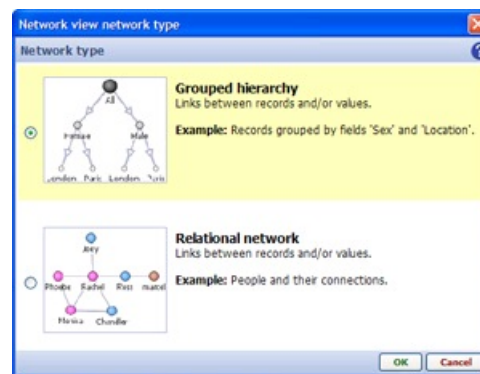
For any given Network View, there are two broad options for specifying the type of network you wish to visualise, Grouped Hierarchies and Relational Networks:

Grouped Hierarchies

A grouped hierarchy can be used to visualise almost any type of data. In a grouped network each node represents a group of records. Once you have selected a grouped hierarchy use the field selector on the Network View toolbar to define the columns in your data set to be included within the network. Each field (column) chosen will define another 'level' within the hierarchy. At each level, the records will be split by the associated field values.

Relational Network

A relational network can be used to represent any dataset where a common relationship exists between the rows. Each row should define a 'key' field and one or more 'linked fields'. The 'key' field should provide a unique identifier for the row entity. For example, for a data set comprised of people, the 'key' field might be the person's name, insurance number or other identifier unique to that particular person. The 'linked' fields create the linkage(s) to another entity, defining the key value for the linked entity, thereby allowing the network to determine which entities are connected.



More detail and examples of configuring network types are given under [choosing your network type](#). [219]

Network View Toolbar

Like the View Toolbar displayed in other views, the Network View Toolbar contains a View Selector, Data Subset Selector and the Aggregate options drop-down menu that function in the same way as they do in other views. The View Tools drop-down contains first the commands specific to the Network View, and then the commands common to all views.



To the right of View Tools drop-down are the options menus specific to the Network View; Appearance options, Node options, Selection Mode options, Zoom options, Fields selector, Layout options, Navigator pop-up and Node Labelling, Colouring, Outlining and Sizing options. These menus are discussed in the sections below.

Appearance Options Dialog

The [Appearance options dialog](#) [220] is immediately to the right of the View Tools drop-down. This is a large, multi-tabbed dialog that allows you to configure the colour, size and shape of the nodes, lines and labels within the network. There are three tabs; Nodes, Lines and Labels, with many options on each tab.

Nodes [221] - options relating to the shape, size, colour and images used to represent the Nodes in your data

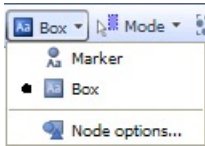
Lines [222] - options relating to the display, thickness, colour, arrows and arrow positioning of the Lines between the Nodes

Labels [223] - options relating to the display of labels, field (column) names, empty values, and the spacing, alignment, fonts and background used

All of the Appearance dialog options on all three tabs are documented [here](#) [220]

Network View Toolbar - Node type options

The Node Type options allows you to choose how nodes in the network will be portrayed. The Network View currently provides two node shape options: markers for which a range of shapes can be selected, and square/rectangular boxes.



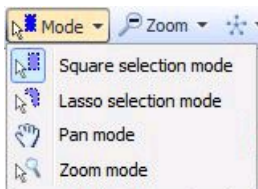
Marker - a marker consists of an arbitrary shape and a label shown adjacent to the marker. The marker option is particularly useful when visualising networks with a large number of nodes.

Box - a box is a rectangular shape for each node. The box label is shown inside the box and is always visible. Box nodes usually require more space than marker nodes and, as such, are more useful when visualising networks with a small number of nodes.

Node Options - use the Appearance options > [Node options](#) [221] tab to select the shape to be used for markers and to set the size and shape of boxes.

Network View Toolbar - mouse Mode options

This menu provides users the option to control the behavior of the mouse when navigating and filtering the network. The mouse mode options in the Network View are the same as those used in other views, such as the Graph and Map Views.



Square selection - allows you to select and move node. To select one or more nodes hold down the left mouse button and drag the mouse across the view panel. A rectangular shape is created as a result of dragging the mouse. All of the nodes that are enclosed within the rectangular shape are included in the selection. To move a node simply move the mouse over the top of the node, hold down the left mouse button and drag the node to the desired location. You can move several nodes at once by selecting the nodes then moving any node from the selection.

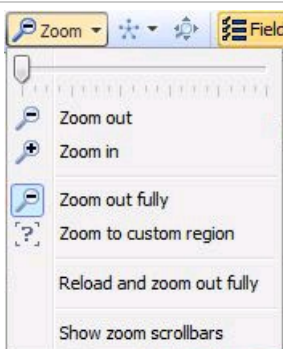
Lasso selection - lasso selection is used in the same way as the square selection; the difference is that a flexible lasso shape is used to manage the selection instead of a rectangle. With a lasso you can move the mouse to create a free-form shape, thereby allowing for more complex selections of one or more free-form areas.

Pan - The pan mode allows you to navigate the network by moving the screen to frame the desired area. Once you select the pan mode a 'hand' icon will appear. Hold down the left mouse button and drag the mouse to move the window in the corresponding direction. Whilst using the pan mode you can use the mouse wheel to zoom in and out of the network.

Zoom - The zoom mode allows you to zoom in or zoom out of the current network. To zoom to a specific area hold down the left mouse button and drag the mouse to create a rectangle highlighting the area to zoom to. To zoom in or out of the map hold down the right mouse button and drag the mouse up (to zoom in) or down (to zoom out).

Network View Toolbar - Zoom options

Zoom options in the Network View are very similar to those provided in the Graph and Map Views. The slider and the zoom buttons allow you to increase or decrease the magnification level. The following additional controls are provided:



Zoom out fully - Zooms the graph out to the full extent. This menu item is highlighted whenever the network is zoomed out fully.

Zoom to custom region - Changes the interaction mode to the 'Zoom' mode. This menu item is highlighted whenever the network is zoomed to a custom magnification.

Reload and zoom out fully - Reloads the entire graph, applies the current layout algorithm and zooms out to the full extent.

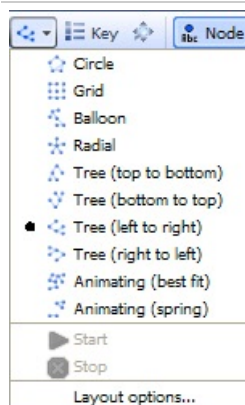
Show zoom scrollbars - Indicates whether the zoom scrollbars are displayed. The zoom scrollbars are shown to the right and at the bottom of the view. They allow you to both zoom and pan the view window.

Network View Toolbar Fields Picker

The Fields chooser allows you to define which fields (columns) are displayed or hidden, and functions just as it does in most other Omniscope Views

Network View Toolbar - Layout selection

Specifying Layout Options allows you to apply a pre-defined layout algorithm to the current network. The position of the Nodes within the network is determined according to the parameters of the chosen layout algorithm. The Network View currently provides seven layout algorithms:



For examples of each, see Layout Examples

Circle - In the circle layout all of the nodes are evenly spaced across the edge of a circle.

Grid - In the grid layout the nodes are placed across the view with an even horizontal and vertical spacing. This gives the impression that the nodes are the corners of a grid.

Balloon - In the balloon layout the child nodes are placed around the outside of the parent. This pattern is repeated for the entire graph.

Radial - The radial layout consists of several 'layers' of nodes. Each layer is represented as a circle; the innermost circle contains the root nodes, and each subsequent circle contains nodes from the next level of the hierarchy.

Tree - The tree layout determines the positions of the nodes based on a classic network tree; nodes at the root of the hierarchy appear at the top of the tree and their descendents are placed further down. There are four orientation options.

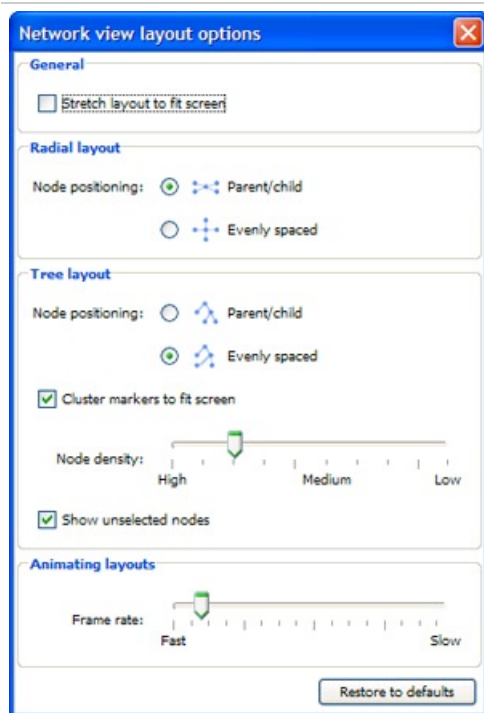
Best fit - (animated) The best fit layout uses a similar algorithm to the spring layout; however it is designed to run for an arbitrary period of time and then stop. The Best fit layout algorithm is generally better suited to larger volumes of data than the Spring layout.

Spring - (animated) The spring layout attempts to find the optimal position of the nodes based on their connection to other nodes. It may be best to describe the spring layout by asking you to imagine that all of the links between nodes are actually springs. If nodes are reconnected they will be pulled together, with the 'pull' between the nodes being greater the further apart they are. The spring algorithm is better suited to smaller volumes of data.

Layout options - accesses the Layout options dialog (see below)

Network View Toolbar - Layout options dialog

Under the Layout selection drop-down is a link to the Layout options dialog, which allows you to modify the behaviour of the various layout algorithms.



General: Stretch layout to fit screen - If this option is checked all of the nodes in the layout will be stretched out so that the maximum amount of screen space is used. Stretching is done by default in some layouts (Tree, Grid), and this preference will have no effect if one of these layouts is in use. A good example of the effect changing this preference can have is to create a network and select the 'Circle' layout. Now select 'Stretch layout to fit screen'. You should see the circle of nodes stretch out to form an ellipse.

Radial layout: Node positioning - defines how the node position is determined when the radial layout is in use:

- **Parent/Child** - children are grouped together underneath the parent node. This makes the network hierarchy much clearer, but may mean a large number of nodes are overlapping.
- **Evenly spaced** - nodes in each level of the hierarchy are evenly spaced out.

Tree layout: Node positioning. Same as above.

Cluster markers to fit screen - when checked, nodes too close together are 'clustered' to create a single node. Clustering can only be applied if the network is hierarchical, i.e. it has a root node, and the root has zero or more child nodes that in turn have zero or more child nodes...with each node having a single parent node.

Node density - determines how close nodes have to be to each other before they are clustered. If the density is set to 'High' then the space between each node is reduced, therefore allowing for a high number of nodes. If the density is set to 'Low' then the space between each node is increased, equating to a small number of nodes.

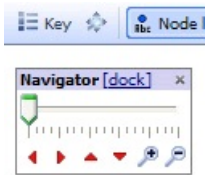
Show unselected nodes - determines whether nodes which have not been selected are shown.

Animating layouts: Frame rate - The Network View currently provides two animated layouts: Spring and Best fit. Use this slider to

determine how fast the layouts run. If your network is large and complex, setting a fast speed could have a detrimental effect on performance.

Network View Toolbar - Navigator

Click on the 'Navigator' button to open a small network navigation window. The navigator window will be docked on the right hand side of the view however it can be dragged and placed anywhere on screen.



Zoom slider - Moving the zoom slider or clicking on the Zoom In or Zoom out buttons allows you to increase or decrease the magnification.

Navigation arrows - Clicking on the red navigation buttons allow you to shift the view in the corresponding direction

Zoom magnifiers -

Network View Toolbar - Node label

The Node Label drop-down allows you to determine how the label attached to each node is constructed.

The dropdown provides three types of measure:

- Number of records - displays the number of records associated with the node.
- Summary - displays summary details associated with the node.
- Field name - constructs the label based on the value of all the records for the selected field. If the field is numeric and there is more than one value the label value will be determined by applying the function specified in the 'Number field function' sub-menu. If the field is textual and there is more than one value the field value will not be shown.

You can select as many of these measures as you want. So you could choose to show 'Number of records' and 3 fields. The order these are shown is determined by the order they are shown in the drop-down. You can change the order by clicking and dragging the measure to the preferred position in the list.

Network View Toolbar - Node colour

The Node Colour drop-down menu allows you to specify the measure used to determine how Node colouring is calculated.

There are currently three types of measure:

- None - the default option, no measure is used, instead node colour is the base colour setting as specified in the Appearance Options dialog.
- Number of records - the node colour is determined by the number of records represented by the node. If a node represents a large number of records then the colour of the node will be close to the colour specified at the higher end of the graded colour scheme.
- Field name - you can choose to colour nodes by a particular field inside the dataset. If the field is numeric and there is more than one value the colour of the node is determined by applying a function to all of the values. You can choose which function to use by using the 'Function' sub-menu in the drop-down. The 'Function' sub-menu is only visible when a numeric field is selected. If the field is textual and there is more than one value either multi-colour lines or a pie-chart are used to show the values for the selected field. You can choose the fill type by using the 'Fill type' sub-menu in the drop-down. The 'Fill type' sub-menu is only visible when a numeric field is selected.

Network View Toolbar - Node outline

The node outline drop-down menu allows you to specify the measure used to determine how the node outline is calculated. The Node outline option can be used in exactly the same way as the Node colour menu. You might find it easier to identify the node colour outline by increasing the outline thickness. You can modify the outline thickness using the Node options dialog.

Network View Toolbar - Node size

The node size drop-down menu allows you to specify the measure used to determine the size of a node in relation to the other nodes on screen.

There are currently three types of measure:

- Node - the default option. No measure is used, instead the node size is the base size setting as specified in the Appearance options dialog.

- Number of records - the node size is determined by the number of records represented by the node. If a node represents a large number of records then the node will appear larger.
- Field name - you can choose to size nodes based on a particular numeric field in the dataset. The larger the value for the selected field, the larger the node. If the node represents more than one value then the value used to determine the size is calculated by applying the function selected in the 'Function' sub-menu.

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Network Types

Selecting Network Type

What sort of network(s) are in my data?

The Network View can depict many types of relationships within any given data set. You can have as many Network Views in a file as you like, and multiple Network Views per tab. But how to decide which types of Network View best suits your data set?

Choosing and configuring network types...

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Layout Examples

Network View Layout Examples

Choosing the best layout for your data and users

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Appearance Options

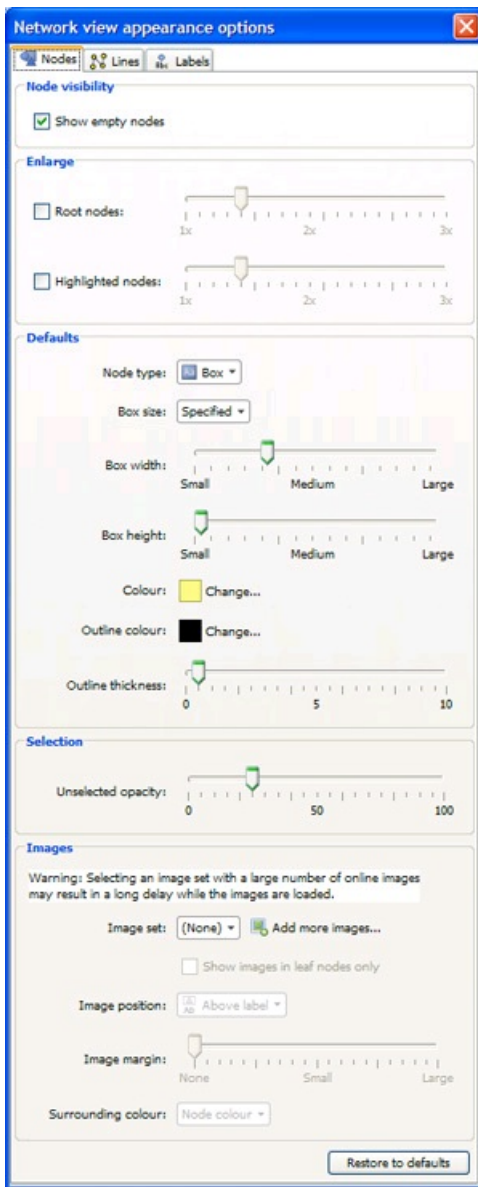
Network View - Appearance Options

Configuring Nodes, Lines and Labeling

The Network View Appearance options dialog has three tabs; Nodes, Lines and Labels

Nodes

The Nodes tab contains options to configure almost all aspects of how Nodes are displayed, including display of images to represent Nodes.



Node Visibility: untick box to hide empty nodes in the display

Enlarge: set the enlargement scales for both Root Nodes and Highlighted Nodes

Defaults:

Node type - choose either round 'Marker' or square 'Box'

Marker options: (only shown when Node Type is set to 'Marker')

- **Marker size** - allows you to control the size of the Markers representing Nodes in a given Network View. Smaller sizes increase the number of nodes displayed on screen. Larger sizes are useful when applying measures to the Markers (colour, label, outline and size) as it makes it easier to identify the grading on each measure value.
- **Shape** - select from various different Marker shapes.

Box options: (only shown when Node Type is set to 'Box')

- **Box size** - Allows you to specify the sizing policy applied to boxes within the network. Choose either
 - 'Specified' - size of the box is determined by the box width and box height sliders below.
 - 'Fit label' - size of the box is determined by the size of the label inside the box.

Colour - select the node background colour.

Outline colour - defines the node outline colour. You may find it useful to adjust the outline thickness when setting this value in order to make your colour selection more prominent.

Outline thickness - defines the thickness, in pixels, of the node outline.

Selection: Unselected opacity When you make a Selection within the Network View all of the selected Nodes appear blue whilst the unselected Nodes appear slightly faded. The unselected opacity slider allows you to define the fading level for unselected Node. A value of '0' means the nodes don't fade at all whilst a value of '100' means the Node disappears when de-selected.

Images:

Image set - Allows you to define an image set and display images from that set in the corresponding nodes on the network.

Show images in leaf nodes only - Defines whether the images are displayed only in the end nodes within a hierarchy

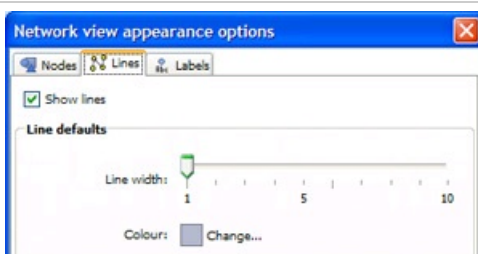
Image position -

Image margin - Allows you to define the gap between the edge of the node and the image inside.

- *Extrapobte from image.* Uses the colour of the image edge.
- *Node colour.* Uses the colour of the node.

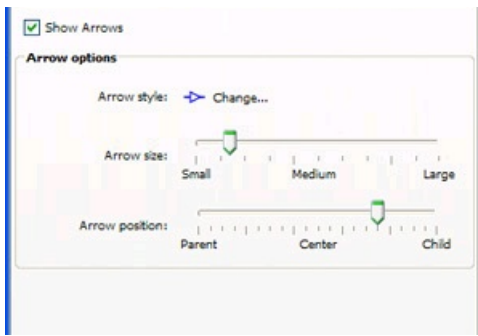
Surrounding colour - Allows you to define the colour surrounding the image. The dropdown provides you with two options:

Lines Options



Show lines -

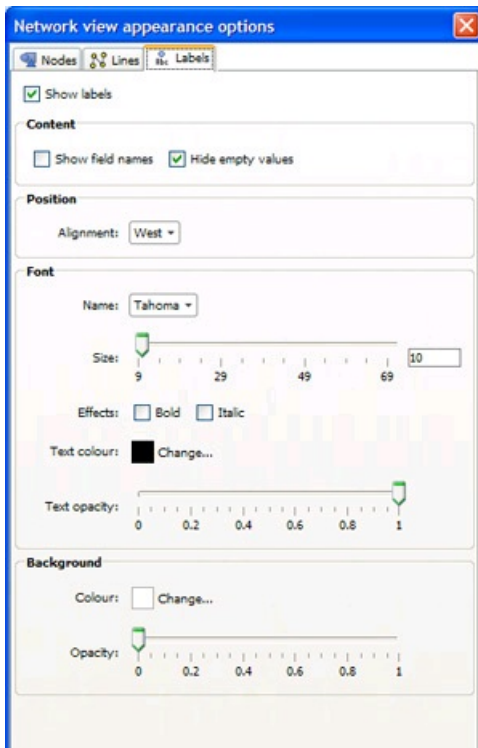
- **Show lines.** Determines whether lines will be displayed.
- **Line defaults : Line width.** The thickness of the line.
- **Line defaults : Colour.** The colour of the line.
- **Show arrows.** Determines whether the line arrow will be displayed.
- **Arrow options : Arrow style.** Allows you to define the arrow head style.



- **Arrow options : Arrow size.** The size of the arrow head.
- **Arrow options : Arrow position.** The position of the arrow head in relation to the parent and child nodes.

Label Options

Show labels -



- **Show labels.** Determines whether labels will be displayed.
- **Content : Show field names.** You can show field values by clicking on the node and line label measure dropdown in the toolbar. Once you have selected the fields you wish to view this option determines whether the field name will be shown alongside the field value.
- **Content : Hide empty values.** After using the node and line measure dropdowns in the view toolbar to configure the label fields this option determines whether fields with empty values are still shown.
- **Position : Label proximity.** This option is only available when the 'marker' node type is selected. In a network of markers the label positioning is determined by the space available next to the marker. If no space is available the label is not shown. The label proximity slider determines how close labels can be placed to adjacent markers. If the slider is set to a low value more labels can be shown, however it may be difficult to determine which labels belong to which markers. If the slider is set to a high value then fewer labels will be shown thereby making it easier to identify the node associated with any visible label.
- **Position : Alignment.** This option is only available when the 'box' node type is selected. Determines the location of the label inside of the box.
- **Font : Name.** The label font face name.
- **Font : Size.** The font size.
- **Font : Effects.** Enables or disables the bold and italic font effects.
- **Font : Text colour.** The label foreground colour.
- **Font : Text opacity.** The text transparency value. Selecting a low value by moving the slider to the left makes the text more transparent, selecting a high value by moving the slider to the right increases the opacity and therefore makes the text clearer.
- **Background : Colour.** The label background colour.
- **Background : Opacity.** The label background transparency value.

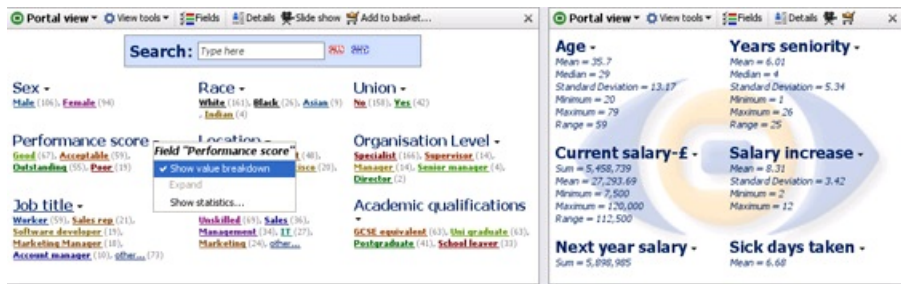
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Portal View

Using the Portal View

The Portal View summarises most aspects of the data set (it can search but does not display text fields) as either field (column) value breakdowns (left example below), or statistics (right example below), or a mix of both. The optional search box works like a search engine across the entire data set, and the dynamically generated range breakdowns can be selected for use in power queries using the Move, Keep and Reset commands.



Portal View Controls

The Portal View features a global **Search Box** used to select text string values from anywhere in the data set. This is equivalent to the 'Search all' filter device available on the Side Bars. Selection is done by typing into the keyword box (hits are shown in the preview counter on the far right as each character is typed. Multiple words can be entered and the 'and/or' relationship set using the 'ALL' and 'ANY' buttons to the right of the text search box ('ALL' is the default). Note: there is not currently an 'EXACT' option for use with numbers, etc.

The **Search Box** can be used in conjunction with the individual fields in the Portal View by entering text in the **Search Box** and selecting one or more value ranges within the view. The keyword 'hits' will be displayed in the Search Box while the overall number of hits (text and other values) will be shown by the blue preview bar inside the green barometer on the Main Toolbar. Note: the blue preview bar is only visible when selections are made. Any combination of text string input and multiple field range criteria can be selected and used to execute power queries using the Move and Keep commands on the Main Toolbar. The **Search Box** can also be used very effectively in conjunction with other views, such as the Table or Details Views set to display the **SELECTION** universe.

Field Settings menu- each numeric, date or category field displayed has a small black downward pointing arrow that reveals a Portal View field display configuration menu with 3 options:

Show value breakdown- displays selectable dynamic ranges of the values in the field. Each field displays up to five categories, ranges, or intervals as a default. Additional categories are grouped into a category named 'Other'. Numerical fields are broken into intervals necessary to make five groups of records. The fields containing collapsed categories are underlined. Click on any underlined field title to expand that field and see all categories or smaller numerical intervals. Click again to collapse it again.

Expand- expands the number of ranges displayed. If **Show value breakdown** is not selected, this option is greyed-out.

Show statistics- displays a pick list of statistics available for each field (column). Tick those you want to display, with or without the value ranges:

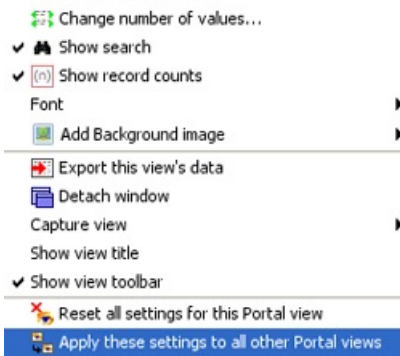


Portal View Toolbar

The Portal **View tools** drop-down menu features a number of options to configure the display. The **Fields** menu adjacent displays a pick and ordering list used to hide or show fields. Click and drag on the hands to change the order of the fields in the view.



Colour values- when ticked (the default), colours the values in line with other view colouring. Untick to remove colouring.



Number of columns- changes the number of columns in which the field ranges are displayed. The default is two columns.

- ▶ **Change number of values**- changes how many categories or numerical ranges or intervals are shown under each field title when collapsed. The default is five categories/ranges (intervals) as shown above.

Show search- shows or hides the global Search Box

Show record counts- shows or hides the number of records per category or interval in each field. The default is to show the counts.

Font- allows you to select font name, face and size (not colour).

Add background image- enables you to add a faded image to the backdrop of the view. Same as the option provided in other views and documented in the [Page Menu](#) [91] commands.

The other options on the Portal View Toolbar, **Show Details**, **Slide show** and **Add to Basket** are common to all views and documented in the section on [View Toolbar](#). [121]

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Map View

Using the Map View

The Map View is a powerful and flexible option for displaying spatial data at any level; world, country, city or even exhibition or office floor plans or sports playing fields. Omniscope embeds its own multi-layer vector maps that let you choose to display various geographic map layers (roads, mountains, sea depths, etc.). Omniscope comes with the world map shown below, but you can also download hundreds of other free country, regional and city maps from the [Maps Library](#) [141] for embedding in your Omniscope .IOM/.IOK files.



Using any activated edition of Omniscope, use the **File > Open map > Download maps** option to install and display new maps with blank data sets, which you can either ignore or start populating with your data. To load a scanned image or photograph for use as a backdrop, use the **File > Open map > Browse for image or map file** command.

Note: Omniscope currently imports Image (.JPG, .BMP, .GIF, .PNG depending on your Java version) plus Visokio's own .VEC, .MAP and .ILF file formats for use as coordinate backdrops in the Map View. If you save an .IOK file containing embedded image map(s), Omniscope will bundle them into the .IOK file so that anyone with the free Viewer will see the file with the correct map(s).

Each record (row) in your data sets can be associated with a marker displayed on the map, as long as the two designated map coordinate columns contain non-null, valid decimal coordinates. Using **Place marker mode**, you can add coordinates to your data set by opening a map view (or Google Maps), zooming in to show enough detail, then pointing at the location of each record with your mouse. More on [Placing Markers](#) [143]...

Details for each record are available by clicking on the marker representing the record or aggregated group of records. Note: if the Details view is not open, groups of four records or less will be displayed as a cascade of individual details windows, one per record, while markers aggregating five or more records will display the pop-up **Show details** table window showing the selected records with links to display individual details.

Map View Toolbar

The Map View Toolbar includes the **View Tools** drop-down menu, an option to switch back and forth between vector and Google maps, a **Map (Map Type for Google)** selector, a **Layer** pick list, choice of mouse **Mode** and **Zoom** navigational controls, plus field (column) pick lists to set **Colour, Sizing, Shape** and **Label** options.



The Map View also features a pop-up **Navigator** overview mini-window, plus the **Show Details, Slide Show, Add to Basket** and **[X] Close View** options common to all views and documented [here](#). [121]

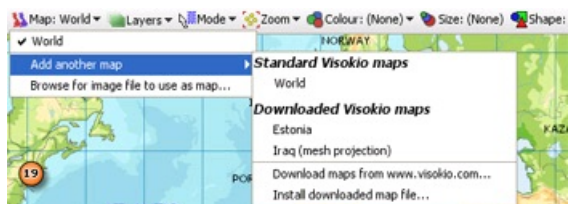
Switch to Google/Vector Maps- to the right of the View Tools drop-down menu this option allows you to switch from the default vector map to a Google Map view which uses the same coordinate columns. When you are using Google Maps, this option label changes to **Switch to Vector Map**.

Suggestion: Placing, moving and correcting coordinates using the mouse in Place Marker Mode using Google Maps works well. However, if you are manually editing, deleting or cutting and pasting coordinate data with an open Google Maps display, make sure that the Zoom setting is NOT **Zoom to fit visible data**. If you are scrubbing and filtering data and find your Google Map display updating slowly or not displaying properly, switching to the corresponding vector map, then switching back will usually restore the display in Google Maps.

A tutorial on navigating in the Map View is available [here](#). [147]

Map View Toolbar- Map selector for vector maps

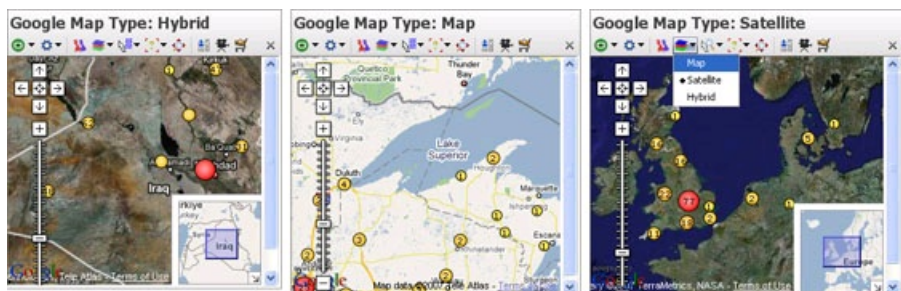
The **Map** selector is used to change the map in the view, or add a new vector map to the file. The drop-down menu shows the list of maps already configured in the file, with the currently displaying map ticked. Below that is the option to add another map from those already downloaded onto your machine, or by downloading additional maps from the [Maps Library](#) [141]. If you select to add a new, unconfigured map to the file, the **Configure Map** wizard will appear (see above) so that you can define a title and specify the coordinate fields (columns) to be used with the new map.



There is also an option to import your own map as an image in formats supported by your version of Java, plus Visokio Map formats (.VEC,.MAP,.ILF). Click on **Browse for image file to use as a map**, then browse to and select any image you choose. It will appear in the **Map** selector drop-down map listing menu as part of your growing collection. You can use any kind of photograph or scanned image as a Map View backdrop for placing data points. Typical examples include sporting fields, exhibition hall, office or factory floor plan layouts, banquet seating arrangements etc.

Map View Toolbar- Map Type selector for Google Maps

When displaying a Google Maps as a backdrop, the Map selector becomes Map Type, and allows you to choose from 3 options for the Google Map display: **Map, Satellite** and **Hybrid**:



Choose one or more Google Map types that best suits the purpose of each display.

Map View Toolbar- Layers

The default map is a Mercator projection world map with physical and political information in a series of configurable layers. With the default world map open, click 'Layers' to choose what to display. Click 'Physical' to hide or show physical altitudes and reveal the 'Political' layer. Tick or

untick layers until you have the map you want.



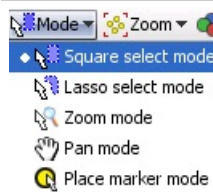




Note: some layers, such as capital, major and minor cities, will not be visible when zoomed out. Omniscope shows map detail progressively, only when the view is close enough to make sense of it. As you zoom in, more and more detail will appear, revealing the layers you have chosen.

If you would like to develop your own layers for distribution in .IOK files for display on vector or Google Maps, please [contact us](#). [178]

Map View Toolbar- Mode selector

Map View selection **Mode** options are very similar to those used in the [Graph View](#) [114], including mouse-defined **Square select** and **Lasso** free-form selection as well as Zooming, and Panning navigational modes.

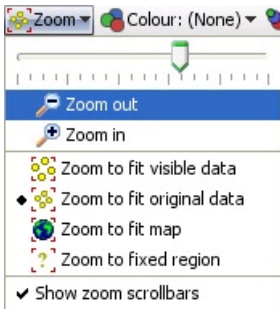
The **Mode** options menu enables you to choose how to navigate and select points and groups of points on the display. You can define one or more selection areas/shapes in order to exclude or isolate records using  **Move** and  **Keep** power query commands on the Main Toolbar. You can also use the mouse in navigational mode to define and explore specific zones in the display in maximum detail.

	Square select mode - the mouse defines one or more rectangular selection area(s)
	Lasso select mode - (not available in Google Maps) the mouse defines one or more free-form shaped selection area(s)
	Zoom mode - a navigational mode, the mouse defines a rectangular zone and the display zooms to show only that area. Holding the right mouse button down in zoom mode and moving the mouse up and down will zoom in and out continuously
	Pan mode - (only visible when zoomed in manually) a navigational mode, the mouse 'hand' cursor is used to 'grab' the screen and move it to frame the desired area.
	

Place Marker mode- used to place markers for selected records, thereby generating values for the coordinate fields in the data. To do this, open a Table View and select a record with no coordinates/map marker by clicking the row header (or multiple records using the Shift or CTRL keys). Once selected, go to the open Map View, and with **Mode** set to **Place marker mode**, click on the point you want to locate the selected records on the map. In the case of the Visokio and Google world maps, the correct decimal longitude and latitude values will be placed in the coordinates columns. In the case of other maps, the coordinates will be relative to the specific map. For more detail, see [Placing Markers](#) [143].

Map View Toolbar- Zoom selector

The Map View Toolbar **Zoom** selector is also very similar to that used in the Graph View. The slider and Zoom out or Zoom in controls increase or reduce the magnification, changing the area and amount of detail/layers displayed.



Zoom to fit:

Visible data- map automatically zooms to the level required to just show all data points in the target universe.

Original data- map zooms to the level required to show the full range of data points in the data set.

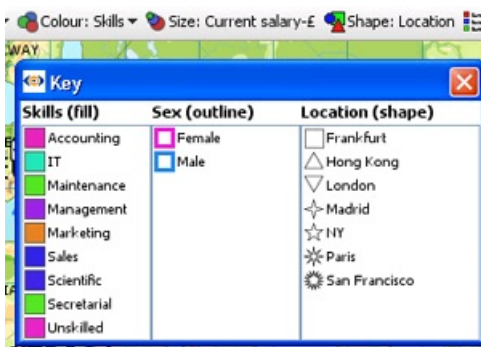
Map- displays adjust to show the full extent of the map, regardless of the data selected or remaining in the target universe

Zoom to fixed region- allows you to define a region of interest with the mouse, to which the map display will revert, regardless of the data points selected or remaining in the target universe.

Show zoom scroll bars- when ticked, displays the zoom scroll bars bottom and sides at all times, even when zooming is not active.

Map View Toolbar- Colour, Size and Shape menus (& Key)

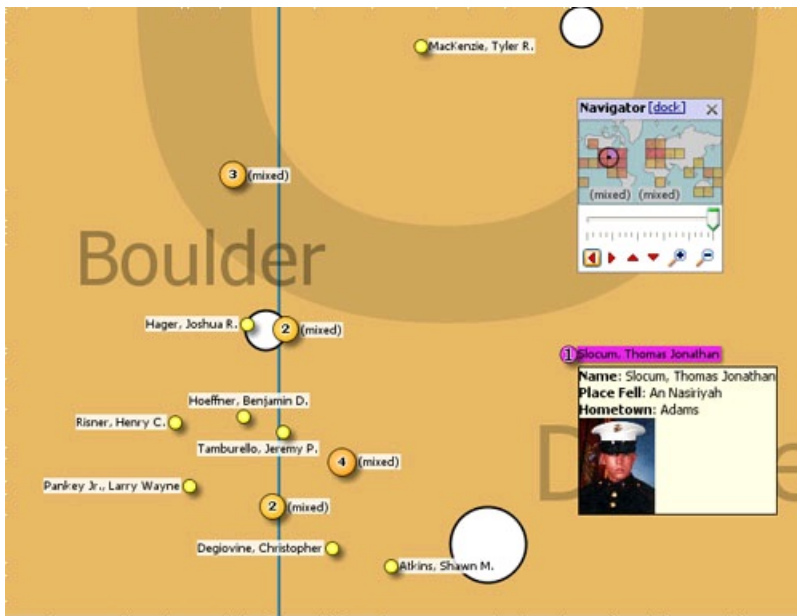
Marker **Colour**, **Size** and **Shape** options are all defined with field pick lists available under each of these Toolbar options. If any of these options (or the **Marker outline colour by** option available in Marker options-see above) are set, the **Key** display also appears to help the reader relate the appearance of each marker to the underlying data.



NOTE: You set the colour and shape associated with each different field (column) values using **Data > Manage Fields** available from the Main Toolbar. The intensity of the relative sizing effect is controlled with the **Size** and **Range** sliders in the **Marker options** Advanced menu (see above).

Map View Toolbar- Labelling (vector maps only)

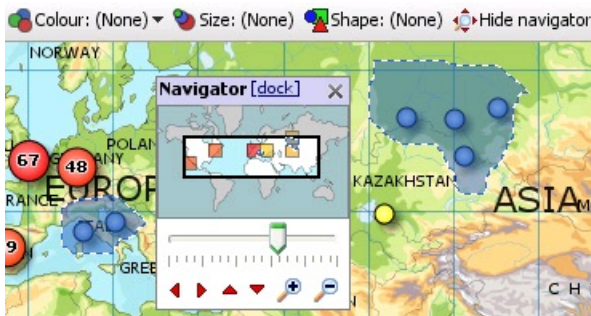
The **Label** drop-down selector enables you to choose the field to display next to all unaggregated markers. Aggregated markers show the label (mixed) until zooming or selection results in disaggregation to a single record.



Labelling is displayed for all unaggregated records. Selecting a record can also trigger the display of Tooltips, which can include associated images. Tooltips are configured for all views using **Settings > Tooltips > Fields** from the Main Toolbar.

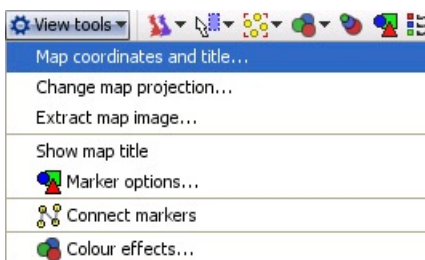
Map View Toolbar- Navigator mini-view window

Click the 'Navigator' button to show a small map navigation and view control window that can be placed anywhere on screen. Moving the zooming slider, or clicking the (+) Zoom in, or (-) Zoom out icons increases or decreases the magnification, which reduces or increases the coverage area shown in the thumbnail map framing window. Clicking the red vertical and horizontal arrows in the Navigator moves the small framing window around the thumbnail map. The thumbnail map in the Navigator shows a heat map of record density, and selected areas in blue. Click and drag the red thumbnail map framing window in to move around the main map.

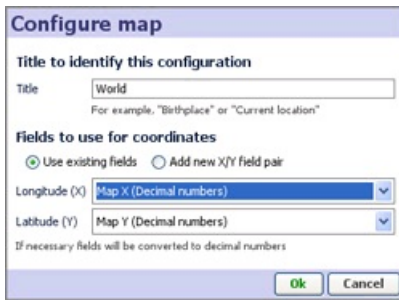


Map View Tools

The Map View Tools drop-down menu provides options to define maps and control the display of markers.



Map coordinates and title- displays the Configure Map dialog used to specify the title and coordinate fields (columns) to be used to place records on this particular map. With the correct map displayed in the view, select the fields to use as coordinates.

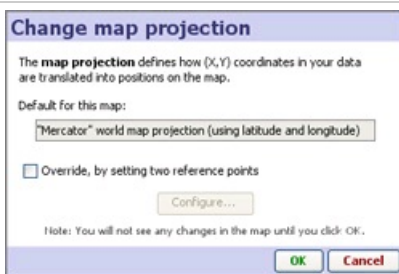


Use existing fields- if your data sets already have columns of decimal coordinates, fully-populated or not. Most Visokio maps, including the default World map, support decimal numeric values available free from Google Earth.

Add new X/Y field pair- use this option to add two new blank fields (columns) that will specify the coordinates for the map displayed. If you use manual placement (see below), Omniscope will write the values for each record in these fields, which you name in the dialog.

For more detail on map coordinate systems, and creating/transforming coordinate systems, see the Knowledge Base section on [Maps & Coordinates](#). [144]

Change map projection- (not shown with Google Maps) used to create or refine coordinate systems for maps/backdrops that do not conform to the default Mercator projection decimal latitude and longitude system. This is most commonly the case with scanned images like floor plans, sports fields, some city and road maps, etc.



Override, by setting two reference points- ticking this option launches the **Change Map Projection** wizard to define or refine the coordinate mapping. The wizard displays the map, with three advanced options to define or re-calibrate the mapping by 1) positioning corner reference points of known location, or 2) distributing the range across the entire map, or 3) using one-to-one mapping of pixels to coordinates (the default).

For more detail on using these 3 options to determine the display of your data on a given map or image, see the Knowledge Base section on [Changing Projections](#) [224].

Extract map image- (not available with Google Maps) allows you to export a copy of the embedded vector map as an image file

Show map title- (not available with Google Maps) when ticked, displays the map title(s) in the upper left the map, in orange font as shown in the examples at the top of the page.

Marker options- clicking launches the **Marker options** dialog, very similar to that used in the [Graph View](#) [114]. This dialog enables you to configure how markers on displayed on the maps/scanned images you are using as backdrops for your data.



Heat Map- (not available with Google Maps) shows density plot of records on a grid. Useful for plotting very large numbers of records that overlap a great deal.

Aggregated- (default for data sets over 100 records) combines overlapping markers into larger markers showing the number of records aggregated. Useful when you have overlapping records and need to see the density, similar to the Heat Map. Note: Display on the markers of sums and other functions calculated from fields in the records aggregated is not currently supported.

Displaced- (not available with Google Maps) used if you have many exactly overlapping markers and want to convey a visual representation of the density of underlying records. When ticked, the markers will be slightly offset to show a dense cloud, rather than overlapping exactly despite identical values.

Displacement- (not available with Google Maps) changes the amount of displacement vertically and horizontally to improve access to data

points for selection and linking.

Size slider- changes the absolute scale for marker sizing to increase or decrease all marker sizes

Range slider- (greyed-out unless the **Size** option is set to a field) changes the magnitude of relative sizing (see **Size** below)

Shape by: (not available with Google Maps) selects the field (column) whose values will determine the shapes plotted (same as **Shape:** toolbar pick list below) with additional options to specify the display of markers of records which are null (blank, not zero) in the selected **Shape by** field. In Simple mode, the Default shape to use when no **Shape-by** field has been chosen can be set.

Default shape/colour- selects the default colour of markers when no other colouring options are set.

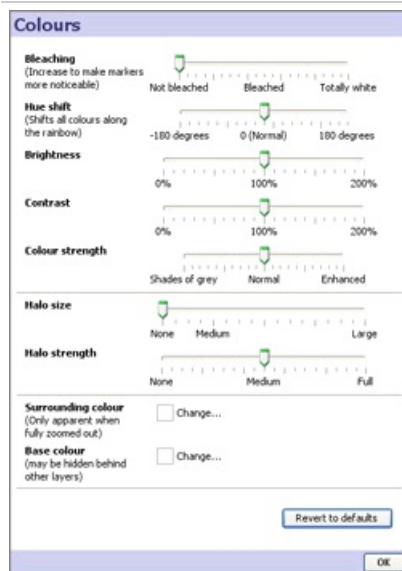
Outline colour by: (not available with Google Maps) adds an outline of another colour, based on another field. For example, if 'Sex' is used, this command would put a blue outline on the dots representing Males and a pink outline on the dots representing Females- assuming that you have assigned the those colours to the values 'Male' and 'Female'.

Hover plot- (not available with Google Maps) sets a pop-up display of either a pie or a bar chart whenever the user hovers on a marker, aggregated or not. When set, you can select the field (column) to be charted using the pick list at right, which is otherwise greyed-out.

Marker link- (not available with Google Maps) selects a link to display when markers are clicked (one record only). Pick (None), Details, or one of the links already configured in the file using the **Settings > Links** wizard accessed from the Main Toolbar.

Connect markers- (not available with Google Maps) similar to the option available in the [Graph View](#) [114], opens and expandable sub-menu. Use of these options with the Map View is documented [here](#). [225]

Colour Effects- (not available with Google Maps) launches an extensive menu of options to modify the display of the map/backdrop:



Bleaching- reduces the intensity of the map image, making the markers more distinct.

Hue shift- shifts the map colours to achieve a different palette

Brightness- reduces or enhances brightness of map

Contrast- reduces or enhances map contrast

Colour strength- shifts the map colouring from shades of grey to saturated colouring

Halo size- defines the radius of a surrounding 'halo' for each marker

Halo strength- defines the intensity of the halo colouring

Surrounding colour- used to specify a background colour that displays around the edge of the map. It is only visible when zoomed out beyond the edges of the map

Base colour- specifies a colour only visible when all map layers are removed

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Connect Markers

Connect Markers-Map View

This section demonstrates how to use the **Connect Markers** option in the Map View to draw a path around the map. You can download this example file showing a holiday around the world [here](#). [226] The various display commands on the expanded sub-menu are documented below.



1. Create a new Map View file

Start Omniscope and select **File > Open map**, then choose World. A new empty file will be created and opened, showing the Map View and the installed World Map, ready for adding markers.

2. Enable Connect markers

From the Map View **View Tools** menu choose **Connect Markers**. Since you don't have any markers yet, you won't see any change.

3. Place markers

From the **Mode** drop-down in the Map view, choose **Place marker mode**. The mouse pointer will change to a cross-hair when over the map. Move to the first location in the trip (for example, London in the UK), and click the left mouse button. The Add record dialog will appear. Type in a summary of this location, and press Enter or click OK. For example, 'Depart London, UK'. Move the mouse pointer to 'hover' over this marker. You'll see a Tooltip appear with the text you have entered.

4. Zoom in for more accuracy

Now click the Map View Navigator button to show the Map Navigator, and use the controls to zoom in and pan around until you can see the next location accurately. Click to add another marker, and enter the description. For example, zoom into Hong Kong and add a marker with the text 'A few days in Hong Kong'.

You'll see a black line joining the marker from the previous point. Carry on zooming into cities and adding markers and text until you've finished the path around the map. You can add more information by adding fields (columns) using **Data > Manage Fields** [95] to add fields (columns), and then entering data into your new fields from the **Table View** [110], which you can open using **Add View**.

5. Viewing the result

Click the Map View **Mode** drop-down again and change to **Zoom mode** to avoid accidentally placing markers. Open the **Mode** drop-down again and click **Zoom to fit map**. You'll see the entire trip with a black line joining the markers. Hover the mouse pointer over a marker and you'll see the text for that point. If you don't like the "line/curve smoothing", you can adjust or turn this off from within the **View Tools** menu.

Connect Markers sub-menu command reference

Show a line for each- used to define how many discrete lines will be plotted. Choose the Category field (here ISIN Bond Reference) that defines each set of observations to plot. The black lines will then be replaced by a number of coloured lines corresponding to each of the category values. If your data set does not include observations for multiple categories, leave **Show a line for each** with "(None)" selected to display a single black line.

Traversal Order (showing an omni-directional path) By unticking **Time series (connect markers by X axis)**, you can choose to draw the lines in a different order than dictated by the X axis. If you are plotting data based on criteria other than time, configure the Traversal order field appropriately.

Show moving average: None; Simple & Exponential If you have many data points in each time series, you may wish to try showing a moving average, by choosing Simple, Exponential or other data smoothing options on the sub-menu.

Line/curve smoothing- By default, lines are turned into curves while preserving data points. In other words, curves are drawn between the data points. Depending on your data, this may be inappropriate. You can disable this using the Line/curve smoothing sub-menu. Alternatively, a second form of curve smoothing is provided, which does not pass through the data points. Untick **Curves pass through vertex points** to use this option. Both forms of smoothing can be adjusted for amount of smoothing using the Smoothing amount option.

Line width-By default, lines are shown 2 pixels thick. Use the slider to change this any value between 1 and 25 pixels.

Arrows: Show forward arrow; backward arrow; arrows for each segment; middle of each segment-adds different kinds of directional arrow heads to the line segments displayed

Coloured- By default, if you have multiple lines displayed, these are coloured according to the values in the Category field. You can disable this

and show only black lines by deselecting this option.

Show markers- Hides or reveals the markers within the plotted lines (to resize markers, see **Marker Options** on the **View Tools** menu)

Anti-aliased- Smooths the way the line is displayed

Show labels- By default, text labels will be shown beside each line if you have multiple lines. By de-selecting **Show labels**, these will only be shown as you move the mouse pointer over a line.

The section on [Time Series](#) [215] also covers advanced options for the **Time Series > Connect Markers** functions, most of which are the same in the Map View.

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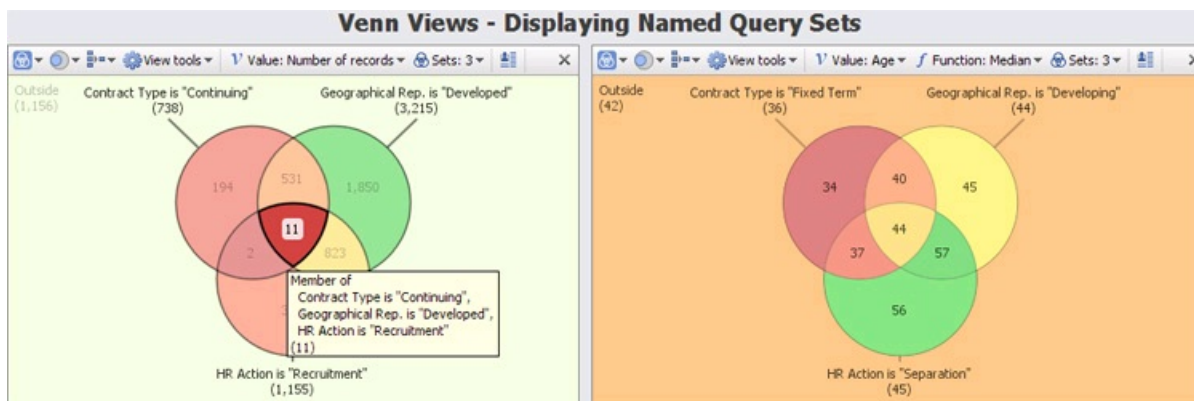
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Venn View

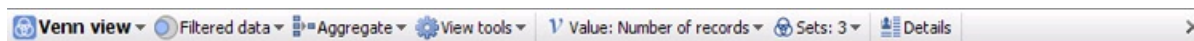
Venn View

Visualise intersections & overlaps among define data queries/subsets

The Venn View is based on the familiar Venn diagram. This view enables visualisation and filtering on overlaps between up to 5 different named query data sets or subsets, which must first be pre-defined as [Named Queries](#) [10]. Notice that the number of records (or other measure specified in Value/Function) not included in any selected set/subset is displayed upper left after the heading 'Outside'. In the HR example below right, the median age of all the staff not included in one of the selected subsets is 42.

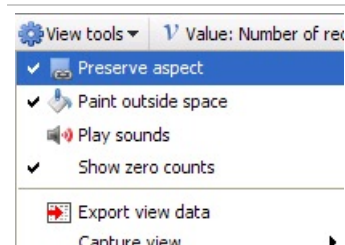


Venn View Toolbar



Venn View Toolbar **View** picker, **Data Subset** selector, **Aggregate** options drop-down and the show **Details** all function the same as they do in all the views. View Toolbar options unique to the Venn View include the upper-pane **View tools** options, the **Value:** menu to specify the values to be used, and the **Sets:** menu to specify the existing Named Query data subsets (maximum 5) for which Venn shapes will be displayed.

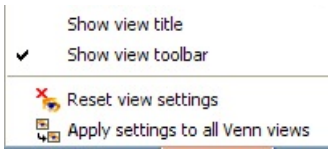
Venn View Tools



Venn View > View tools

Preserve aspect - (default) locks the shape of each circle to remain a circle. Unticking this option allows the Venn shapes to distort to reflect the intersections.

Paint outside space - colours the background outside the Venn shapes, which can improve visual impact especially if there are unselected records



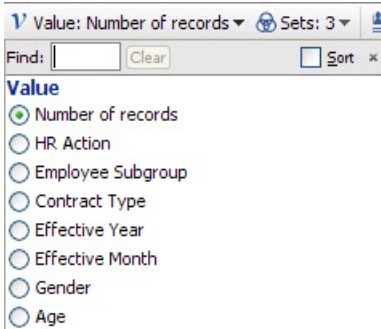
being displayed upper left under the heading 'Outside'

Play sounds - try it, you might like it

Show zero counts - displays set names and intersection counts even if zero.

The rest of the options in the lower panes are common to the **View tools** menus for all views and are documented [here](#) [207].

Venn View Value/Function:



Venn View > Value: {Function}

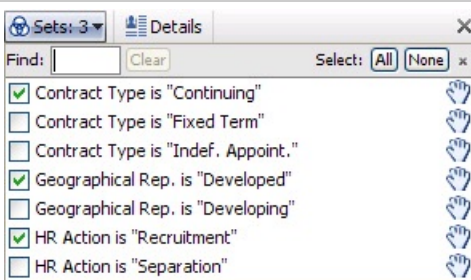
Use this menu to select the values for which the counts are displayed inside the Venn shape representing each data set/subset. Notice that text columns are not shown.

Counts only are available for category values. If you select numeric value, an additional Function menu appears allowing you to specify the calculation applied. (see example of average age above right)

Find: shows subsets of field (column) names to shorten the list

Sort: orders the field (column) names to speed selection

Venn View Sets:



Venn View > Sets: (number of sets selected)

All of the Named Queries which define subsets are available here for selection and display as Venn shapes, up to a limit of 5. Drag the hands at right upwards or downwards to re-order the list.

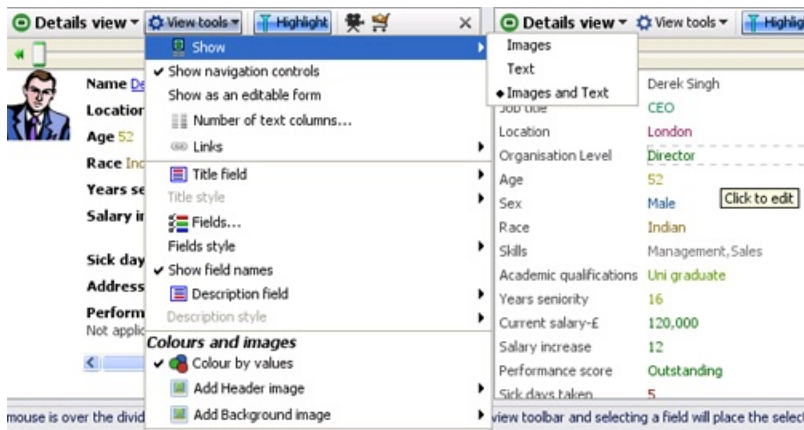
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Details View

Using the Details View

The Details View can display all of the information about a record in Omniscope, with very flexible branding, text formatting and image display options. Can also be used as an editing form, allowing data entry and corrections by anyone with basic keyboard skills. Whenever a Details View is open, the Details display for individual records will show in the open view, rather than the pop-up or Side Bar panel details displays.



Details View Toolbar

The Details View toolbar contains a **View Tools** drop-down, a **Highlight** button (used to turn record highlighting in other views off and on) and the **Slideshow**, **Add to Basket** and **[X] Close view** commands common to other views. For more detail on highlighting and configuring slide shows, see [Viewing Details and Highlighting](#) [122].

Warning: If you have global record cycling enabled, and you turn off the Highlighting option, the record cycling will stop. To re-start record cycling, hover your mouse on the barometer to expose the global automatic record cycling menu, and click on the green forward arrow to re-start.

View Tools

The View Tools drop-down menu contains many flexible options for configuring the Details View display:

Show- defines what to display; images only, text only or both. When there is more than one image set configured, you can select which images to show (they appear horizontally).

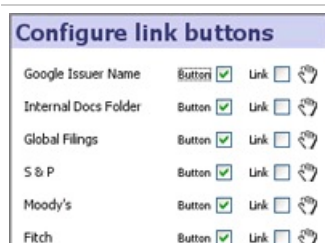
Show navigation controls- when ticked, displays a manual record-cycling slider only for the Details View. This is different from the automatic record cycling which affects all views. Drag the slider forwards and back, enter a record number or use the green forward/back arrows. When ticked, the **Sync**(ronisation) option keeps the record cycling in the that Details View on the same record as the global record-cycling.

Show as an editable form- when ticked, for each record, all fields are displayed in a single column with the values in individual text editing boxes, as shown in the example above right. This mode is used to facilitate data entry and correction using a single, easy-to-understand interface that anyone can use.

Number of text columns- drag the slider to the number of columns you want to use to display the text/field values you wish to show. The default is two columns with coloured values following field names as shown in the example below:



Links- similar to the command used in other views, this displays a pick list is used to assign which values will be underlined and launch associated links from the Details View. In the example directly above, the 'Issuer', 'S&P', 'Moody's' and 'Fitch' field values have been assigned links, and therefore show underlined. In the Details View, at the top the top of the links menu is a **Configure links buttons** option:



As shown in the example above, for each link where the 'Button' option is ticked, and action button is displayed in the Details View.

Ticking on the 'Link' option adds an underlined link bearing the link name to the bottom of the display, as an alternative to the button.

Capital Track	Button <input checked="" type="checkbox"/>	Link <input type="checkbox"/>		Use the 'hand' drag handles to move Buttons/Links up or down, re-ordering them in the display from left to right as shown above.
ICMA Info	Button <input checked="" type="checkbox"/>	Link <input type="checkbox"/>		
Markit Bond Pricing	Button <input checked="" type="checkbox"/>	Link <input type="checkbox"/>		

Title Field- selects a field (column) value to display in the upper left-hand corner of the view window. If you display a field as a Title, remember to untick the Title field in the fields pick list (see below) to avoid displaying the values twice.

Title Style- enables you to apply text styling (fonts, font face, colour and alignment) to the Title field display.

Fields- a pick list appears allowing you to tick/untick fields you wish to show/hide; drag the hands up or down to change the order (Note: you will only see these when 'Text' or 'Images and text' is chosen in the 'Show' menu).

Show field names- when ticked (default) displays the field (column) names prior to the values. Untick to suppress the field names.

Description field- selects a field (column) value to display at the bottom of all other fields. Used to display longer text entries that do not wrap well if displayed in the columns with other, shorter field values. If you display a field as a Description, remember to un-tick the Description field in the fields pick list (see above) to avoid displaying the values twice.

Description style- enables you to apply text styling (fonts, font face, colour and alignment) to the Description field

Colour by values- when ticked, colours category values according to the colours assigned to each value, and numbers/dates by the scale reflecting the range of values (default : low=red to high = green). Text fields are always displayed in black.

Add Header/Background Image- used to include logos and other faded backgrounds in the display. These commands appear in several views with otherwise blank backgrounds and are documented under the [Page Menu](#) [104].

The other commands on the Details **View Tools** menu are common to all views and documented under [View Tools](#). [121]

View Controls- configuring the display layout

The layout and sizing of the image and text spaces in the Details View is controlled using a divider line which you can find by hovering the mouse over the divider between image and text. When you do this, the frame divider will appear. Click and drag the divider to get the proportion of image to text area you want. Click the frame divider switch button on the right when the divider appears and the orientation will switch between horizontal and vertical.

Suggestion: Omniscopes has powerful image re-sizing and management features. Be sure to experiment with allocating more space to the images to optimise the display in the Details View

Back to [Using Views](#) [212] or [Views Reference](#) [109]

[User Guide Top](#) [108]

Web View

Using the Web View

Opening Static Web Views

The Web View is one of the 12 standard views available in Omniscopes. It differs from the other views in that it is not intended to depict all of the data in the data set. Instead, it is intended to broaden the reach of the .IOK/.IOM file to other related content and services available on the web.

As with other views, you can add a Web View to the display by switching one or more existing views to be Web Views (by clicking the view name and choosing Web View in the **View Chooser**) or by adding a new Web View to the display using **Add view** on the Main Toolbar

You can have any number of Web Views open, with each pointing to a different address (URL) on the web:



The first time you open the Web View, it will show the Omniscopes default static page (the Google homepage). "Static" means this view won't update when you filter or navigate in Omniscopes. Omniscopes Web Views work just like web browsers. You can enter a different address in the address bar, or follow the links on the page displayed to change the current page. You can resize the windows to be quite small. Omniscopes can switch the screen display of the web page to a style intended for small screen devices.

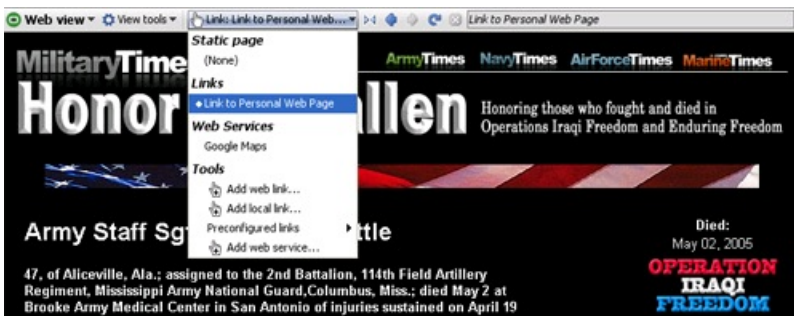
If you save the .IOK file and later re-open it, any static Web Views will re-open showing the same page that was showing when you saved the file. There is no such thing as a "home page" with the Omniscopes Web View. Instead, Google is the default page if you've never opened a Web View before, and each Web View will re-open as it was saved.

Configuring Dynamic Link-based Web Views

A dynamic Web View is one that is automatically synchronised with the rest of Omniscopes. When you select specific data in another Omniscopes view, the Web View will reload to show a relevant page as defined by the selected link. You can't enter a different web address into a dynamic Web View. To change a dynamic Web View back to a static one, change **Link** or **Web service** to "(none)" in the **View Toolbar**.

There are two types of dynamic web view: link-based and web service-based. Both are used for showing web pages containing information about a single record (link-based) or groups of records (web-service based). When you highlight a record in Omniscopes, an open link-based Web View will update to show the linked page for the highlighted record. If there is no record selected/highlighted in any Omniscopes view, link-based dynamic Web Views will remain blank.

In Omniscopes, a highlight is set whenever you select a single record, such as a single row in the Table View. In the example below, selecting the record of a specific casualty in Iraq displays a personal memorial page for that soldier in the link-based Web View:



To create a link like this in an Omniscopes file, choose **Web View > View Toolbar > Link > (Tools)/Add web link**. This allows you to define the link and associate that link with that Web View. You can administer all the links in your file from the top-level **Settings > Links** [227] menu.

It is possible to define much more complex data-driven links. For example, you can use two or more field values as parameters in a link like this one:

`http://myIntranetServer/addressBook?firstName=[First Name]&lastName=[Last Name]`

where 'First Name', and 'Last Name' are fields in the data set.

Omniscopes has a number of preconfigured links built in, which saves you having to figure out the link syntax for common websites offering free web services. See [Using Web Services in the Web View](#) [228]

Back to [Using Views](#) [212] or [Views Reference](#) [109]

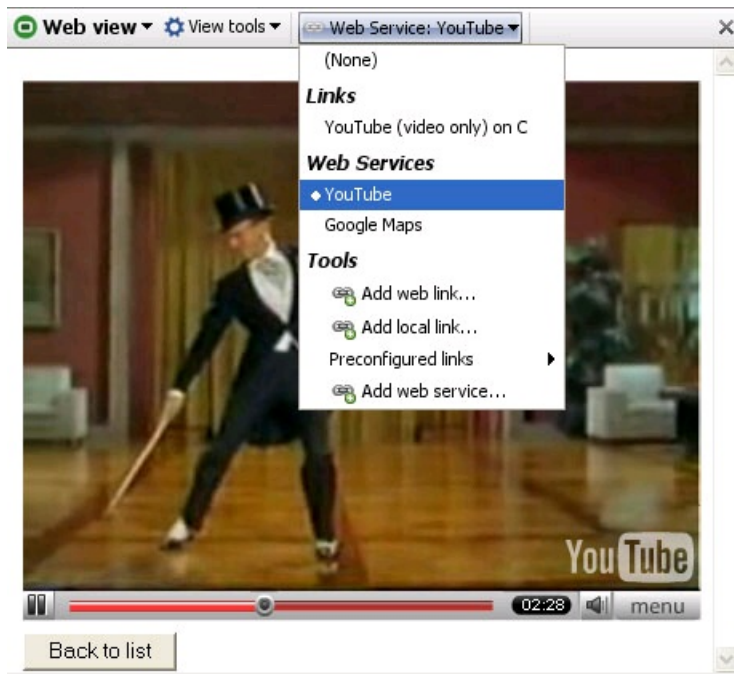
[User Guide Top](#) [108]

Using Web Services

Using Web Services in the Web View

Dynamic Web Views - Web Services

Web views are also used to display the results of dynamic requests for web services. Some free web services, such as YouTube and Google Maps, are already configured. If your file includes a collection of video clip identifiers recognised by YouTube, selecting a clip from your Omniscope 'video jukebox' will play the corresponding clip in a Web View as streamed from YouTube:



You can also add any custom Web Service to your file. As with Links, you must pre-define custom Web Services configurations using the Main Toolbar **Settings > Web Services** menu, then use the Web View selector drop down to the right of the **View Tools** drop-down to link that Web View with the selected web service.

Multi-input web services

Connections to web services that accept a series of inputs (or a table), rather than a single value/text string, are less easy to implement, since they require a specific web server page implementation. Examples of multi-record Web Services already defined in Omniscope include popular mapping services, such as Google Maps.

Multi-record web services links to Omniscope work by submitting an HTTP POST to the web service page containing a series of record IDs. This is equivalent to submitting a form listing all the record IDs. This functionality allows you to program server pages that accept a list of record IDs in an HTTP POST request and provides any further information associated with those records in HTML, in the HTTP response. You can also configure the maximum number of records in a web service post (the default is 100). This allows you to restrict access to the server page to only moderate requests, especially useful if allowing users to retrieve 50,000 price graphs at a time might be undesirable. At present, you can only configure a single-parameter web service post. If you envision a solution that requires a tabular, multi-field post, please contact us.

We provide a simple example 'echo' page which can be used to test your configuration and to understand the results. This is the default page when adding a Web Service. To see the test echo service, go to **Settings > Web Services > Add web service** and click OK without making any changes to the defaults.

After adding a web service, depending on how it was configured, you may need to select it in the Web View using the **Link > Web Service** selector to the right of the **View Tools** drop-down.

The screenshot shows a software interface with two main views: 'Table view' and 'Web view'.

Table view: A table with columns: Issuer, Group, Debt Ty. Rows include Zurich Finance (USA) Inc, Zenit Bank, and Yum! Brands Inc.

Web view: A test page with the following content:

- This test page lists the content of the selected records.
- RECORD4 = "US987434A134"
- RECORD3 = "US987434A134"
- RECORD5 = "US988498A134"
- RECORD8 = "XS0201168842"
- RECORD1 = "US984245A134"
- RECORD0 = "CH0009216745"
- RECORD2 = "US987434A134"
- RECORD7 = "XS0177601811"
- RECORD6 = "XS0170388424"

Generated by the VISOKIO machine.

Web Services:

- Submit selection to remote service for Evaluated Pricing
- Submit selection to remote service for Online Analytics
- Echo Test (highlighted)
- YouTube
- Google Maps

Tools:

- Add web link...
- Add local link...
- Preconfigured links
- Add web service...

Web Views pointing at Web Services rather than links will show all records currently included by your filters. If you then make a data selection in another view (such as the Pie View), the Web View will show only the selected records. When you clear your selection, the Web View will return to showing all the records included by your filters.

To use the Echo test, first filter down to, or select, no more than 100 records using Side Bar filters and/or using Select, Move & Keep power query sequences in other views. Once the selected number of records falls below the threshold, Omniscopie creates a form submission with form keys "RECORD0", "RECORD1", "RECORD2" (etc.) and posts the form values to the configured server for the selected Web Service. You will normally see the results of the POST returned in the Web View.

The Web View, like other views, is configurable using Report Pages. You can, for example, create a Report Page with 3 Web Views, and another Report Page with just a Table View and one Web View, then switch between the two. Omniscopie supports opening any number of views and managing the positioning of these views through flipping individual panes using the 'flip' icon command on the view divider.

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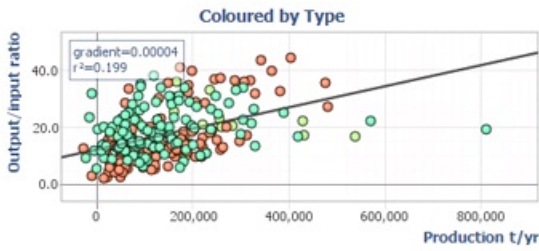
Content View

Using the Content View

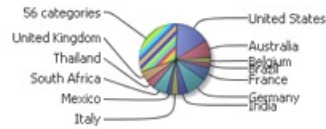
Add and display free HTML text, dynamic formulae and links to related web content

Note: This is a new view in version 2.5; this page is still under development

The new Content view allows you to place text in different sizes and styles...



Positive Production t/yr Split by Country (total 40,333,105)



... anywhere you want. You can also add dynamically evaluated formula results and images:



Bayou Consulting Group

The total production is 40,333,105

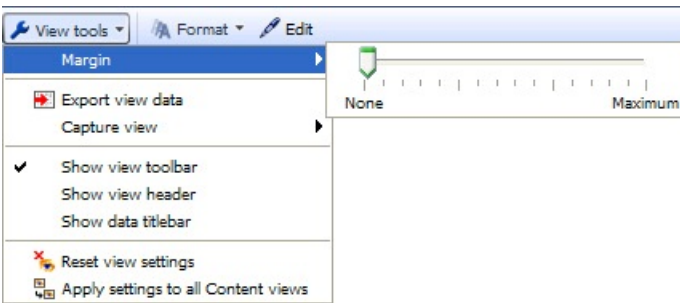
View Toolbar

Like other View Toolbars, the left-most part of the Content View Toolbar contains the View and data Subset selectors, and the Aggregate options. The View Tools drop-down begins with commands unique to this view, followed by commands common to all views.

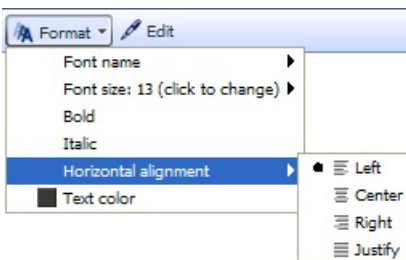


To the right of the View Tools menu are the Format and Edit options drop-downs. Use of these is discussed in the sections below.

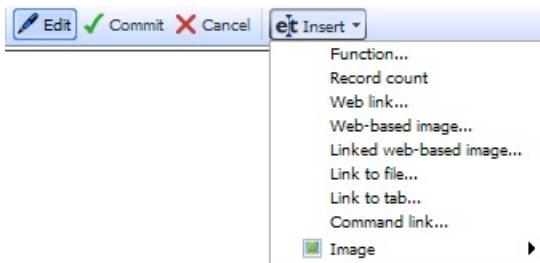
View Tools



Format options



Edit options



Insert - Click to enter Edit mode, which reveals the Insert drop-down containing options to insert a wide variety of content inside the view display using the wizards to assist you

Commit - Once you have completed inserting content, click to make your changes persistent in the file. You can still change the formatting of the content you have inserted.

Cancel - Reverts the content to the last committed state.

Functions

Record count

Web link

Web-based image

Link to file

Link to tab

Command link

Image

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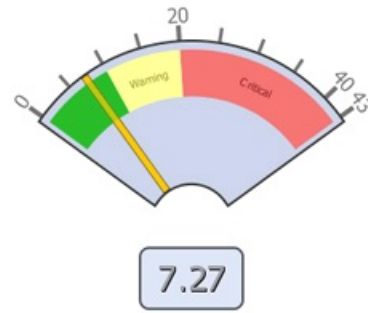
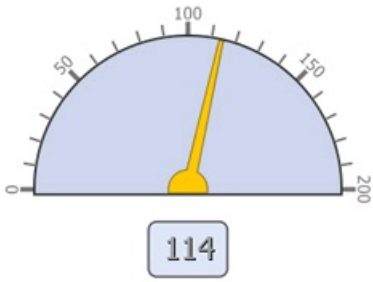
[User Guide Top](#) [108]

Dial View

Using the Dial View

Adding typical 'dashboard' gauge-type displays and alerts

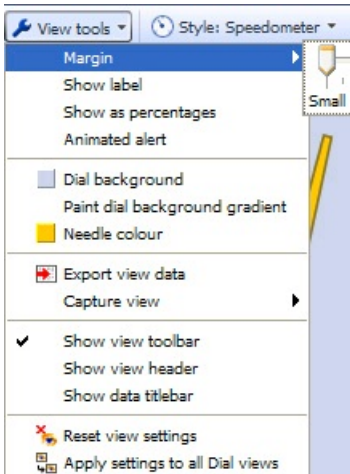
Note: This is a new view in version 2.5; this page is still under development



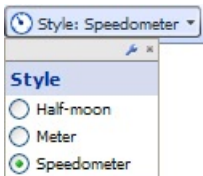
View Toolbar



View Tools



Style Options




Range settings

Edit dial range

Automatic range

Minimum value on dial

Maximum value on dial



Alerts settings

Edit alerts

Alerts

Not supported by all dial styles. If multiple alerts match then only the first one would be displayed.

Add Alert

Alert text

Alert position

Alert condition ▾

Zones Settings

Edit zones

Zones

If zones overlap, earlier zones take precedence. Not supported by all dial styles.

Add Zone

Minimum value

Minimum is inclusive

Maximum value

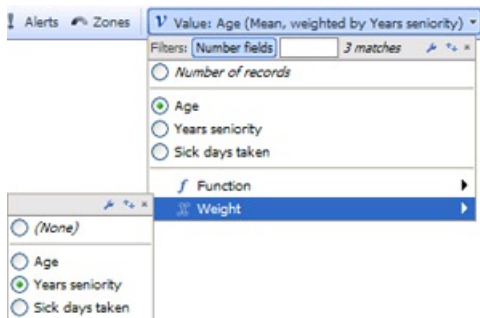
Maximum is inclusive

Color Specify

Label

(Not supported by all dial styles)

Value Options



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DataPlayer View

DataPlayer View

DataPlayers are standard .SWF Flash files which contain the data, multiple visualisations and intuitive query devices used to filter the interactive display(s). For a general introduction to Visokio DataPlayers and how they are created and refreshed using Omniscopes, please see the sections on [DataPlayers](#) [193], [Creating DataPlayers](#) [23], and [DataPlayer FAQs](#) [229].

DataPlayers can be created in any size, using either tabbed or simultaneous 'dashboard' layouts and any of many different view types. Interactive DataPlayers are exportable, universally-accessible Flash .SWF files for documents (PowerPoint, Excel and Adobe .PDF) and/or web pages. DataPlayers can be exported from Omniscopes files using Professional or Enterprise Editions either directly into documents (with full interactivity), or as an HTML scripted target page, plus related Javascript, images and .SWF files within a single, uploadable folder, or as standalone .SWF files for refreshing exported DataPlayer data sets by overwriting already posted .SWFs.

The Omniscopes DataPlayer View enables DataPlayers to be created and displayed on tabs within Omniscopes files. Omniscopes .IOK files should be configured with dedicated tabs for one or more exportable DataPlayers. Whenever the data in the .IOK file is refreshed from its linked source or edited from any tab, the DataPlayer(s) will be updated within their Omniscopes tab(s) using the newly-refreshed data and the persistent settings in the **Views** sub-menus.

The example below shows a tabbed configuration using each of the current views, one per tab. The Human Resources data set in the example below is the same as that included in the embedded 'How to use Omniscopes.iok' tutorial file's DataPlayer tab. The data describes 111 employees of a fictional company with more than 4 years seniority.

Principal elements of all DataPlayers include:

View chooser buttons (tabbed display only) - each DataPlayer can contain multiple view types. Clicking on these tabs changes the view type displayed, the order of which you can determine by changing the order of the view types in the **Views** drop-down menu. Simultaneous 'dashboard' display is another **Appearance** option.

Query devices - the Omniscope Side Bar filter devices and value colouring/ordering settings displayed when the DataPlayer View is opened are replicated in the DataPlayer side filter panel. Like in Omniscope, clicking or sliding the filters in the side panel reduces the displayed record count, as displayed in the barometer at the bottom.

Slider - often, there are more query devices on the side filter panel than can be displayed vertically. DataPlayers where this occurs display a vertical slider to allow the user to access the query devices below the opening set.

Barometer - like Omniscope files, each DataPlayer displays a 'barometer' that indicates the number of records inside the DataPlayer, and the subset of those which are displaying given the current filter settings

Details button - this button can be used at any time to display record (row) level values according to the settings for single and multiple **Details** display.

Refresh button - like Omniscope files, clicking Refresh returns any filtered records to the visible data set, as confirmed by the barometer.

Within each view, drop-down menus can be configured to give users choices of fields (columns) to display, or no options at all.

Using the menu items available on the DataPlayer View Toolbar (see below), you can extend and refine the opening DataPlayer by adding other DataPlayer view types, and changing the Omniscope Side Bar filter settings to change the query devices available the filter panel generated in the DataPlayer(s) you are creating.

WARNING: If you have more than 10-15,000 records in the 'Filtered data (IN)' data set when you first open a DataPlayer View, current limitations in Flash may interfere with full rendering of the initial DataPlayer. It is best to first define either an Aggregation or a Named Query (or both) such that the number of records to be encapsulated in the initial default DataPlayer is reduced to under about 10,000 (depending on row count and data complexity).

CAUTION: The DataPlayers displayed in the DataPlayer View are fully interactive, and thus it is possible to set filters, change selection drop-downs etc. just as end-users of the DataPlayer will. However, these changes are *not persistent*. The next time the DataPlayer View is opened and the DataPlayer re-generated, all settings will revert to the settings established in the View Toolbar **Views** settings menus, as described below.

DataPlayer View Toolbar Menus

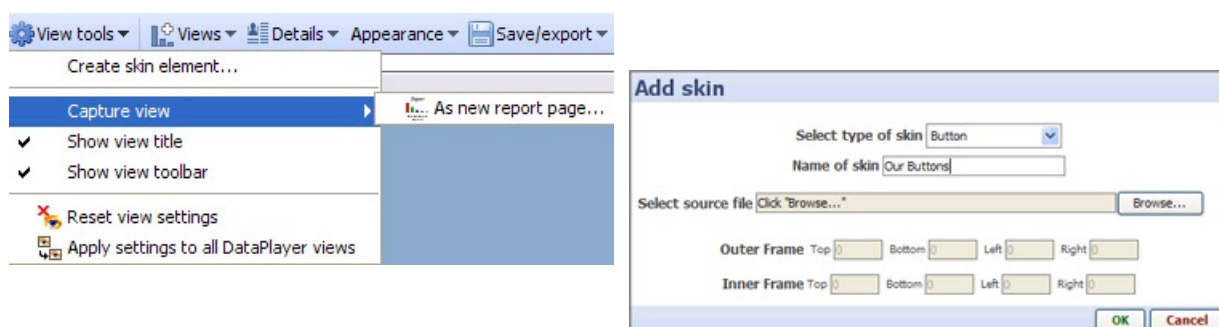
The DataPlayer View Toolbar includes options to create exportable DataPlayers like the example above, using defined subsets, or even all of your data [194].



The DataPlayer View Toolbar **View** chooser, **Data Subset** selector and **Aggregation** drop-down menus work as they do in all Views. The functions of the other View Toolbar drop-down menus are documented below.

> View Tools

The bottom five commands on the View Tools drop-down are common to all Views and are documented here. Unlike most other views, **View Tools > Capture View** offers only the option of saving the DataPlayer on a new tab. Options to export DataPlayers to documents and web pages (with full interactivity) are located on the **Save/export** sub-menu.

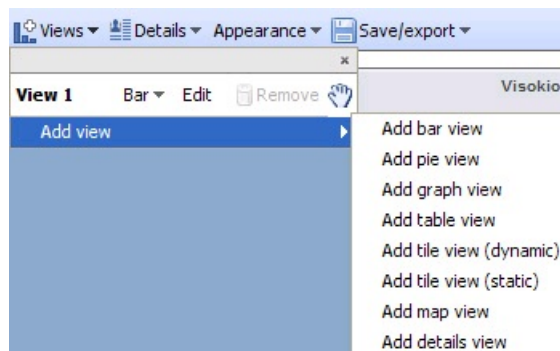


Create skin element > Add skin - DataPlayers are highly customisable. All of the principal elements of DataPlayers use skin elements that can be replaced with skin elements of your own creation. If you wish to add skin elements of your own to a file, select the type of skin element that you have created, give it the name you want to appear in the menus, select the source file containing your version, and set the Inner and Outer Frame limits. For more information on creating and using your own skin elements, see the KnowledgeBase article on [modifying and creating skins](#) [230].

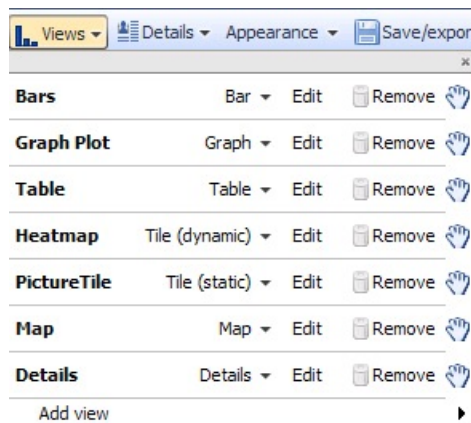
> Views

All of the settings governing adding additional view types and the view-specific configurations of DataPlayers are on the **Views** drop-down menu.

Opening View:



One of each View Type added with names:



Add, change, re-order (drag the 'hands' up or down) or remove DataPlayer view types from your DataPlayer using the commands on the **Views** drop-down menu.

CAUTION: It is good time-saving practise to re-order the DataPlayer view you are working on from last to first in the list. This is because each time you click 'Apply' or 'OK', the DataPlayer will be updated/re-generated with new settings, and the result will open to the first view/tab. Once all the views have been fully configured, you can re-order the views to suit your readers.

The **Edit** sub-menu commands (including re-naming each view) specific to each view type are documented on pages accessed from the links below (or from the User Guide DataPlayer View sub-menu links at the upper left of this page).

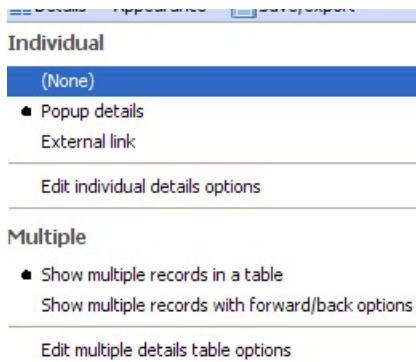
> Views > Edit command sub-menus

- [Bar View](#) [195]
- [Pie View](#) [196]
- [Graph View](#) [197]
- [Table View](#) [198]
- [Tile View - dynamic](#) [199]
- [Tile View- static](#) [200]
- [Map View](#) [201]
- [Details View](#) [202]

More view types are in development and will be added to future versions of Omniscop. Over time, the view types available in exportable Flash DataPlayer format will approach those available in the Omniscop project files. If you have urgent particular needs for evolution or addition of view types, please [contact us](#) [86].

> Details

Regardless of the number of view types in a DataPlayer (either in tabbed or simultaneous layout), options to display user-selected subsets of the records, either singly or in groups, for all of the views in a given DataPlayer are set using the Details drop-down menu.



Individual record (row) display options:

(None) - no details display for individual records

Pop-up details - (the default) pressing the Details button with a single record showing, or clicking on markers or rows corresponding to a single record will bring up a configurable secondary details display on top of the DataPlayer

External link - a pre-defined or possibly parametric (data-driven) link to a separate web page will be used to display details or supplementary (usually hi-res) images

Edit individual details options - if 'Pop-up details' has been chosen, a three-tabbed options dialog will appear, [documented here](#) [231].

Multiple record (row) display options:

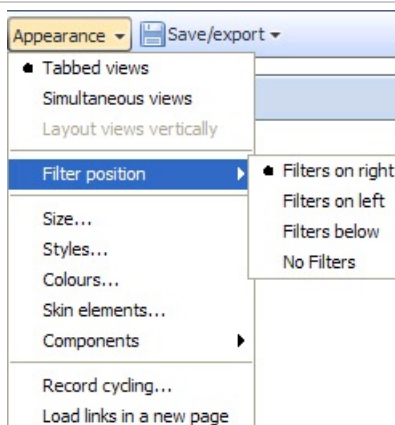
Show multiple in table - use expandable table view secondary details display for multiple record selections.

Show multiple with forward/back - show 'card-deck' style secondary display enabling users to page through the pop-up details display for all the records selected.

Edit multiple details options - depending on which option for multiple record display is chosen, a tabbed options dialog will appear, [documented here](#). [231]

> Appearance

The options governing the overall look and feel of the DataPlayer outside the individual view types are accessed from the **Appearance** drop-down menu.



Tabbed Views - display all one view at a time with buttons to switch views.

Simultaneous Views - a 'dashboard' display of all views simultaneously.

Layout views vertically - modifies the default layout for simultaneous 'dashboard' DataPlayers (use the Size setting to increase the size of the DataPlayer for 'dashboard' views).

Filter position - sets the position of the filter panel and query devices within the DataPlayer.

Size - use sliders to set the width, height and filter panel width in pixels.

Styles - allows you to modify and save a set of skin colouring settings that match your organisations standards, or experiment with pre-configured options.

Colours - allows you to individually specify colouring of all skins. You can save your own set of selections as your own Style and add it to the Style menu.

Skin elements - allows you to select different, non-default skin elements (Frames, Filters, and Buttons) from drop-down lists.

Components - options to change the functional look and feel, text strings fonts and font colours, etc. associated with various components.

Configuration sub-menus for **Size**, **Styles**, **Colours**, **Skin elements** and **Components** options are [further documented here](#) [232].

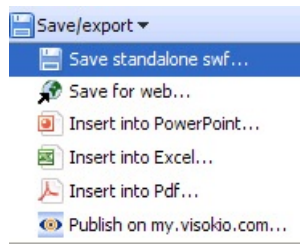
Record cycling - DataPlayers can be animated to 'step through' the highlighting of individual records, displaying Tooltips in some views

Load links in new page - if you have selected Individual details display option **External link**, tick this option to display the results of the link in a new tab of your readers' default external browser.

> Save/export

DataPlayers are separate Flash .SWF files which can be exported from Omniscope and inserted in documents and web pages with full interactivity. To use the document export options, your machine must have the relevant document-creation applications installed; MS

PowerPoint and Excel, and either Adobe Acrobat Reader (free) or a .PDF Publisher.



Save standalone .SWF - exports just the main .SWF file, which can be uploaded with the same name to replace an older online version with a new version containing new data or modified configuration.

Save for web - exports an model .HTML file containing <script> tags referencing a collection of files, image folders and scripts and the related, uploadable folder. All you need to do is paste in the <script> text and insert the <object> tags positioning the main .SWF file in the folder on the display page.

Insert into PowerPoint - inserts the DataPlayer into a new or existing PowerPoint slide (only displays when presentation is opened in Slide Show mode).

Insert into Excel - inserts the DataPlayer into a new or existing Excel workbook tab.

Insert into .PDF - inserts the interactive DataPlayer into an Adobe .PDF document.

Publish on my.visokio.com - you can post a DataPlayer on a blank page hosted by Visokio, then reference this page from your blog or send a link to the page to your readers by e-mail.

More information on [posting DataPlayers online](#) [233]

More information on [inserting DataPlayers in common documents](#) [234]

Back to [Views Reference](#) [25]

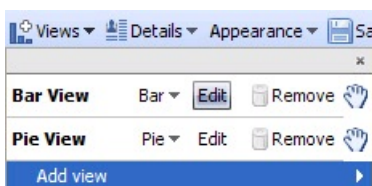
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DP Bar View

DataPlayer Bar View

Editing persistent/default settings for Bar View DataPlayers

DataPlayer View: View Toolbar > Views > Edit menus



General tab

Bar view options

General Fields Colours/Fonts

Name

- Show count
- Draw vertical
- Draw axis
- Show empty categories
- Fixed height bars
- Sort bars by size
- Sort number bars by size
- Reverse sort
- Color by value
- Highlight bars
- Draw boundary box
- Fade deselected
- Show total

Width of bars

Fields tab

Bar view options

General **Fields** Colours/Fonts

Unit field

Columns Visible
 User can change
 "None" value:
 Title:

Split field

Columns Visible
 User can change
 Title:

Stacking field

Columns Visible
 User can change
 "None" value:
 Title:

Apply OK Cancel

Unit field

Columns Visible

Select: x

Employees

Employee level

Age

Years seniority

Sick days taken

Current salary-£

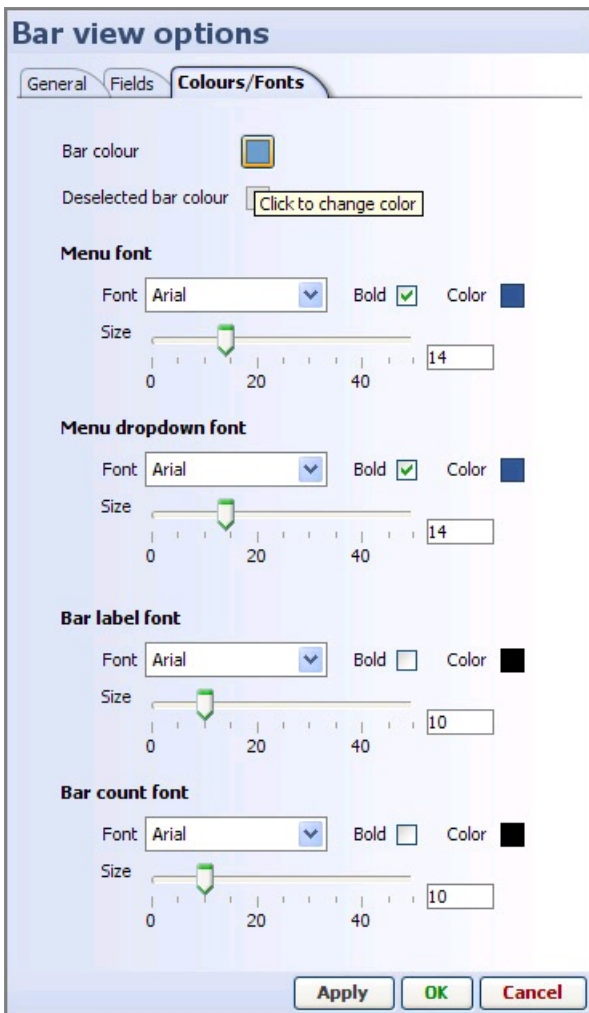
Salary increase

Next year salary

Map X

Map Y

Colours/Fonts tab



Back to [DataPlayer View](#) [54]

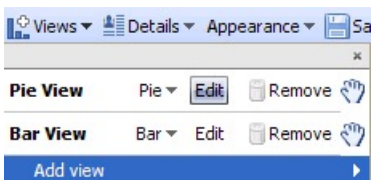
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DP Pie View

DataPlayer Pie View

Editing persistent/default settings fro Pie View DataPlayers

DataPlayer View: View Toolbar > Views > Edit menu



General tab

Pie view options

General Fields Fonts

Name

Show percentage

Draw shadow

Colour labels by value

Show border around labels

Show label background

Show rotate button

Rotate at start

Apply OK Cancel

Fields tab

Pie view options

General Fields Fonts

Unit field

Columns

Visible

User can change

"None" value:

Title:

Split field

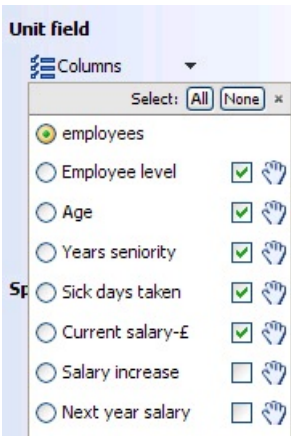
Columns

Visible

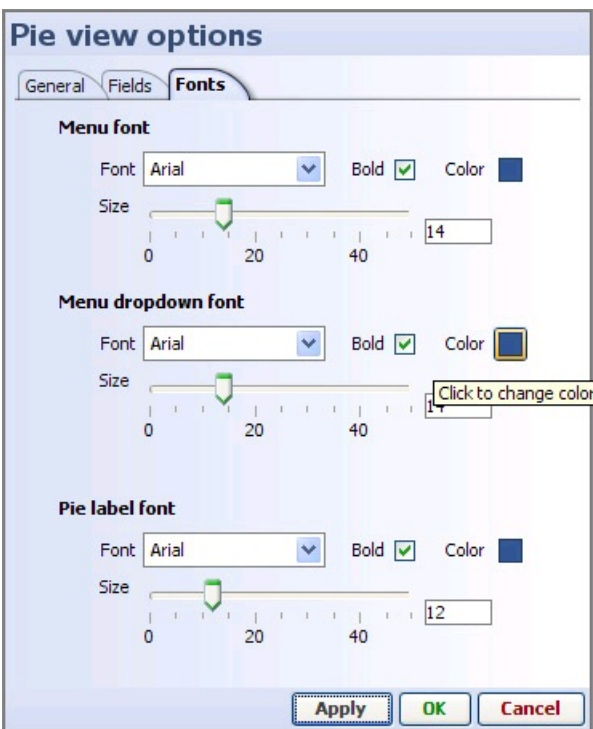
User can change

Title:

Apply OK Cancel



Fonts tab



Back to [DataPlayer View](#) [54]

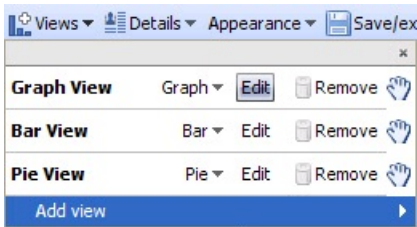
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DP Graph View

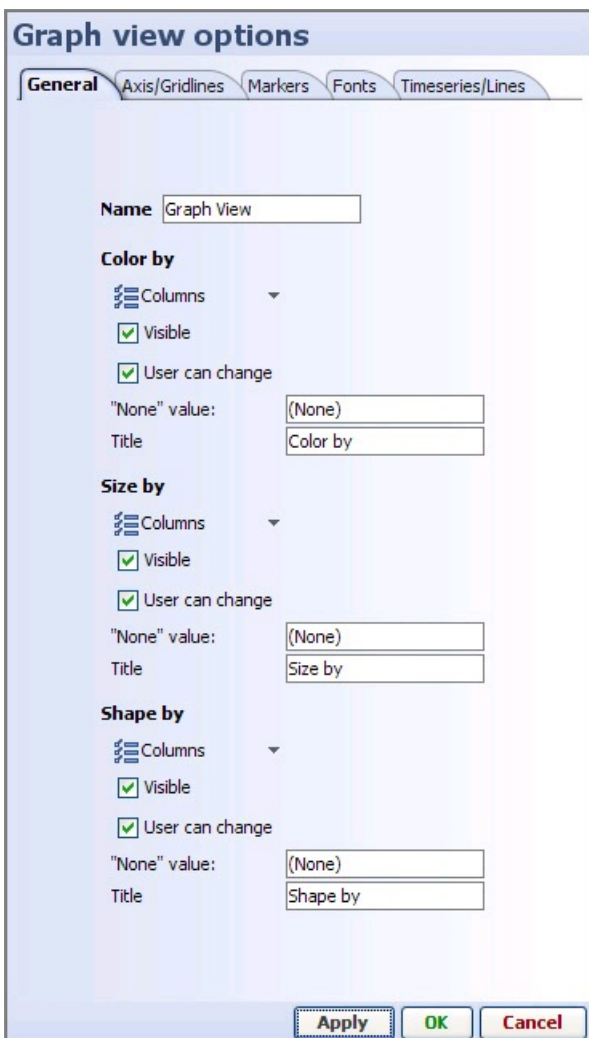
DataPlayer Graph View

Editing persistent/default settings for Graph View DataPlayers

DataPlayer View: View Toolbar > Views > Edit menu



General tab



Axis/Gridlines tab

Graph view options

General **Axis/Gridlines** Markers Fonts Timeseries/Lines

X-axis

Columns ▾

Visible

User can change

Title

Y-axis

Columns ▾

Visible

User can change

Title

Show origin

Show border around graph

Zoom to visible data

Show gridlines

X-axis gridline density

Y-axis gridline density

X-axis

Columns ▾

Select: *

Age

Years seniority

Sick days taken

Employee level

Current salary-£

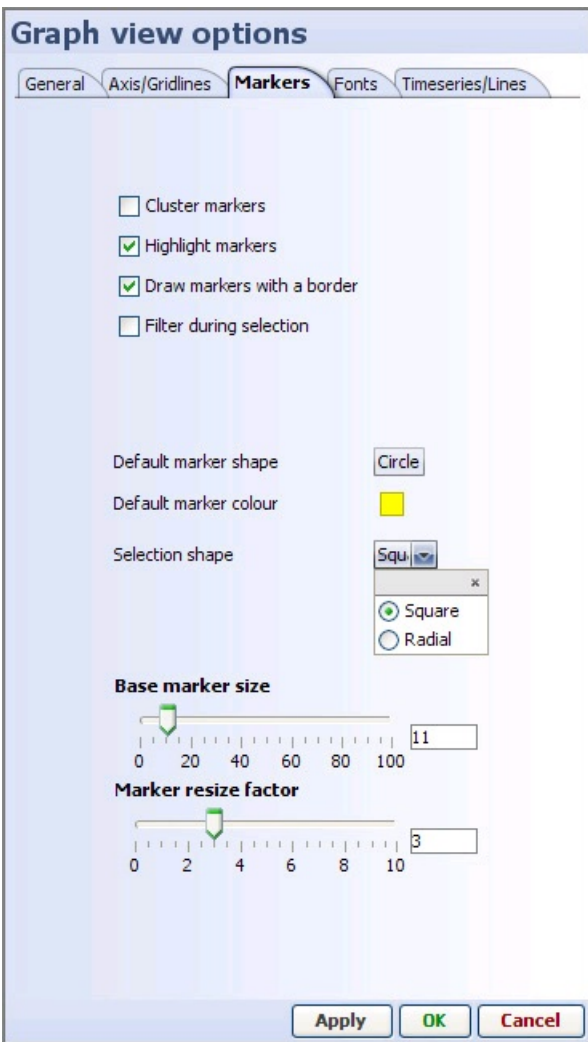
Next year salary

Salary increase

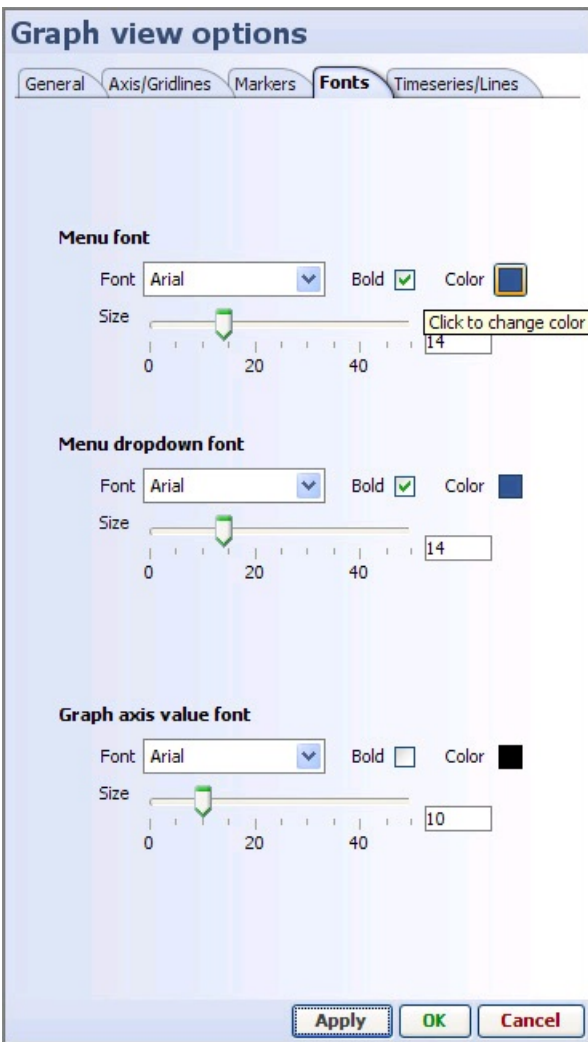
Map X

Map Y

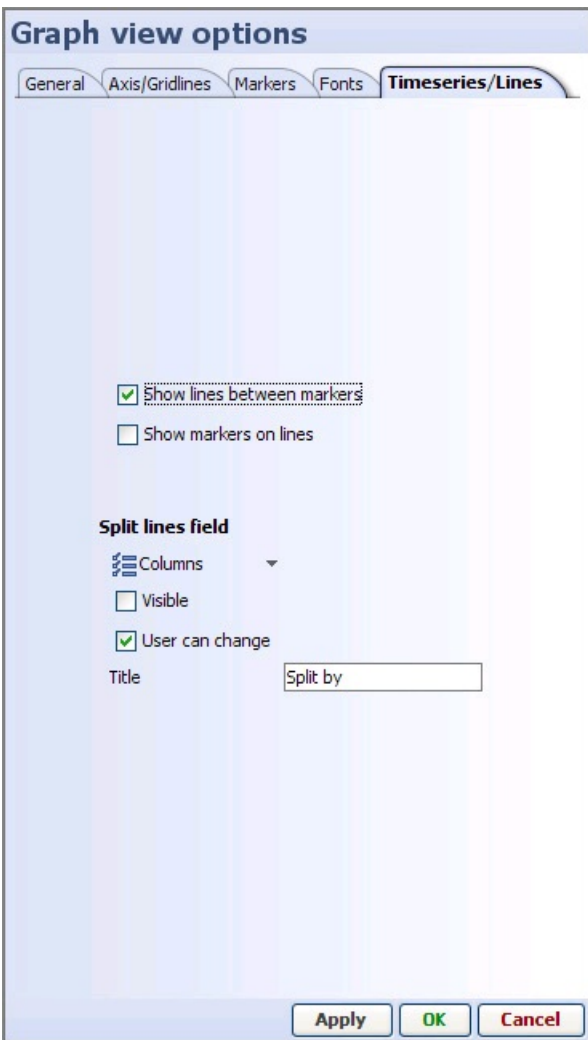
Markers tab



Fonts tab



Time Series/Lines tab



Back to [DataPlayer View](#) [54]

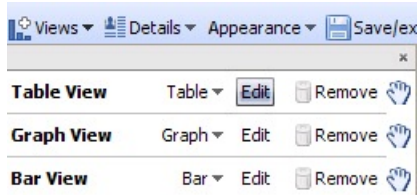
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DP Table View

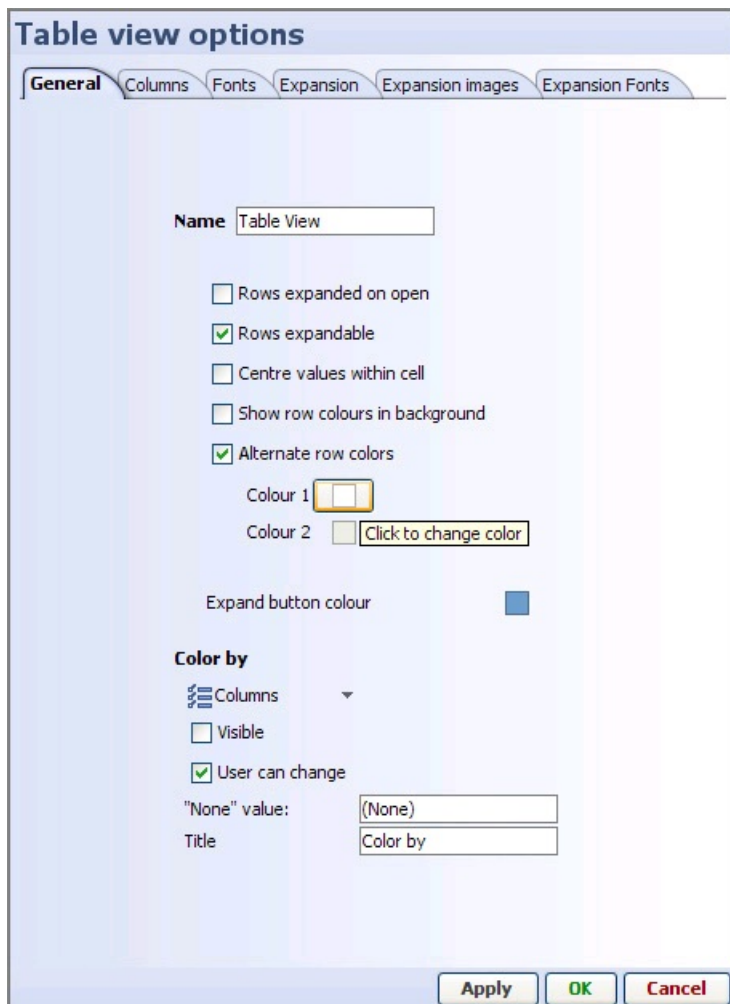
DataPlayer Table View

Editing persistent/default settings for Table View DataPlayers

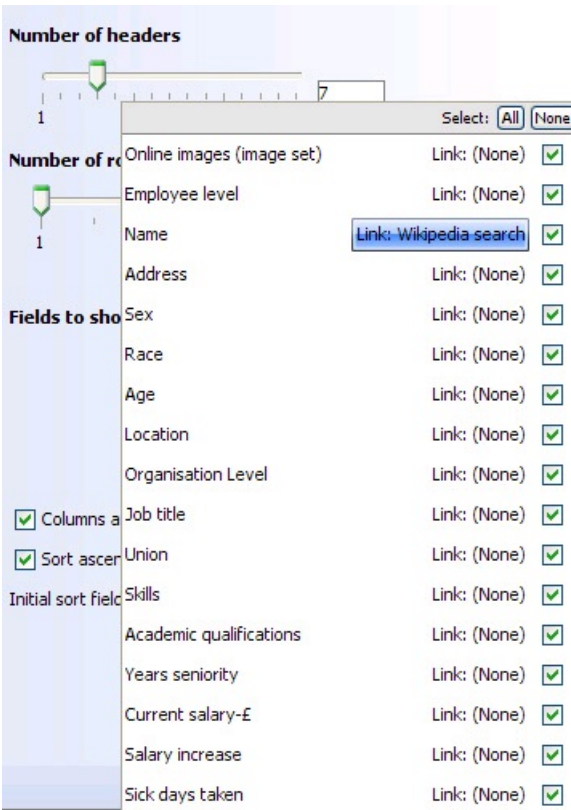
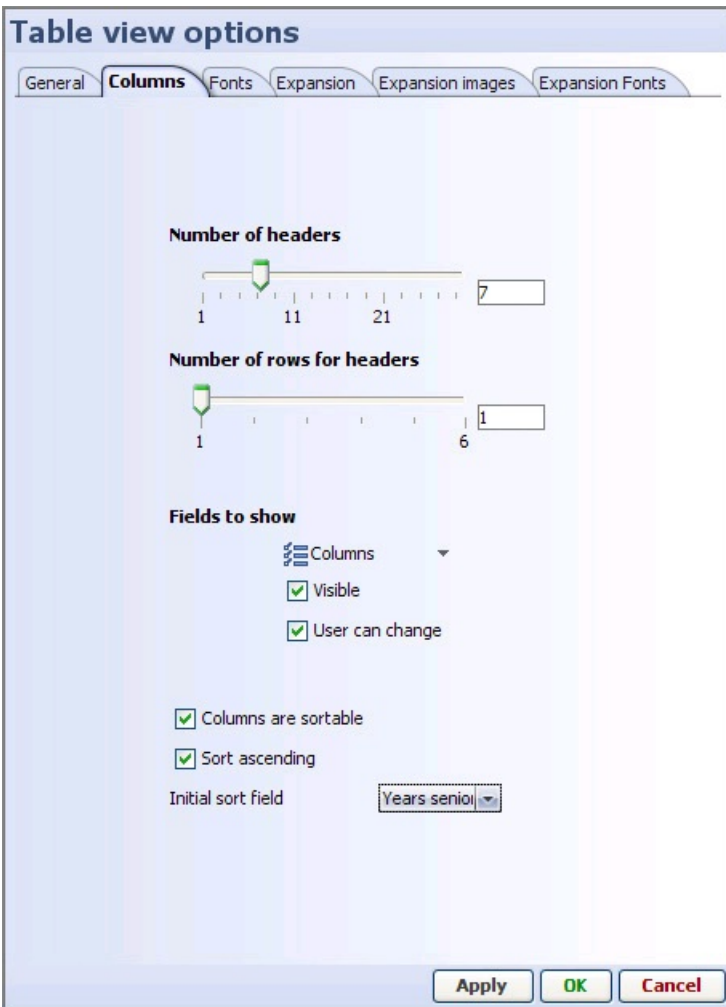
DataPlayer View: View Toolbar > Views > Edit menu



General tab



Columns tab



Fonts tab

Table view options

General Columns **Fonts** Expansion Expansion images Expansion Fonts

Table header font

Font: Arial Bold Color

Size: 11

Table header dropdown font

Font: Arial Bold Color

Size: 11

Table value font

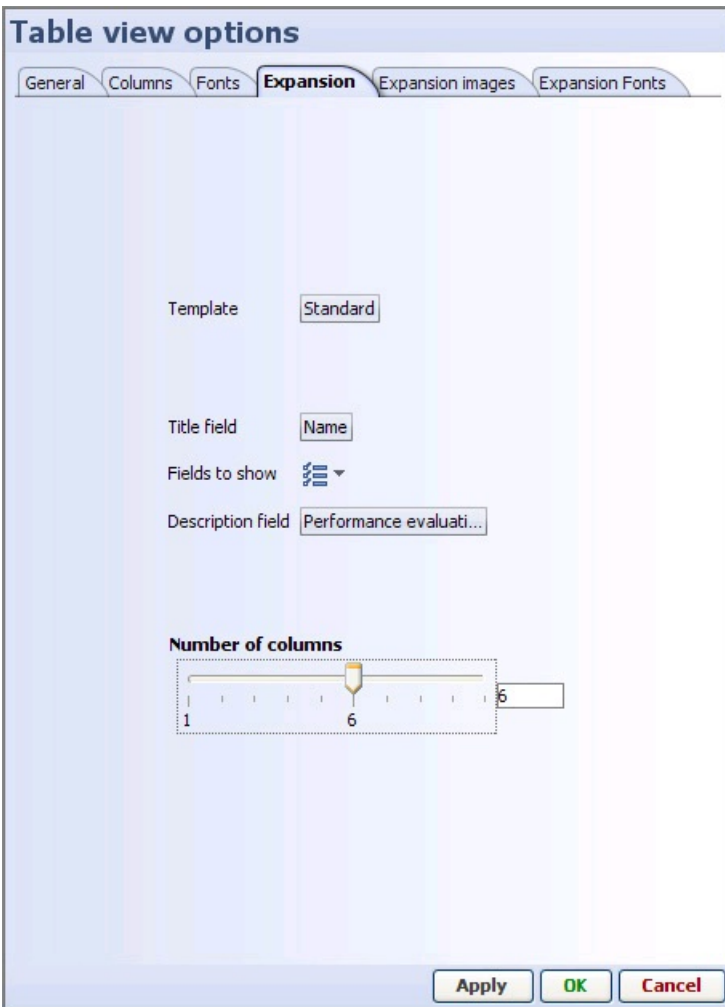
Font: Arial Bold Color

Size: 10

Header background colour

Header border colour [Click to change color](#)

Expansion tab



Select: *

Name	<input type="button" value="Show title"/>	<input type="button" value="Link: Wikipex"/>	<input checked="" type="checkbox"/>		
Address	<input type="button" value="Show title"/>	<input type="button" value="Link: Wikipedia search"/>	<input checked="" type="checkbox"/>		
Sex	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Race	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Age	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Location	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Employee level	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Organisation Level	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Job title	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Union	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Skills	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Academic qualifications	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Years seniority	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Sick days taken	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Current salary-E	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Salary increase	<input type="button" value="Show title"/>	Link: (None)	<input type="checkbox"/>		
Next year salary	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Performance score	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Performance evaluation	<input type="button" value="Show title"/>	Link: (None)	<input checked="" type="checkbox"/>		
Pic ref	<input type="button" value="Show title"/>	Link: (None)	<input type="checkbox"/>		

Expansion images tab

Table view options

General Columns Fonts Expansion **Expansion images** Expansion Fonts

Configure Images

Centre image horizontally
 Centre image vertically

Image width (pixels)

0 200 400 600 800 1,000

Image height (pixels)

0 200 400 600 800 1,000

Image slideshow options

Show controls in image
 Show play controls
 Show step controls

Size of controls (pixels)

0 20 40 60 80 100

Play on open

Speed (seconds)

0 2 4 6 8

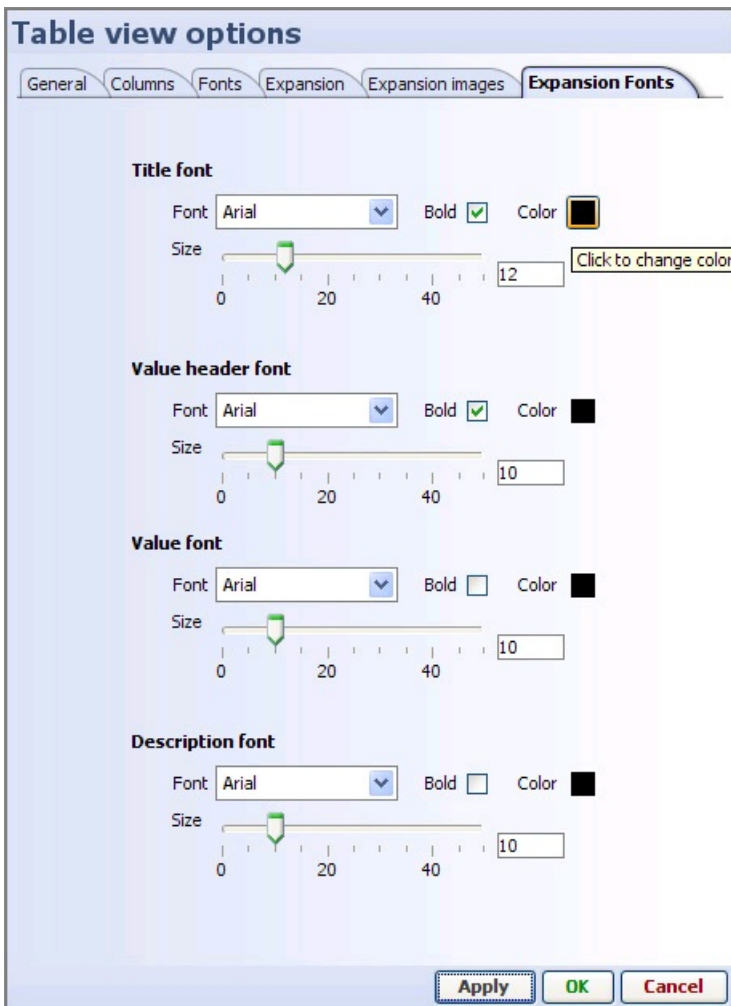
Images

(None)
 Use tile view image
 Use external image or slideshow

Online images
 Embedded images (limited)

Apply OK Cancel

Expansion fonts tab



Back to [DataPlayer View](#) [54]

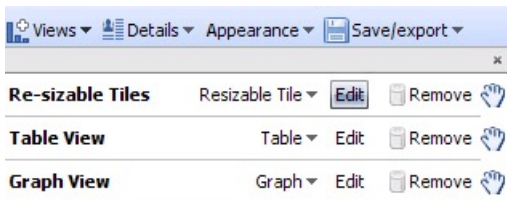
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DP Tile View-dynamic

DataPlayer Dynamic Tile View - Re-sizable solid tiles

Editing persistent/default settings for Tile View (re-sizable) DataPlayers

DataPlayer View: View Toolbar > Views > Edit menu



General tab

Tile view options

General | Fonts

Name:

Include negatives in sizing

Color by

Columns

Visible

User can change

"None" value:

Title:

Size by

Columns

Visible

User can change

"None" value:

Title:

Group by

Columns

Visible

User can change

"None" value:

Title:

Size by

Columns

Select: x

(None)

Salary increase

Employee level

Age

Years seniority

Sick days taken

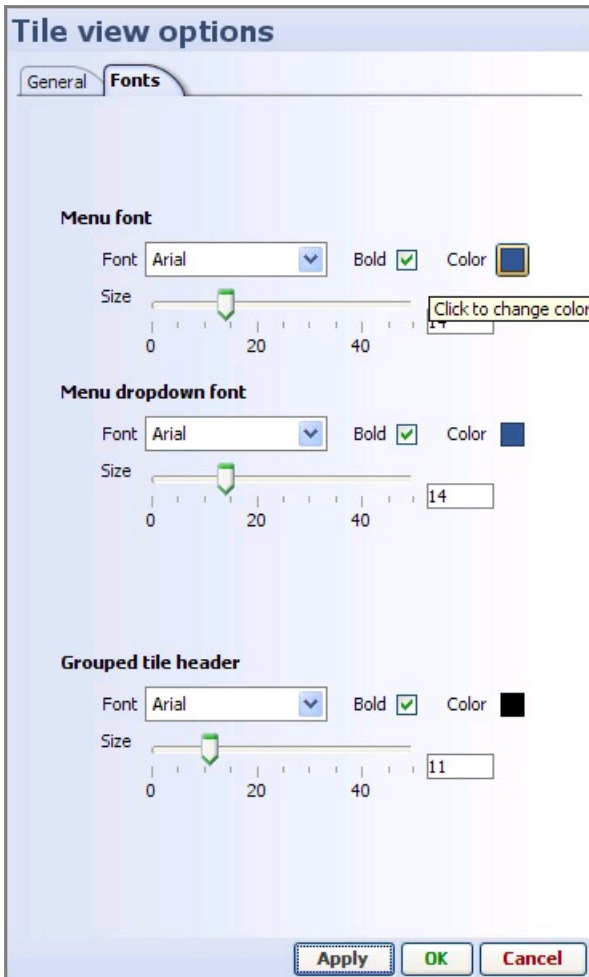
Current salary-£

Next year salary

Map X

Map Y

Fonts tab



[Back to DataPlayer View](#) [54]

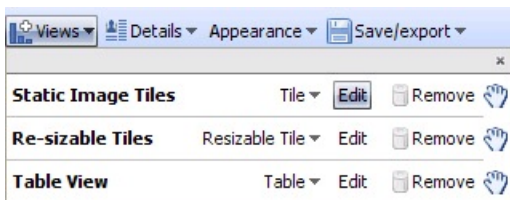
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DP Tile View-static

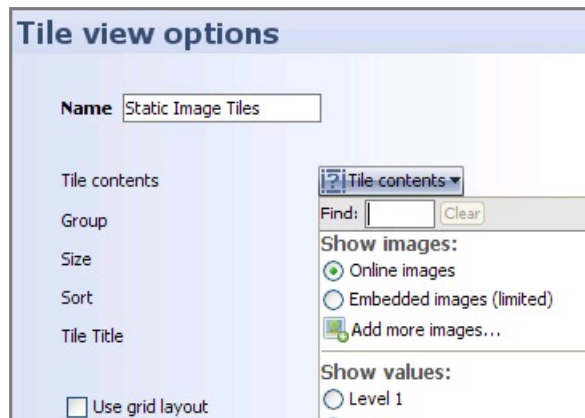
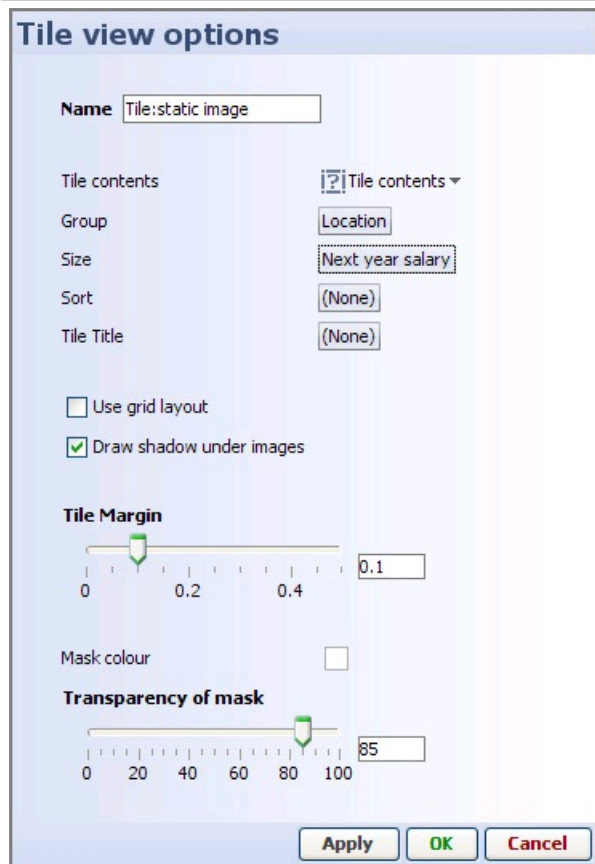
DataPlayer Static Tile View - non-resizable image tiles

Editing persistent/default settings for Tile View (static) DataPlayers

DataPlayer View: View Toolbar > Views > Edit menu



The non-resizing (with images) Tile View has only one options tab:



Name - the name you give will appear on the tab of the DataPlayer corresponding to this view.

Tile Contents - specify either images from defined image sets or values from the data set to appear inside the tiles.

Back to [DataPlayer View](#) [54]

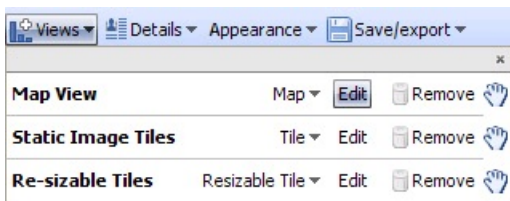
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DP Map View

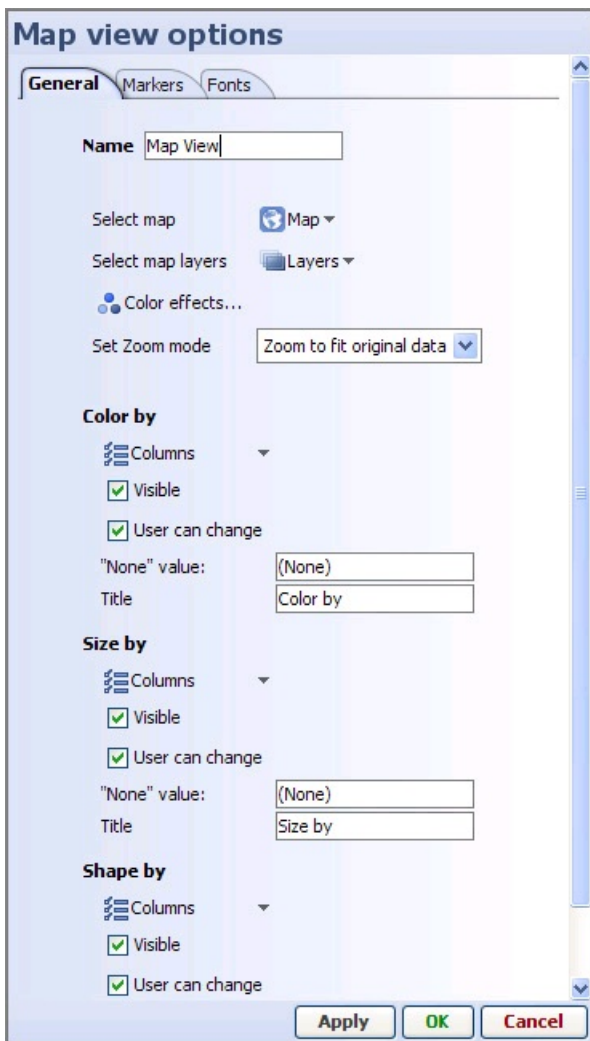
DataPlayer Map View

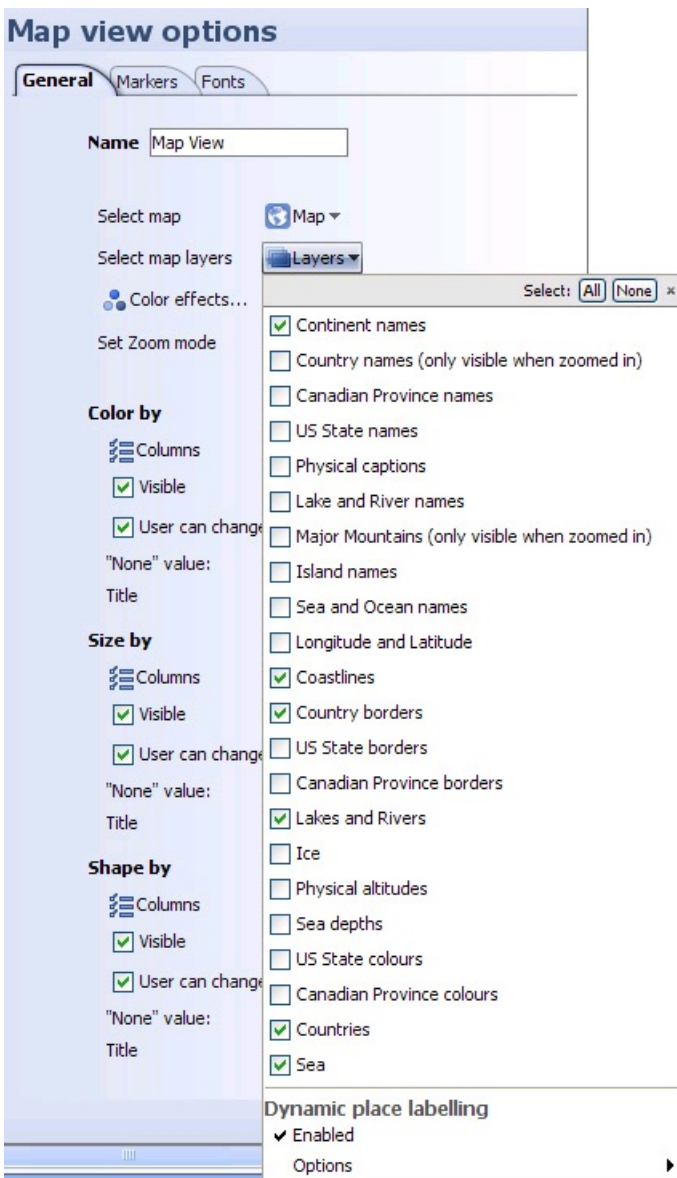
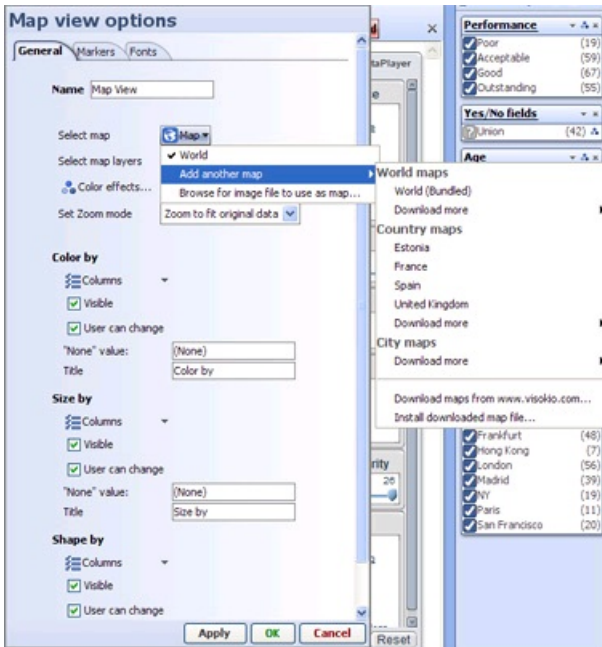
Editing persistent/default settings for Map View DataPlayers

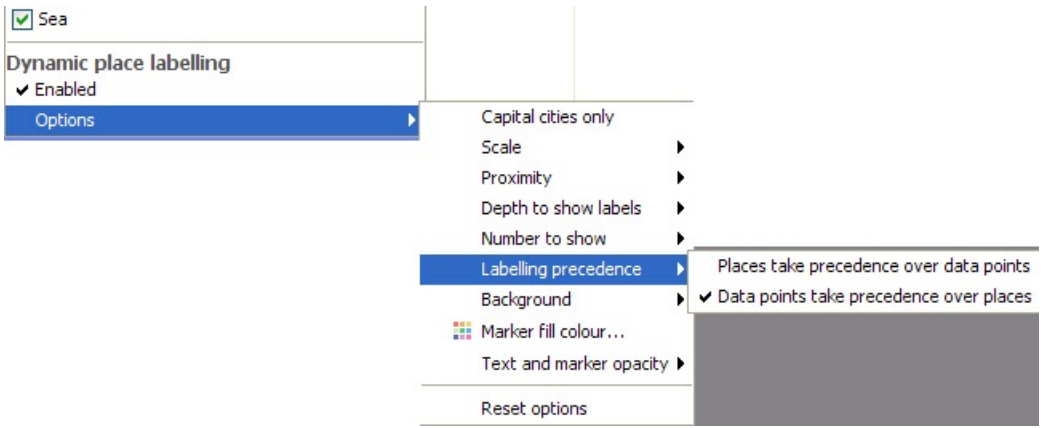
DataPlayer View: View Toolbar > Views > Edit menu



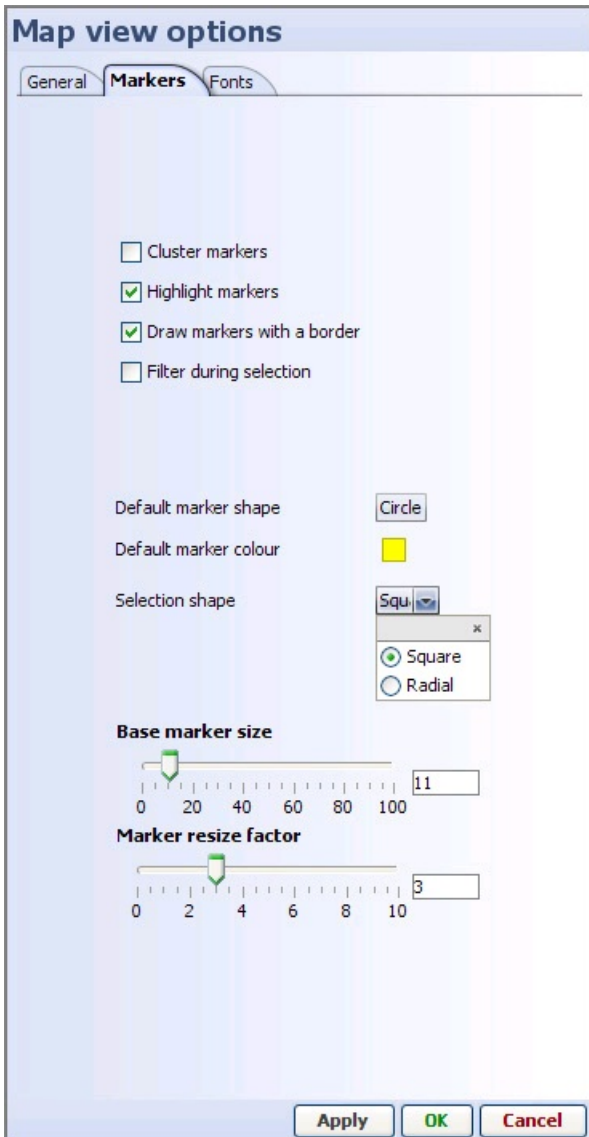
General tab



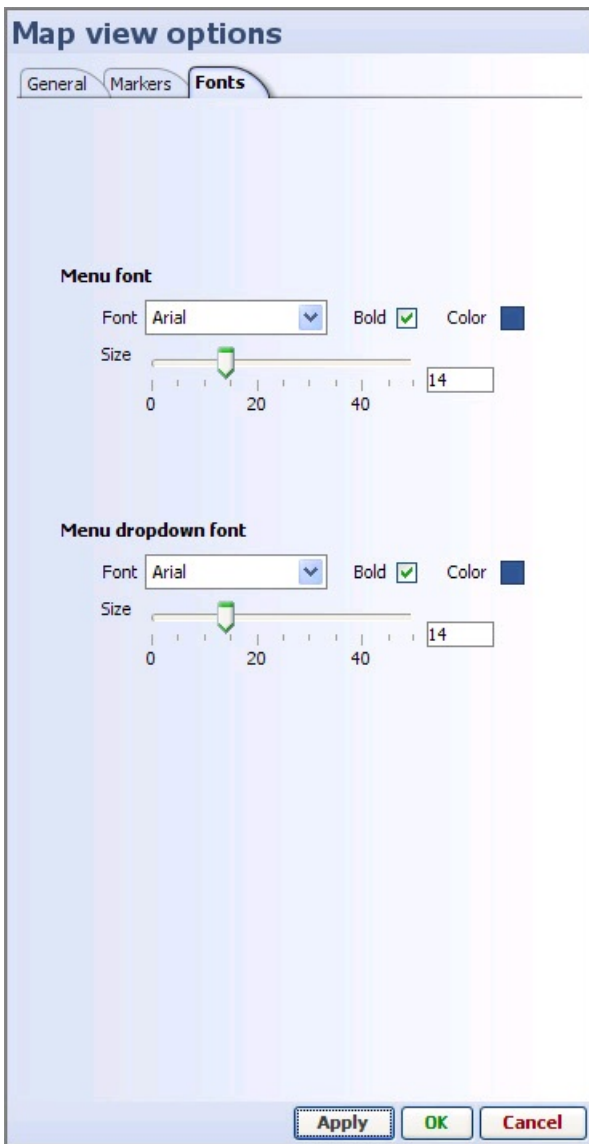




Markers tab



Fonts tab



Back to [DataPlayer View](#) [54]

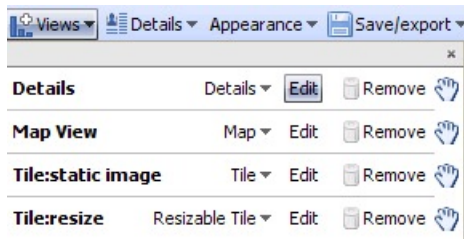
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DP Details View

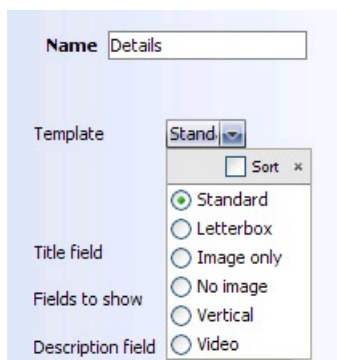
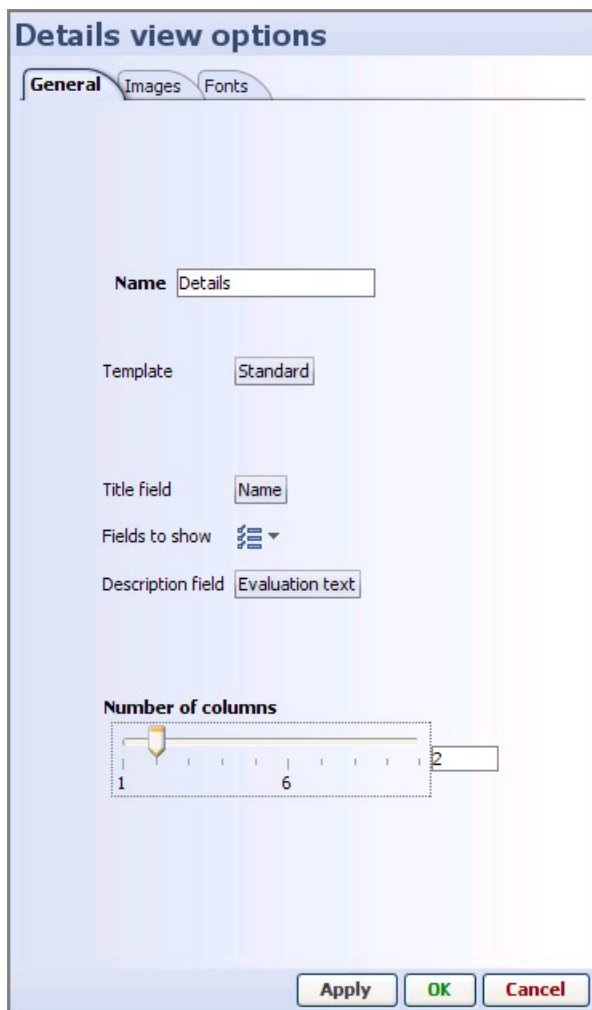
DataPlayer Details View

Editing persistent/default settings for Details View DataPlayers

DataPlayer View: View Toolbar > Views > Edit menu



General tab



Details view options

General Images Fonts

Name

Template

Title field

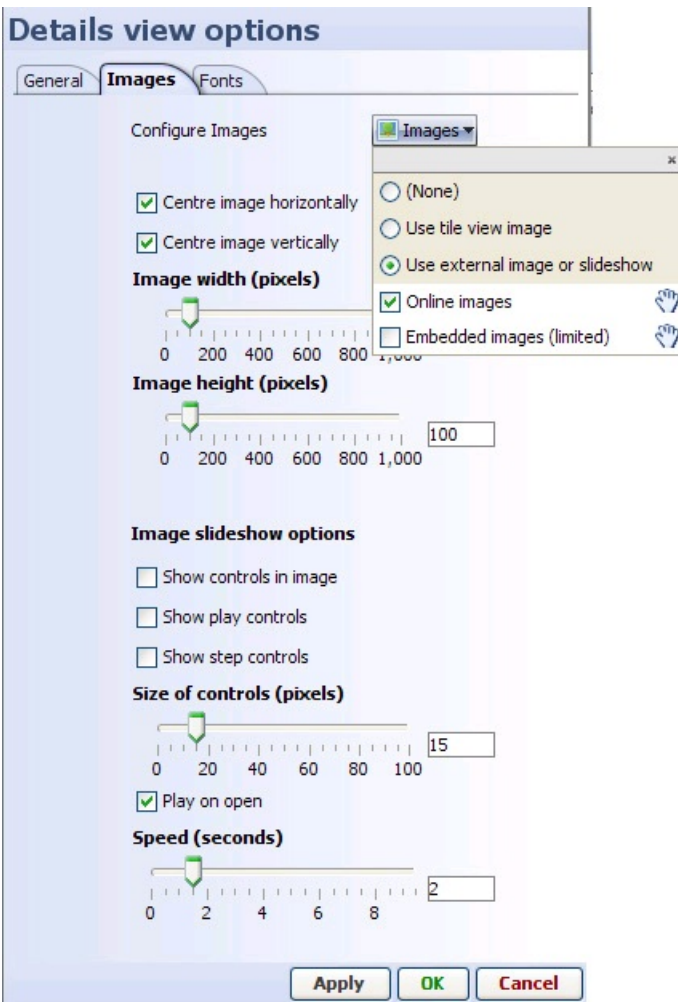
Fields to show Select: x

Field	Action	Link	Visible	Help
Employee level	Show title	Link: (None)	<input checked="" type="checkbox"/>	
Name	Show title	Link: (None)	<input checked="" type="checkbox"/>	
Address	Show title	Link: (None)	<input checked="" type="checkbox"/>	
Sex	Show title	Link: (None)	<input checked="" type="checkbox"/>	
Race	Show title	Link: (None)	<input checked="" type="checkbox"/>	
Age	Show title	Link: (None)	<input checked="" type="checkbox"/>	
Location	Show title	Link: (None)	<input checked="" type="checkbox"/>	
Organisation Level	Show title	Link: (None)	<input checked="" type="checkbox"/>	
Job title	Show title	Link: (None)	<input checked="" type="checkbox"/>	
Union	Show title	Link: (None)	<input checked="" type="checkbox"/>	
Skills	Show title	Link: (None)	<input checked="" type="checkbox"/>	
Academic qualifications	Show title	Link: (None)	<input checked="" type="checkbox"/>	

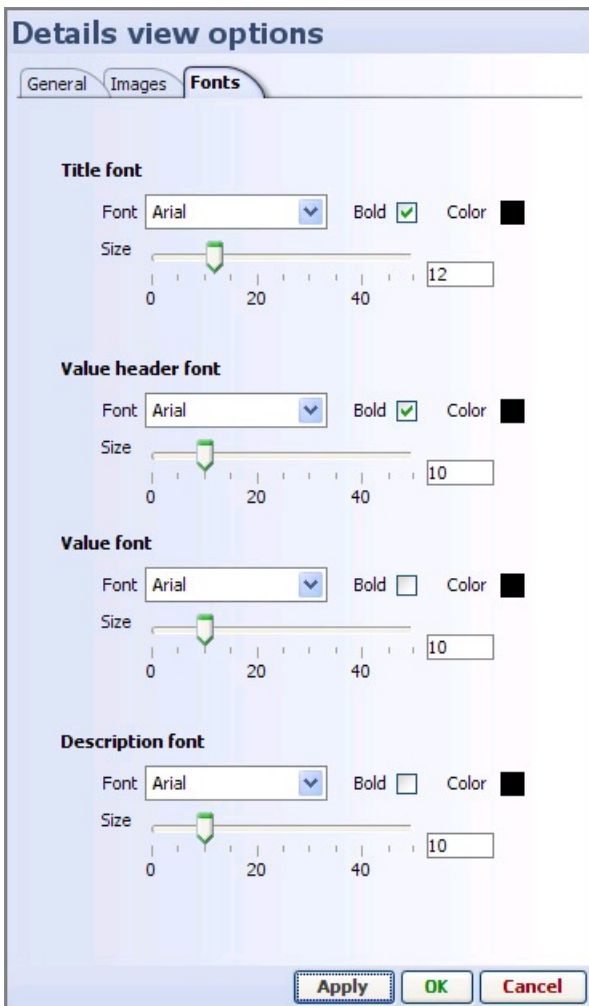
Description field

Number of columns

Images tab



Fonts tab



Back to [DataPlayer View](#) [54]

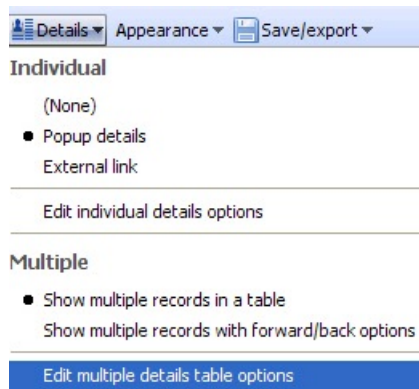
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DP Detail Displays

Editing DataPlayer Details Windows

Setting single and multiple details window display options

There are several options for configuring the display of the Details display windows that underlie each DataPlayer. Details display windows are not the same as Details View DataPlayers. Every DataPlayer view type includes a subsidiary Details window that responds to user clicks on the Details button.



Individual - refers to details for one record (row) only

None - no details display window for individual records

Popup details - details window will open on top of DataPlayer; configurable to be slightly smaller...display cannot be larger than DataPlayer

External link - allows you to use an external web page to display details (and hi-res images, etc.) for each record. Link must already be defined using **Main Toolbar: Settings > Links > Add web link**

Edit individual details options [235] - all settings controlling the display of details for individual records (rows)

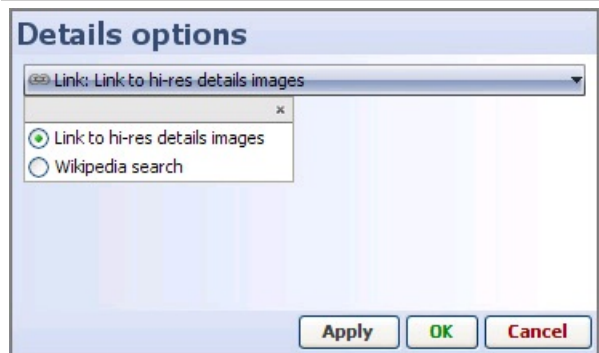
Multiple - refers to details for selected subsets of records (rows)

Show multiple records in a table [236] - multiple record details in an expandable table. (similar to DataPlayer Table View)

Show multiple records with forward/back options [237] - multiple record details in a single window with forward/back paging through records

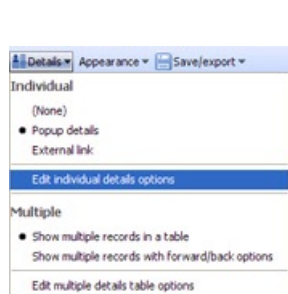
Edit multiple details table options - all settings controlling the display of multiple records according to the choice of either single window or expandable table display.

If you specify **External link**, then click on **Edit individual details options**, you will see a list of the links already configured in the file:



DataPlayer View Toolbar: Details > Edit individual (record) detail options

If you choose **Popup details** as the single record details display type, then click **Edit individual details display options**, you will see a three-tabbed dialog containing all the settings



General tab

Images tab

Fonts tab

General tab

The General tab includes

The screenshot shows the 'Details options' dialog box with the 'General' tab selected. The settings are as follows:

- Template: Vertical
- Title field: Name
- Fields to show: (icon)
- Description field: Evaluation text
- Number of columns: 2 (slider from 1 to 6)
- Checkboxes:
 - Show column headers
 - Always show details for all records
 - Animate
- Size of window (% of total size): 75 (slider from 0 to 100)

Buttons at the bottom: Apply, OK, Cancel.

The close-up shows the 'Template' dropdown menu with the following options:

- Vert (selected)
- Sort x
- Standard
- Letterbox
- Image only
- No image
- Vertical
- Video

Template settings determine the layout of space in the details display window

- Standard -
- Letterbox -
- Image only -
- No image -
- Vertical -
- Video -

Fields to show:

Details options

General Images Fonts

Template: Standard

Title field: Name

Fields to show: [icon]

Description field: [icon]

Select: All None x

Name	Show title	Link: (None)	<input checked="" type="checkbox"/>	[hand icon]
Address	Show title	Link: (None)	<input type="checkbox"/>	[hand icon]
Location	Show title	Link: (None)	<input checked="" type="checkbox"/>	[hand icon]
Job title	Show title	Link: (None)	<input checked="" type="checkbox"/>	[hand icon]
Sex	Show title	Link: (None)	<input checked="" type="checkbox"/>	[hand icon]
Race	Show title	Link: (None)	<input checked="" type="checkbox"/>	[hand icon]
Age	Show title	Link: (None)	<input checked="" type="checkbox"/>	[hand icon]
Employee level	Show title	Link: (None)	<input type="checkbox"/>	[hand icon]
Organisation Level	Show title	Link: (None)	<input type="checkbox"/>	[hand icon]
Union	Show title	Link: (None)	<input checked="" type="checkbox"/>	[hand icon]
Skills	Show title	Link: (None)	<input type="checkbox"/>	[hand icon]
Academic qualifications	Show title	Link: (None)	<input type="checkbox"/>	[hand icon]
Years seniority	Show title	Link: (None)	<input checked="" type="checkbox"/>	[hand icon]
Sick days taken	Show title	Link: (None)	<input checked="" type="checkbox"/>	[hand icon]
Current salary-£	Show title	Link: (None)	<input type="checkbox"/>	[hand icon]
Salary increase	Show title	Link: (None)	<input checked="" type="checkbox"/>	[hand icon]
Next year salary	Show title	Link: (None)	<input checked="" type="checkbox"/>	[hand icon]
Performance	Show title	Link: (None)	<input checked="" type="checkbox"/>	[hand icon]
Evaluation text	Show title	Link: (None)	<input type="checkbox"/>	[hand icon]

Number of columns: 1

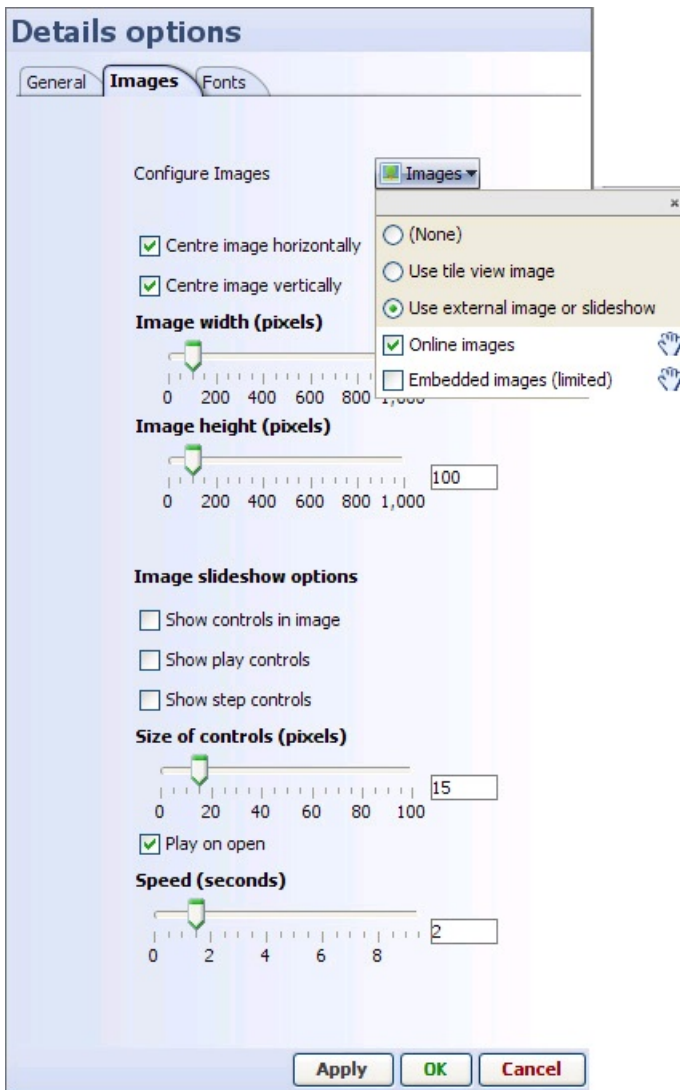
Show column headers

Always show column headers

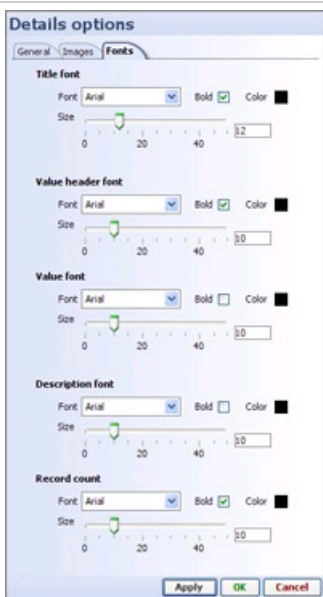
Animate

Size of window: 0 20

Images tab

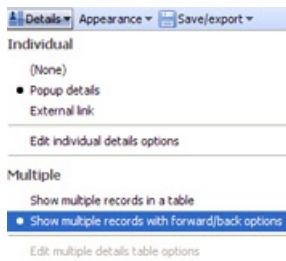


Individual fonts tab

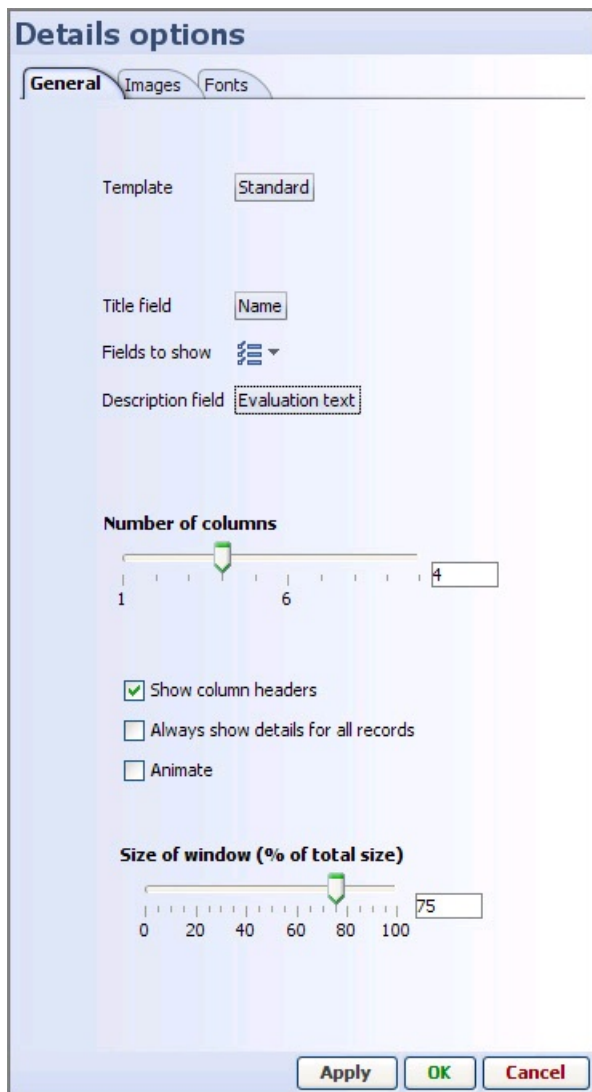


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DataPlayer View Toolbar: Details > Show multiple records with forward/back options



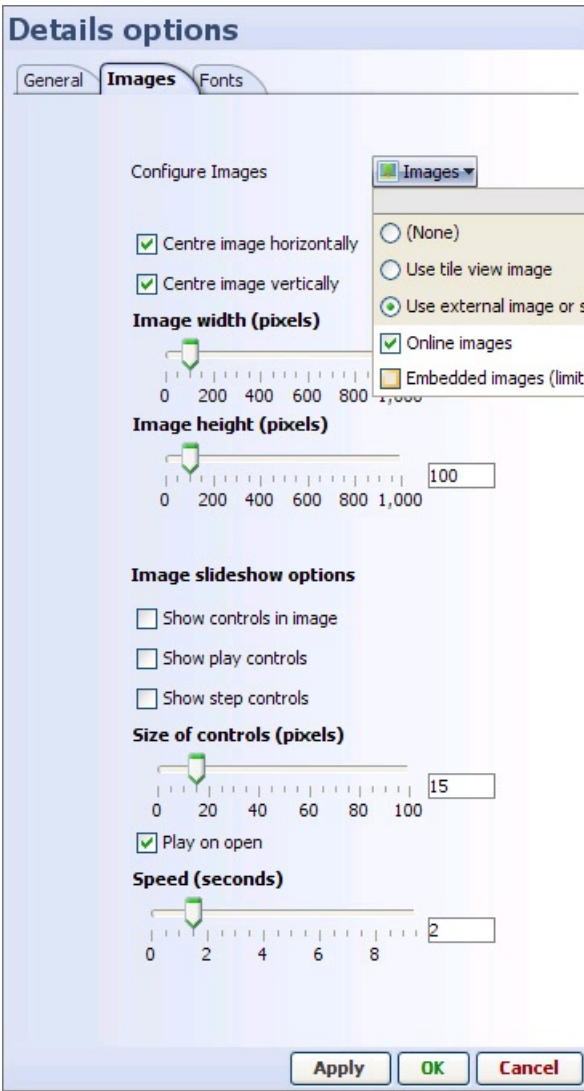
General tab



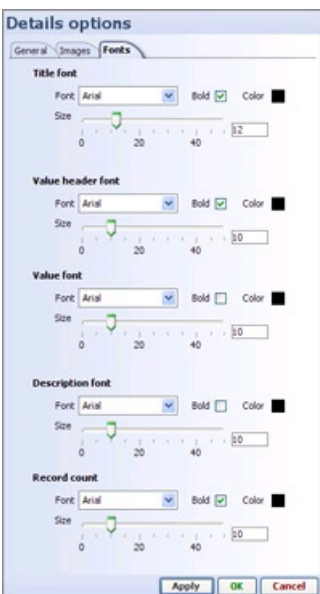
Templates are the same as those for individual record displays

Fields to show drop-down selector works the same as for individual record details display (see above)

Images tab



Fonts tab



[\(back to top\)](#) [238]

[Details](#) | [Appearance](#) | [Save/export](#)

Individual

(None)

- **Popup details**
- External link

[Edit individual details options](#)

Multiple

- Show multiple records in a table
- Show multiple records with forward/back options

[Edit multiple details table options](#)

General tab

Details table options

General
Columns
Fonts
Expansion
Expansion images
Expansion Fonts

Rows expanded on open

Rows expandable

Centre values within cell

Show row colours in background

Alternate row colors

Colour 1

Colour 2

Expand button colour

Color by

Columns ▼

Visible

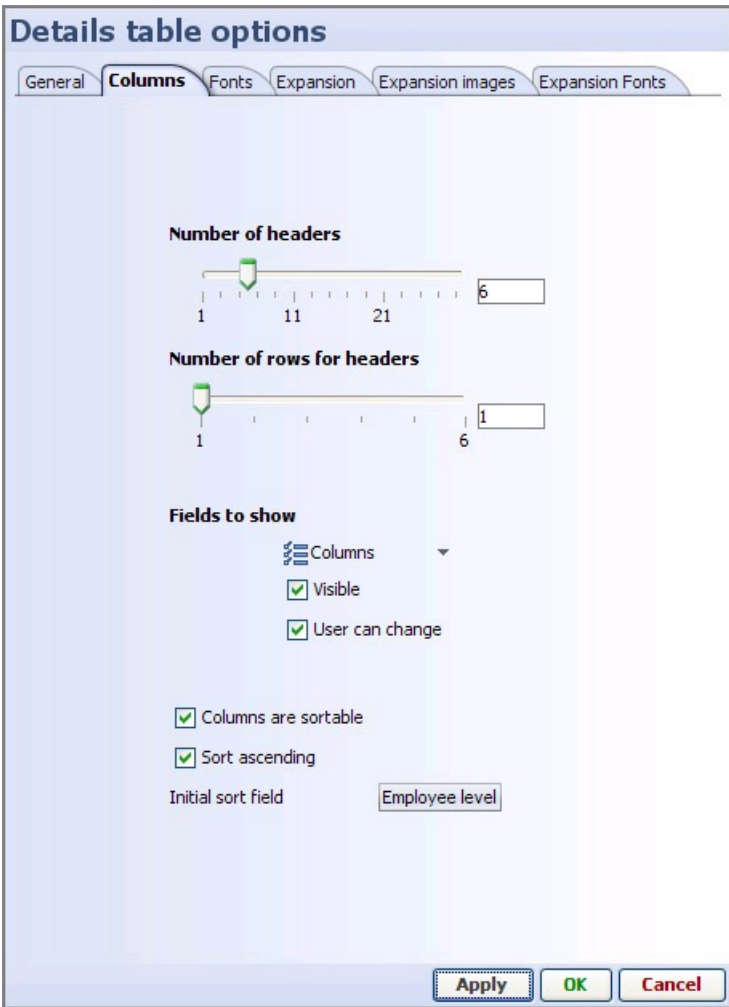
User can change

"None" value:

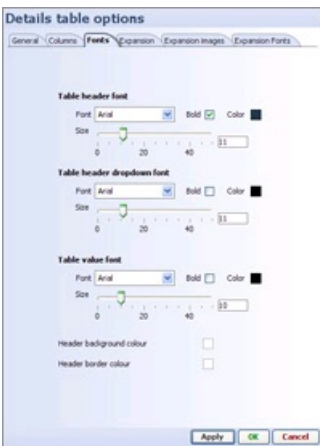
Title:

Size of window (% of total size)

Columns tab



Fonts tab



Expansion tab

Details table options

General Columns Fonts **Expansion** Expansion images Expansion Fonts

Template: Standard

Title field: Name

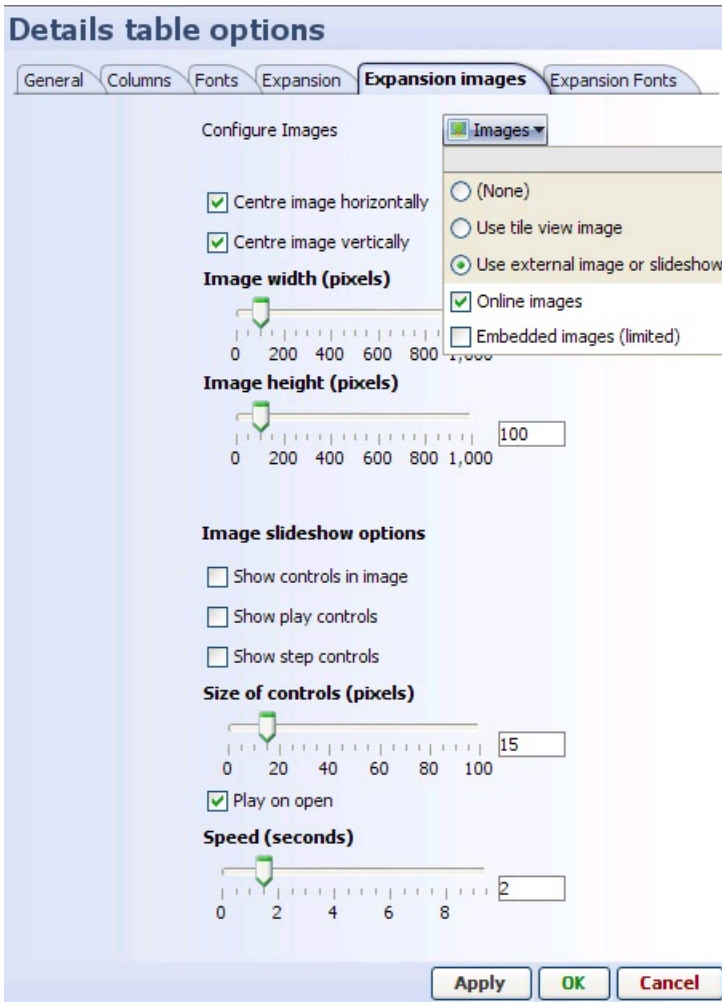
Fields to show: [icon]

Description field: [icon]

Number of columns: 1

Select: All None x	
Name	Show title Link: Wikipedia <input type="checkbox"/> [hand icon]
Address	Show title Link: (None) <input type="checkbox"/> [hand icon]
Sex	Show title Link: (None) <input checked="" type="checkbox"/> [hand icon]
Race	Show title Link: (None) <input checked="" type="checkbox"/> [hand icon]
Age	Show title Link: (None) <input checked="" type="checkbox"/> [hand icon]
Location	Show title Link: (None) <input checked="" type="checkbox"/> [hand icon]
Organisation Level	Show title Link: (None) <input checked="" type="checkbox"/> [hand icon]
Job title	Show title Link: (None) <input checked="" type="checkbox"/> [hand icon]
Union	Show title Link: (None) <input checked="" type="checkbox"/> [hand icon]
Skills	Show title Link: (None) <input checked="" type="checkbox"/> [hand icon]
Academic qualifications	Show title Link: (None) <input checked="" type="checkbox"/> [hand icon]
Years seniority	Show title Link: (None) <input checked="" type="checkbox"/> [hand icon]
Sick days taken	Show title Link: (None) <input checked="" type="checkbox"/> [hand icon]
Current salary-£	Show title Link: (None) <input checked="" type="checkbox"/> [hand icon]

Expansion images



Expansion fonts



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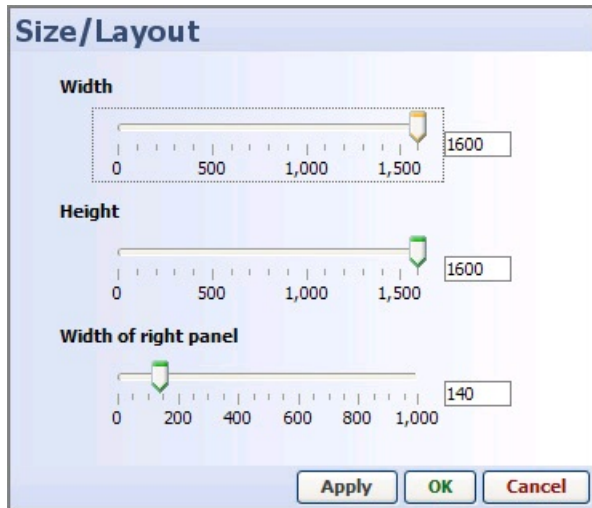
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DP Appearance Display

DataPlayer View Toolbar > Appearance > sub-menu options

Configuring Size, Styles, Colours, Skin elements and Component options

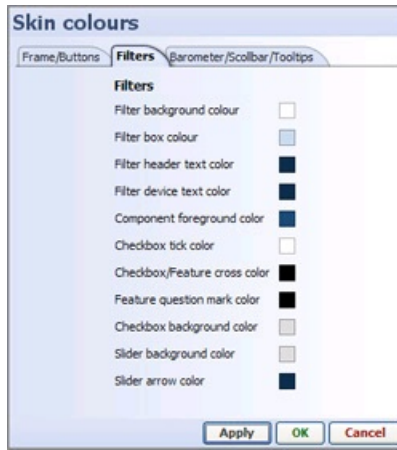
> Size



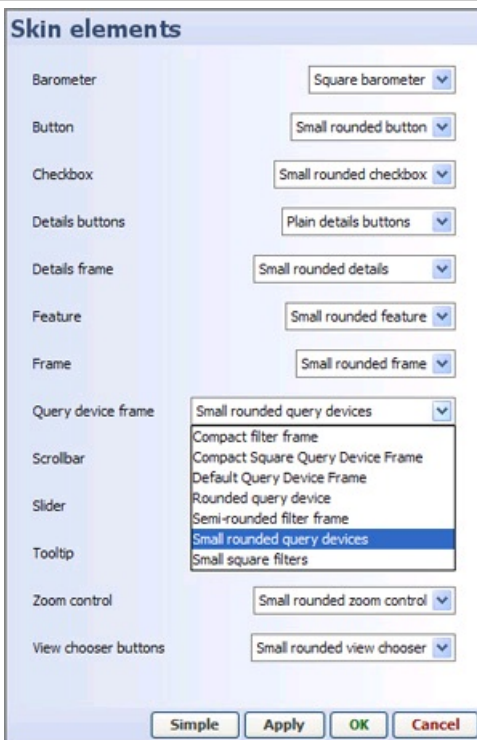
> Styles



> Colours



Skin Elements



> Components

> Barometer

Barometer options

Show barometer

Barometer text
 Showing out of
Showing x/y

Barometer text font
 Font: Bold Color
 Size:

Apply OK Cancel

> **Buttons**

Button options

Details button
 Show
 Text:
 Font: Bold Color
 Size:

Reset button
 Show
 Text:
 Font: Bold Color
 Size:

Details 'Next' button
 Font: Bold Color
 Size:

Details 'Previous' button
 Font: Bold Color
 Size:

Apply OK Cancel

> **Filters**

By default, the numbers or dates appear above the sliders. If you have short integer numbers, and more horizontal space, you can un-tick the ***Text always above sliders*** option and the values will appear at the ends of the sliders. (not recommended for dates)

Relatively large data sets may not be able to synchronise the display with movement of the slider in real time. Use the ***Sliders filter on release*** option to de-couple movement of the slider from the up-date of the visualisation, improving the user experience.

Filter options

Text always above sliders

Sliders filter on release (recommended for large datasets)

Value to show for nulls

Size of filter components

12

Filter header font

Font: Bold: Color:

Size: 12

Filter font

Font: Bold: Color:

Size: 10

> Global colour options

Sets colour options across all view types in the DataPlayer

Global colour options

Color by

Columns

Visible

User can change

"None" value:

Title:

Menu font

Font: Bold: Color:

Size: 14

Menu dropdown font

Font: Bold: Color:

Size: 14

> Scroll bars

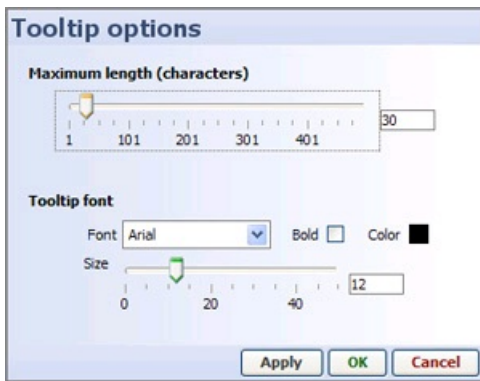
Scrollbar options

Width of scrollbars

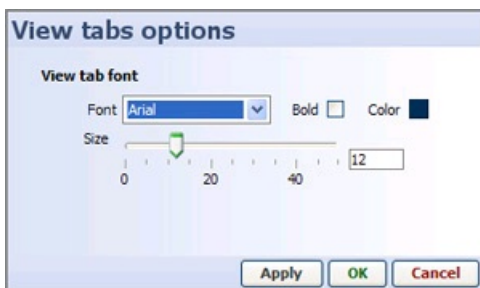
10

> Tooltips

The column(s) to show as tooltips are currently a global Omniscene setting available from Settings > Tooltips (2.5)



> View Tabs



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DP Document Display

Displaying DataPlayers inside Documents

Inserting DataPlayers in common document format files - with full interactivity

DP Web Display

Displaying DataPlayers on the Web

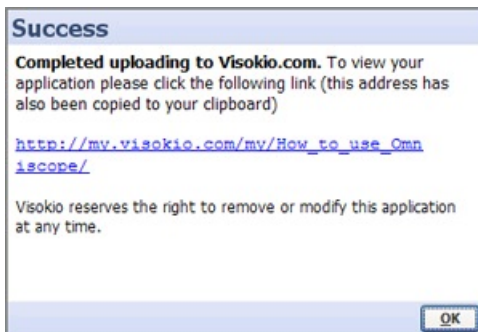
Posting and refreshing DataPlayers to your own or Visokio-hosted web pages

There are currently three options for exporting DataPlayers for display on the web:

- **Publish on my.visokio.com** - If you do not have your own website, or you cannot edit the HTML on the page you wish to display the DataPlayer on, you can use a hosted Visokio.com page, and link to your DataPlayer page from your blog, or send the link to your users via e-mail.
- **Save for web** - If you have your own web site pages and administrative rights to add or modify pages, choose the **Save for web** option the first time you publish your DataPlayer. You will be given a page of HTML and a related folder to upload (see below).
- **Save standalone .SWF** - If you just want to test a DataPlayer, or are updating a main .SWF (same name and size) that you have already published using fresh data and/or modifications to the views or settings, you can export just the main .SWF and upload it to replace its predecessor.

Save/export > Publish on My Visokio.com

If you choose this option, you will be asked to assign a password to the page/file and once your DataPlayer has been successfully uploaded, you will see the link to the page displaying your DataPlayer.



You can use the resulting link in blogs and e-mails to display a blank web page with just your DataPlayer on it:

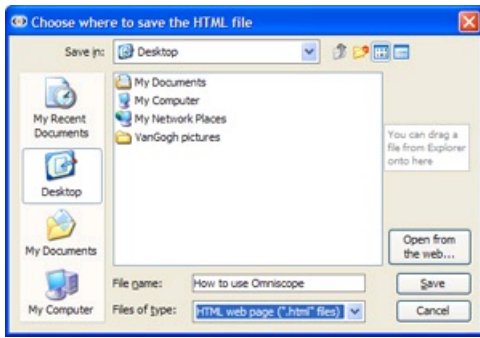
http://my.visokio.com/my/How_to_use_Omniscope/ [239]

You can update this online DataPlayer at any time by saving a new file to the same location with the exact same name (you will be asked for the password).

You cannot delete the page or the file, but you can upload a blank or re-directing version if you wish to display elsewhere and cannot recall the links you distributed.

Save/export > Save for web

Choosing the **Save for web** option exports a blank .HTML file and an associated folder containing some 'helper' files and image folders.

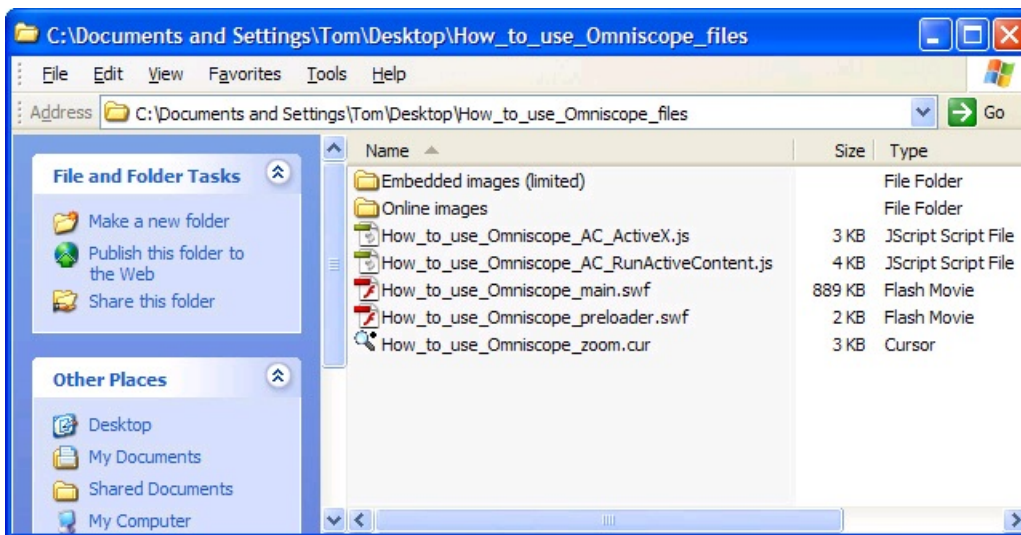


Choose the name of the DataPlayer save for web file carefully, avoiding spaces and illegal characters, and using caution with upper and lower case naming. Omniscopes will check for spaces and illegal characters, but preserve case in the names.

Once you approve any changes to the name, Omniscopes will save an .HTML page and an associated folder of files and images with the same name to the location you indicate.

The blank HTML page can be used as a starting point for creating the page on which the DataPlayer will display, or the code between the <script> tags pasted into an existing display page. The folder of files should be uploaded to the web server preserving the name and the same relative position to the display page (immediate sub-directory).

The exported **Save for web** folder contains any image folders (containing all the image files) used/referenced in the DataPlayer, the main .SWF DataPlayer file (with the extension _main.swf) and some helper files used to smooth the loading and display of the DataPlayer in site visitors' browsers.



The easiest way of publishing the main.swf DataPlayer file on your intended display page is to use your CMS to position the Flash file and generate the object tags. Alternatively, you can add hand-coded <object> tags following the model code below. Be sure to note the size of the DataPlayer and provide an appropriate space in the page.

```
<object classid="clsid:D27CDB6E-AE6D-11cf-96B8-444553540000"
codebase="http://download.macromedia.com/pub/shockwave/cabs/flash/swflash.cab#version=6,0,29,0"
width="750" height="290"><param name="movie"
value="/files/How_to_use_Omniscopes_files/How_to_use_Omniscopes_main.swf"
/><param name="quality" value="high" /><param name="menu" value="false" /><param name="wmode" value="" /><embed
src="/files/How_to_use_Omniscopes_files/How_to_use_Omniscopes_main.swf"
wmode="" quality="high" menu="false" pluginspage="http://www.macromedia.com/go/getflashplayer [240]"
type="application/x-shockwave-flash" width="750" height="290"></embed></object>
```

ADVANCED: For advanced users, the blank HTML page exported together with the folder for upload contains the following code, reflecting the names you assigned when you saved the DataPlayer and when you created any associated image folders. If you wish to use scripts, you can paste this code into the various sections of your page.

```
<HTML>
<HEAD>
<script src="How_to_use_Omniscopes_files/How_to_use_Omniscopes_AC_RunActiveContent.js"
type="text/javascript"></script>
<meta http-equiv=Content-Type content="text/html"; charset=ISO-8859-1">
<TITLE>Visokio Omniscopes - How_to_use_Omniscopes</TITLE>
```

```
</HEAD>
<BODY align=center topmargin=0 leftmargin=0 marginheight=0 marginwidth=0>
<center>
<div style='margin: 10 10 10 10'>
<!-- using adobe javascript to pre-activate control -
needs the How_to_use_Omniscope_files/How_to_use_Omniscope_AC_RunActiveContent.js script file -->
<script type="text/javascript">
  AC_FL_RunContent(
    'codebase','http://download.macromedia.com/pub/shockwave/cabs/flash/swflash.cab#version=6,0,47,0',
    'width','750',
    'height','290',
    'id','preview',
    'quality','high',
    'bgcolor','#FFFFFF',
    'FlashVars','movieToLoad=How_to_use_Omniscope_files/How_to_use_Omniscope_main.swf',
    'movie','How_to_use_Omniscope_files/How_to_use_Omniscope_preloader'
  );
</script>
</div>
</center>
<!-- Javascript to get round IE "Click to activate and use control" -->
<script type="text/javascript" src="ieupdate.js">
  theObjects = document.getElementsByTagName("object");
  for (var i = 0; i < theObjects.length; i++) {
    theObjects[i].outerHTML = theObjects[i].outerHTML;
  }
</script>
</BODY>
</HTML>
```

Save/export > Save standalone .SWF

If you have already published a DataPlayer and you wish to replace it with a more current .SWF containing refreshed data, or you wish to test the performance or other features, you can choose to export just the main .SWF file. Choose the name carefully, avoiding spaces and illegal characters, and using caution with upper and lower case naming. Omniscope will check for spaces and illegal characters, but preserve case in the names. If you are replacing an existing .SWF on the site, be sure to use the exact same name with the suffix 'main'. In the example above, the relative location and name of the file to be overwritten on your web server is shown following the code 'movieToLoad=

How_to_use_Omniscope_files/How_to_use_Omniscope_main.swf

Note: to display a standalone .SWF locally, you may need to associate the .SWF file extension with your browser.

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Commands Reference

Main Toolbar Commands Reference - Version 2.5+

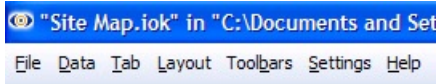
What does this command/option do?

Below is an index to the version Main Toolbar command menus starting from version 2.5. Click on the anchor links below to jump down to the sub-section containing the command(s) you are seeking. If you are still using version 2.4 or earlier, the 2.4 Commands Reference is [here](#) [241]. For information on commands and options related to specific Views and View Toolbars, please consult the [Views Reference](#). [25]

Accustomed to the version 2.4 menus?

If you're using 2.4, please see the [command reference for 2.4](#) [241]. If you're used to Omniscope 2.4, and can't find a command in 2.5, see [this guide to changes](#) [242].

Version 2.5 and later



| **File** [55] | **Data** [56] | **Tab** [57] | **Layout** [58] | **Toolbars** [59] | **Settings** [60] | **Help** [61] |

File menu [55]

New File [55]
Open file [77]
Connect to database [78]
Open image collection
Open folder of files
Open online source
Open map
Open demo

Save
Save as...
File security
About this file
Help with this file

Export
Save screen image
Print
Print as PowerPoint
Print as PDF

Close

Exit

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Manage fields
Add field (column)
Add records (rows)
Delete selected records
Formulas

Reload from file
Refresh from source
Automatic refresh
Edit source

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Repeat last merge
Import from Bloomberg

Replace within values
De-pivot
Re-pivot
Scramble

Undo edit
Redo edit
Undo/redo history

Tab menu [57]

New [57]

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Commit changes for all

Revert changes
Revert changes for all

Rename
Duplicate

Delete
Delete others
Go to

Tab settings

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Mode selection: [58]

Working mode
Presenting mode
Reporting mode
Dashboard mode

Edit modes

View spacing
Title
Title style

Annotation
Annotation style

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Header image
Center image

Import PowerPoint slide
Clear layout

Styles
Configure styles

Toolbars menu [59]

Toolbar visibility:

[59]

Main toolbar
View toolbars
View headers
View data toolbars
Sidebar toolbar
Details toolbar

Left sidebar
Right sidebar
Freeze sidebar width
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Cycling toolbar
Tab bar
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Toolbar settings

Settings menu [60]

This tab: [60]

Brushing enabled
Details
Tooltips
Value colours
Colour ranges
Advanced tab settings

This file:

Images
Links
Web Services
Branding
Advanced file settings

Application-wide:

Language
Window size
Enterprise (Enterprise only)
Advanced

Help menu [61]

Create Help Page [61] (screen)
Open user guide file
Video tutorial
Online help

Visit Visokio website
Contact us
Error reporting

Automatically check for updates
Check for software updates now

About
License agreement
Licensing and activation

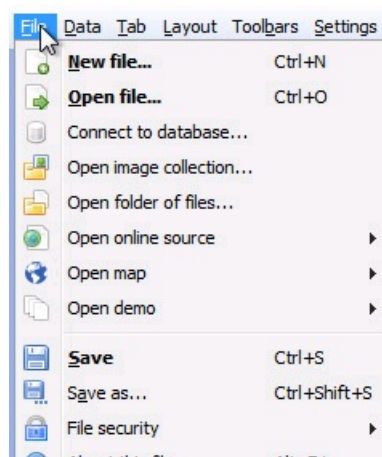
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File Menu

File > Menu Commands

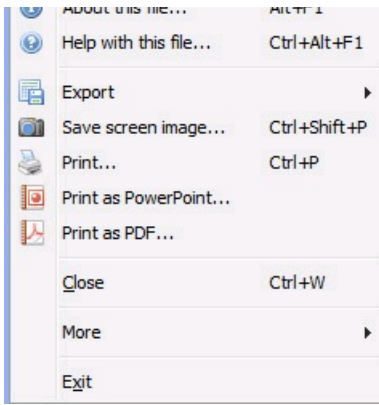
Version 2.5+



File > Menu: groups commands related to importing data from a file, table(s) of a relational database, online 'cloud', a folder of files/documents, our online map library or a folder of images.

New file - opens a dialog where you can specify how many rows and columns you need to start with. Generally, you should start small, except if you are planning to cut-and-paste data into the new Omniscope file, in which case you must specify enough rows and columns to receive the paste.

Open file - launches the **Open file dialog** [77], which looks like a Windows file browse window, but has some additional features and options on the right side. Navigate your directory structure and find the file you wish to load, be it an existing Omniscope .IOK file, or a supported delimited data file; Excel .XLS, .CSV (comma separated value) or other common data file formats such as .TSV, .TXT etc.



Connect to database - launches the **Database Connection Wizard** [78]

Back to **Commands Reference** [27]

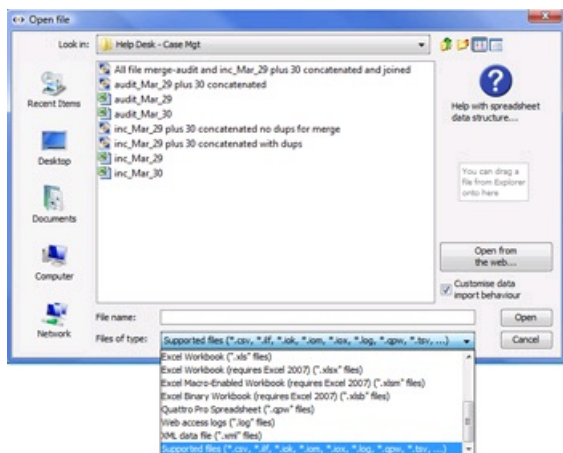
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Open file

File > Open file...Using the Open Data File Dialog

Opening and importing data from files

Clicking on **File > Open file** brings up the File open dialog, which looks similar to a Windows file browse dialog:



File > Open dialog: Most source data files in Excel .XLS, .CSV, .TSV and other common delimited text data file formats will open directly in Omniscope. The  Help icon in the upper right displays a [format guide](#) [243] for importing spreadsheet files. Always confirm that your spreadsheets conform to this simple layout before trying to open them in Omniscope. If you have problems, such as all the values appearing in one column, you may need to change the delimiter or rename a tab-delimited file extension from .TXT to .TSV. If only some of the data fields (columns) have not separated cleanly, you can use the **Expand or Collapse Values** functions in the [Table View Tools](#) [38] menu to separate data into more columns or combine data from multiple columns into fewer columns.

If you encounter problems importing data from one or more files, see also the KnowledgeBase section on importing and exporting data to and from [Data Files](#). [79]

Opening remote data files

Enter web address (URL)

Opening remote data files over the web -



If the source data file you want to open is not on your machine or local network, you can use the **Open from Web** button to specify the exact location (URL) of the data file you wish to import.

Customise data import



Adapting to regional and non-standard data formatting -

If you are repeatedly using/importing other peoples' spreadsheets, you can depart from the recommended standard spreadsheet layout somewhat by ticking the **Customise data import behaviour** option and providing Omniscope with additional information about the layout of the data you are importing. For example, sometimes you may have a .CSV, .TSV or Excel .XLS file which does not have the column headers on the first row. Without customisation, Omniscope will assume the first row contains headers, and include the actual column headers as the first row of data. To skip any number of redundant upper rows on file import, use the **Skip first ??** rows box to enter the number of redundant (usually formatting) rows in your data file to be skipped before trying to read in the headers.

International data issues

Data File delimiters - the .CSV file extension stands for "Comma Separated Values", which means the cells in each row of the data table are separated by the comma character. However, if you are in a region that also uses the comma for the decimal point (e.g. several European countries, such as France) some versions of Excel create .CSV files that use a semicolon as the separator character. Sometimes these files are saved with a .TXT rather than .CSV extension, even though they are multi-column tables. Omniscope is unable to detect these situations automatically. If you open such a file in Omniscope, your data will very clearly be wrong, with most columns appearing as text with semicolons. To import this kind of file, use the **Customise data import** option dialog to change the **Separator character** to a semicolon ";". Pipe "|" delimited files can also be imported, but first you must re-save the file with a .CSV extension, then use the option that appears to change the delimiter to "|".

Dates & Numbers - If you are running on Windows, when importing data that is in a delimited text format which includes Excel, CSV and TSV (tab-separated values), Omniscope will use your Windows Regional Settings to try to automatically recognise data. For example, for a PC with United States Regional Settings, Omniscope will recognise "5/13/2005" as a date and "1,500.5" as a number. For some international users, however, this may not work as expected and the result will be an import of all columns as type Text (shown either as multi-coloured Category columns or white Text columns in Omniscope). If this occurs, you can usually manually convert numbers and dates & times fields using the **Data > Manage fields** dialog. For more information on formatting dates & times, and dealing with time zone issues, see the section on Dates & Times.

If you know your data has been formatted for a different region, change the *Locale* drop-down accordingly. For example, if you live in Germany but have received a .CSV from an American customer, you should choose 'English (US)'. If you find Omniscope gets things wrong and your data is incorrectly recognised, you can disable auto-detection of dates and numbers by deselecting the two **Recognise...** checkboxes. All fields will open as Category or Text data and their text values will be preserved. See the KnowledgeBase section for more on information on dealing with [International data issues](#). [244]

Importing XML files

Importing .XML files which have already been transformed to Visokio [.XML Schema](#) [245] is the same as opening a .CSV.



Transforming XML into Omniscope Schema -

If your .XML file conforms to another schema, then you must prepare an [.XSL Transform](#) [246] file, tick **Customise data import** and specify that file to transform the non-Visokio XML file to Visokio XML Schema for import. Your .XSL Transform stylesheet can be accessed from any location, including the web, using the Enter web address (URL) option to specify the online location of the .XSL file.

Note: if your XML data set is not already in a tabular structure, you must array it into a tabular structure using your XSL file.

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Connect to database

File > Connect to Database... Using the Database Connection wizard

Connecting to relational databases using SQL and ODBC or JDBC

Omniscope can connect to and import data from any relational database that supports common protocols like ODBC and JDBC. The Database Connection wizard guides you through the process of connecting and importing your data, and saving it as a new Omniscope file. Your file will remember its source(s), and on refresh re-execute the embedded SQL statement to re-generate the reporting view/table and repeat any subsequent merges with other files either on opening, or on demand.

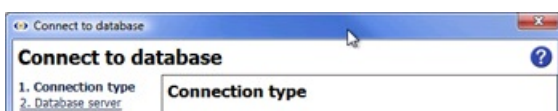
The Omniscope Database Connection wizard lets you define a connection and pass any standard SQL expression that results in a single 'flat' table. If you do not have authorisation to execute SQL statements, or don't know the SQL required to generate the table you want, your Database Administrator may have to create the connection in the wizard and/or create the appropriate reporting view(s).

Some organisations also have additional high-performance analytical and reporting databases that pre-prepare data for reports by performing joins, aggregations, sorts and scans on data assembled from multiple transactional databases. In general, Omniscope interacts with 'business intelligence' analytical databases in exactly the same way as transactional database views/tables. For more technical information, see the [Database Connections](#) [80] section of the KnowledgeBase.

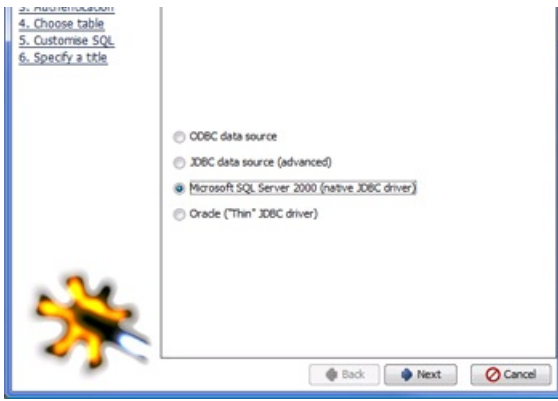
Using the Database Connection Wizard

Clicking on **File > Connect to database** launches the Database Connection wizard. The wizard guides you through a six-step process for defining a linked data source from a relational database view/table. You will need to know the type of database and its connection details. Using the Database Connection wizard, you enter the connection details for your database and choose which database table or reporting view you wish to retrieve data from. By default, this will create a persistent linked data source relationship between this database table/view and the Omniscope file.

Connection type: Select the type of connection you are creating from the options currently available.



ODBC - use this option to connect to defined data sources, like MS Access. Can also be used to connect to spreadsheets for testing.

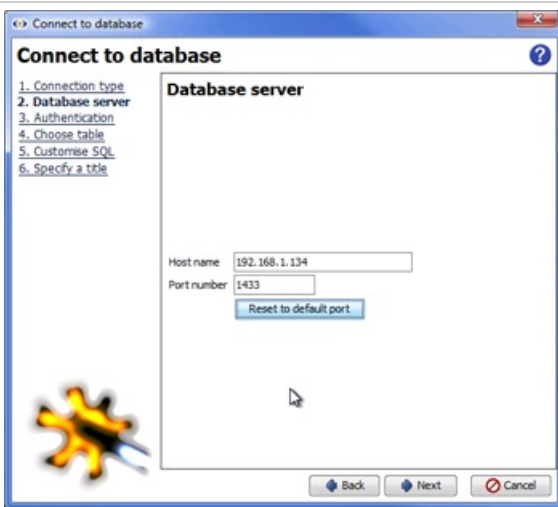


JDBC - use with databases other than MS SQL Server & Oracle if you have the JDBC driver installed.

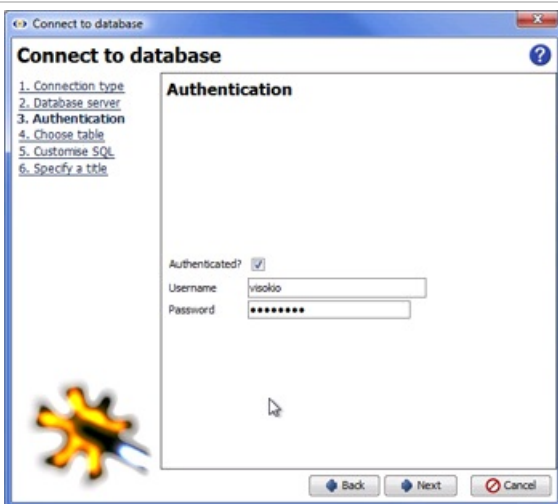
MS SQL Server - use this option with MS SQL Server 2000. If you have 2005 or 2008 use the generic JDBC option.

Oracle - use this option with all versions of Oracle databases

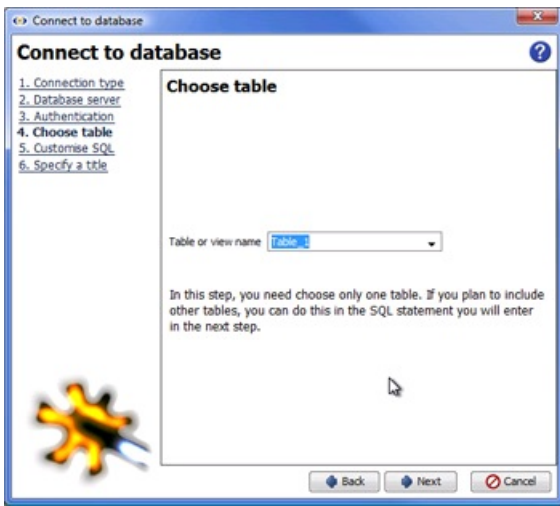
Detailed examples of each type of connection are available in our [KnowledgeBase](#). [247]



Database server:



Authentication:



Choose table:



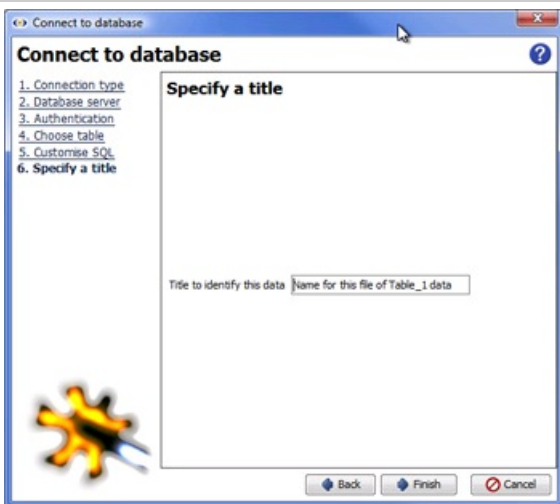
Customise SQL:

Omniscope can import the results of any SQL statement that returns a table. The default SQL statement imports everything from the selected data table or reporting view.

If you know SQL and your database, you can modify the default statement and your statement will be saved and re-evaluated each time the file is refreshed.

If you have several related queries, you may want to save them in a text file and paste them in with minor variations.

Note: To modify the SQL statement programatically using Enterprise XML actions for automated refresh and distribution using the [Scheduler watch folder](#) [248], please contact us.



Specify a title:

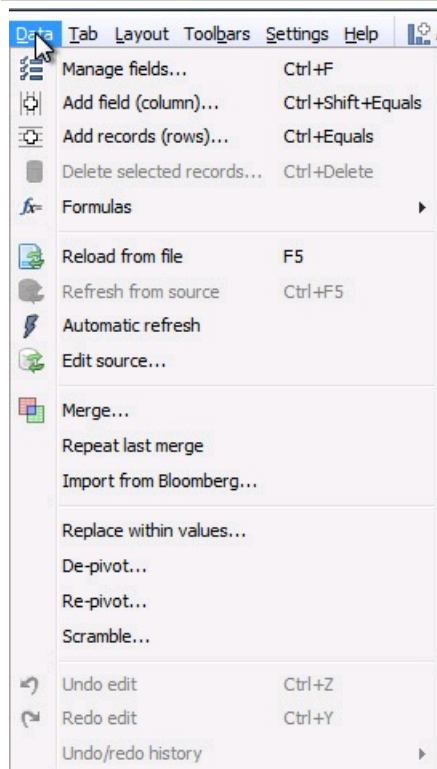
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Data Menu

Data > Menu Commands

Version 2.5+



Data > Menu: groups commands for managing the underlying tabular data set in the open file, including adding fields (columns) and records (rows), creating formula fields, refreshing the data from source(s), merging in data from other sources, etc.

Manage fields -

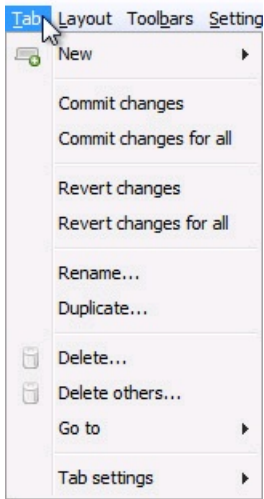
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Tab Menu

Tab > Menu Commands

Version 2.5+



Tab > Menu: groups commands providing options for creating new tabs, for managing the options to commit or revert changes you have made to the configuration of tabs, deleting tabs and managing tab settings.

New - provides options for creating a new tab. There are many options and settings. This same dialog is also available under the drop down to the left of the "+" at the rightmost end of the Tab Bar where all the tabs are displayed. More detail on options for creating new tabs.

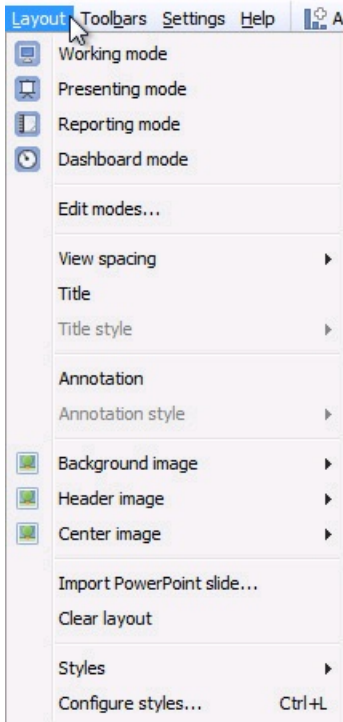
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Layout Menu

Layout > Menu Commands

Version 2.5+



Layout > Menu: groups commands governing the formatting and annotation of each tab.

Display mode options selector: use these to quickly change the formatting of each tab for different purposes. (the first two options also appear on the far right of the Main Toolbar for quicker access.)

Working mode -
Presenting mode -
Reporting mode -
Dashboard mode -

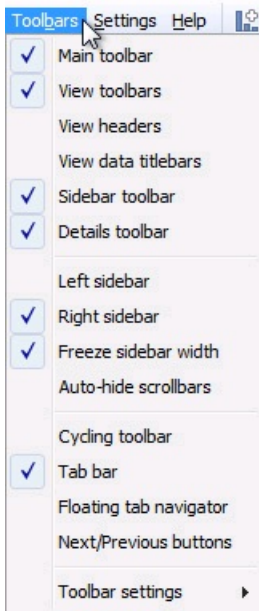
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Toolbars Menu

Toolbars > Menu Commands

Version 2.5+



Toolbars > Menu: Groups commands governing the visibility of various toolbars and other on-screen aids

Main Toolbar - untick to hide the main toolbar on a given tab, this is done automatically in some display mode layout options, like reporting Mode.

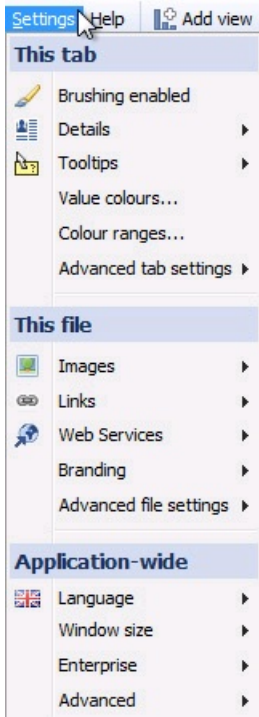
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Settings Menu

Settings > Menu Commands

From version 2.5



Settings > Menu: groups commands setting options at Tab level, File level, and Application-wide level.

This Tab:

Brushing enabled - 'brushing' or fading is an option that greys-out unselected records in Views on a given tab. Click to toggle this setting on or off for a given tab.

Details -

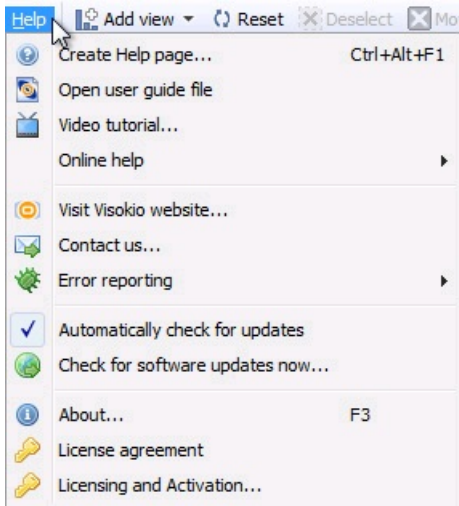
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Help Menu

Help > Menu Commands

Version 2.5+



Help > Menu: groups commands and links to online resources that can help you make the most of your Omniscience installation.

Create help page - opens the dialog used to prepare and edit the file-specific help screen for users/recipients of the file. More detail on creating help screens for your files is [here](#).

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Change List: 2.4 to 2.5

Mapping 2.4 to 2.5 commands & dialogs

Where did that command go?

This page lists Main Toolbar Command menu items in Omniscience 2.4 which have been moved as of version 2.5.

The old 2.4 command menu name/location is shown like this. *The new 2.5 command/location is shown like this.*

Commands whose names/locations have not changed are not listed here.

For the full list of commands, see the Commands Reference sections for version [2.5](#) [27]+ or [2.4 and previous](#) [241].

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Omniscience 2.4 File menu

Demo files *File > Open demo*

Import into current file:

Reload data from file *Data > Reload from file*

Refresh data from source *Data > Refresh from source*

Edit data source *Data > Edit source*

Update for new data source *Data > Edit source*
Import query from XML file *Queries > Import/export XML query file*
Import references into basket *Replaced with linked text search devices*
Merge data from another file *Data > Merge*
Repeat last merge *Data > Repeat last merge*
Import fields from Bloomberg *Data > Import from Bloomberg*

Save IOK *File > Save*

Omniscope 2.4 Edit menu *Data menu*

Manage fields (columns) *Data > Manage fields*
Add field (column) *Data > Add field (column)*
Add records (rows) *Data > Add records (rows)*
Delete selected rows *Data > Delete selected records*
Replace within values *Data > Replace within values*
De-pivot data *Data > De-pivot*
Re-pivot data *Data > Re-pivot*
Undo edit *Data > Undo edit*
Redo edit *Data > Redo edit*
Undo/redo history *Data > Undo/redo history*

Omniscope 2.4 Tools menu *Settings menu*

Automatic refresh *Data > Automatic refresh*
Language *Settings > Language*
Enable brushing *Settings > Brushing enabled*
Record cycling *Toolbars > Cycling toolbar*
Show details using *Settings > Details*
Tooltips *Settings > Tooltips*
Links *Settings > Links*
Web services *Settings > Web services*
Images *Settings > Images*

Advanced Tools:

Edit publishing settings *Settings > Advanced file settings > Publishing settings*
Start Scheduler *Settings > Enterprise > Scheduler*
Edit Enterprise action descriptor *Settings > Enterprise > Edit Enterprise action descriptor*
Application-wide settings *Settings > Advanced*
Show virtual keyboard alongside text fields *Settings > Advanced > Miscellaneous > Virtual keyboards*
HTTP proxy settings *Settings > Advanced > HTTP proxy settings*
Auto-convert large category fields to text *Settings > Advanced file settings > Auto-convert text fields*

Omniscope 2.4 Reports menu *Tab menu*

Page: Rename *Tab > Rename*
Page: Delete *Tab > Delete*
Page: Delete others *Tab > Delete others*
Export XML query file *Queries > Import/export XML query file*
Administer all: Delete all pages *No longer available*
Create page: From current Omniscope configuration *Tab > New > From current layout (or click the + button next to the tabs)*
Create page:Text only *Tab > New > Text-only*
Create page: From image or PowerPoint slide *Tab > New > From image*
Navigation: Start *No longer available*
Navigation: Next Page *No longer available*
Navigation: Previous Page *No longer available*
Navigation: Go to page *Tab > Go to*
Navigation: Exit Report *No longer available*
Show report tabs *Toolbars > Tab bar*

Omniscope 2.4 Page menu *Layout menu*

Reset layout *Layout > Clear layout*
Remove all views *Layout > Clear layout*
Page margin *Layout > View spacing*
Add/Change background image *Layout > Background image*
Add/Change header image *Layout > Header image*
Add/Change centre image *Layout > Centre image*

Add/Style/Remove title [Layout > Title](#)
Add/Style/Remove annotation [Layout > Annotation](#)
Show main toolbar [Toolbars > Main toolbar](#)
Show view toolbars [Toolbars > View toolbars](#)

Omniscope 2.4 Appearance menu

Resize window to [Settings > Window size](#)

Branding: [Settings > Branding](#)

Add web services logo [Settings > Web services > Button image](#)

Set publisher link [Settings > Branding > Corner logo > Link](#)

Value colouring:

Value colour schemes [Settings > Value colours](#)

Graded colour range settings [Settings > Colour ranges](#)

Universes-allow/hide universes [Settings > Advanced tab settings > Data subsets](#)

Views-allow/hide views [Settings > Advanced tab settings > View restrictions](#)

Misc:

Show view toolbars [Toolbars > View toolbars](#)

Show main toolbars [Toolbars > Main toolbar](#)

Freeze width of Side Bars [Toolbars > Freeze sidebar width](#)

Show unused options [No longer available](#)

Show report tabs [Toolbars > Tab bar](#)

Report tab text lines [Layout > Configure styles > Tabs > Text lines](#)

Look and feel [Layout > Configure styles > ...](#)

Apply to all report pages [Layout > Configure styles > Apply to all tabs](#)

Themes [Layout > Configure styles > Presets](#) (or use layout modes)

Omniscope 2.4 Help menu

How to use Omniscope [Help > Open user guide file](#)

User guide [Help > Online help > User guide](#)

Quick Start guide [Not available](#)

Knowledge base [Help > Online help > Knowledge base](#)

Movie tutorials [Help > Video tutorial](#)

Report a bug [Help > Error reporting > Report a problem](#)

View saved bug reports [Help > Error reporting > View saved reports](#)

Submit a sales enquiry [Help > Contact us](#)

Submit a support query [Help > Contact us](#)

Compare Omniscope Editions [Not available](#)

Online demonstration files [Help > Online help > Online demonstration files](#)

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2.4 Commands Reference

Main Toolbar Commands Reference - Version 2.4 and earlier

What does this command/option do?

Below is an index to the version 2.4 and earlier Main Toolbar command menus. Click on the links below to jump down to the sub-section containing the command(s) you are interested in. This section is for users of version 2.4 and earlier. For information on commands and options related to specific Views and View toolbars, please consult the [Views Reference](#). [25]

Moving to Omniscope 2.5+?

Many commands have changed in 2.5 to make them clearer and more logically structured. If you're used to Omniscope 2.4, and can't find a command in 2.5, see [this guide](#) [242]. Also see the full [command reference for 2.5](#) [27].

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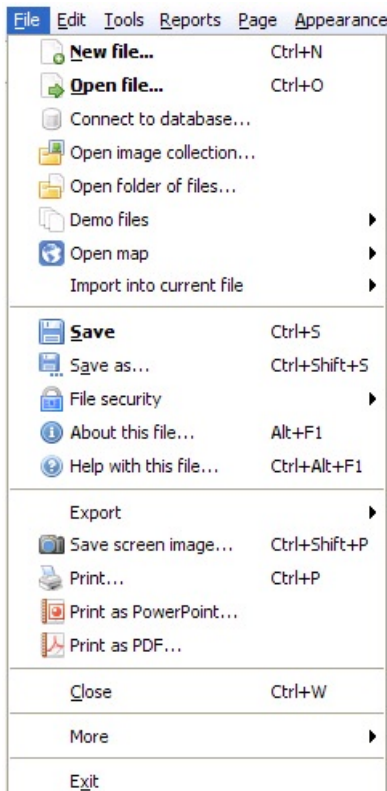
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2.4 File Menu

File > Menu Commands

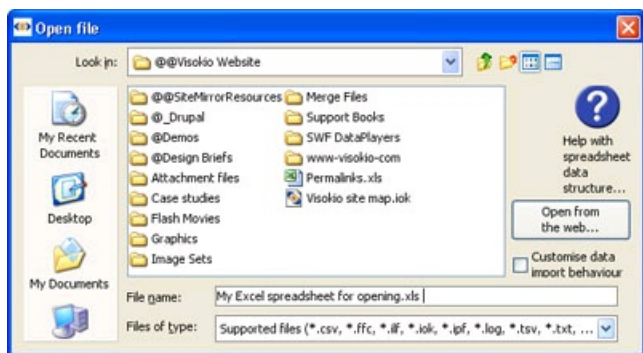
The **File >** menu on the Main Toolbar contains commands used to import data into Omniscope, manage .IOK files, and export data from Omniscope in various file formats and as images for printing/pasting into documents. Commands accessible from the **File >** drop down on the Main Omniscope Toolbar include:



New- Choosing **New** creates a new blank table with an initial number of fields (columns) and rows (records) you can specify. The default is 500 rows and 6 columns. If you have an activated Edition, you can set the number of rows and columns to be larger. Once you specify a size, a new blank table will open showing the 3 empty default views; Table View, Pie View and Chart View. In the Table View, right click on column header 'A' and select **Tools > Rename field** to begin assigning your own names to the fields, then begin entering data as you would for a spreadsheet. Note: You can also administer the naming and data typing of each column from the **Edit > Manage Fields** menu.

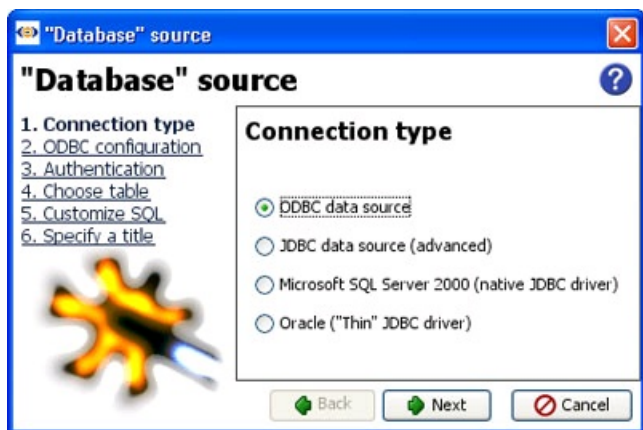
Open File- Choosing **Open file** launches the [Open Dataset wizard](#) [129], which looks like a Windows file browse window, but has some additional features and options on the right side. Navigate your directory structure and find the file you wish to load, be it an existing Omniscope .IOK file, or a data in a supported data file format; Excel .XLS, .CSV (comma separated value) or other delimited text data file formats such as .TSV, .TXT etc.

The **Open Data Set wizard** looks like a Windows file browse dialog:



The [Help](#) icon in the upper right of the [Open Dataset Wizard](#) [129] displays a [format guide](#) [243] for importing spreadsheet files. Always confirm that your spreadsheets conform to this simple layout before trying to open them in Omniscope. For more detail, see [Using the Open Dataset wizard](#) [129]. If you encounter problems, see also the Knowledge Base section on importing and exporting data to and from [Data Files](#). [131]

Connect to database- The **Connect to database** command launches the [Database Connection wizard](#) [132] which guides you through the steps required to import data directly from a relational database table/view instead of an exported data file.



Omniscope uses [ODBC](#) or [JDBC](#) [261] protocols to access database files. For more detail, see [Connecting to Databases](#) [132] and, for more technical detail, consult the Knowledge Base [Database Connections](#) [262] section.

Open image collection- Omniscope can be used to inspect and manage collections (folders) of images, for use as embedded image sets in Omniscope, as image folders associated with DataPlayers, or for any purpose where well-organised and documented (large) folders of images must be assembled, inspected, managed and shared with others at any size/resolution. More on using [Open Images](#) [217].

Open folder of files- Omniscope can also be used to visualise and navigate collections (folders) of computer files, whether the files are a .PDF document archive on a file server, a collection of podcasts or videos, or the entire contents of your hard disk drive. Omniscope permits you to visualise the relative size and age of the files, sort them based on data modified, etc. If you point Omniscope at a folder containing documents in .PDF format, the documents will display in the Omniscope Web View when selected. More on using [Open Folder of files](#) [256].

Demo files- Omniscope installs with a selection of embedded demo files you can use to familiarise yourself with the possibilities inherent in Omniscope. Some of the embedded demo files have associated image sets that can be downloaded when the application is launched. In some cases, you can download the image sets separately and associate and re-size the image set yourself. See [Image Sets](#) [263] under the Resources section of our web site.

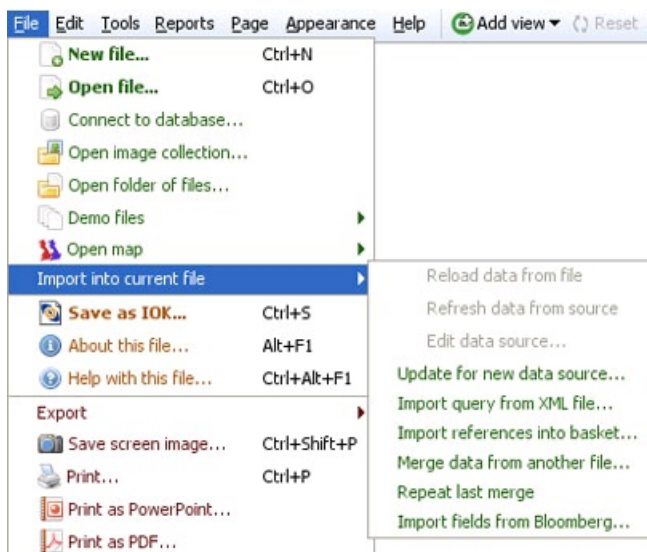
Open Map- This option is used to add more maps to your installation or import and embed a specific image file for use as a Map View backdrop with a custom co-ordinate system. Freely-downloadable, embedded vector maps from the Visokio [Maps Library](#) [141] can be accessed and downloaded at anytime. The **Open Maps** command displays all the maps which are already stored on your machine (the files are usually located in C:\Program Files\Visokio Common\maps) for use in both Omniscope and Flash DataPlayer .SWF files.



The **Open Map** command reveals available maps already downloaded, the default world map, the option to download additional standard Visokio maps, and the option to browse for and import/embed an image or customised map file for use as a backdrop with a derived coordinate grid. Recognised map file types for import and embedding include Image (.JPG, .PNG, .GIF, etc. depending on your version of Java), files, plus (Visokio) .MAP, .VEC, and .ILF files. Whether you download a standard map or import a customised map, the next display will be in the [Map View](#) [118]. For more information on using geographic coordinate systems with Visokio maps and customising co-ordinate systems for use with imported images such as floor plans or sports fields, consult the Knowledge Base section on [Maps & Coordinates](#) [144].

Import sub-menu

Import into current file- This command reveals a sub-menu containing options for refreshing data from linked sources, administering the data sources linked to a specific file, importing XML query files to recreate record selections sent by others, importing single column lists of references sent by others as .TXT files for matching, merging in (or repeating the merge of) additional columns or rows of data from other .IOK or .XLS/.CSV data files (see using the [Merge Data wizard](#) [128]), and importing/refreshing fields from Bloomberg (Professional & Enterprise Editions only, assuming you are running on a Bloomberg-connected PC).



For more detail on the sub-menu commands, see the section on the [Import into current file](#) [145] sub-menu.

Save/Save As .IOK- This creates a new Omniscopie file based on the existing one you have open. This command uses the same Data Export wizard screens discussed [here](#) [163], with the export data file type already set to .IOK, and the same data sub-set and field (column) selection options used when exporting subsets of your data to .XLS or .CSV files. When creating a new version of an .IOK file, you can also choose to save the new .IOK file with additional options:

- **Write-protected-** which prevents accidental saves of experimental variants overwriting the master copy;
- **Password-protected-** to prevent unauthorised access;
- **Prevent data edit/export-** data cannot be edited, exported or cut-and-pasted to another application;
- **Time-limited-** an option to set the time period the file will be valid for and open without prompting the user to refresh the file with a more current one. If you choose to time-limit the new file you are saving, you will see a screen like this:

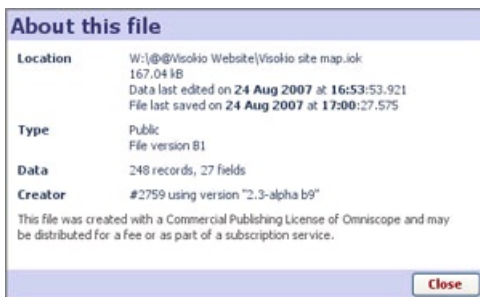


The **Save as copy** option makes it possible to save the file to another location, without changing the location of the current directory, so you can save an later update to the same base location, for example.

File security - depending on your edition (Professional or Enterprise) allows you to set some of the security options available for the file. For more detail on security options for Omniscope files, see section on [file security options](#) [24].

Informational screens

About this file- displays an informational screen giving administrative and licensing details about the open file. For details about your installation of Omniscope, press Ctrl+F1



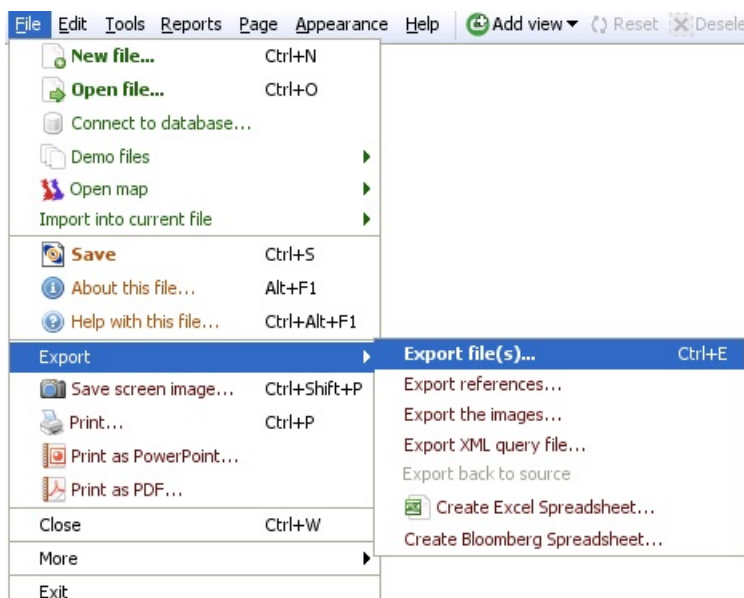
Help with this file- displays the file-specific Help page you can configure for file recipients using the **Help > Edit help page** wizard. See [Help Menu commands](#) [106] for more information and an example.

Note: Publisher-authored Help pages are not currently Report Page-specific.

Export sub-menu

Export- this command reveals a sub-menu of options for exporting some or all of the data from the current .IOK/.IOM file.

Selecting **Export** launches the [Export files dialog](#) [163] with the export file type already set by default to Excel .XLS workbook files. You can change this to .CSV or other supported data file types.



Export references- launches the [Export files dialog](#) [163] with the export file type already set to the single column .TXT file format. The wizard allows you to specify the field and records (by universe) from which to generate an exported a list of references.

Export the images- launches the [Export files dialog](#) [163] with the export file type already set to a folder of images. The wizard allows you to choose which associated image set you wish to export and to set re-sizing limits on individual picture size to limit the maximum size of the images exported to the folder. Note: Omniscopes files make excellent image catalogues. You can view and filter a collection of images, put selected images in the Basket, then export them as a new collection to a folder for re-use.

Export XML query- launches the [Export files dialog](#) [163] with the export file type already set to XML Query. This allows you to export your current filter settings (query) or any other named query as a small, portable text file that others (such as database administrators, customers, etc) who have the same Omniscopes file can load the query file and instantly focus their display on the exact sub-set of records corresponding to your exported query.

Export back to source- will overwrite the linked data source file (but not a relational database table/view) with corrected/edited data from the Omniscopes file. **Warning:** if your source data file is a spreadsheet file with formulae, formatting or comments fields, they will be overwritten and lost.

Create Excel spreadsheet- creates a new Excel spreadsheet containing the fields (columns) and data subset you specify. Note that if you want to paste data from Omniscopes into an existing Excel spreadsheet, you can also use copy/paste. You must have Excel installed to use these features.

Create Bloomberg spreadsheet- creates a new Excel spreadsheet including imported, automatically refreshing Bloomberg fields i.e. source files that can update in real-time. Professional and Enterprise Editions only. You must have Bloomberg access and Excel installed on your PC to use this feature. For more information, see [Working with Bloomberg](#) [26].

Printing

Save screen image- Exports the current screen display in a range of image file formats (.JPG, .BMP, .GIF, .PNG, .WBMP) suitable for pasting into other applications. Also provides an option to copy the image directly to the clipboard for re-use.

Print screen- Sends the current screen display to your printer as an image.

Print page- for more detail on Printing, see [Printing options](#) [258]

Print as PowerPoint- for more detail on Printing, see [Printing options](#) [258]

Print as .PDF- for more detail on Printing, see [Printing options](#) [258]

Close & Exit

Close- closes the current Omniscopes file. Opening a new Omniscopes file will automatically close the Omniscopes file currently open. You will be asked if you want to save your changes first.

Exit- Exits the Omniscopes application (but not the Enterprise Edition Scheduler or Generator, which are autonomous applications intended to be run on always-on servers). You will be asked if you want to save if you have made changes to data or view configurations, but neither closing nor exiting will commit changes to Report Pages. The file will next open with the Report Page tabs in red, indicating that you have to either commit the changes or revert to the original configuration of the Report Page.

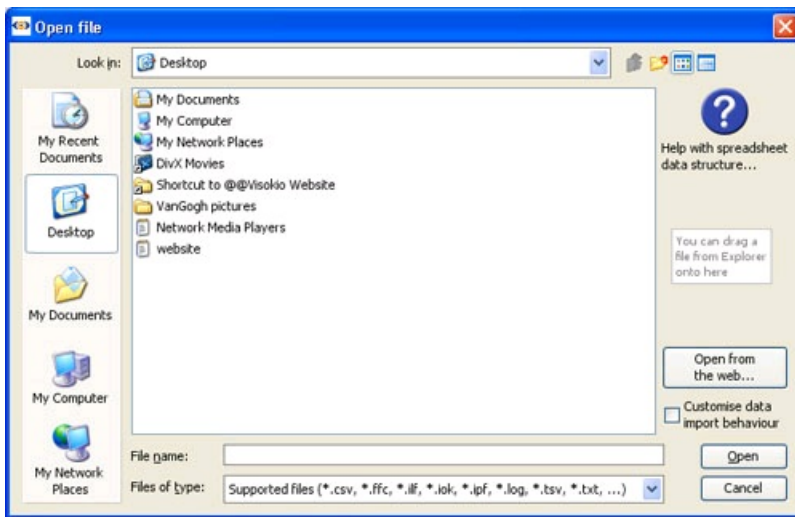
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Open Files

File > Open File...Using the Open Dataset Wizard

Clicking on **File > Open file** brings up then **Open Dataset** wizard, which looks much like a Windows file browse dialog:



Note: Until you decide to un-link the files, Omniscience will remember the location of the source file(s) you are importing from, and will check to see if the data in these file(s) has changed, usually every time the Omniscience file is opened. The source data file(s) are known as a linked source. You can break and re-establish the links between Omniscience and its source data file(s) at any time. If you have multiple tabular files as linked sources, they must share a common column such that Omniscience can re-perform the merges each time the data in the source file(s) changes.

Most source files in Excel .XLS, .CSV, .TSV and other common delimited text data file formats will open directly in Omniscience. If you have problems, such as all the values appearing in one column, you may need to change the delimiter or rename a tab-delimited file extension from .TXT to .TSV (see below). If only some of the columns have not separated cleanly, you can use the **Expand or Collapse Values** functions in the [Table View Tools](#) [110] menu to separate data into more columns or combine data into fewer columns. For more information, see the section on [Data Layout](#) [130].

If the source data file you want to open is not on your machine, or local network, you can use the **Open from Web** button to specify the exact location (URL) of the data file you wish to import:



Customise Data Import

If you are repeatedly using/importing other peoples' spreadsheets, you can depart from the recommended simple spreadsheet layout somewhat by ticking the **Customise data import behaviour** option and providing Omniscience with additional information about the layout of the data you are importing. For example, sometimes you may have a CSV, TSV or Excel file which does not have the column headers on the first row. Without customisation, Omniscience will assume the first row contains headers, and include the actual column headers as the first row of data. To skip any number of redundant rows on file import, use the **Skip first ??** rows box to enter the number of redundant rows in your data file before the header.



International data issues

Data File delimiters- CSV stands for "Comma Separated Values", which means the cells in each row of the data table are separated by the comma character. However, if you are in a region that also uses comma for the decimal point (e.g. several European countries, such as France), some versions of Excel create .CSV files that use a semicolon as the separator character. Sometimes these files are saved with a .TXT extension, even though they are multi-column tables.

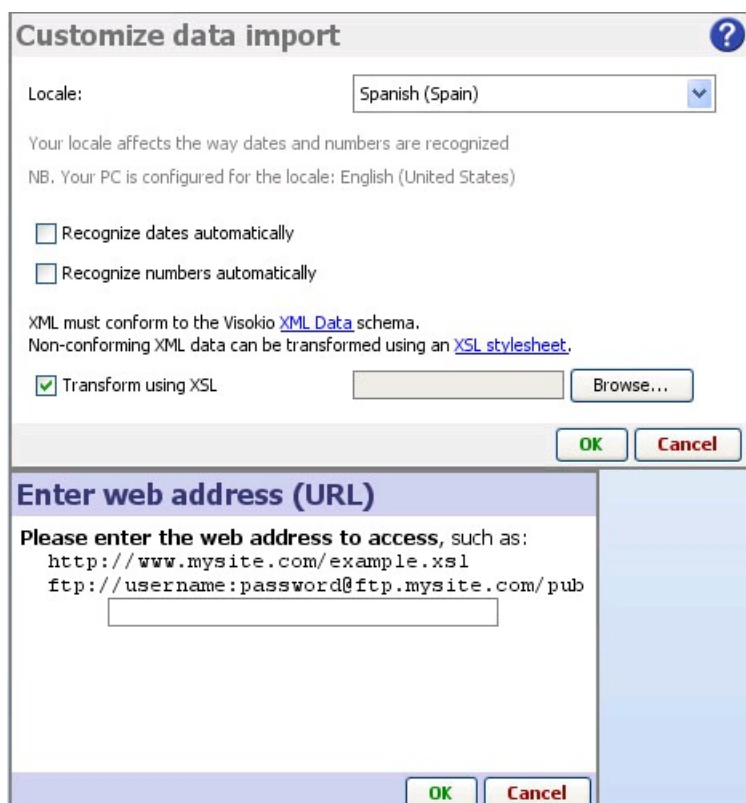
Omniscope is unable to detect this situation automatically. If you open such a file in Omniscope, your data will very clearly be wrong, with most columns appearing as text with semicolons. To import this kind of file, use the **Customise data import** option dialog to change the **Separator character** to a semicolon ";".

Dates & Numbers- If you are running on Windows, when importing data that is in a delimited text format which includes Excel, CSV and TSV (tab-separated values), Omniscope will use your Windows Regional Settings to try to automatically recognise data. For example, for a PC with United States Regional Settings, Omniscope will recognise "5/13/2005" as a date and "1,500.5" as a number. For some international users, however, this may not work as expected and the result will be an import of all columns as type Text (shown either as multi-coloured Category columns or white Text columns in Omniscope). If this occurs, you can usually manually convert numbers and dates & times fields using the **Edit > Manage fields** dialog. For more information on formatting dates & times, and dealing with time zone issues, see the section on Dates & Times.

If you know your data has been formatted for a different region, change the *Locale* drop-down accordingly. For example, if you live in Germany but have received a .CSV from an American customer, you should choose "English (US)". If you find Omniscope gets things wrong and your data is incorrectly recognised, you can disable auto-detection of dates and numbers by deselecting the two **Recognise** checkboxes. All fields will open as Category or Text data and their text values will be preserved. More on dealing with [International data issues](#) ^[136]

Importing XML files

Importing .XML files which have already been transformed to Visokio [XML Schema](#) ^[245] is the same as opening a .CSV. If your .XML file conforms to another schema, then you must prepare an [.XSL Transform](#) ^[246] file, tick **Customise data import** and specify that file to transform the non-Visokio XML file to Visokio XML Schema for import. Your .XSL Transform stylesheet can be accessed from any location, including the web. Note: if your XML data set is not already in a tabular structure, you can array it into a tabular structure using your XSL file.



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Connect to Database

File > Connect to database

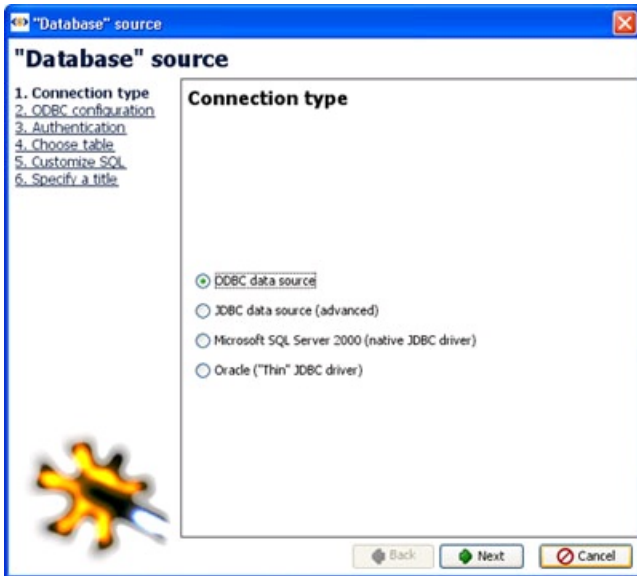
Using the Database Connection wizard

The Omniscope Database Connection Wizard lets you define a connection and pass any standard SQL expression that results in a flat table output. If you do not have authorisation to execute SQL statements, or don't know the SQL required to generate the table you want, your Database Administrator may have to create the appropriate comprehensive reporting view(s). This means using database reporting tools to draw data from multiple transactional tables to create a single, 'flattened' tabular view of your data for human consumption via Omniscope, i.e. scrubbing, analysis, reporting and presentational purposes.

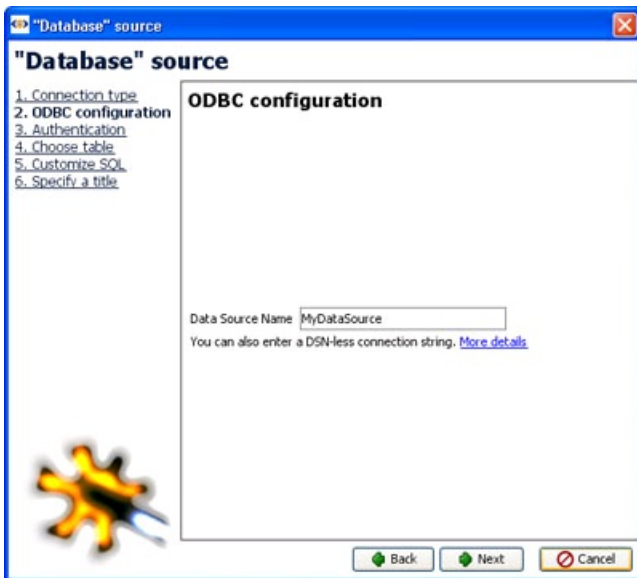
Some organisations have additional high-performance analytical and reporting databases, sometimes which perform joins, aggregations, sorts and scans on data assembled from multiple transactional databases. In general, Omniscope interacts with these additional 'business intelligence' analytical databases in exactly the same way as it interacts with transactional database views/tables. For more technical information, see the [Database Connections](#) [80] section of the KnowledgeBase.

Using the Database Connection Wizard

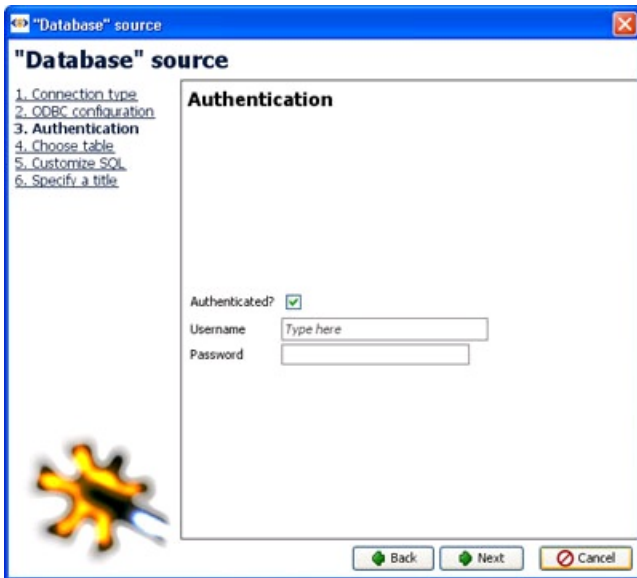
Clicking on **File > Connect to database** launches the Database Connection wizard. The wizard guides you through a six-step process for defining a linked data source from a relational database view/table. You will need to know the type of database and its connection details. Using the Database Connection wizard, you enter the connection details for your database and choose which database table or reporting view you wish to retrieve data from. By default, this will create a persistent linked data source relationship between this database table/view and the Omniscope file.



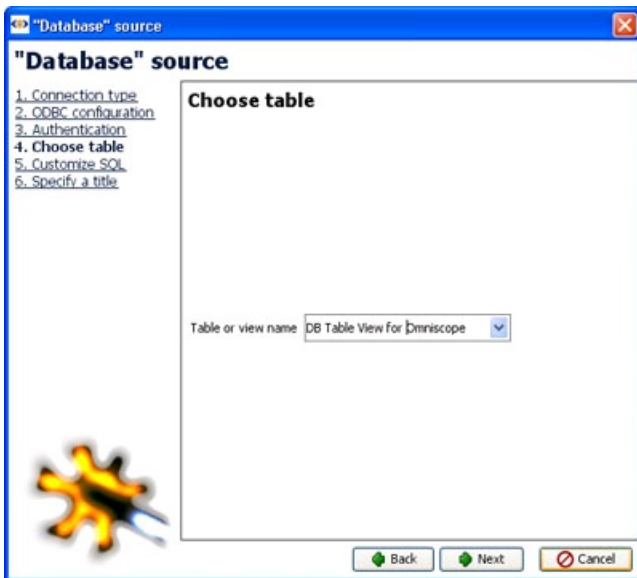
1. Connection type: In this step you define what type of connection you are creating from the options currently available. Detailed examples of each type of connection are available in our [KnowledgeBase](#). [4]



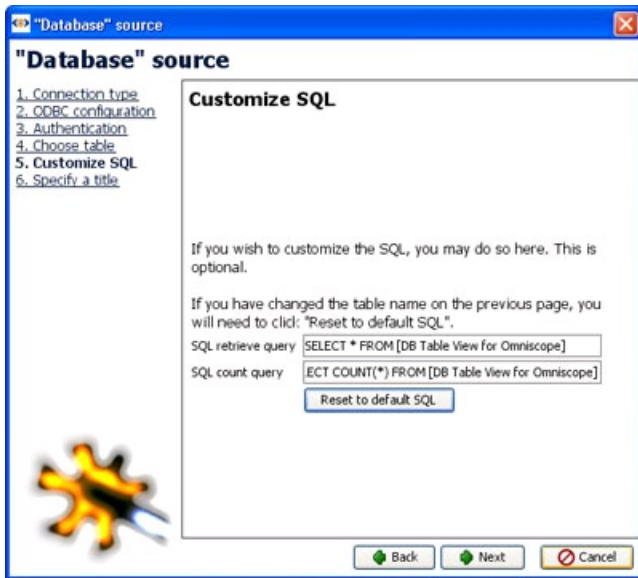
2. ODBC configuration: Assuming you chose the most common ODBC connection type, you will be asked for a name, or if you are rolling out auto-refresh from the database to a large number of desktops, a DNS-less connection string may be preferable. For more details on using easy-administration connection strings, see the [KnowledgeBase](#). [265]



3. Authentication: if access to the database view/table is authenticated, tick the box and supply the Username and Password combination to be used whenever the file is refreshed.



4. Choose Table: assuming the comprehensive database reporting view has already been defined as an ODBC-required single table, enter the name here:



5. Customise SQL: If there is a need to exclude some records in the linked database view/table from the Omniscope file, queries can be added to the connection. These can be refined/edited at any time using **File > Import to current file > Edit data source**

6. Specify a title: Choose a name for this connection/linked relational database source that communicates something about the underlying queries (if any) being used.

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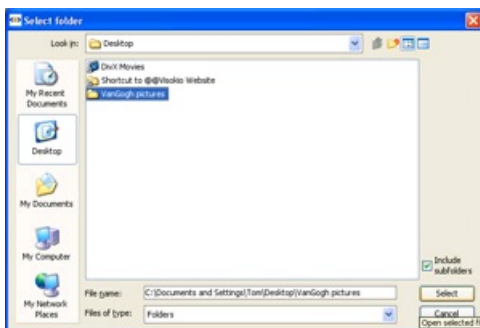
Image Collection

File > Open Image Collection (Folder)

Omniscope can be used as a photo browser, allowing you to explore and manage large folders of images, and to send selected, annotated collections to others in compact, searchable .IOK files with supplementary information on the photos, their locations etc.

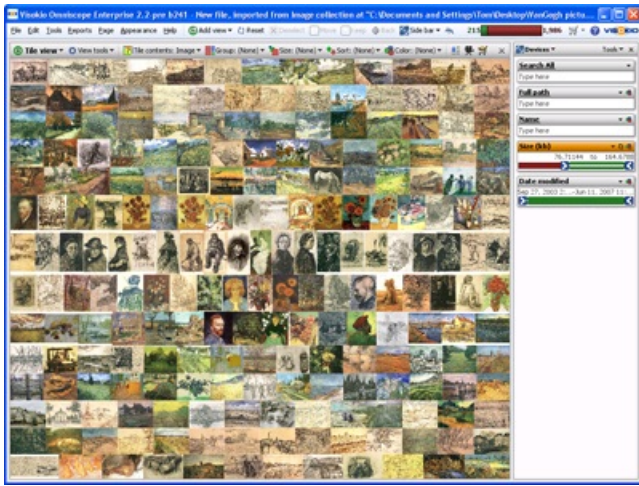
Open and link to folder

File > Open Image Collection opens a new Omniscope file in folder browser mode that allows you to point at any folder (with or without sub-folders) containing image files in .JPG, .GIF, .BMP, or .PNG format. Browse to the folder, select it and click **Select**.



Browse Photos & Save File

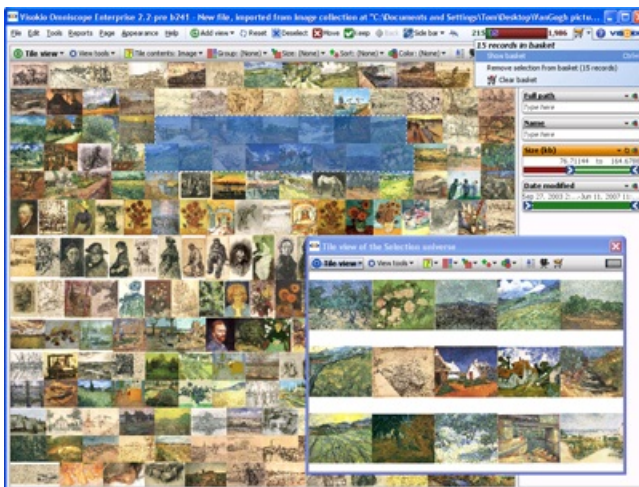
Wait a few moments for Omniscope to import the pictures. The Tile View and left Side Bar will appear, with the images scaled down to display in the Tile View. The Side Bar filter/query devices allow you to *Search All* for a keyword, to filter the size of the files (and hence the quality/size of the picture), and to filter the date of the pictures. The Tile View initially shows all the pictures found in the folder chosen. As you filter, some pictures will disappear, and the remaining pictures will get bigger.



At this point, you might want to save a new .IOK file linked to this image folder. This will capture any settings you configure to the file. You do not have to embed the pictures in the file at this time. In future, you can use **File > import into current file > Refresh from source** to update the file to include any new photos added to the folder.

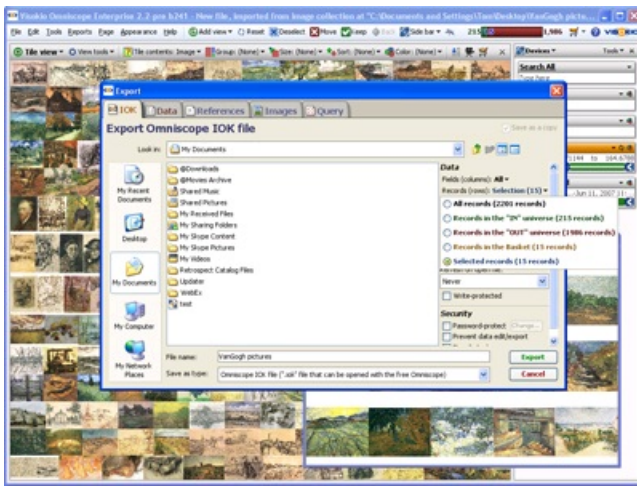
Selecting collections

You can Select and Move pictures you want to exclude from further consideration, thereby enlarging the remaining pictures. When you see a picture you would like to add to a collection file (such as your 'holiday highlights'), click the picture to get the Details pop-window showing a larger view, then click **Add to basket** to save that picture in the **BASKET** universe. Carry on filtering and exploring your photos, adding more pictures selected for the collection file to the Basket.



Viewing the basket

When you've finished selecting photos for the collection file, view the Basket by clicking the **Basket (1)** **Basket** button to the right of the **Barometer** on the Main Toolbar. A Table View of the **BASKET** universe will appear. Click **Table View** to display the View Chooser, and select a **Tile View** of the **BASKET** universe. For more detail, see [Data Universes](#) [162]



If you're happy with your **BASKET** of images, you might want to view a Slide show. See [Viewing Details](#) [122].

Saving the new image collection file

When you've finished reviewing the images you wish to save as a collection, choose **File > Save as IOK/IOM**. In the **Save as** dialog that appears, you will see a number of configuration options on the right-hand side.



Click **Records (rows)** and choose **Records in the Basket (XXX records)**. This will create a new file with only the images you added to the Basket. When you make this change, the dialog will transform from a **Save as** dialog to an **Export the images** [163] dialog with the **Images** tab pre-selected.

Under **Embed images**, click **Image sets** and tick **Image**. This means the image set called 'Image' will be embedded inside the IOK file. In other words, the IOK file will be like a ZIP or archive, containing images. If your images are quite large, you may want to down-size them when embedding in the IOK file. If so, tick **Reduce image sizes**. A dialog for down-sizing the images will appear after you click **Export**. In **Linked data source**, un-tick **Keep link** to remove the reference to the original folder of images on your PC. Enter the name you want to save the file as, say 'My holiday snaps', and click **Export**.



If you chose to reduce image sizes, enter the maximum dimensions you want for any image (in pixels), and all images exceeding these dimensions will be down-sized, preserving their aspect ratio, until they fit within these dimensions. You may have to wait a while down-sizing the images, but once done, you should have a simple and small (depending on the size and number of images) .IOK/.IOM file for sending to friends.

If you send an .IOK file, they only need the Omniscope free Viewer to open and view it, even export their own selected images if you have not locked the file. If you are using Omniscope Standard and send an .IOM file, they will need at least a Standard in order to open and act upon the file.

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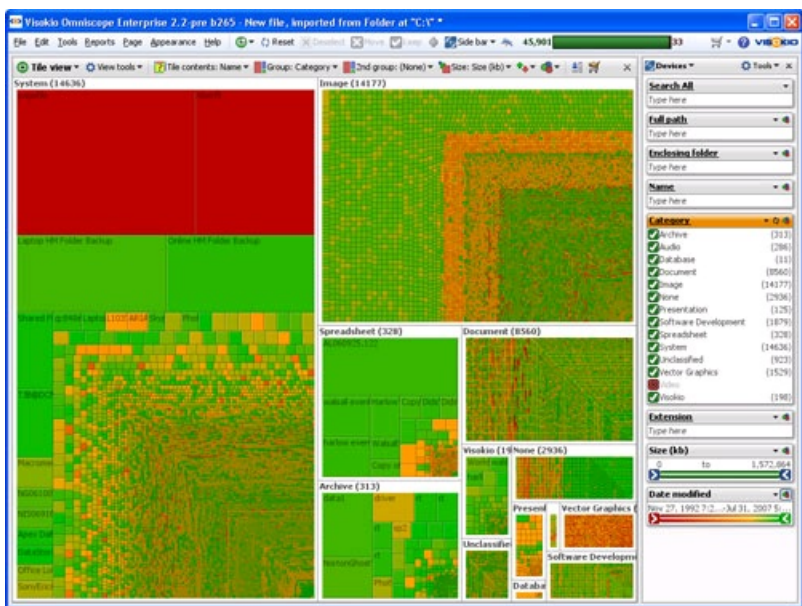
Open Folder

File > Open Folder of Files

Like opening a folder of images, Omniscope can also be used to explore folders of files on part or even all of your PC or connected servers' hard disks. Choose **File > Open folder of files**. Browse to the top-level folder you want to explore (for example your entire C:/ drive) and click Select. After a few moments, depending on the number of files scanned, you will see the Tile View on the left and the right-hand Side Bar with filter/query devices showing on the right.

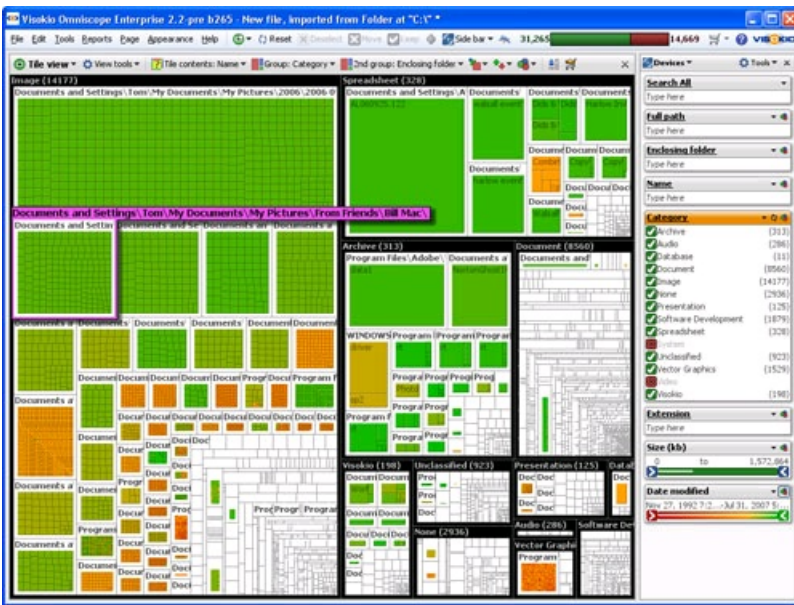
Opening View

By default, in this configuration of the Tile View, each tile represents a file, sized according to the size of the file. Initially, tiles (files) are grouped by types of files. For example, System files, Video files, Music files, etc. Colour is used to show the date of each file. A green tile represents a recently modified file; red represents older files. This view allows you to see at a glance where the space on your hard disk is allocated (by the size of the tiles) what sort they are (by the grouping) and how old the files are (by the colour).



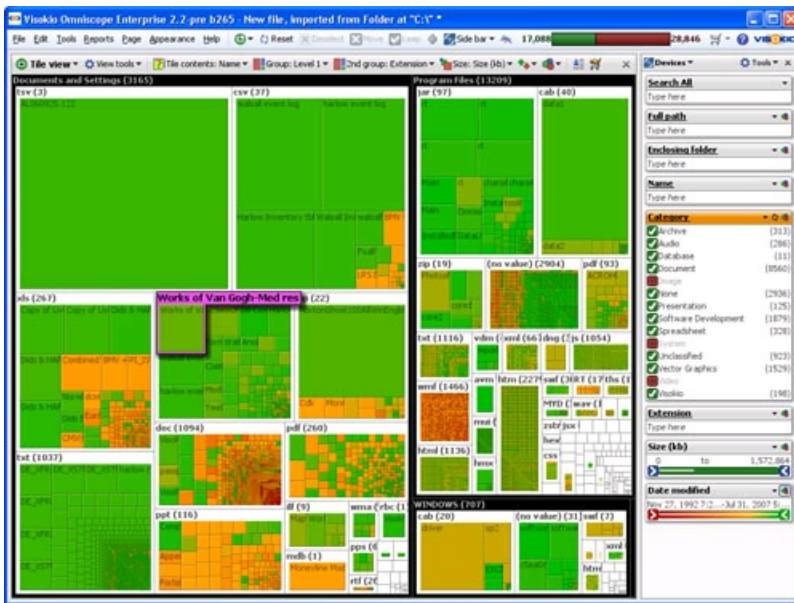
Filter and Group by Folder

The smallest tiles/files might not be clearly visible if they are much smaller than the biggest files. Use the Side Bar query devices on the right to filter and search for relatively smaller files. For example, on a Windows machine, certain very large system files have very old dates. Filter them out by excluding System files in the Side Bar. You may want to do the same for Video files. Now set the 2nd Group option to Enclosing Folder, enabling you to see the exact locations of your larger, older (non-system) files:



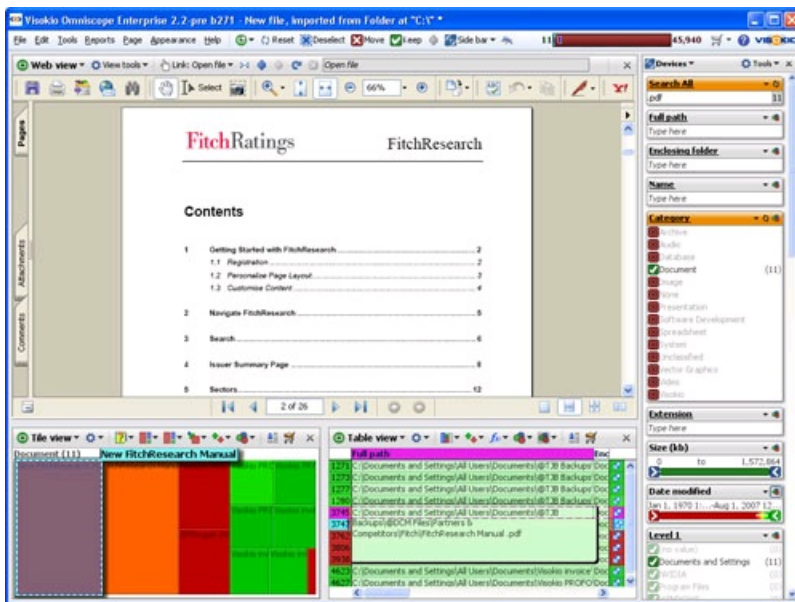
Grouping by Levels and Extensions

You can change the primary grouping (using the Group drop-down in the Tile view) to show Level 1, which groups the files according to the first level of folders in your directory structure. You can also change the 2nd Group option to Extension to gain an overview of your files by file type. After you have analysed your Images, for example, exclude them using the Side Bar filter to focus on other types of files which tend to be smaller. Instantly you will see the relative size of each top-level folder, excluding System, Video and Images.



Browsing Documents (.PDF)

By filtering out all files that are not documents, you can use Omniscopie as a document browser. For example, the Web View can display any Acrobat .PDF document. Saving this configuration as a Report Page with the filter set to Documents only permits any recipient of the file to browse the documents in a defined location (any network-accessible file server, not just their local machine as in this example).



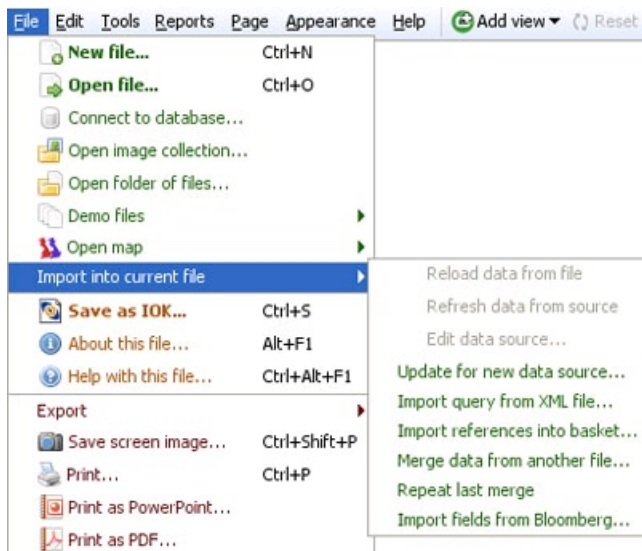
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Import & Refresh

File > Import to Current File...

The **File > Import to current file** sub-menu contains commands for refreshing, up-dating and adding to the data in the open Omniscipe file, as well as importing queries and lists of references prepared by others to focus attention on particular records in the data set.



Reload data from file- reloads the data currently held in memory, which may have been updated from another Source .IOK file while you were working on the display. If there is no refresh available, the command is greyed-out.

Refresh data from source- this command overwrites the current data set with the latest data available from the linked source, whether it is a time-stamped data file or a direct connection to a continuously-refreshing relational database view/table. If there is no linked data source defined for the open file, the command is greyed-out.

Edit data source- this command applies to currently linked data sources and is typically used when the linked data source is a direct database connection with a query defined. This command can be used to access the connection settings and refine the query definition or other settings. If no data source is currently defined for the file, the command will be greyed-out.

Update for new data source...allows you to re-establish a link to a data source for an .IOK file that does not currently have one, most likely because it has been unlinked. If either the Omniscopie .IOK file or the linked data source file have changed name or position, you can use this command to edit the link to keep the linked data source operational. You will be warned about potential loss of any edits you made to the Omniscopie file while unlinked, and connected to either the Data File Import or Database Connection wizards depending on whether the new or re-established linked source is a file or a database view/table.

Import query from XML file...if someone else has prepared and exported a query relating to your file, you can reproduce the effect of the query on your own file by importing their XML query file, which will execute the imported query and update the records in your **IN** and **OUT** universe accordingly.

Import references into basket- if someone has exported a list of references as a .TXT file, this command imports that list, and places all the matching records into the **BASKET** universe. Omniscopie will warn you if any incoming references cannot be matched and placed in the Basket. For more information, see [Using the Basket](#) [107].

Merge data from another file...Omniscopie supports merging rows and columns of data from other unlinked files, such as other .IOK, .CSV or .XLS files, either as Joins (adding more columns) or Concatenations (adding more rows).

- **Joins:** Data can be brought in as additional fields (columns) assuming there is a common column of values that Omniscopie can use to match up the rows in both files. More than one column can be used to specify joins.
- **Concatenations:** .IOK files with largely common fields (columns) but different records (rows) can be "stacked" on top of each other to assemble combined files containing all the records (rows). For example, several 'regional' files could be concatenated to create a single 'global' file.

Omniscopie provides a **Merge Files wizard** to help you execute Joins and Concatenations. For more detail, see [Using the Merge Files wizard](#). [128]

Repeat last Merge- this option is used whenever the merge files used to create an Omniscopie file are also changing and being updated, such that a full refresh of the Omniscopie file also requires re-executing the merges to update all data to the most recent values. This option requires that the merge files remain in the same relative location with the same name(s).

Import fields from Bloomberg...(Professional & Enterprise Editions only) used to add fields (columns) available from Bloomberg into the current .IOK file. The columns will only be populated when running on machines with access to Bloomberg. When first importing fields (columns) from Bloomberg, the option to **Refresh Bloomberg data** is added to the menu. Depending on the number of records (rows), you may have to press this a few times to fully populate a multi-field import for the first time. For more information, see [Working with Bloomberg](#) [266].

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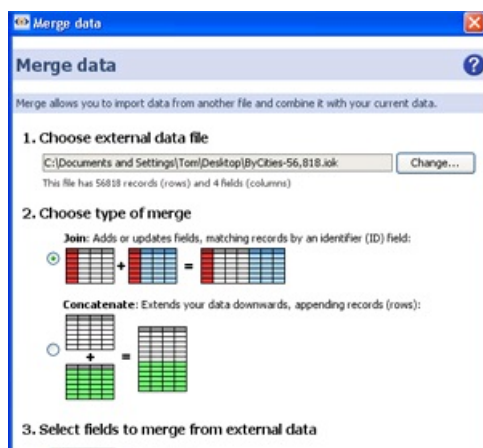
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Merge Data

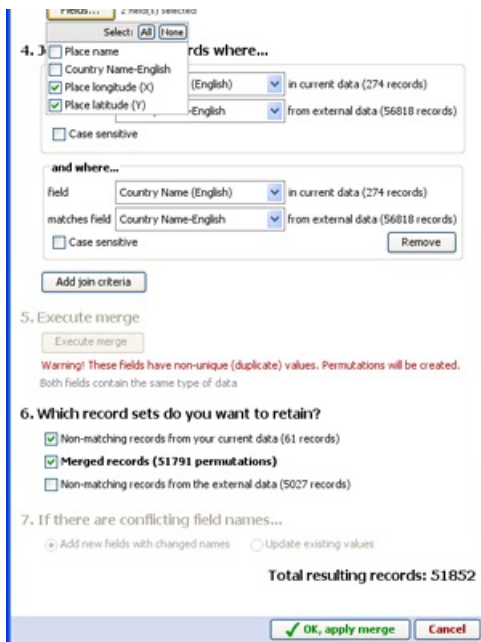
Using the Merge Data Wizard

To merge data from another file into your own IOK file, you must have at least one column in your data matching one of the columns in the external merge file. For example, to use our By Countries merge files, you must have a column in your data that has the names of countries, or their ISO codes, or other standard identifiers. Sample merge IOK files containing geographic co-ordinates for countries and major cities, plus examples of other useful reference data are [available here](#) [190].

To open the **Merge Data** wizard, click **File > Import into Current File > Merge Data from another file:**



1. **Choose external data file-** point to the external merge file containing the fields (columns) you wish to join into your data.
2. **Choose type of merge-** You have a choice of types of merge, **Join** or **Concatenate**. To add new fields/columns to your data from a Merge File, choose **Join**. To add similar files together, for example combining regional report files together to form a global report, choose **Concatenate**.
3. **Select fields to merge from external data-** the drop-down list will show all the columns in the external merge file. Untick the box next to any columns that you do not wish to import into your new, merged file.
4. **Join by matching records where-** If you choose **Join**,



specify one or more fields (columns) present in your file and the merge file you wish to import, combining its columns with your own. Choose the field (column) in your data set, and select the corresponding field (column) in the external merge file. If you chose **Concatenate**, all the Join options will be greyed out. Scroll to the bottom and...

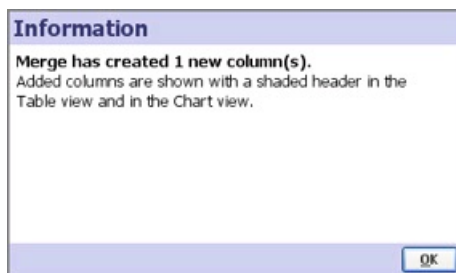
5. **Execute Merge.** For **Joins**, the wizard provides feedback on the matching process, reporting records in your file that do not match any merge file records, records that do match (and how many duplicate matches there are). It also reports the number of records in the merge file that do not match any records in your file.

6. **Which record sets do you want to retain?** for **Joins**, depending on your needs you can keep your non-matching records, the matching records, and/or the external merge file records that do not match as well. For **Concatenates**, if the file being added contains fields (columns) that are not in your original file, Omniscope will inform you you that new column(s) have been added and colour their headers blue.

Note: If you use Date and Time fields as **Join** criteria, the names of the fields (columns) can be different but be sure that the format of the data in both fields (columns) is exactly the same.

SUGGESTION: Before using a field (column) as a matching field, it is good practise to check whether the values in the matching fields in both your own (target) file and the incoming merge file are unique (using **Table View > View Tools > Tools > Select duplicate records**). If both are unique, the number of merged records will be the same as the number of matching records, plus any non-matching records if you choose to keep them. If your (target) file's matching field has repeated records (such as multiple addresses with the same post code), Omniscope will warn you that permutations (additional records) will be created in the incoming post code merge file so that all address records receive their map coordinates. If you attempt to merge two files, both of which have repeated values in the matching fields, try to specify as many additional join criteria as you can so as to minimise the number of permutations created.

7. **If there are conflicting field names...**before accepting the merge, protect yourself in the event of duplicate column names (both files may contain columns called City and Country). If you tick this option, Omniscope will modify the names of duplicated columns to, for example, City(2) and Country(2) to avoid mixing/overwriting dissimilar data. Click **OK, Apply Merge** to modify your file by adding in the corresponding columns from the Merge File.



Warning: If you click **File > Save** (or Ctrl+S) after merging, your original file will be overwritten with the merged file. If you do this inadvertently, you can always recover the original file by deleting all the merged columns (highlighted in blue). If you want to preserve your original file (recommended) be sure to use File/Save As to save the merged file as a new file with a different name.

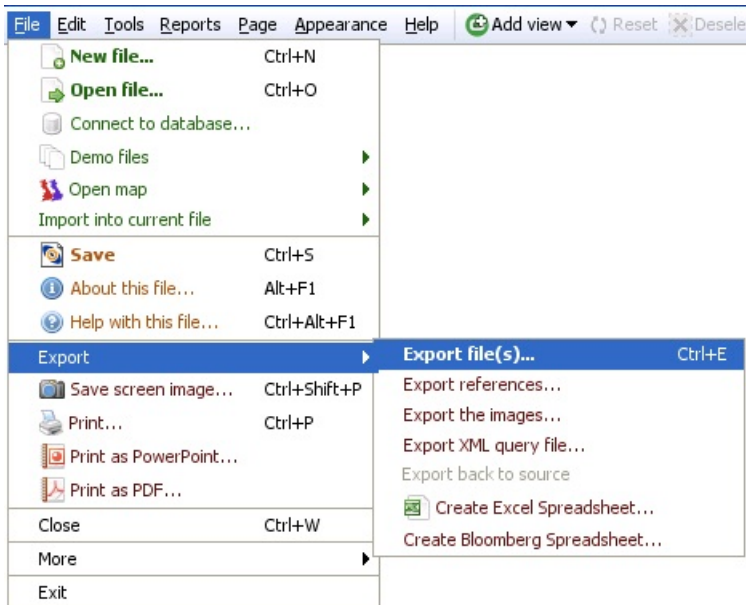
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Export Files

Using File > Export > Export files dialog

The **File > Export > Export file(s)** sub-menu provides many options for exporting some or all of the data, images and queries from the open Omniscope file for use by other applications, such as spreadsheets, or in the case of References and XML query files, by other Omniscope users with access to copies of the same .IOK/.IOM file.



Selecting **File > Export > Export file(s)** launches the **Export Data wizard**. Choosing **File > Export > Export file(s) > Export References**, **> Export the images**, and **> Export XML query file** also open the Export file wizard to the relevant tab.

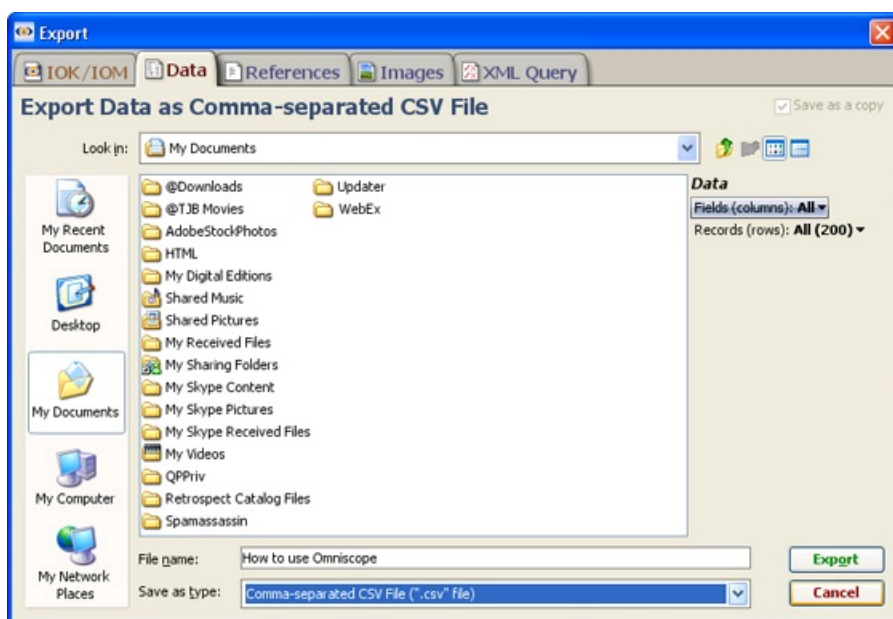
[266]

Export files wizard

The **Export files** wizard is a tabbed dialog that enables you to export data as a new Omniscope .IOK file, an Excel .XLS file, a list of references (values from one selected field/column) as a .TXT file, a folder of images you have associated with (but not necessarily embedded into) the .IOK file, or an Omniscope query as an .XML file that can be opening by other Omniscope to re-create the same view with the same data file. You change the type of file you want to export by selecting the appropriate tab at the top of the Export files wizard.

Exporting to Spreadsheets- .CSV, Excel .XLS etc.

Selecting the **Export Data** tab will specify an Excel Workbook .XLS file by default, but you can change the format of the exported data file to another supported format such as comma-separated value (.CSV), tab-separated value (.TSV) or an .XML text data file (in [Visokio schema](#) [267]).

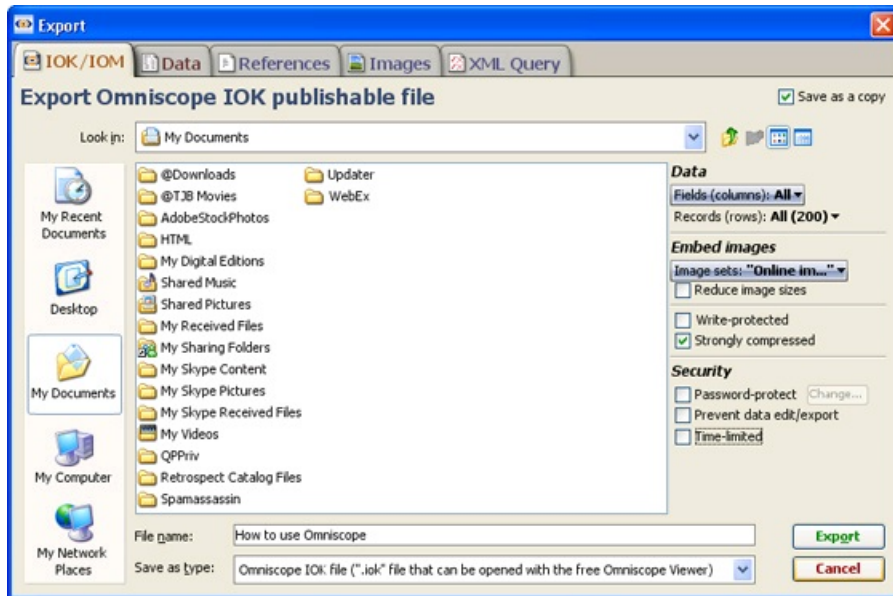


At the right side of the Export Data wizard, there are powerful options for specifying the fields (columns) and records (rows) to be exported. Untick any fields you do not want exported to the new file, and specify which data universe currently contains the records that you wish to export.

Save As...Exporting Omniscope .IOK/.IOM files

At any time, you can use the **File > Save as** or the **Export Data wizard** to create a new Omniscope .IOK or .IOM file from an existing one by selecting the first **.IOK/.IOM** tab on the **Export Data wizard**. In addition to specifying the fields and records you want to export, you also have several options to manage access and the refresh cycle for the new .IOK file.

Note: Standard Editions save only .IOM files that can be opened only with activated, licensed Omniscopes. Professional and Enterprise Editions can save both .IOK and .IOM files, and can open an .IOM and re-save it as an .IOK file that will open in the free Viewer.



Strong compression

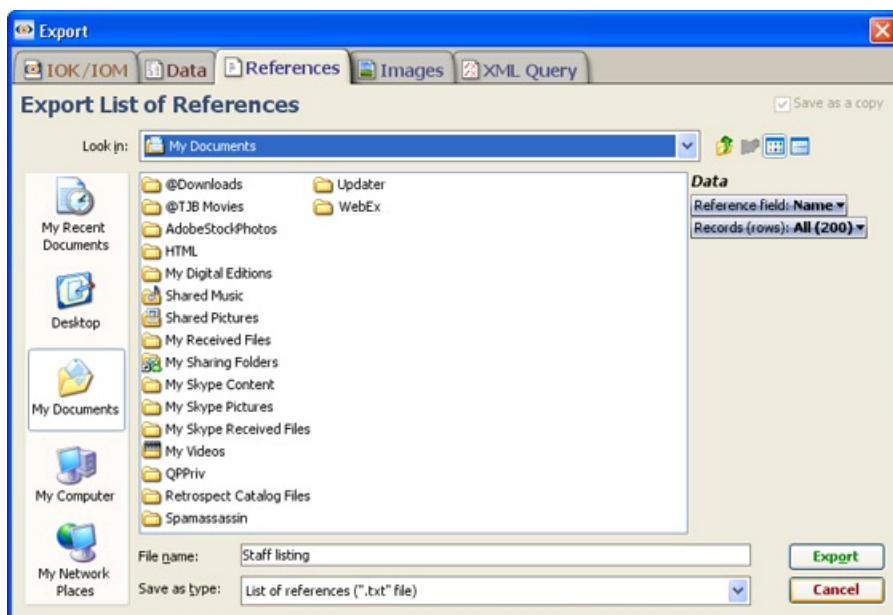
IOK files are already many times smaller than the equivalent spreadsheet file size. Strong compression reduces the size of IOK files even further, at the expense of requiring more memory and taking longer to save the file. You might use this if you are publishing or sending files via email or the web.

File security options

When creating new Omniscope .IOK/.IOM files, you can choose to save the new .IOK/.IOM file using several options for managing access to the file, to the data inside the file, and the period of time for which the file will be valid. [More information...](#) [24]

Exporting a list of References

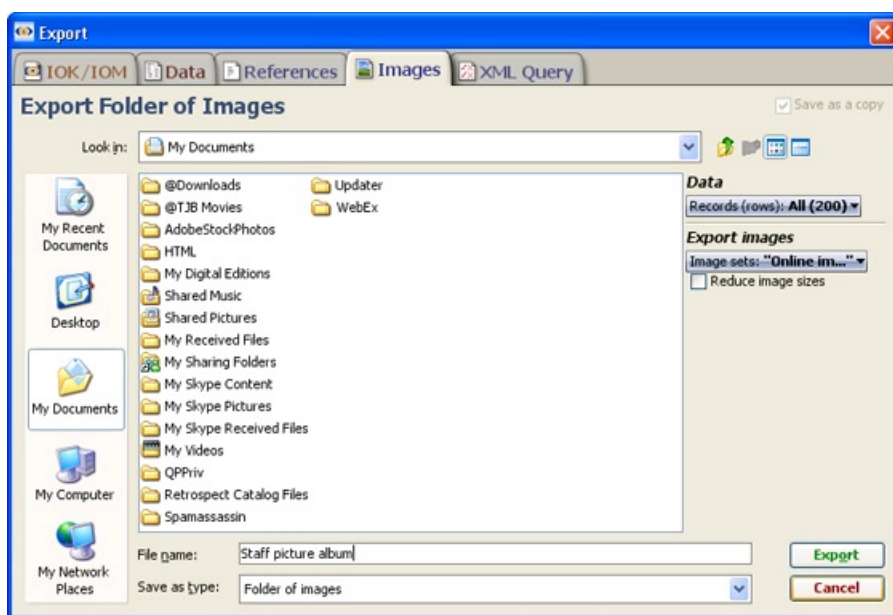
Sometimes you will want to export only a list of record (row) identifiers to share with others using Omniscope or other applications. Choosing the **References tab** in the **Data Export wizard** allows you to specify which field (column) you wish to export, and which Universe contains the records you wish to export. For example, if you have saved a number of interesting records in the Basket, you would specify **BASKET**, rather than **IN**, **SELECTION** or **ALL** universes as the source of the records references to be exported.



Reference files are exported as single column .TXT files, useful for importing/matching in to other applications or other Omniscope to re-create the same list, perhaps with up-dated data, for co-workers or customers.

Exporting a folder of Images

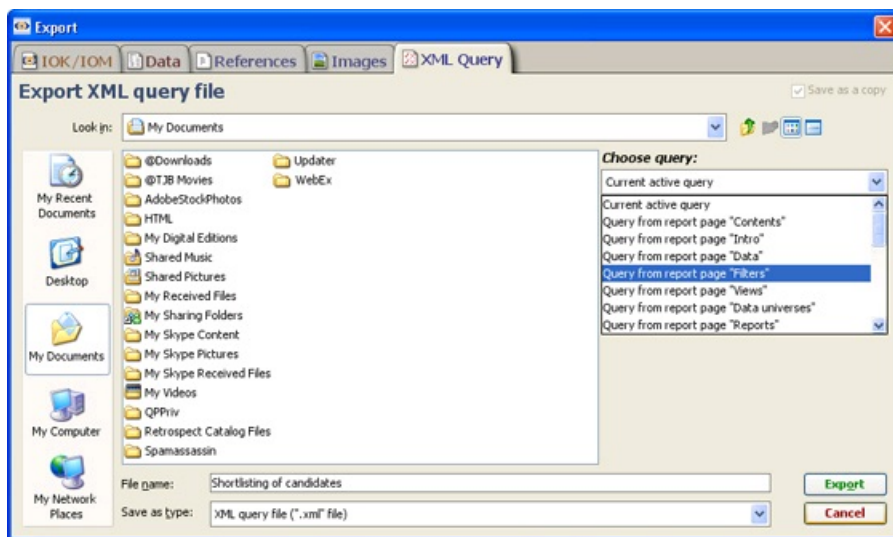
If you have associated an image set with a particular Omniscope file, the **Export Data wizard** will display an **Images** tab option. Selecting this tab allows you to create a new copy of the image folder, perhaps changing the size of the images to reduce the size of the files in which they will be embedded. If you have downloaded all online images associated with a file (by opening a Tile View showing the images, or using record cycling in the Details view, for example) you can export a copy of those images to a folder for local use.



Note that the image set to be exported only needs to be associated with (but not necessarily embedded into) the current Omniscope file in order to use the Export Folder of Images option. If you are exporting an embedded image set that you have already reduced from the original sizes, Omniscope may warn you that it does not have access to the folder with the images at original size, and that the images in the new, exported folder will be of reduced size.

Exporting an XML Query file

Any pattern of filter settings and history of Moves and Keeps can be saved as a named query, using an XML file only Omniscope can read. The query may be the current active query, or any query associated with a Report Page defined in the file.



Exported queries can only be opened by other Omniscope with open files that have the same fields present. There may be new records or changed data values in the version of the file importing the query, however. The export/import XML queries feature is used to permit others to quickly reproduce a data quality or screening views using the **IN** and **OUT** universes, perhaps on a daily basis as the data in each successive version of the .IOK/.IOM file changes.

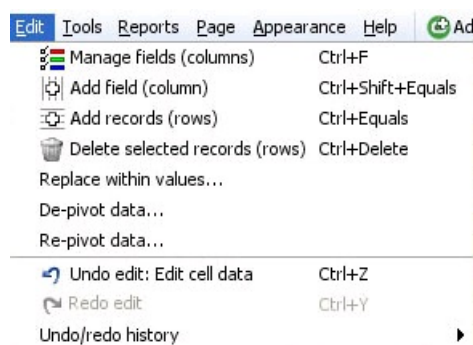
Back to **File Menu** [100]

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2.4 Edit Menu

Edit Menu Commands

The **Edit** menu contains commands used to alter the content and layout of your data sets.



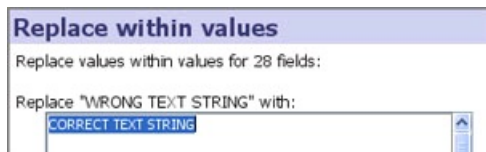
Manage fields (columns)- launches the powerful and useful **Manage Fields** dialog, from which you can configure nearly every aspect of each field (column) in your data set. This dialog is used to add, remove, hide and globally re-order fields. It is also used to manage/change the data typing for each column (integer number, decimal number, dates and times, text and categories) and to configure and format the way the values are displayed. For more information, see Using Manage Fields .

Add field (column)- adds a new, blank field (column) to the dataset. Unless you are in Reports Mode, you will see the new column appear at the far right in the Table View. If you are in Reports Mode, the new column will not be visible until you go to **View Tools > Column Options > Columns to show**, find the new field at the bottom of the pick list, tick it to reveal the new column and drag it into place in that Table View. This command is also available at the bottom of the **Manage Fields** dialog. The difference is that if you drag the new column into place using the Manage Fields dialog re-order, it will position the new column globally for all views, not just the Table View (and pop-up Show details table) or a Table View in a Report Page.

Add records (rows)- adds a specified number of new records (rows) to the bottom of the data set. This can also be done (with more precision as to where the rows are added) from the Table View row header right-click menu.

Delete selected records (rows)- deletes selected rows (can be un-done using **Undo edit** ...see below)

Replace within values- used to perform global search and replace operations. Choose which fields (columns) you are going to search and replace, then type in exactly the text string to be found, and the string you wish to replace it with.



De-pivot/Re-pivot data- Sometimes source data is laid out 'horizontally' when Omniscope would manage it better 'vertically' (e.g. time series), and vice-versa. Sometimes data needs to be exported from Omniscope in an orientation different from that used in Omniscope reports. To avoid the time consuming process of changing the orientation of data from horizontal to vertical (row becomes column) or vertical to horizontal (column becomes row), Omniscope has both a **De-pivot** and **Re-pivot** function. Use of these functions is discussed in more detail [here](#) [138].

Note: transposing a data set (exchanging all rows and columns) with or without headers currently takes two steps, this will likely change...

Undo/Redo edit- allows you to reverse data editing operations

Undo/Redo history- keeps a history of reversible operations. Operations which can no longer be reversed/re-done are greyed out.

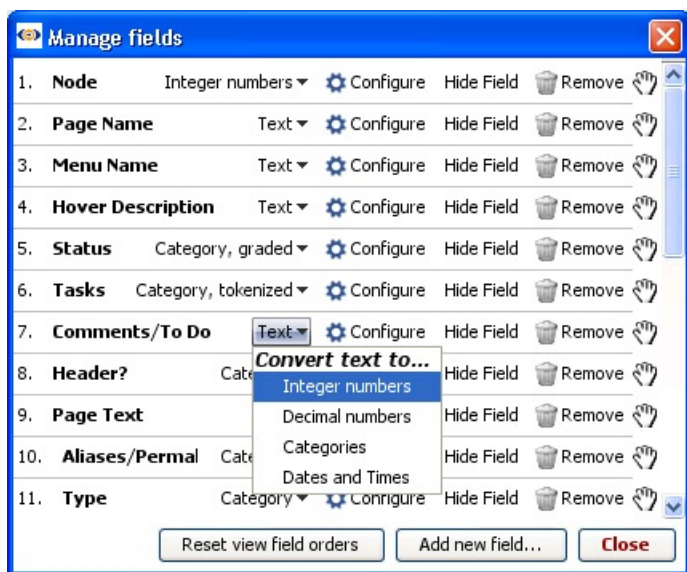
Back to [Main Toolbar](#) [268] Or [Command Reference](#) [160]

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Manage Fields

Edit > Manage Fields

The **Manage fields** dialog is the central menu for accessing almost all commands that relate to adding, naming, showing or hiding, and removing fields (columns) from your data set. All of the fields (columns) in your data set will be visible here, even if you have hidden them in some or all views. Data typing, which tells Omniscope how to treat the values it finds in each field (column), can be centrally managed from this dialog.



Note: **Rename**, **Change Field type** and **Field options** commands are also available from the Side Bar (right-click on filter device) and the Table View (right-click on column header).

Changing field data type

For each field, the **Field Type** drop-down allows you to change the data type from the default assumptions made by Omniscope when the data was imported. Depending on your data source, Omniscope cannot always automatically determine the most suitable data type. The Field

type drop-down shows the current data type, which may or may not be optimal for your analysis and reports. Omniscope classifies all data columns as either Integer numbers, Decimal numbers, Dates and Times, or Text. In addition, if the number of unique values in a column is less than about 250, Omniscope can treat each of the unique values in that column as a Category. It is important to use the most suitable data type for each column to get the best results.

Valid data types for values in each field (column) include:

- **Integer numbers:** (examples: 1,253 or -256) Integer number field options include a thousands separator. Integer number cells will not accept decimal input, and will truncate (not round) any non-integer values found. Often, identification numbers which are not used as numbers, such as '02345678', are typed by Omniscope as Integer numbers. In general, the data type for these fields should be changed to Text (remove the thousands separator first). If there are less than about 200-250 unique values, and you want to graph related values for each ID number, then change the data typing to Category. (see below)
- **Decimal numbers:** (examples: 1,253.761 or -.023, or 12%) Decimal number field options include a thousands separator, the option to display cell values as percentages (0.12 displays as 12%) and you can set the number of decimal places displayed. Decimal number fields only accept numbers (and the minus sign) as inputs, no letters or date separators, etc. If you want to specify a calculation, you must change the field to a Formula field and specify the expression. See [Formulas and Variables](#) [93]
- **Dates and Times** (examples: 5 Jan 2005 15:37 or 12/25/2007) There are a wide range of formats which can be interpreted as dates. Common formats are recognised by Omniscope and imported automatically. If Omniscope does not recognise your date format, it may ask you to specify the format your data is in. Date fields can use specified custom date formats, and you can also change the date display format for an existing date field using the field options. If you encounter problems with recognising and formatting dates and times, see [Working with Dates & Times](#). [135]
- **Text** (examples: names and addresses) Text fields accept any type of input. Omniscope supports putting more than one text value in a cell, with a specified delimiter between each value. See the discussion of [Tokenized data](#). [123]

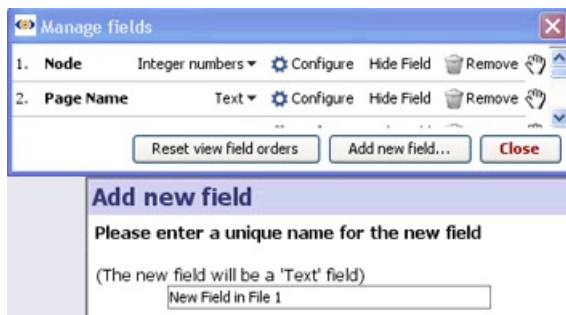
Categories are a useful data type whenever a field (column) contains only a limited number (say 200-250) **unique** values, although the total number of records (rows) can be any number. Typical examples are a 'Sex' column, which usually contains only two unique values; 'Male' or 'Female', or list of distinct colours, such as 'red', 'orange' and 'green'. On data import, Omniscope will count the number of unique values, and for text columns will usually set the data type to be Category by default. Category fields also have the following options: **Graded** (the values are ordered and colour options shown with a continuous green to red scale, and **Tokenized**, meaning each cell can contain a delimited list of multiple values. See the discussion of [Tokenized data](#) [123].

Note: if you import data with a field containing a mixture of numbers and values such as "?", Omniscope will treat this as a Text or Category field. If you then convert the data type type to numbers, Omniscope will warn you before blanking out the "?" values.

Re-ordering, Adding, Removing and Hiding fields

Ordering and Resetting field orders- use the drag handles far right to re-order your columns from the default import order to the order you find most useful in the majority of the views. You can change this order view-by-view and in Reports Pages, but clicking on **Reset field orders** will return all views to this order, although hidden columns will remain hidden.

Add new field- creates a new, blank field in your file after the end of the list of existing fields. Enter the name, which must be unique, and click OK. Initially, the field will be a Category field, and all values will be blank (empty, also called null and shown in grey). Use the **Field type** drop-down to change the data typing to the desired field type (described above). Use the drag handles to move it into position between other fields, then click Reset field orders. This will display the new field in the Table View in the correct location. Note: New fields will remain hidden in Report Pages already configured. You must visit each Report Page and use the **Columns/Fields to show** option in each view to reveal the new field, then Commit the changes to make them persistent.



Configure fields menu

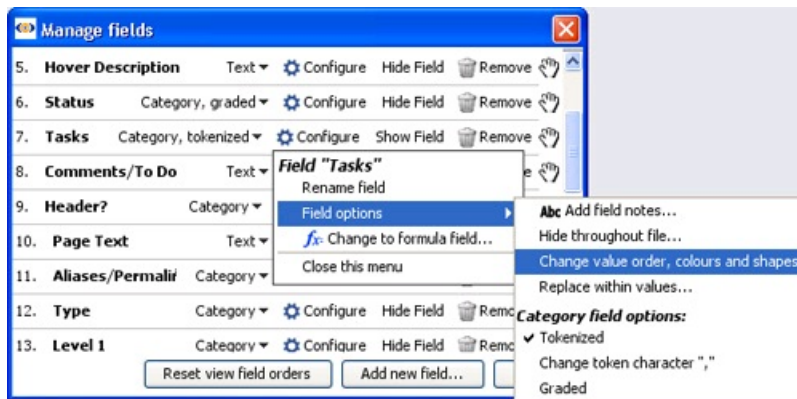
Click the Configure drop-down for each field to get other actions and configurations related to a field.

Rename field- often data sets imported from database tables rather than human-friendly views will have obscure field names which are not easy for those receiving your file to understand. Use this command to change the field (column) names in Omniscope...the data refresh process will not be affected. If you want to preserve the display of upper case acronyms, 'ISIN' rather than 'Isin'...be sure to tick the **Preserve upper/lower case of field name** option.

Change to formula field- converts a column from input values to calculated values according to a formula you specify. See Formulas & Variables.

Field Options sub-menu

Add field notes allows you to annotate a field; any text you enter here will appear in a tooltip whenever the mouse hovers over a Table View column header, or a Side Bar filter device. Use this to attribute the source of your data, clarify definitions, etc.



Hide throughout file- same as Hide Field, you will be asked explicitly if this applies to Report Pages already configured. If you do not want to hide the field in Report Pages where it is currently displayed, choose Skip Report Pages. Note: you can still reveal hidden fields in Side Bar filters using the Devices drop down.

Replace within values- same as the command available on the [Edit menu](#) [101]

Change Value order, colours and shapes

Changing values and value order-

Edit value- Sometimes minor variations in spellings cause Omniscope to manage more distinct categories than actually exist. The Edit value command allows you to standardise spellings of potentially thousands of values in the data set in order to achieve the correct category listings.

Value order- this option applies to Category fields, for which you usually need to define a sorting order. By default, category values are sorted alphabetically. For many categories, alphabetical order is not meaningful. In the example below, a sequence of tasks in creating a web site have been dragged into a new order using the drag handles at far right. The Task values will now display and sort in this new, non-alphabetical order in all views. If we now choose to convert this field to a Graded Category, the new top and bottom values will define the colouring range (see below). Note: If you set a category sort order from top to bottom, and find that some views display the values in a sequence opposite to your preference, try reversing the sort order by dragging the Category values from bottom to top.

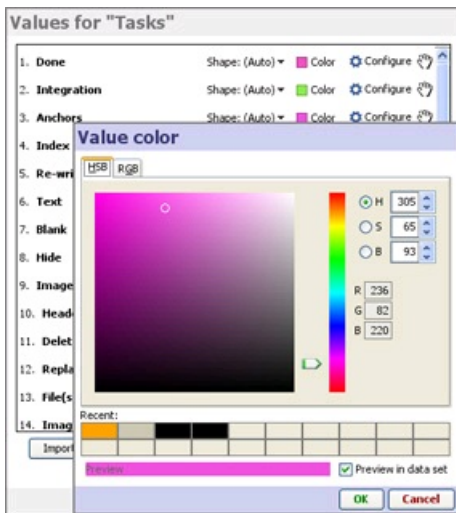


Import/Export- If you have a notepad file (.TXT) listing the values in correct business order, you can import the list and Omniscope will automatically arrange the sort order accordingly. You can also export a list showing the current sort order.

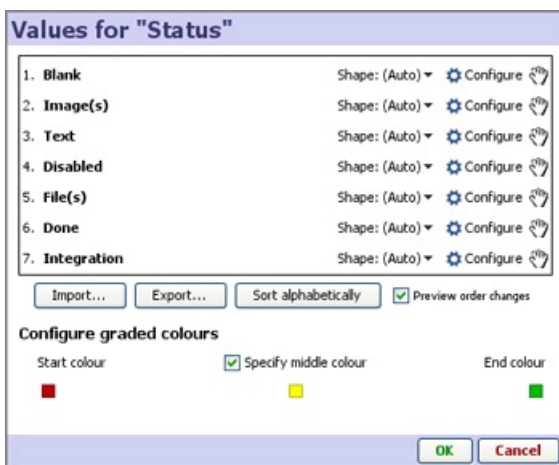
Sort alphabetically- returns the sort order to the default

Setting and changing colours

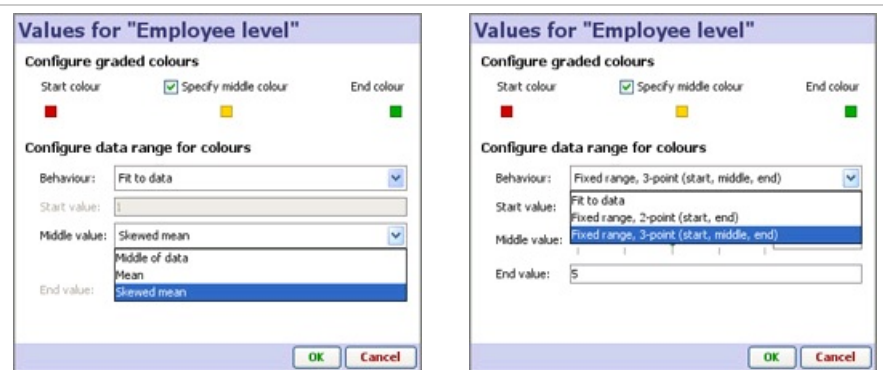
For Category fields, if you don't like the colours chosen automatically for your Category values, or have specific colours you would like to use, click the square colour box next to the value you would like to change to display a **Colour Chooser**. This dialog enables you to select the colour associated with each Category value with great precision.



If your Category field is *Graded* (see above), you can't change Category values individually. Instead, you can choose start and end colours, and the values in between have a graded colour.



Date and Time, Integer and Decimal fields also allow you to change the gradation colours, with various options to achieve the best use of colour given any distribution of values within the field. You can specify the start and ending colours for the continuous range, and skew the colour spectrum by specifying the middle colour also.

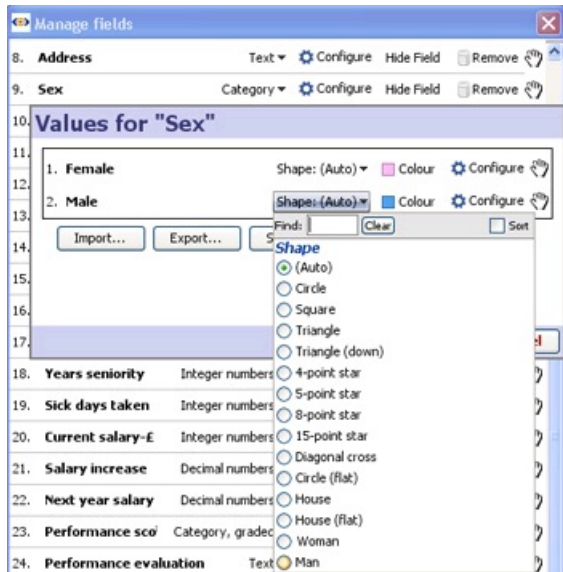


Numeric fields often have very skewed distributions due to extreme values, etc. and the resulting colour spectrum will be too uniform for most of the values. If you choose **Fit to data** behaviour, you can adjust for skewed data by selecting mean or skewed mean as a way of finding the

'middle' value for colouration purposes. If you have a more uniform distribution of values in your field, you may choose **Fixed Range** behaviour and specify **Start, Middle and End** values to achieve very precise colouring effects.

Setting and changing shapes

You can assign marker shapes to category values, such that different shapes are plotted on the Graph or Map view, depending on the value for the specified Shape field in each record.



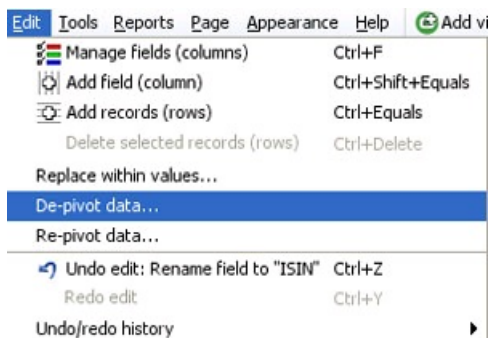
Back to [Edit Menu Commands](#) [101]

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De/Re-Pivot

Edit > De & Re-Pivot

Sometimes source data is laid out 'horizontally' in rows when Omniscope would manage it better 'vertically' in columns. Sometimes data needs to be exported from Omniscope in a layout/orientation different from that used in Omniscope. To avoid the time-consuming process of changing the orientation of data from horizontal to vertical (row becomes column) or vertical to horizontal (column becomes row), the Omniscope Edit menu has both a **De-pivot data** and **Re-pivot data** function.



Edit > De-Pivot data...

Data tables containing repeated observations of values sometimes place each set of observations in a column, such as the example of daily bond yields by ISIN identifier below. This 'horizontal' layout with the dates of each observation in a separate column is not useful for time series analysis in Omniscope, so we use the **Edit > De-pivot data** wizard to change the layout/orientation of the data set:

Table view View tools Aggregation Sort: Isin

Isin	07/03/2006	08/03/2006	09/03/2006
8 AT0000384227	0.03134274	0.03109708	0.03120253
49 AT0000384821	0.03306073	0.03281203	0.03301274
58 AT0000384938	0.03345801	0.03318207	0.03341197
3 AT0000384953	0.03103324		
78 AT0000385067	0.0341944		
99 AT0000385356	0.03501026		
154 AT0000385745	0.03705262		
119 AT0000385992	0.03551502		
128 AT0000386073	0.03570835		
160 AT0000386115	0.03878305		
141 AT0000386198	0.0360426		
2 BE0000257635	0.03081942		
104 BE0000262684	0.03504583		
29 BE0000268749	0.03190767		

De-pivot

Please select the fields to de-pi

Find:

Isin

07/03/2006

08/03/2006

09/03/2006

10/03/2006

In this case, the ISIN identifier is already in a single column, so we do not need to create another column. We therefore untick this column from the list of columns to be De-pivoted as shown above.

In the new data layout, we want all the dates of reported yields/prices to be in one column, which we can re-name 'Date' or similar. Next to the new 'Date' column (the pivot series values), for each ISIN we want the observed Yield/Price for that day (the pivot cell values), which we can rename accordingly:

De-pivot

Please enter a name for the new field that will contain the pivot series values ("07/03/2006", etc.)

De-pivot

Please enter a name for the new field that will contain the pivot cell values

Given the information above, Omniscope will automatically change the data layout/orientation accordingly, with the ISIN reference duplicated for each date, and the column names changed to those you specified. Note: do not worry about the 'vertical' duplication of the ISIN values. This duplication is only visible in the Table View and does not appear in the reports and charts

Table view View tools Aggregation

ISIN-not de-pivoted	Changed to 'Date Column'	Changed to 'Yields/Prices'
AT0000386198	14/08/2006	0.03981206
AT0000386198	15/08/2006	0.0397898
AT0000386198	16/08/2006	0.03943345
BE0000257635	07/03/2006	0.03081942
BE0000257635	08/03/2006	0.03046917

Manage fields

1. **ISIN-not de-pivoted** Text

2. **Changed to 'Date Column'** Text

3. **Changed to 'Yields/Prices'** Decimal numbers

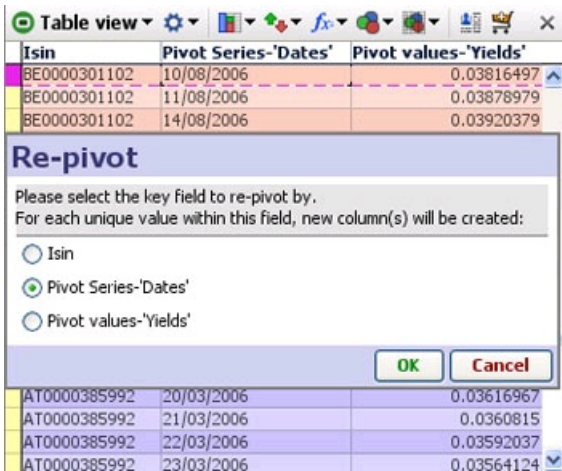
BE0000257635	27/03/2006	0.03090655
BE0000257635	28/03/2006	0.03164651

With the data now in 'vertical' Omniscope layout, we can use the Graph and other views to display the time series:

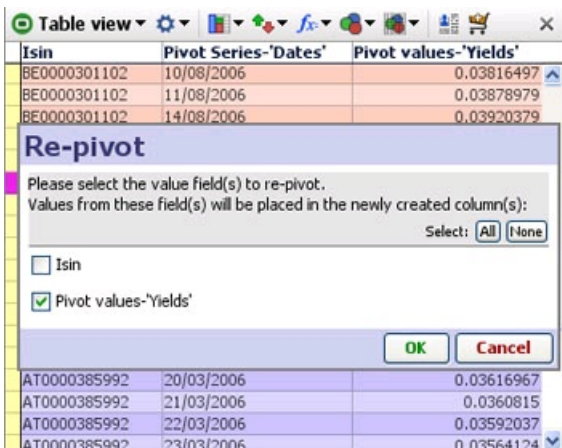


Edit > Re-Pivot data...

Sometimes you may need to do the reverse of De-pivoting, i.e. converting a single column into many different columns by unique values. For example, you may need to export a data set in spreadsheet format with a layout/ data orientation different from that used in your Omniscope reporting file. The **Edit** menu also contains a **Re-pivot data** function which performs these changes in data layout or orientation automatically. In the example below, we are going to convert this data set from the 'vertical' layout with the dates all in one column, to a 'horizontal' layout with a column for each date and the observations under each date.



We want to keep the ISIN column as a column, so we select Dates as the pivot series as shown above, then we select Yields as the value fields to be arranged under the new date columns as shown below:



The result of the **Re-pivot** is a typical 'horizontal' data layout/orientation:

ISIN	07/03/2006	08/03/2006	09/03/2006	10/03/2006	13/03/2006
AT0000385992	0.03551502	0.03538114	0.03573454	0.03578429	0.036
AT0000386073	0.03570835	0.03560486	0.03597548	0.036028	0.036
BE0000303124	0.03576936	0.03567375	0.03604816	0.03610169	0.036
BE0000305145	0.03372971	0.033483	0.03372638	0.0337405	0.034

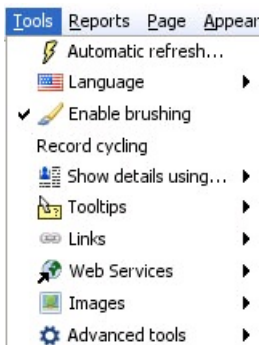
Back to [Edit Menu commands](#) [101]

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2.4 Tools Menu

Tools Menu commands

The Main Toolbar **Tools** menu and sub-menus group together commands and options for managing data refresh, language settings, 'brushing' or fading of unselected records, display of individual record-level details, links to related content and services outside the file, associating image sets with the file and many advanced configuration options.



Automatic refresh- when ticked, displays the Automatic refresh drop-down management menu and Hold button on the right side of the **Main Toolbar**. See [Using Automatic Refresh](#) [269] for more detail.

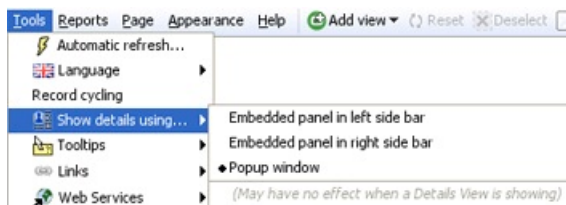
Language- enables you to change the language of all the menus in Omniscope. See detailed section below.

Enable brushing- greys-out (fades) non-selected records in all views simultaneously. To read unselected Table View records when greyed-out, disable brushing by unticking this option. Note: brushing option not Report Page specific. If Table View records become too sparse, change the Table View universe to the **SELECTION** universe to concentrate all the selected records.

Record cycling- record cycling automatically shifts selection from one record to another, with a configurable time delay. Tick/untick to turn global record cycling on and off (including inside Details Views if the synchronise option is ticked). For more on using record cycling, see [Viewing Details](#) [122].

Tools > Show details using

In addition to using the Details View, there are various options for showing record-level details.



The default (whenever the Details View is not open) is to display details using the pop-up window. If Side Bars are visible, there are options to display details panels at the bottom of either one (but not both) of the Side Bars. For more information, see [Viewing Details](#) [122]

Tools > Tooltips

Tooltips are temporary text displays that appear whenever you hover your mouse over a marker or other representation of one (or a group of) record(s) in the data set. Using the drop-down pick list, you can select which field values will be displayed whenever Tooltip displays are visible.



Tooltip displays are Report Page specific. If you are in Reports Mode, the selections you make will be remembered and the selected values will appear in all Tooltip displays on that Reports Page. If you Exit Reports, the Tooltip displays will revert to the defaults you set for the file. Note: Use Tooltips sparingly...selecting too many field values to display will can create large blocks of text values that obscure too much of the open views.

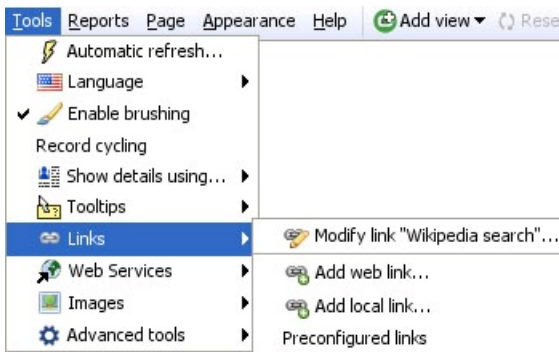
You can also choose to display associated image sets as tooltips:



To learn how to associate image sets with your .IOM/.IOK files, see **Tools > Images** below.

Tools > Links

Links extend your file users' experience to include content not contained within the Omniscope .IOM/.IOK file itself. By adding links, anyone can integrate related external content (documents, files and web pages) into their .IOM/.IOK files, with one-click access via their local network, and the open web.



You specify links and make them available for use within your .IOM/.IOK file using the **Add web link**, **Add local link** and **Preconfigured links** dialogs. For more information, see [Tools > Links](#) [227].

Tools > Web Services

Web Services are data processing services that use Internet standards to post data to a remote server, which usually delivers a response in web page format. Popular examples of Web Services in action include submitting text to a search engine and receiving the results page, or submitting stock tickers to view price charts. [More detail on Web Services](#) [270].



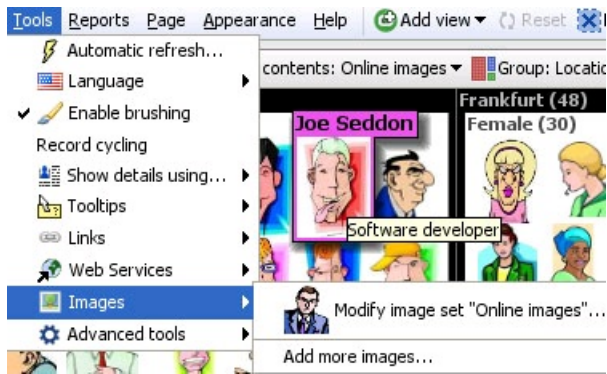
Omniscience is a 'hybrid' web/desktop application that is easy to integrate with Web Services. In addition to the preconfigured free web services (that accept a single value text string input) available on the Links menu, there is also a useful multi-record submit Web Service via HTTP POST available in Omniscience. The **Tools > Web Services** dialogs permit you to configure and edit Web Services that expect multi-record input to work seamlessly with your Omniscience files. Accepting the defaults under **Add web service** will configure an 'echo test' service (hosted by Visokio) in which our server repeats back a list of references you have selected in your local Omniscience file. More information on configuring and using web services with Omniscience is available in [Tools > Web Services](#) [173] and the [Web View](#) [119] subsection on [using Web Services](#) [228].

Tools > Images

Before you can display images, you must associate one or more folders of images with the .IOK file as a named image set. Preparation for this involves saving a set of images in a single folder with a consistent naming convention, such that the same text values are present in one of the columns of your .IOK file (it may be a column included just to hold the names of the images). It is also possible for Omniscience to display multiple images per record, provided you have entered multiple 'tokenized' values in the image reference cell.

There are 3 ways to display image sets in Omniscience:

- For high speed and performance, images can be displayed from a separate local folder, assuming the Omniscience .IOM/.IOK file is always kept in the same position relative to the image folder.
- For more portability and publishing, entire image sets can be embedded into Omniscience files at selected sizes/resolutions to minimise the impact on .IOM/.IOK file size.
- It is also possible for Omniscience to display images obtained 'on-demand' from a remote server.



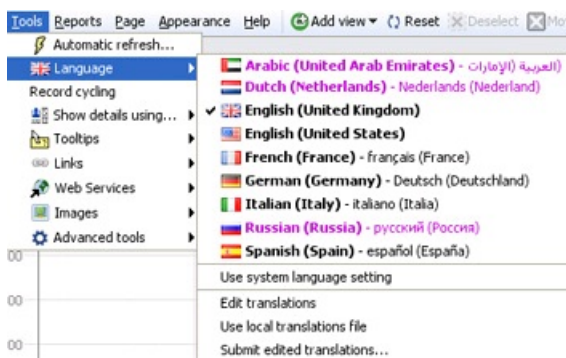
Once you have associated one or more image sets (each with single or multiple images per record) with your file, you can display these images in various views:

- Table View (**View Tools > Column Options > Show images in cells**- select column),
- Tile View (**Tile View > Tile Contents > Show Images**-select image set),
- Details View & pop-up windows (**Details View > View Tools > Show > Images**)
- **Slide show** pop-up windows (launched from most **View Toolbars**)

For more detail, see [Adding Image Sets](#) [260]

Tools > Language

Omniscope can be used with any language. You can use existing translations, modify existing translations, or create your own translations files based on those that already exist.



Language selector- choose from the list of available translations

Use system language setting- tick this option to start Omniscope with the language setting specified in the operating system. If a user selects a different language, it will override and untick this setting. That user's installation will open using the preferred language until reset using this command.

Edit translations- opens the embedded EditedLanguages.iok translation file. You can make changes to the translations text in this file, being careful to follow the Guidelines in the [Translations Guide](#) [172]. When you have finished editing, choose **File > Save** (not **Save As**) to save the edited file in its original location. In **Tools > Languages**, ensure your edited language is selected, then close and re-start Omniscope to see the changes you made via the edited file.

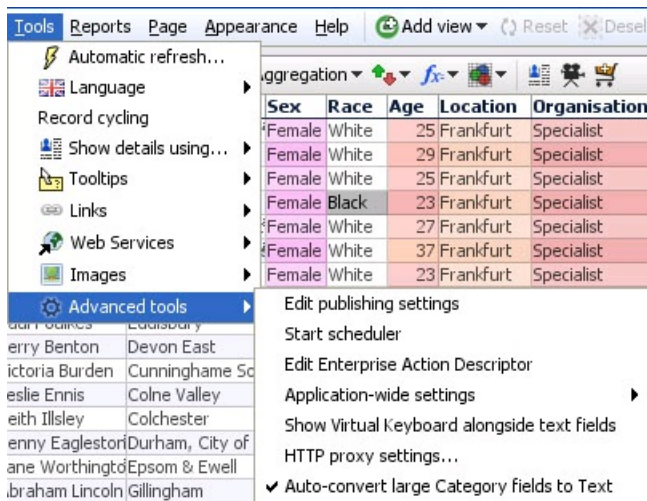
Use local translations file- if you open the embedded EditedLanguages.iok file to make and save changes, this option will be ticked. To revert to showing the default translated text, untick this option and restart Omniscope.

Submit edited translations- if you would like your translations/edits to be included in the default for a given language, or added to the menu as a new language or variant, submit your EditedLanguages.iok file to us using this command.

We supply free extended trial keys to people helping us with translations. For more information, see the [Translations Guide](#) [172] in our Knowledge Base.

Tools > Advanced tools

Additional **Tools** sub-menus are available from the **Advanced Tools** menus. Note: Some of these commands are only available in the Enterprise Edition.



For more detail on these and other **Tools > Advanced tools** sub-menu commands, see [Advanced Tools](#) [175]

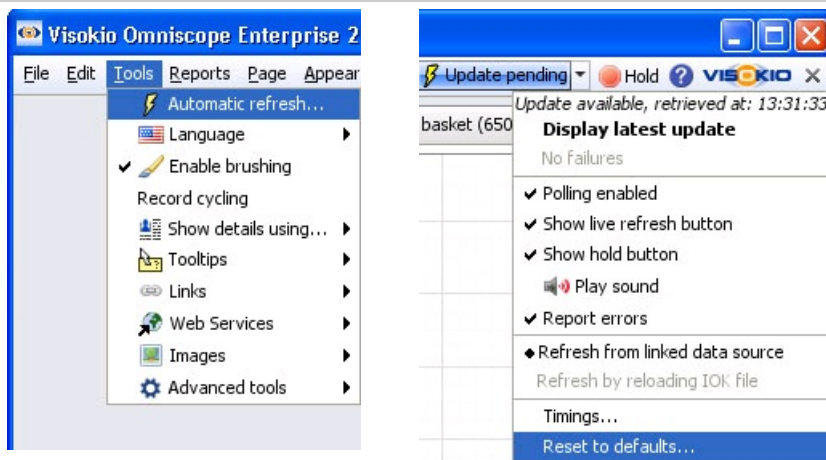
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Auto Refresh

Using Automatic (Live) Refresh

Automatic refresh is a new Professional/Enterprise edition feature available from version 2.3 that automates the process of refreshing data whenever it changes from within an open Omniscscope file. To activate Automatic Refresh, choose **Data > Automatic refresh**. A notice will tell you that a new **Auto refresh** drop-down menu and a red **Hold** button have been added to the right-hand side of the Main Toolbar:



The menu will display the timing of the last update. If a fresher version of the data has been retrieved from source and is available, but not yet delivered, the **Display latest update** option will be available. Pressing the red **Hold** button pauses refreshing, which may be useful if you are selecting records in preparation for adding them to the Basket or executing power queries using Move and Keep.

If any failures to refresh fully are detected, they are recorded in a log file you can access. Otherwise you will see a greyed-out notice **No failures**.

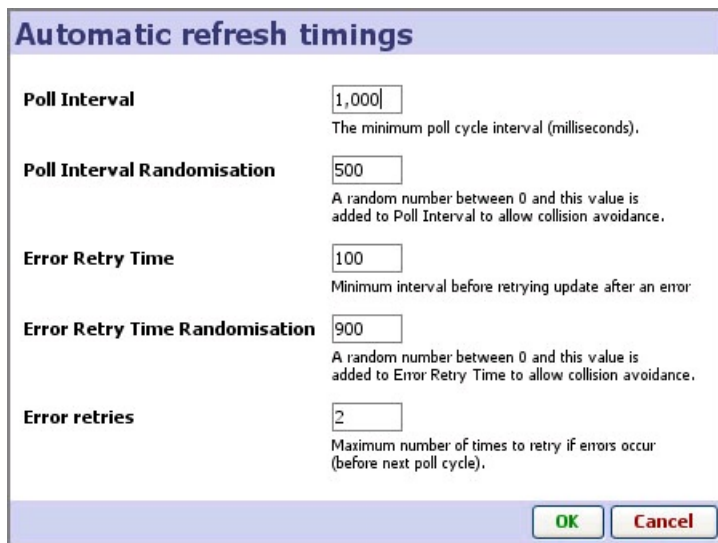
Unticking **Polling enabled** will stop the automatic refresh process. Unticking **Show live refresh button** will hide the button until the next time you select **Data > Automatic refresh** on the Main Toolbar. You can also choose whether or not to play a sound on refresh and report errors on this User's installation. You can also disable all automatic refresh behaviour by deselecting **Data > Automatic refresh**.

There are two options for implementing automatic refresh depending on the source of the data. The default is for the User File to refresh from the Source .IOK file from which it was created. This is the **Refresh by reloading IOK file** option. The other option, **Refresh from linked data source** is used when the source data file is not an .IOK Source file, but is instead a data file such as a spreadsheet, an exported copy of a database view/table, or a direct connection to a database via [ODBC or JDBC](#). [261]

If the linked data source is a file, Omniscscope will automatically check the source file time stamp at the intervals specified in the Timings section. If the time stamp has changed between polling intervals, Omniscscope imports the latest version of the data and displays it.

If the linked data source is a direct ODBC or JDBC connection to a database view, Omniscope will pull a copy of the data from the database view(s)/table(s) at every interval specified, but will not display it if there has been no change in the data. More sophisticated, higher-performance and less resource-intensive update and refresh options can be developed for direct connections to databases using bespoke Connectors. For more information on developing bespoke Connectors, [contact us](#). [178]

Timings options controlling polling behavior are useful when many User machines are being auto-refreshed. They are configured from this dialog:



These settings enable automatic refresh solutions to be tuned to the update cycle of the data, and to avoid large numbers of User Omniscope hitting the same resources at exactly the same time.

For more background on this and other data refresh options, see the Knowledge Base sections on [Integration](#) [169] and configuring [Auto-Refresh](#) [170] solutions on both the client and server side.

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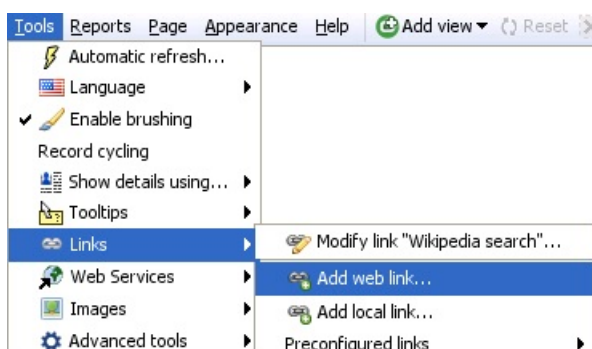
Links

Tools > Links

Links extend your file users' experience to include content not contained in the Omniscope .IOK file itself. By adding links, anyone can integrate other related content (documents, images, web pages, audio-video clips, etc.) into their .IOK files via their local network, and the open web. You can include full links in a column in your data, or specify data-driven (parametric) links that Omniscope composes on the fly, combining pre-defined strings with user-selected values in cells to create valid URLs.

Omniscope comes with a number of preconfigured links to free web services, such as a Google search, Wikipedia reference or Yahoo stock price charts. Once created, links can be attached to any field using the **Links** command available in many **View Tools** menus. Any number of [Web Views](#) [119] can be configured to display the results of selected links, or the users' default browser is used.

From the Main Toolbar, the **Tools > Links** menu enables you specify links and make them available for use within your .IOK file using the **Add web link**, **Add local link** and **Preconfigured links** dialogs:

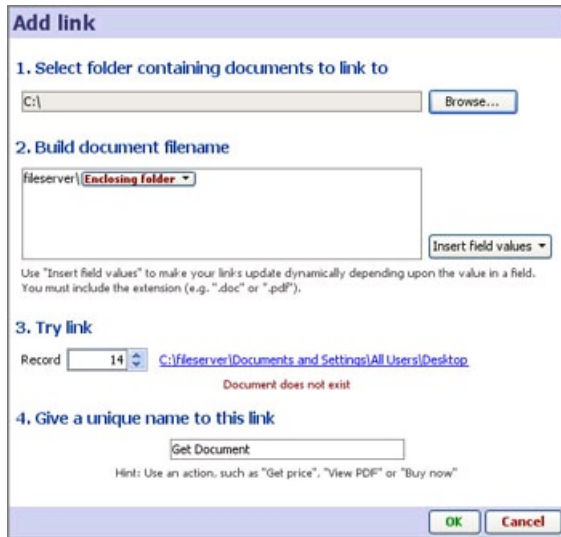


The **Add local link**, **Add web link** and **Preconfigured links** dialogs are simple to use and allow anyone to create dynamic local and web links combining text strings typed in just once (like a network file server/folder locations or web site domain names) with the values of fields contained in the .IOK file. The result is user-selected, dynamic, data-driven links that extend users' access to related information dramatically.

Adding/Editing Local links

File folders located on your machine (or on other machines accessible to you over your local networks) can contain documents, images, audio and video clips, practically any kind of digital content related to your data. For example, you may store a folder of documents on a remote file server that users of your .IOK file may wish to consult. If you have a reference name/number for each document (or the enclosing folder for groups of documents), including the references as a column in your .IOK file will permit users of your file to link to the folder or specific documents, audio or video clips, etc. inside.

[173]



Using the **Add local link** wizard, you build up the link by:

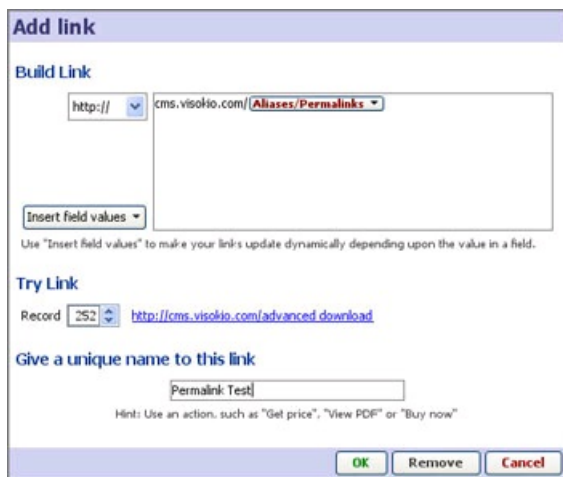
- 1.) Browsing to the network location containing the files you are linking to,
- 2.) Building the file name by adding in any text that does not change (e.g. 'fileserver' in the example above) and specifying each of the fields in your .IOK file containing values that will add specificity to the location/document/file the user will be linking to. To delete, backspace and try again. Once have have fully specified the link to an existing file/document,
- 3.) Try the link across a number of different records (in the example above, there was no document found)
- 4.) Name the link once you are sure that the link is correctly specified and working across the full range of records

Once the link is fully configured, it will appear with the name you have given it on all menus relating to links in the file. If you then assign the link to a field (column) in the data set, you can create an underlined link from all the values in that field that launches the link whenever the user clicks on a value in that field (column). You can assign a link to a field in several ways, the simplest being to open the Table View, then click **View tools > Links** and select the field from the list that appears. In the Table View, the values for that field (column) should become underlined once you assign the link. You can also display local links as action buttons/links in Details Views and pop-up windows.

Note: You can assign a link to any field (column), not just the fields whose values comprise part of the definition of the link. For example, you could define a link made up of the reference numbers of documents and some other text, but assign this link to the column containing the title of the document. Clicking on the title would launch the document, using the reference number from that record, (not the title) as an argument to complete the definition of the link.

Adding/Editing Web links

Any resource available on the open web can be linked to an Omniscope .IOK file using the **Add web link** wizard.

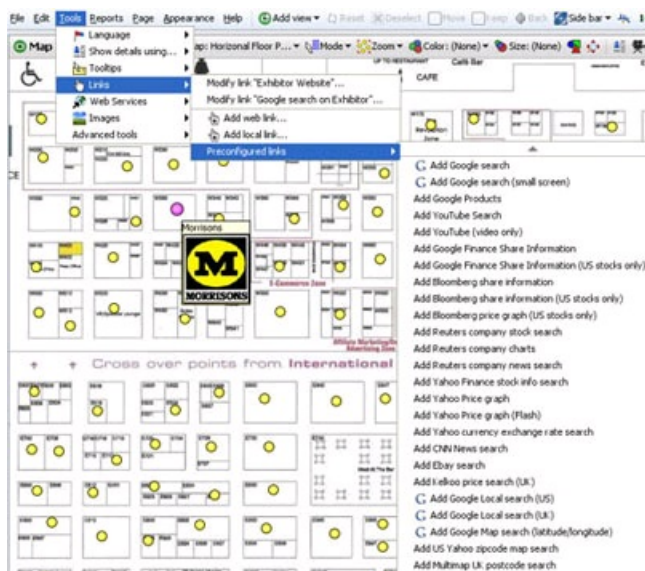


The **Add web link** wizard process is similar to building local links. Use the drop-down to specify the web protocol for the resource (usually http://) then type in the part of the URL/web address that is not contained in one of the fields in your data set. Next, select one or more fields from your data set, typing in any necessary separators like /, %20, etc. between the inserted fields. To delete mistakes, backspace and try again.

Once you have configured a valid URL/web address, test the link by cycling through various record field values, and clicking on the displayed link. Once you are sure that it is working as you expect, give the link a name. The link will now be added to the list of links available in your file. In the same way as local links, you can associate web links with any field (column) and they can appear as action buttons/links in Details View and pop-up windows. Web links can also be associated with Web Views by selecting the links from the list in the Web View Toolbar drop-down. For more information, see [Using the Web View](#). [119]

Pre-configured links

Omniscience contains a menu of preconfigured links to many free, popular web services you can add to your files for the convenience of file users.



Free web services tend to expect a single cell value, such as a search term/string of text, a recognised identifying number like a stock ticker, CUSIP or ISIN (securities) or an ISBN number (books). If your data set includes fields (columns) that can be submitted to these or other web services (see [Adding Web Services](#) [173]), you should consider configuring these links in your files. You can set the results to display in one or more Omniscience [Web Views](#) [119], or the user's default browser.

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Add Images

Tools > Image Sets

Before you can display images related to your data set, you must first associate one or more image folders with your .IOK/.IOM file as named image sets. Preparation for this involves saving a set of images in a single folder with a consistent naming convention, such that one of the columns of your .IOK/.IOM file (it may be a column included just to hold the names of the images) contains the same text values as the file names of the images in the folder, i.e. 'picture1', 'picture2' etc. Any image naming convention can be used, so long as the same exact text strings are present in one of the columns of your data set. You can omit the file extension from the data column if all the images have the same extension, e.g .JPG or .GIF. If the images are mixed format, the names in the data column must include the file extension for at least one of the formats.

There are 3 ways to display images in Omniscope:

- For high performance, images can be displayed from a separate local folder, assuming the Omniscope .IOK/.IOM file is always kept in the same position relative to the image folder.
- For more portability and publishing, entire image sets can be embedded into Omniscope files at selected sizes and resolutions to minimise the impact on .IOK/.IOM file size.
- It is also possible for Omniscope to display images obtained from a remote server.

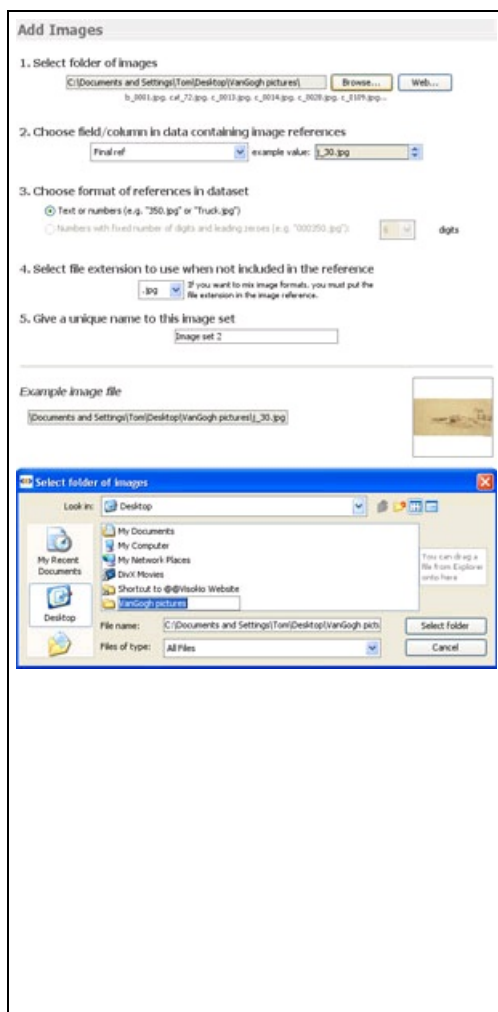
It is also possible for Omniscope to display multiple images per record, provided you have entered multiple values in the image reference cell by declaring the field (column) to be Tokenized (for more detail, see [Tokenized data](#)). [123] If you enter multiple image references per cell, the Tile View will show the first image by default, but you can change this in the Tile View **View Tools > Advanced** sub-menu. The Details View, pop-up windows and Slide shows will all display the tokenized images for each record.

The **Tools > Images** menu contains two options:

Add Image Set launches the Add Image Set wizard documented below.

Modify Image Set (only visible if an image set is already associated with the file)- launches the Edit Image Set wizard, which is effectively the same as the Add image set wizard. The modify image set option is usually used to re-import or re-embed an image set using the **Refresh embedded images** button at the bottom. **Warning:** Only use this command if you are sure you know the location of a complete new image set, ideally containing images at the original resolution, so that you can remove the old one and replace it with a new one.

Using the Add/Edit Images wizard



1. Select Folder of images- Browse to the folder containing the images. If the file is located on a remote machine accessible via the web, click **Web** and enter the web address of the folder.

2. Choose field/column containing image references- specify which field in your data file contains the names of the image files, and confirm by cycling through a range of example values.


3. Choose format of references- specify which format the image names are in

4. Select file extension to use- for image sets with mixed formats (e.g. .JPG and .GIF), you must include the file extensions for the non-default format as part of the image names in the reference field, but you do not need to add the extension to the default format references.

5. Give a unique name to this image set- give each image set you create a descriptive name.

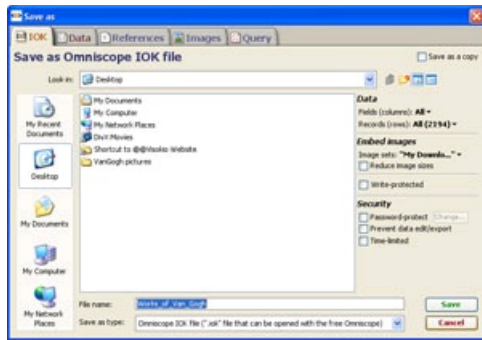
Check the example image at bottom right corner of the wizard and ensure that the correct image is displayed. Click OK to associate the named image set with the open .IOK/.IOM file.

Viewing Images

To see your image set displayed, go to  Add View on the Main Toolbar and add a Tile View. On the Tile View Toolbar, click on the [?] field (column) selector drop-down and select 'My Image Set' or whatever unique name you have used. The Tile View should display all the images in the image set. Missing images will be substituted with a red tile, but you can create a special image to substitute the missing ones, give it a name, add it to the images folder, and add its name to the empty cells in the image reference column.

Saving/reducing image sets to manage file size

Once you have associated an image set, you can save the .IOK/.IOM file with your images embedded. You can also experiment with the trade-offs between file size and image clarity/resolution when you reduce the image sizes to reduce the size of the .IOK/.IOM file. To save a version of your file click **File > Save as .IOK/.IOM**. The **File Save** wizard will appear:

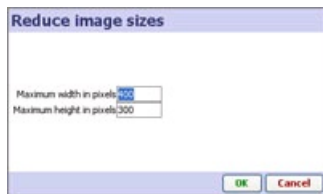


Note the commands available along the right hand side:

Data: used to select subsets of data to save in new file

Embed Images: If you wish your image set to be available inside the .IOK/.IOM file, you must embed the image set when you save the file. Select the image set you wish to embed. .

If you embed large numbers of large images without reducing their size, the resulting .IOK file can become far too big. In general, images can be substantially reduced from their original size without affecting the quality of the display on computer monitors. To test the effects of reducing the image file sizes, tick **Reduce Image size**. Give the new version of the file you are saving with reduced embedded images a name, such as 'My File with max picture size 200x150.iok'.



Click Save and you will see an image reduction dialog that enables you to reduce the maximum dimensions of the images, thereby reducing the size of the .IOK/.IOM file, but sometimes at some cost in terms of image clarity. If you set maximum values for width and height, Omniscipe will scale down any images with dimensions exceeding the maximum until the relevant dimension is within the maximum.

The size of the images displayed is not affected as much as the resolution, since Omniscipe manages the sizing of the images dynamically within each display.

Testing Image Quality

Open the new version of the file and close all the open views except the Tile View, which should be configured to display the now embedded image set My Downloaded Images. On the Tile View Toolbar, select the movie camera **Slide show** icon to the left of the **Add to basket** icon far right. Click **Start slide show** and choose full screen sub-option. Look at the image quality on your screen. If it is acceptable for the audience/screen resolutions you intend, consider reducing the images more to reduce the .IOK file size further. If the image quality full screen is not acceptable, you may have to reduce the maximum size of the images less (increasing the file size), or configure the views such that images are never displayed so large. To do this, repeat the steps above, and set larger maximums in the **Reduce image size** dialog.

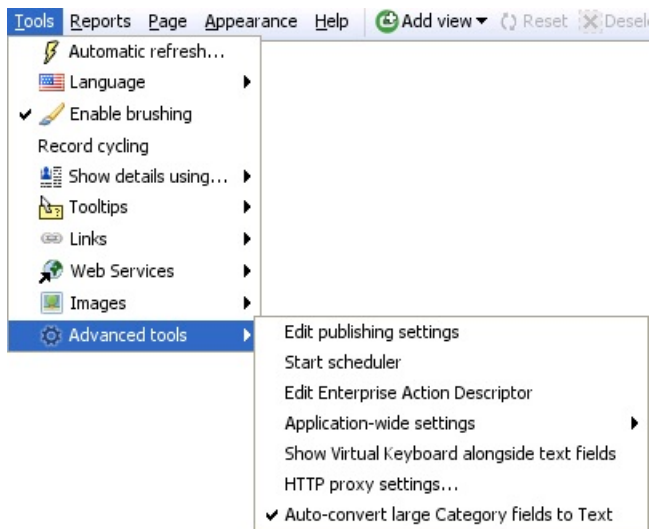
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Advanced

Tools > Advanced Tools

The Main Toolbar **Tools > Advanced Tools** menu and sub-menus include a number of important options, some of which (**Edit publishing settings, Start Scheduler, and Edit Enterprise Action Descriptor**) are only available in the Enterprise Edition (see below).



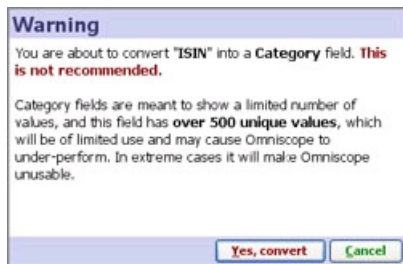
{Note: Some of the menu items shown above are only available in the Enterprise Edition...these functions are discussed in the section Enterprise Edition-Advanced Tools below}

Show virtual keyboard alongside text fields- tick to enable users to enter text without keyboards

HTTP Proxy Settings- useful for activation, updates and automatic bug reporting. For more information, see [Proxy Settings](#) [85] in our Knowledge Base.

Autoconvert large Category fields to Text- by default, Omniscope will not treat a Text field (column) containing more than about 200 unique values as a Category field, for performance and other reasons. Sometimes there is some leeway around this depending on the size and composition of your data set, and some views will only display breakdowns by Categories. Unticking this option will allow you to experiment with treating some text fields as very large Categories.

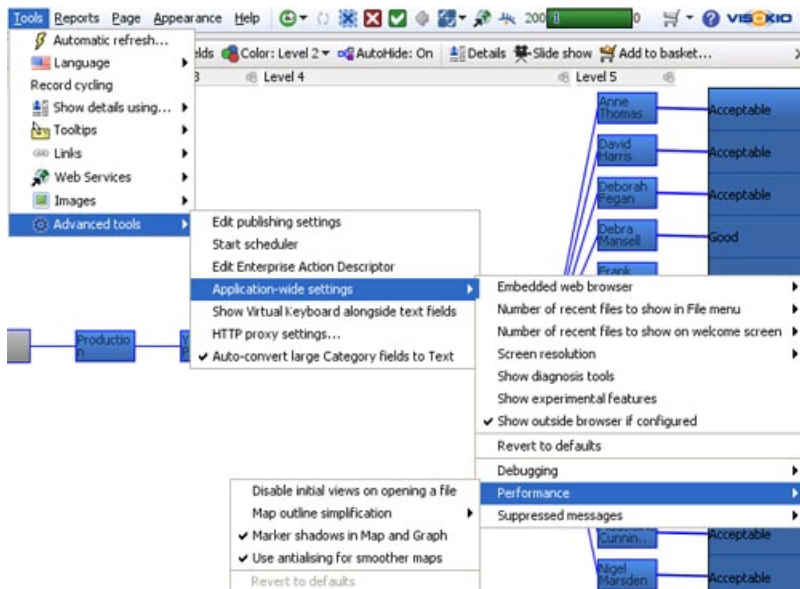
Warning: There is still a safe upper limit for unique values treated as Categories rather than Text. Trying to convert a field (column) with more than 500 unique values will definitely trigger a warning:



For more information on data typing and converting text fields to categories, see [Edit > Manage Fields](#) [95].

Application-wide settings sub-menu

The application-wide settings sub-menu is used to configure various aspects of your Omniscope installation that apply to all files you open.



Embedded web browser- allows you to change the installed browser underlying the Web View and Outside browser (see below). Current options include Internet Explorer and Firefox/Mozilla.

Number of recent files to show in file menu- allows you to specify the number of recently-opened files to show at the bottom of the File menu.

Number of recent files to show on welcome screen- allows you to specify the number of recently-opened files to show under **Recent files** heading on the Welcome screen (version 2.3+).

Screen resolution- Used to tell Omniscience the type of display screen the file will be used on (Handheld, Projector, Desktop or Kiosk/TV), so that layout, font size etc. can be optimised. This is the same as the display setting on upper right of the the Welcome screen (version 2.3 +). This is not the same as the option to change **only** the resolution displayed, which does not affect Omniscience's choice of layout, font size, etc. See also the command [Appearance > Resize window to \[1105\]](#): which changes only the resolution displayed.

Show diagnosis tools- this option reveals some additional error reporting options, for example a menu item to report errors on loading images from image sets. We may ask you to enable this to help with troubleshooting.

Show experimental features- every version of Omniscience contains some experimental features which are still under development. Tick this option if you want to see/ test these features.

Show outside browser if configured... the outside browser is an Omniscience web browser which opens before any specific .IOM/.IOK file is opened. It is different from Web Views, which are configured within each .IOM/.IOK file to open as required. The outside browser feature is used to provide a group of users the ability to browse and select from a library of .IOM/.IOK and other data files displayed on a web page. For more information, see [Using the Outside Browser \[271\]](#).

Revert to defaults- resets all Application-wide settings menu options to the default settings.

Debugging- used to create log files that record each event in various processes. We may ask you to tick some or all of these in order to generate a log file we can review to help us troubleshoot problems.

Performance sub-menu:

Disable initial views on opening a file- this setting enables you to explicitly control, one-by-one, the views that open with your data. It is used to recover files whose initial opening configuration becomes unusable for some reason, or where opening very large files on machines with limited RAM that require the utmost conservation of memory. **Warning:** If you leave this setting ticked, all files will open with no views showing....use only when dealing with specific circumstances.

Map outline simplification- reveals a sub-menu which allows you to adjust the resource demands associated with drawing and zooming/updating maps.

Marker shadows in Map and Graph Views- unticking this will improve performance in some files with very large numbers of markers visible in the Map or Graph Views.

Use anti-aliasing for smoother maps- unticking this will improve performance in some files with extensive use of maps

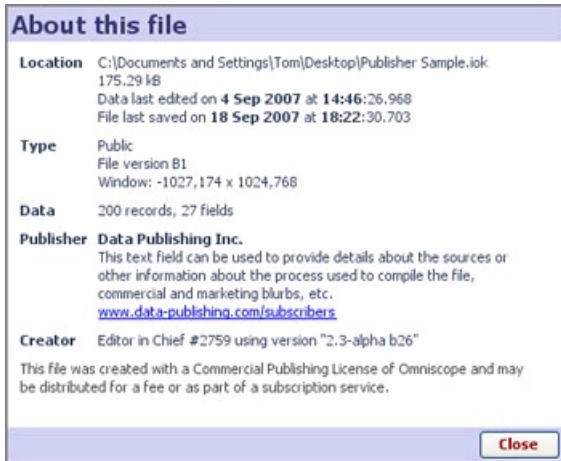
Reset to defaults- resets performance options to the default settings

Enterprise Edition Advanced Tools

The Enterprise Edition contains advanced automation, data and revenue protection features used in commercial data publishing:

Edit publishing settings- {Enterprise Edition only} this dialog is used to set the publisher identification text and links that will appear

whenever a file recipient clicks on **File > About** on a file produced with this installation.

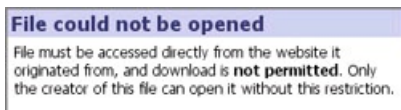


Edit publishing settings: file protection options- {Enterprise Edition only}

Protected- used to prevent data editing, export and copying (including copy-and-paste copying). Other options to time-limit or password-protect files are available from the **File > Export or Save as** [163] dialog.

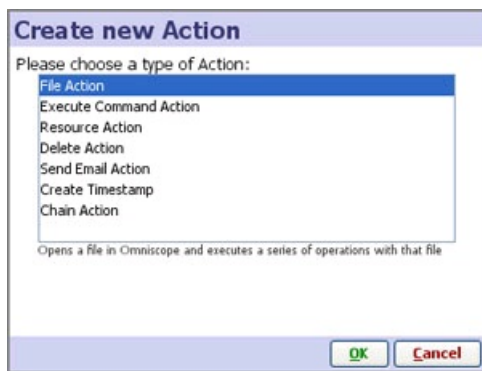


Tie to website- {Enterprise Edition only} enables domain locking, a powerful and effective revenue protection feature. Omniscopy .IOK files are free-standing and easily transferred by e-mail, posting/downloading from blogs and websites, etc. Commercial publishers can use this domain-locking feature to require that anyone trying to open their files must be logged in to a specific web site. If the file recipient is not logged in, the .IOK file containing the data will not open, and will display a notice to that effect:



Start Scheduler- {Enterprise only} the Scheduler is Visokio application separate from Omniscopy used to automate the refresh, import, merge and publishing/distribution of data files by defining a set of actions performed repeatedly on a specified time cycle. For more information, see [Using the Scheduler](#) [272].

Edit Enterprise Action Descriptor- {Enterprise only} the Scheduler uses Enterprise Actions Descriptors XML files, which you can configure using an Enterprise Edition user interface, or manually, based on a [documented specification](#). [273] Examples of actions which can be automated include:



For more detail, see [Creating and Editing XML Actions](#) [274]

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2.4 Reports Menu

Reports Menu Commands

The Main Toolbar Reports menu provides access to all the commands used to create and administer Reports Pages configured in the file. If no Reports Pages are yet configured, you will see only the **Create Page** heading on the menu. If Omniscopie is currently displaying a combination of views, queries, variable settings, etc. that you would like to make persistent, you should choose to create a Reports Page. Note: Standard Edition can create only one Report Page, which is the same as the opening display. Professional and Enterprise Editions can create any number of persistent, tabbed Report Pages, with grouping and other advanced options.



Create page from current Omniscopie configuration. You will enter Reports Mode and all your current settings will be copied to create a new Reports Page. In Reports Mode, any further changes you make will apply only to the open Report Page, and all subsequent changes must be **Committed** to become persistent (see below).

If you choose **Text only**, you will presented with a dialog to create a typical formatted text presentation page, with up to 3 different images embedded.

If you choose **From image or PowerPoint**, a file browse dialog will open to select either a large image file (for example a .JPG screenshot file exported from another Omniscopie file) or an existing PowerPoint file, from which you can select slides to import as Report Pages.

The commands below are also accessible from the Reports Navigator, which appears in the lower right-hand part of the screen when the file is in Reports Mode. These commands are more fully documented below in the **Reports Navigator** section.

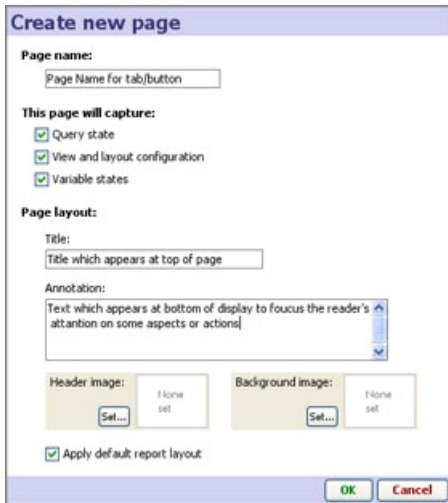
Administer all pages- if you already have Reports Pages configured in your file, you can manage modifications to all pages, or delete them all using these commands.

Navigation: Start ; ...Go to Page- if you already have Reports Pages configured in the file, these commands allow you the access any Page, from the start or from a drop-down menu that appears on the right of the **Go to Page** command.

Show report tabs- this option displays a tab for each Report Page across the top of the Main Toolbar, even if you are also displaying buttons in the Side Bar Reports Panel.

Creating Report Pages

To create a Report Page from the current display in Omniscop, or as a text or image slide/imported PowerPoint slide, use **Reports > Create Page** from the Main Toolbar Reports menu. If you have revealed the Side Bar Reports Panel, you can also click **New** to access the **Create New Page wizard**:



Page name: this name appears on a report tab at the top of the display, or a button on the Side Bar Reports panel if you provide access to Report Pages there. You can change this name at any time on the tab or in the Reports panel. It is best to keep the page name relatively short, as you can use Title and Annotation fields below to convey more detail.

Query State- preserves all filter settings and exclusions as persistent settings for the page

View and layout configuration- preserves the open views and layout

Variable states- if you have defined one or more assumption variables as part of formulae, this preserves the current value(s) of those variables as the opening value(s) for the page.

Title: the title text that will appear at the top of the page. You can edit this at any time by right-clicking on the title field with no text selected.

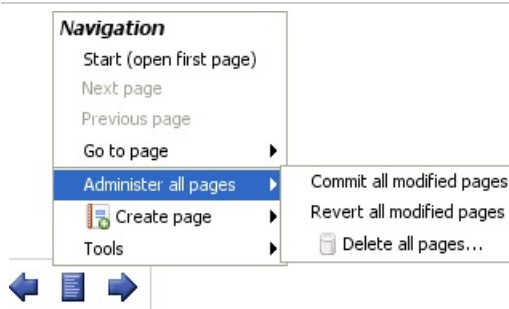
Annotation: explanatory text to focus the readers' attention on specific aspects or actions. You can edit this at any time by double-clicking on the annotation text field.

Header/Background Image- adds images to each Report Page; Header images display at the top of the page, Background images can be faded and display in views that otherwise display blank backgrounds. For more information on fading background images, see [Page menu commands](#). [104]

Apply default report layout: If you leave this box ticked, Omniscop will hide the View Toolbars and increase the margins around the views for a cleaner display. If you wish to preserve the existing settings, untick this box.

Once configured and named, each pre-defined, persistent Report Page appears anytime the user clicks on the top report tab, or the button next to the Report Page name in the Side Bar Reports panel, or uses the **Report Navigator** menu, which appears faintly in the bottom left corner of the display in Reports Mode.

Reports Navigator



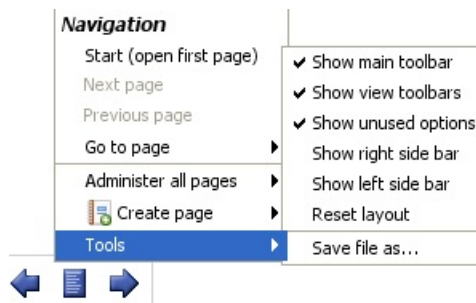
Start; Next; Previous; Go to page...used to cycle through the Reports Pages already configured in the file.

Administer all pages sub-menu:
Commit all modified pages- makes all changes which you have made to your Report Pages persistent

Revert all modified pages- returns all Reports Pages to their last persistent configuration

Delete all pages- deletes all Report Pages currently configured

Reports Navigator > Tools sub-menu: Tick or untick to Show or Hide various toolbars. Note that these changes apply to the current Report Page only, and only if the modifications are **Committed** to make them persistent.



Show/Hide main toolbar- when unticked, the Main Toolbar is not visible unless the user hovers the mouse near the top of the display.

Show/Hide view toolbars-when unticked, the View Toolbars associated with each view are not shown

Show/Hide unused options- when unticked, simplifies the display of certain view menus

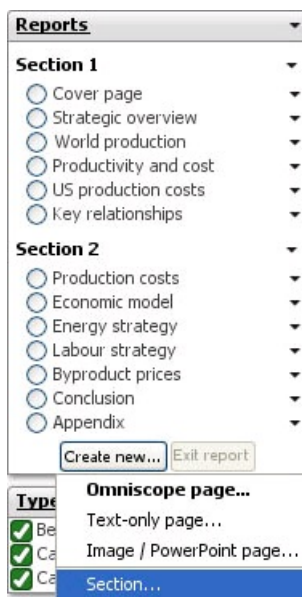
Show/Hide right/left side bars-when unticked, hides one or both Side Bars

Reset layout- returns the page layout to the defaults, such as the Main Toolbar displayed, Report Tabs displayed, etc.

Save file as...saves the open file with a new name and/or settings and options, using the [Export file as .IOK/.IOM \[163\]](#) dialog

Report Sections

From the Side Bar Reports panel, you can group your Reports into sections, as shown in this [example file \[275\]](#). To create a section name, choose **Create New > Section** at the bottom of the Side Bar Reports panel. Rename or delete sections using the black triangle drop down. Drag and drop to reorder reports in sections.



Reports with independent queries and views

You can also mix query-only and view-only reports. To create such query-only or view-only report items, choose **Create new Omniscope page** from the **New...** button in the Reports panel, and select either **Query state** or **Views and layout configuration**.

This [example file \[276\]](#) illustrates navigating a set of query-only reports, grouped under a section name in the Side Bar Reports panel, and a set of view-only reports configurations, also grouped independently. This allows you to configure a set of different view configurations (by task, or form of analysis, such as 3 Web Views, or a Graph and a Web View, or 2 Pie Views) and an independent set of queries (such as last week's, or last month's trades, or erroneous trades) enabling users to navigate any combination independently. For example, a user might open Query A then Views X. They can then choose to either change to a Query B while keeping Views X displayed, or Views Y while keeping Query A displayed.

Note:the buttons in the Side Bar Reports Panel only highlight the last report item opened. If you open Query A then Views X, you will see only Views X selected in the Reports Panel. The view configuration from Views X will be showing and the filters will continue to represent Query A correctly. But because only Views X is actually selected, manipulating the query will not affect Query A.

Back to [Main Toolbar \[268\]](#) commands

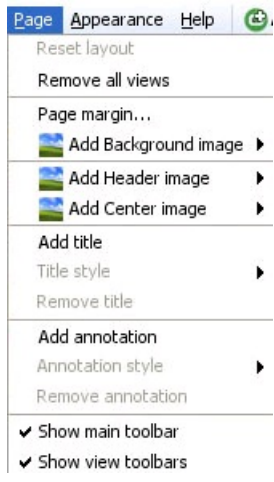
2.4 Page Menu

Page Menu Commands

The Main Toolbar **Page** menu commands provide many options useful for creating more informative displays and Reports Pages. The commands on this menu can be used to configure many aspects of the current display. If you make changes to the current view using **Page** menu commands, then close and save the file, it will next open with those changes preserved in the current display, even if the display is not configured as a Report Page.

Configuring Pages

Page menu commands can be used to:



Reset layout-removes any changes which have been made to the margins and other layout settings. If no changes have been made, the command is greyed out.

Remove all views-closes all open views. To add new views, use **Add View**

Page margin- sets a width (in pixels) for spacing to display around the edges of views. Remove with **Reset layout**

Add Background; Header; Centre image- allows you to specify an image file (.JPG, .GIF, .PNG, .BMP depending on your Java version) to be displayed in various parts of the Page (see below for more detail on image display options)

Add; style; remove title- adds, styles or removes a text title at the top of the page in a margin that varies with the font size of the title text. You can edit this at any time by right-clicking on the box with no text selected. See below for more detail on text styling options.

Add; style; remove annotation- a free text field that displays at the bottom of the view, unusually conveying the main message of each page. You can edit this at any time by right-clicking on the box with no text selected. See below for more detail on text styling options.

You can also tick/untick the options to Show/Hide the **Main Toolbar** and the **View Toolbars** for all views on the page. **View Toolbars** can usually be hidden if the users of the page are not expected to need access to the options available on them. Even when hidden, the **Main Toolbar** comes back into view whenever the user hovers the mouse near the top of the display.

Page menu commands apply to each Report Page individually, and any changes must be **Committed** to become a persistent change, or **Reverted** to return the Report Page to its default configuration/layout. For options covering aspects of the look and feel of Report Pages that apply to more than one page, see the **Appearance** [105] command menu.

Text styling options

Title and annotation text can be styled by choosing the font, the font size and face, as well as the horizontal alignment and text colour:

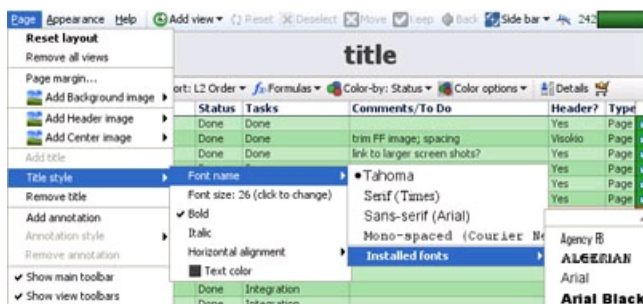
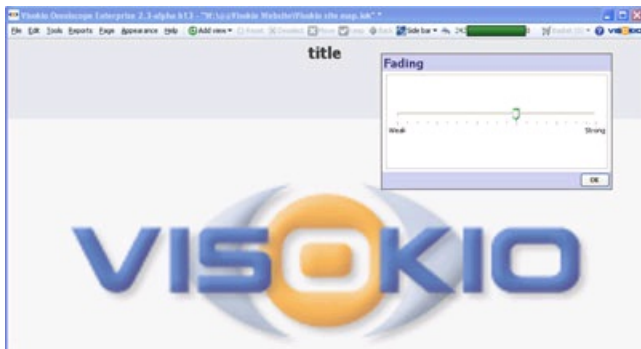


Image display options

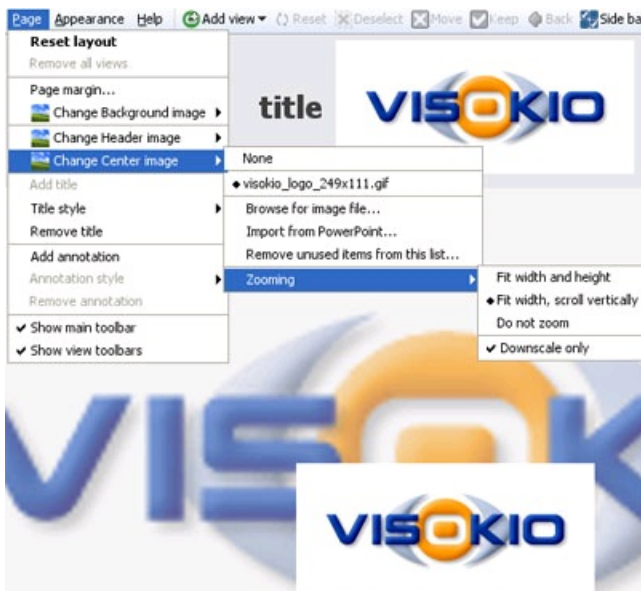
Background images can be faded so that they interfere less with other aspects of the display. Use the **Fading** slider to adjust the intensity of the image, from weak (very faded) to strong (barely faded).



Background image options also include 3 **Crop style** options for fitting background images of any size/aspect ratio to the display:

- **Crop**- preserves aspect ratio by cutting off the longest dimension
- **Letterbox**- preserves aspect ratio by reducing the image along the longest dimension and padding out the other dimension, does not fill the entire display
- **Stretch**- distorts aspect ratio by stretching the image vertically and horizontally to fill the display space available.

Header images are not intended to be faded and/or resized, as they are generally logos whose aspect ratios and legibility must be preserved. If you use a tall header image, it will increase the size of the margin at the top and reduce the display space usable for views.



Centre images can be made from PowerPoint slides or other large screenshots. They are not intended to be faded, but do have zooming options and a control to stop the picture clarity from being reduced by up-scaling.

Back to [Main Toolbar](#) [268] or the [Commands Reference](#) [160]

[User Guide Top](#) [277]

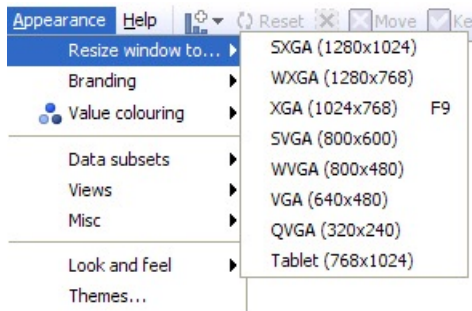
2.4 Appearance Menu

Appearance Menu Commands

Omniscope files can be used not only to assemble, check, analyse and transform data, but also to distribute as interactive final reports and presentations for various audiences; senior management, customers, partners, friends...anyone with an Omniscope free Viewer or better. The Appearance menu commands enable you to change almost everything about the Omniscope display to conform with your desired look and feel and provide the simplest file opening experience for recipients of your files.

Appearance > Resize window to:

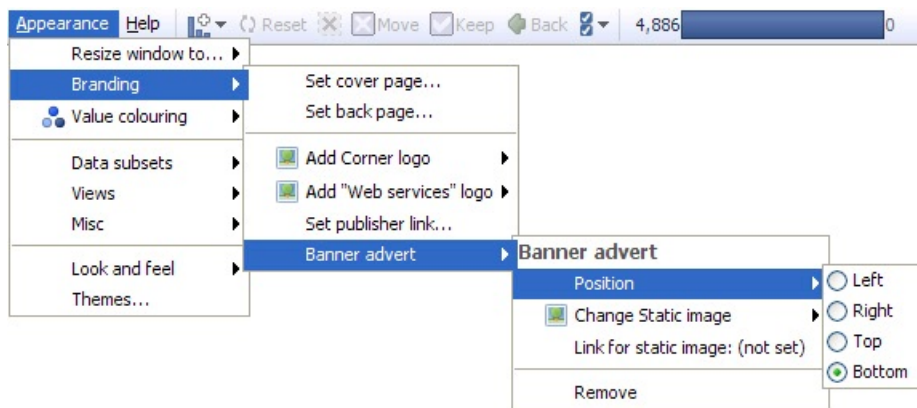
Allows you to resize the Omniscop display to preview how your Omniscop reports and presentations will look at various screen sizes ranging from SXGA (1280x1024 pixels) down to QVGA (320x240 pixels).



The **Resize window to** option only changes the size of the display. You can also adapt the default spacing of layouts, margins, font type and size, etc. to various screen types (Handheld, Projector/Laptop, Desktop and Kiosk/TV) using the Resolution option on the Welcome screen, or from the Main Toolbar **Tools > Advanced Tools > Application-wide settings > Screen resolution**.

Appearance > Branding

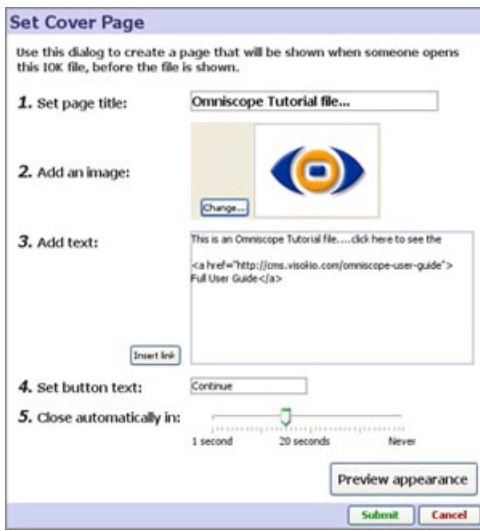
Omniscop is a data file publishing system that supports a wide range of branding and corporate identity options. This includes advertising placement options for data publishing business models supported by advertising revenue.



Set cover page; back page- these pages are informational displays (not interactive Reports Pages)

- The **Cover** page opens (and closes) before any views or Report Pages.
- The **Back**page displays when the file is closed, and is useful for reminders, acknowledgements and providing contact details relating to the file.

Clicking on the option to configure a **Cover** or **Back** informational page launches a **Set ... Page** dialog that accepts 5 inputs from you. The dialog to create the **Back** informational page is very similar to the **Cover** page example shown below:



1. Set page title: enter text to display at the top of the page

2. Add an image: select an image to display (.JPG,.GIF,.BMP,.PNG depending on Java version)

3. Add text: add the text you wish to display, with hard returns to wrap the text evenly and keep the box size from becoming too wide. Basic HTML tags can be used to style the text

Insert link: generates the full HTML to make a link you enter live.

4. Set button text: changes the text displayed in the button from 'Continue' to whatever you prefer

5. Close automatically in: sets the time delay to display the page (not used for the Help Page)

Preview appearance- use this feature to see how the information page will display. Click the button in the preview to return from preview to edit mode.

When you are happy with your information page, click **Submit** to save the configuration and make the page active.

Add corner logo- allows you to replace the small Visokio logo in the upper right hand corner with a logo of your own. For best results, use a logo image about 19 pixels high. If you change the logo, the link associated with it will be changed to the URL you have entered under **Set publisher link** (see below).

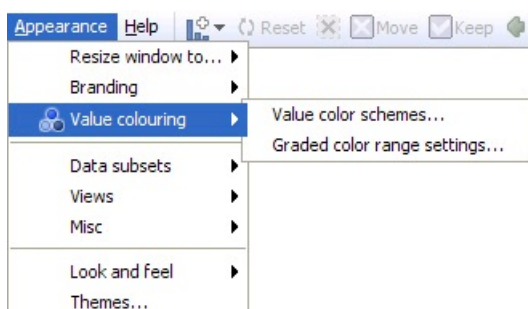
Add Web Services logo- allows you add a logo to the Web Services menu tab on the Main Toolbar. For more information, see [Configuring Web Services](#) [173]

Set publisher link- allows you to enter the address of a web page (URL) that will be displayed as an active link in the **File > About this file** notice for all files produced with your installation. If you have substituted your own logo for the Visokio corner logo, clicking on your corner logo will also take the user to this URL.

Banner adverts- Omniscope supports the display of banner adverts with live links to the advertiser on each page. The adverts can be positioned at the top, right, left or bottom of the display, and do not affect placement of header images, titles, etc. In general, rectangular images look best, such as typical full-width banner ads. Note: Server-based deployment, Flash .SWF display, embedding animated .GIF images and Report Page specific adverts are not currently supported, but this may change in future versions. For more information and examples, see [Advertising Options](#) [165].

Appearance > Value Colouring

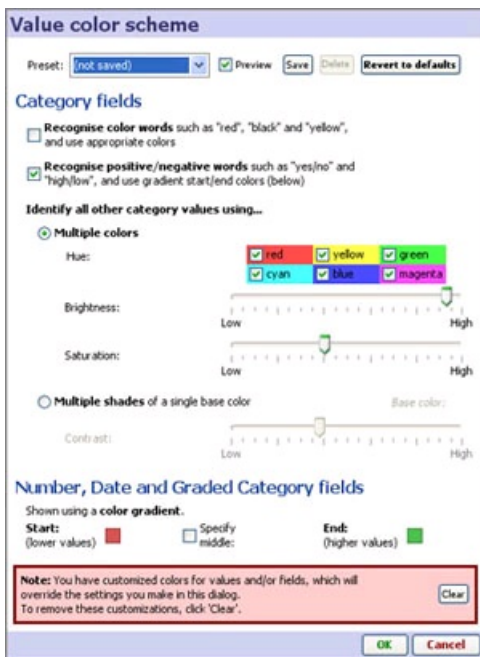
Omniscope makes extensive use of colouring by values to help you and the users of your files visualise the relationships, relative magnitudes and overall meaning in your data sets. The **Appearance > Value colouring** sub-menu contains options to change the way ranges of values within fields (columns) are coloured. It also has options to assign colours to specific values in fields automatically and control the colour palette Omniscope uses to assign initial colours to Category values. You can override colour assignments for specific values and range endpoints at any time using the colour selectors available in **Edit > Manage Fields > Configure >Field Options > Change value order, colours and shapes**.



Value colour schemes- clicking launches a dialog that enables you to manage various aspects of colouring values:

Presets: a number of pre-configured combinations of settings are available, including 'Corporate Blue', 'Subdued' and 'Monochrome' colouring schemes. If you make changes to the defaults to create your own scheme, you can name it and save it for future use with specific files. To return to the default 'Classic' Presets, click on **Revert to defaults**.

Category fields:



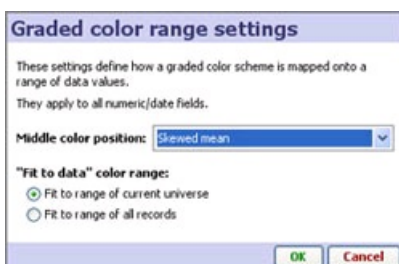
Recognise colour & positive/negative words- when ticked, these options automatically assign pre-defined colours to recognised text values, such as 'red' or 'green' or 'yes' or 'no'.
Identify all other Category values using...multiple colours- use these controls to eliminate colour ranges from the palette used to assign colours to specific values in Category fields. You can eliminate colour ranges by un-ticking them, and set the brightness and saturation to further refine the colouring scheme. To see the effect of the settings, try choosing various Preset schemes and comparing the settings. For example, 'Intense' versus 'Subdued', or 'Primaries' versus 'Bleached'
Identify all other Category values using...multiple shades of a single base colour-used to present an even more uniform colouring of categories using a specified base colour and adjusting the contrast setting to heighten or diminish the differences in colour tones. 'Corporate Blue' and 'Monochrome' are examples of schemes using a single base colour.

Number, Date and Graded Category fields- fields (columns) consisting of defined ranges of values, such as Number, Date & Time and Graded Category fields, are coloured according to a spectrum calculated based on the range between the lowest and highest values and the start (lowest) and end (highest) colour specified here. The default or 'Classic' scheme uses a range from red (lower values) to green (higher values). You can change the default here by clicking on the Start or End colours, and optionally specify a middle value to extend the colouring more or less depending on the middle colour chosen. At any time, you can change the colouring scheme applied to a specific field (column) using **Edit > Manage Fields > Configure >Field options > Change value order, colours and shapes**.

Note: If you do override the settings made in this dialog for one or more fields (columns), you can clear all of your customised settings using the **Clear** button shown above.

Graded colour ranges- this dialog determines default behaviour in colouring ranges for Number and Date & Time fields (columns).

Middle colour position: By default, Omniscope assigns the middle colour of a range to the middle value in the field. This works well for relatively uniform distributions of values. However, when some very high or low values are present in the field, the result can 'compress' the colouring scheme such that there is not enough difference in colouring for most of the records.



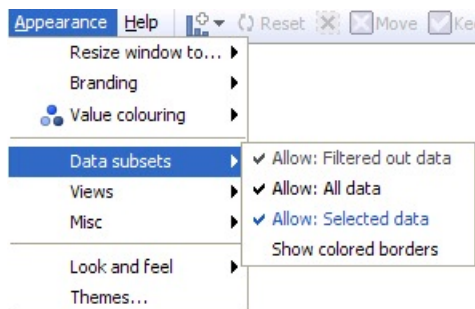
If many of your columns contain 'skewed' distributions of values, you may want to set the default behaviour to assign the middle colour to the mean (average value), or for even more skewed distributions, to the skewed mean. If only a few fields (columns) are skewed, you may want to

set the treatment of the skewed fields individually using **Edit > Manage Fields > Field options > Change value colouring**.

Fit to data colour range- Omniscope manages colour ranges in two modes; a filtering-neutral mode, which assigns and displays colours based on the full range of values in the field (column), and a dynamic filtering re-colouring mode, which re-calculates the range and re-assigns colours based on the range of values present in the universe being displayed. The default is the dynamic re-colouring mode, **Fit range to current universe**, but you can change the default setting here by selecting **Fit to range of all records** instead.

Appearance > Universes

Omniscope selection, filtering and basket management functions assign every record in the data set to multiple data universes. By default, every view can be opened on any of the 5 universes, and each view indicates the target universe being displayed by the colour of the corner 'eye-con' and the view selection menu.

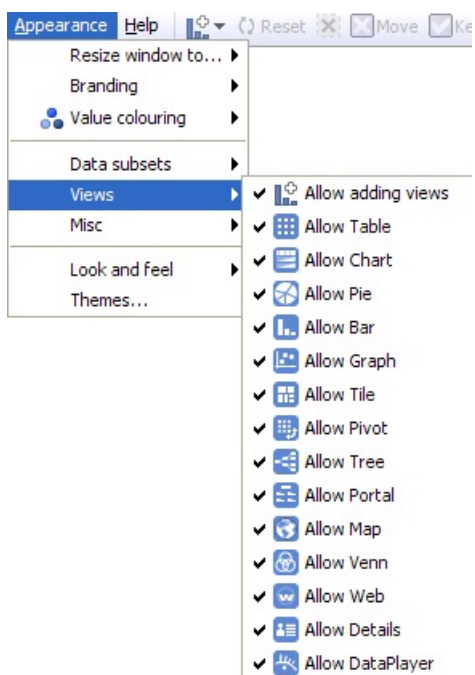


Allow OUT; ALL; SELECTION; BASKET- depending on the file and target users, you may want to simplify the menus and options by preventing views being opened on certain universes, such as the **OUT** or **ALL** universes. If these universes are not being used in Report Pages and could confuse novice users, you can prevent viewing them by removing them from the View Chooser. You can turn off access to all universes other than the **IN** universe by unticking them here. Note: Users can re-enable access to universes on this menu, but not save changed versions of the file, provided you ticked the **Prevent data edit/export** option when you last saved the .IOK/.IOM file

Show coloured borders- this option provides for more visual impact by displaying a coloured border around each view indicating the target universe for the view.

Appearance > Views

Depending on the file and target users, you may want to simplify the display options by removing the **Add View** option from the Main Toolbar, or by removing certain views from the View Chooser. This could be because the view(s) are not useful, or because the size/configuration of the file makes some views slow relative to the usefulness of the view.



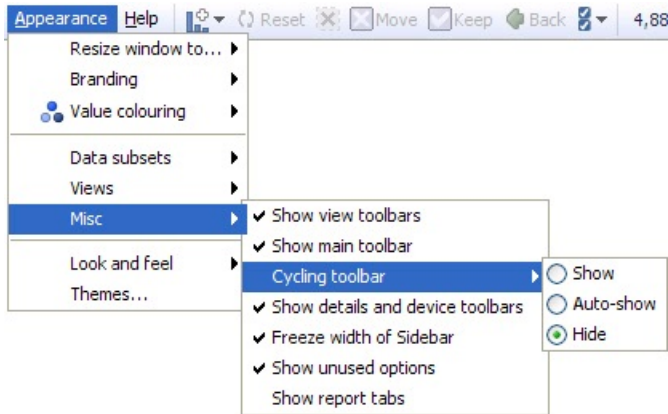
For example, for large files with many unique Category values, the Tree View can be very computationally intensive, and could be turned off if

it is not very useful in Report Pages and configured to perform well. See [Using the Tree View \[117\]](#) for more information.

Note: Motivated users of the file can still access this menu and re-enable the view(s), so these are just menu simplification options rather than a short-cut to avoid configuring all views as meaningfully for your data as possible. However, provided you ticked the **Prevent data edit/export** option when you last saved the .IOK/.IOM file, any user that re-enables or otherwise changes the file settings in the Appearance menu will not be able to save or forward a persistent version of their changed .IOK/.IOM file.

Appearance > Misc

Omniscope is designed to be used for analysis, but also for distribution as final reports, for giving live presentations and for printing as static PowerPoint slides or Adobe Acrobat .PDF documents. Depending on the immediate use you have for the file, you may wish to modify certain aspects of the display:



Show/hide view toolbars- untick this option to hide the View Toolbars, making the display appear more like a final report/presentation

Show/hide main toolbar- untick to hide the Main Toolbar across the top (it will always re-appear when the mouse hovers near the top of the display)

Freeze width of Side Bar(s)- untick this option to allow users to narrow or widen the Side Bars (Report Page-specific)

Show unused options- untick to simplify menus by removing references to options not used in the file.

Show report tabs- untick to hide report tabs at the top, under the Main Toolbar.

Appearance > Look and Feel

In addition to defining colouring schemes for value ranges, you can also manage the overall aesthetics of your file using the options available on the **Appearance > Look and Feel** sub-menu. The options available on this sub-menu are used to define Themes, combinations of settings you can use to, for example, mute the colouring application-wide to achieve a more corporate look. The best way to see the differences these settings can make is to try applying the pre-configured Themes (see below), then opening the Look and Feel dialog and noting the settings used. Note: **Look and Feel** menu options are Report Page-specific. To apply the same settings to all the Report Pages in your file, choose **Apply these settings to all pages**.

<p>Canvas</p> <p><input type="checkbox"/> Canvas background colour</p> <p>View/Device panels</p> <p><input type="checkbox"/> Panel has background gradient</p> <p><input type="checkbox"/> Panel background colour</p> <p><input checked="" type="checkbox"/> Panels have shadows</p> <p><input type="checkbox"/> Panels transparent</p> <p><input checked="" type="checkbox"/> Show border around views</p> <p><input type="checkbox"/> Panel border size...</p> <p><input type="checkbox"/> Panel border colour</p> <p><input checked="" type="checkbox"/> Panel header has gradient</p> <p><input type="checkbox"/> Panel header colour</p> <p><input type="checkbox"/> Panel header text colour</p> <p><input type="checkbox"/> Inside view text colour</p> <p>Query Devices</p> <p><input type="checkbox"/> Active query device colour</p> <p>Title <input type="checkbox"/></p> <p>Font <input type="checkbox"/></p>	<p>Canvas: Canvas background colour- sets the colour of the background displayed when no view is open, in the margins, and behind the title and annotation text.</p> <p>View/Device Panels: modify the appearance of view windows and the Side Bar device panels</p> <p>Panel has background gradient- applies a solid-looking, reflective effect for views with backgrounds</p> <p>Panel background colour-sets the colour of the view panels with backgrounds</p> <p>Panels have shadows- applies a shadowing effect to each panel</p> <p>Panels transparent- allows the canvas to show through for views with a backgrounds</p> <p>Show border around views- turns view border option off and on</p> <p>Panel border size- defines the thickness of the border around each view</p> <p>Panel border colour- sets the colour of the outer</p>
---	--



border around each view

Panel header has gradient- applies a solid-looking, reflective effect to the View Toolbars

Panel header colour- sets colour of area under the View Toolbar

Panel header text colour- sets colour of text on View Toolbar

Query Devices settings: (see below)

Report Page(s) settings: (see below)

Query Devices settings: (displayed on the Side Bars)



Active query device colour- changes the colour indicating that a filter/query device is active from the default dark orange to any other colour (purple in the example left)

Title- sets font face and size (not colour) for the filter/query device titles

Underline expandable sections- removes the default underscore from category devices that are expandable, (such as 'Race' in the example left)

Font- sets font face, size and colour for the labels within the devices (dark blue in the example at left)

Report Page(s) settings: Tabs

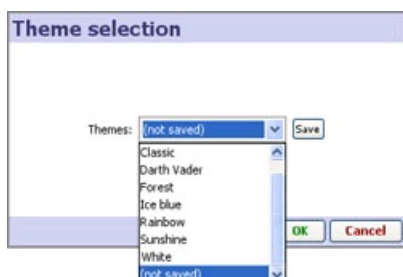
Report tab text colour- sets the colour of Report Page tab text

Report tab font size- sets the size of the Report Page tab text



Appearance > Themes

Themes are combinations of settings of options for Look & Feel. A list of pre-defined Themes come with the application. You can modify these Themes, or create your own, and save your modified settings as a new Theme with a name you assign. Your Theme(s) will be saved in your program folder and will be available for use in all files you prepare with your installation. There is the option to apply the Theme to all Report Pages.

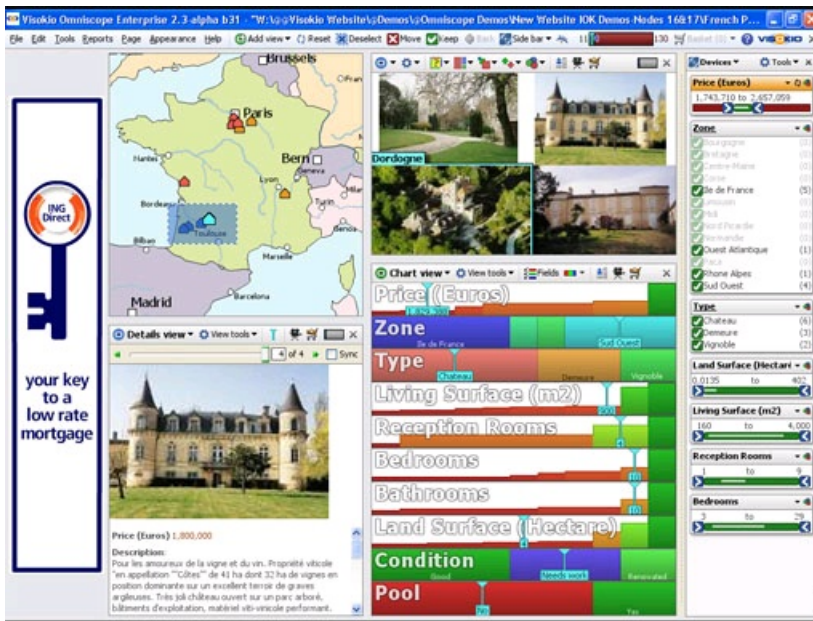


Advertising

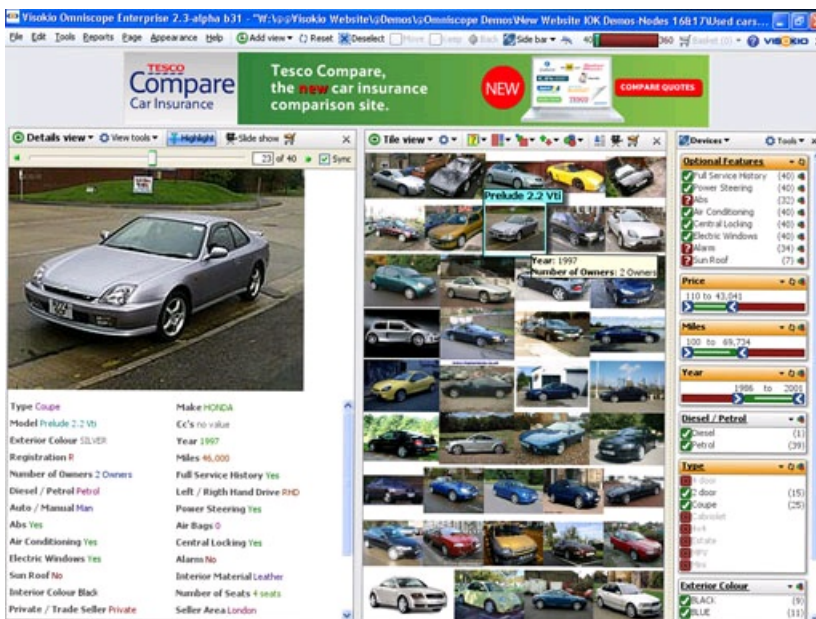
Advertising Options

Banner adverts- Omniscope Professional and Enterprise Editions support the display of banner adverts with live links to the advertiser on each page. The banner adverts can be positioned at the top, right, left or bottom of the display. Currently, you can specify only one banner image per page, and one link per image (see note below).

In general, rectangular images look best, such as typical full-width banner ads, displayed either vertically at the sides:



... or horizontally at the top or bottom:



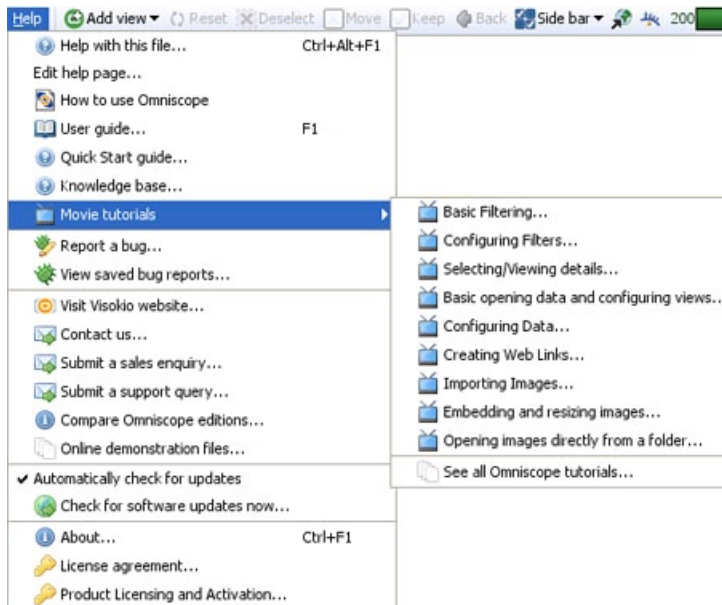
Note: Server-based deployment, Flash .SWF display, embedding animated .GIF images and Report Page-specific adverts are not currently supported, but this may change in future versions

Back to [Appearance Menu](#) [105]

2.4 Help Menu

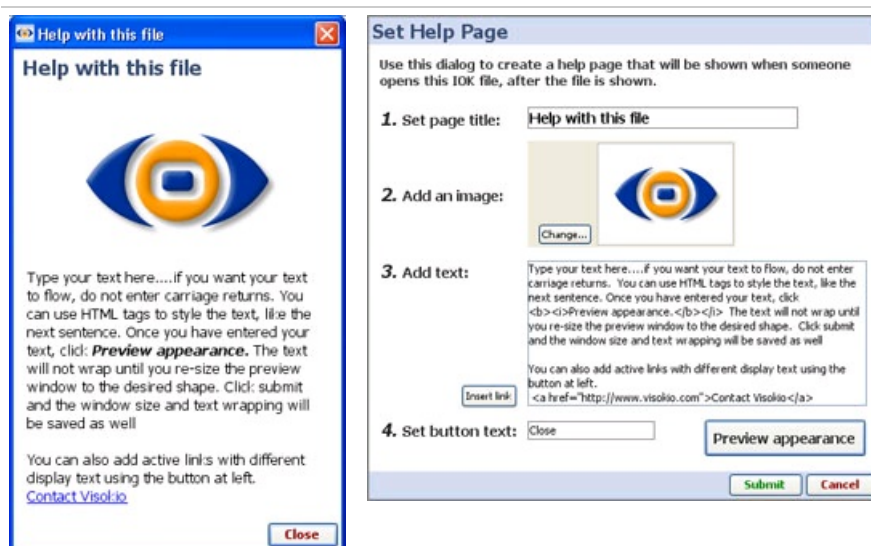
Help Menu Commands

The Main Toolbar **Help** menu contains links to a wide range of support options:



Help with this file- launches the file-specific Help page display you can create to explain the finer points of your file to users. You create this Help page for each file using the **Help > Edit help page** command below. Note: Help pages are not Report Page specific....use annotations and field notes instead.

Edit help page- opens the Set Help Page dialog to compose your help page



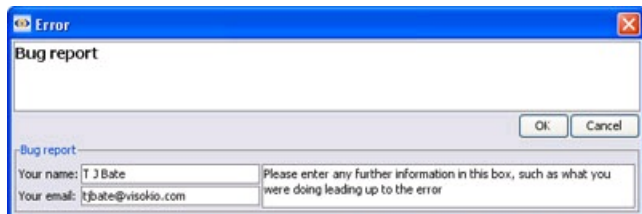
How to use Omniscopes- launches the embedded, interactive, tabbed tutorial file illustrating the major features of Omniscopes.

User Guide- links to this [Omniscopes User Guide](#) [108]

Quick Start guide- links to the [one-page introduction](#) [278] contained in this User Guide

Movie tutorials- links to various Flash screencasts illustrating common tasks in Omniscopes.

Report a bug- if Omniscopes displays an error message (throws an exception), or if you see something you think is a bug, please use this form to tell us about it.



Try to give us as many details as you can regarding what you were doing at the time. This will help us try to reproduce the problem. If the file does not respond, send us the file if you can. If your machine hangs, there is a [Hang Diagnosis procedure](#) [279].

View saved bug reports- If you are offline when filing bug reports, Omniscope will save them for review and forwarding to us via e-mail.

Visit Visokio website- this links to our main site homepage at www.visokio.com [280]

Contact us- links to our [contact page](#) [86]

Submit a sales enquiry- links to our [contact page](#) [86] for license sales

Submit a support query- links to our [contact page](#) [86] for support

Compare Omniscope Editions- links to our [comparison chart](#) [281] summarising differentiating features of the various editions of Omniscope.

Online Demonstration files- links to our main [demos page](#) [282], which features more and larger demos than those embedded in the application. Embedded demos are accessible from the Main Toolbar under **Files > Demo files** and from the opening screen Demos section.

Automatically check for updates- tick this option if you want Omniscope to check for a newer version every time you start the application

Check for updates now- confirms that you have the latest version

About- very useful display of your edition/version number, whether or not you are licensed for Commercial Publishing, your license key number (keep a copy in a safe place) and the version of Java that Omniscope is using (there may be more than one version of Java on your machine).

License agreement- links to our [licensing page](#) [283] with full text copies of our licensing agreements.

Product licensing and activation- this menu is used to activate a free Viewer, and to deactivate an activated installation prior to re-building the machine or moving the key to another machine (you may do this a maximum of 3 times). It is also advisable to periodically **Refresh your activation** after installing a newer version over an older one. For more detail see the [Activation and Refresh](#) [87].

Back to [Main Toolbar](#) [284] or [Command Reference](#) [241]

[User Guide Top](#) [68]

Using Connectors

Connecting to Remote Data

Access, visualise, refresh, edit, archive and share copies of remote-hosted or 'cloud-based' data

Connectors enable Omniscope to access data sources other than delimited data files or relational databases permitting connections to tables/reporting views using [ODBC or JDBC](#) [167]. There are two types of connectors; direct connectors which log into services directly from Omniscope, and web (services) connectors you add into your online services accounts that deliver your data to Omniscope on your desktop.

Omniscope's 'hybrid' desktop/web client-side capability is the perfect compliment to cloud-based platforms and services. Combined solutions address most of the issues associated with the trend towards ever more usage of remote services. We are continuously adding new connectors and other features to help you make the most of these 'hybrid' cloud solutions enabled by Omniscope on the desktop.

Note: Connectors for accessing and synchronising with remote-hosted data and service 'clouds' are available only from activated Omniscopes, not the free Viewer.

Bloomberg Connector

Activated Omniscope Editions can import, save and refresh data from Bloomberg using the commands **Data > Import from Bloomberg** to define the fields (columns) to be added to the file. To refresh on demand with the latest real-time data from Bloomberg, use **Data > Refresh from Source** or **Ctrl+F5**. If you send the file to others with access to Bloomberg, the file will refresh from Bloomberg on opening, assuming refresh behavior has been set to 'Always'. More on using Omniscope with [Bloomberg](#) [26].

Email Connector

Omniscope 2.5 and above include the ability to access email in accounts from providers that support either POP3 or IMAP protocols. How to use the [Omniscope Email connector](#) [32]

Google Spreadsheets

Google spreadsheets are on-line collaborative tools for gathering and maintaining structured data sets.

How to use [Omniscope with Google Spreadsheets](#) [33]

Facebook

[Facebook](#) [285] is a social networking application that allows users to create networks of relationships centred on their accounts.

How to use [Omniscope with Facebook](#) [34]

Google Analytics

The Google Analytics import function allows you to download and analyse Google Analytics data from within Omniscope.

How to use [Omniscope with Google Analytics](#) [35]

Web Mapping

A web site map is a network of interconnecting pages within a particular website. A connection between two pages exists if the first page contains a link to the second page. You can use the webmap functionality within Omniscope to visualise the structure of a website.

How to use Omniscope for [Web Site Mapping](#) [36]

Salesforce/Force.com Connector

[Salesforce](#) [286] is an application that runs in the [Force.com](#) [66] online cloud-computing hosted platform, one of the largest and fastest-growing general-purpose SaaS platforms. Salesforce is widely used for CRM (Customer Relationship Management, composed of the 'Sales Cloud' and service/case management, also known as the 'Service Cloud'). Almost any application can be written on the Force.com platform. If you have a Salesforce account, it is possible to access your Reports and Data Objects/Tables stored in Salesforce using either the Omniscope direct connector (**File > Open online source > Salesforce**) or the [free web connector](#) [67] your Administrator can install into your Salesforce account from the online [AppExchange](#) [287].

Salesforce web connector: the free [Omniscope Connector for Salesforce](#) [67] web service can be installed in your Salesforce account(s) from the [AppExchange listing page](#) [67] by your Administrator, unless you have a Group Edition. Instructions for installing in Group Editions are here. The web connector installation will add a new tab from which you can download reports and un-joined data objects using pre-configured templates to deliver files that will open in the free Viewer. An activated version of Omniscope is required to modify and save customised templates, which can then be uploaded to your account, adding new download and viewing options for different classes of users within your organisation. More on using the online [Web Connector for Salesforce](#) [288].

Salesforce direct connector: Omniscope Professional and Enterprise 2.5 (and later) enable to access your Salesforce reports and data objects directly. More on using the [Direct Connector for Salesforce](#) [289] to access, modify, edit and synchronise changes with your Salesforce-hosted data.

More detail and a solutions roadmap for making the most of the combination of Salesforce and Omniscope [is here](#) [28].

GoogleBase Connector

(experimental feature)

Amazon.com Connector

(experimental feature)

Bespoke Connectors

If you would like to discuss developing an Omniscope Connector for your remote data ASP/SaaS platform, client-premise installed application, or online data service, please [contact us](#). [86]

Bloomberg

Using the Bloomberg Connector



Import real-time data with live updates

{Omniscope Professional and Enterprise Editions only}

Note: Omniscope will connect to Bloomberg only if Omniscope is running on a PC which has Bloomberg Terminal software installed, together with a local copy of Excel and the Bloomberg DDE Server and Add-In for Excel installed.

To determine if the Bloomberg Add-in for Excel is installed on your machine, follow these steps:

In Excel (pre-2007), click the **Tools** menu item, expand the menu fully, and select **Add-In**

In Excel 2007, click the **Office Button > Excel Options > Add-ins > Manage > COM Add-ins > Go**

In the Add-ins window, look to see if there is an item called "Bloomberg" and that it is ticked.

If the Bloomberg Add-in appears but is not ticked, then simply tick it and restart Excel. Otherwise, you will have to install the Bloomberg Add-in. Download and install the **DDE Server** and the **Excel Add-in** from the [Bloomberg Software Support](#) [290] page, then do the test above to determine if it has worked. If it has, then you are ready to use the Omniscope Bloomberg import and export functions via the DDE Server and Excel Add-in.

Importing data from Bloomberg

This method of importing data from Bloomberg outlined below is for manual for simple cases only. More advanced users who are comfortable using the Excel Add-in for Bloomberg and want more automation options should use the method outlined under [Alternative Bloomberg Import Method](#) [291]. We are planning to upgrade the Bloomberg Connector in the near future, please [contact us](#) [86] if you have requirements not currently addressed.

Using the Bloomberg Data Import Wizard

You can manually add refreshable Bloomberg fields to your Omniscope files using the Bloomberg data import wizard.

The Bloomberg data import wizard is accessed from **Data > Import from Bloomberg:**

Bloomberg search formula- choose from four common formulae, or cut and paste your own formula from a working spreadsheet. (each of the options is further explained below)

Select Ticker/ISIN/ID field- your data set must contain a field that can be used by Bloomberg to match to their data. Securities identifiers like ISIN or SEDOLs, or Bloomberg tickers, etc.

Bloomberg fields to import- depending on your licensing arrangements with Bloomberg, there are many thousands of fields of data you can import and refresh directly into Omniscope files:

([Bloomberg fields list](#) [292])

If you do not see the field you want listed in the dialog, check the Bloomberg list to make sure it is available and note its exact name.

Add new field- type in the exact name of the Bloomberg field you wish to import and click add new field. It will be added to your list of import and refresh options and ticked.

Select record set- select which data universe of data you wish



to import the specified Bloomberg fields for. In the example at left, we are importing Bloomberg fields for only 16 securities in the basket, rather than the 72 in the **IN** universe or the 43,975 in this reference file for this class of instrument.

When you click OK, the bloomberg data will be imported, which may take a little while.

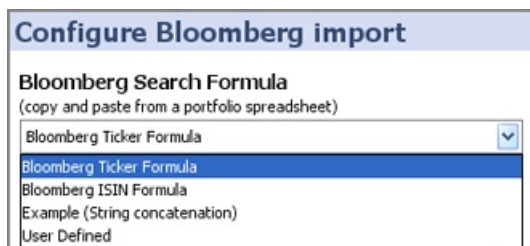
Note: To refresh your Bloomberg fields with live Bloomberg data imported into Omniscope, you must use the Refresh command:

Data > Refresh Bloomberg data (or you can use the keyboard shortcut **Ctrl+F6**)

This works so long as the Omniscope file is open. If you close the Omniscope file and open it again later, you will have to use the Bloomberg Data Import wizard to add the Bloomberg fields to your file again.

Search/import formulae options:

Choose the form of Bloomberg search/import formulae that best suits your data and requirements.



Bloomberg Ticker Formula- =BLP(%ROW%,%COL%)

Typical BLP string which submits the Omniscope field value selected for ID, then the Bloomberg field names being requested, i.e those ticked below

Bloomberg ISIN Formula- =BLP(CONCATENATE(%ROW%," Corp ISIN"),%COL%)

This formula is for submitting ISINs from Omniscope in the form 'XS0109263607 Corp ISIN', then the Bloomberg field names being requested, i. e. those ticked below

Example (string concatenation)- =CONCATENATE(%ROW%," ",%COL%)

This formula can be used to test/demonstrate this function on machines which are not actually running Bloomberg.

User defined- choose this option to specify your own formula, using %ROW% to represent the Omniscope column values selected under **Select Ticker/ISIN/ID field**, and %COLUMN% to represent the Bloomberg fields you have ticked under **Bloomberg fields to import**.

Note: If you are importing fields for many records, you may have to manually refresh several times to ensure that all values have been imported. See Refreshing data from Bloomberg below.

Refreshing Data from Bloomberg

The best method of refreshing data, both in your own desktop, and in copies of the files you send to others who also have access to Bloomberg from their machines depends on your requirements, especially record (row) count, update/refresh speed and performance.

If you or recipients of your files want to refresh Bloomberg fields in Omniscope on a manual, as-needed 'pull' basis, using the **Data > Refresh Bloomberg data** should perform well enough. Indeed, when you first import Bloomberg fields into an Omniscope file, you may have to refresh manually a couple of times to fully populate the file. This form of refresh is best for small portfolios and for less-than real-time updates, for example daily closing prices.

Because persistent auto-refresh from Bloomberg has not yet been fully implemented in Omniscope, if you want to refresh a very large number of records on an automated 'push' real-time basis, use **File > Export > Create Bloomberg spreadsheet** to generate a stand-alone automatic price-monitoring Excel spreadsheet that may perform better for large portfolios requiring frequent real-time updates. This situation will change in future.

Alternative Bloomberg Import Method

Advanced Bloomberg data import & refresh options

There is an alternative method for importing data from Bloomberg which by-passes the manual, non-persistent [Importing using Bloomberg Data Import Wizard](#) [26] method described above. System set up and requirements are the same.

To use this method you must also be permitted to run macros within Excel. Create an Excel spreadsheet using the template available here:

Sample [Excel Bloomberg Import & Auto-refreshTemplate](#) [293]

Within this spreadsheet you set up your Bloomberg data using the Excel Add-in for Bloomberg and set it to auto-refresh. The template contains a macro which will automatically save the file on a regular basis for as long as it is open. Once you are happy with the file, open it in Excel (permitting macros to run if asked) and you can minimise it to the bottom of your screen. Now launch Omniscope and open up the Excel file from the place on your hard-drive where you have it saved. When it is open you can set it to auto refresh and as the data in the Excel spreadsheet is populated from Bloomberg, the Omniscope will pull in that data and update to reflect it.

Alternatively, you can open an existing Omniscope file containing references such as ISINs or ticker symbols which are the same as those in your Excel spreadsheet and merge the values in. Then if you set up Live Update it will refresh the merge while retaining your own data.

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Email Connector

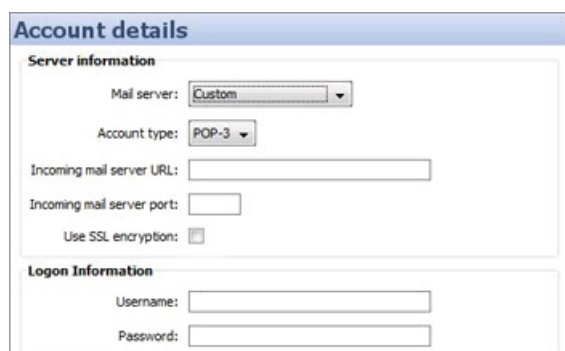
Importing Email

Downloading, visualising and searching email

New in 2.5...page under development

Omniscope version 2.5 and beyond include a connector that can import e-mail from any online email account supporting either the IMAP or POP-3 email management protocols. Most modern web-based email accounts support at least one of these protocols.

To import email data into Omniscope, select **File > Open online source > Email**. The Account details dialog will be displayed:



Mail server - Select your email server. If your email server does not appear in this list you should select the 'Custom' option.

Account type - This option is only enabled if you select the 'Custom' mail server. Select the type of email account (either POP-3 or IMAP).

Incoming mail server URL - This option is only enabled if you select the 'Custom' mail server. Select the address of the mail server.

Incoming mail server port - This option is only enabled if you select the 'Custom' mail server. Enter the mail server port.

Use SSL Encryption - This option is only enabled if you



select the 'Custom' mail server. Check this box if your email server uses Secure Sockets Layer encryption.

Username - Enter the username you use to log-in to your email account.

Password - Enter the password you use to log-in to your email account.

Max messages - Determines the maximum number of email messages that will be downloaded. A value of '10' means the 10 most recent messages will be downloaded.

Download content - Check this box if you want to download the message content. This will enable you to read messages within Omniscopes but will also increase the size and amount of data downloaded.

Download attachments - Check this box if you want to download message attachments. If this option is selected, then you must also specify a valid attachment directory.

Attachment directory - This determines the folder attachments are moved to after they have been downloaded.

Once you have entered the relevant information click the 'OK' button to start downloading the message data. A status dialog will be displayed to show you how many messages have been downloaded and how many are still to come:



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Link to Google Spreadsheets

Using Omniscopes with Google Spreadsheets

Display of dynamic collaborative data sets with live refresh

New in 2.5...this page in progress

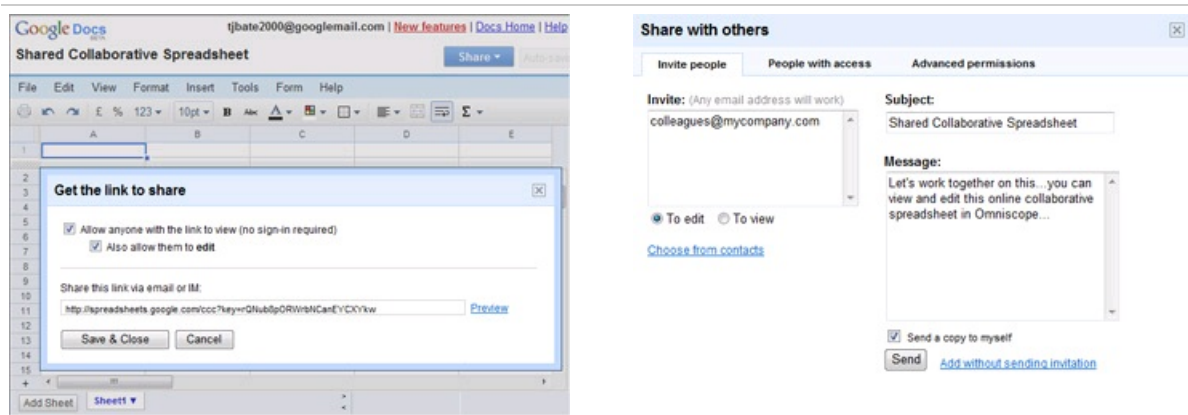
Google Docs and Spreadsheets [294] is a free service that enables anyone to create documents, spreadsheets and presentations online. You can import and collaboratively edit or publish from .doc, .xls, .csv, .ppt, .txt, .html, .pdf and other formats. You can export files for use with traditional desktop software as well.

Hosted online spreadsheets enable powerful new workflows with collaborative data compilation and editing options...no more playing 'file tag' with offline spreadsheet files circulating as e-mail attachments. Hosted online solutions enable co-workers to share the same online copy of each document, spreadsheet or presentation. All revisions are saved and recoverable.

Combining Google's free hosted online spreadsheets with Omniscopes provides a 'best of both worlds' solution enabling many new workflow and publishing options. Data publishers and most businesses can benefit greatly by shifting most typical spreadsheet data compilation and maintenance workflows to an 'online spreadsheet linked to Omniscopes' solution.

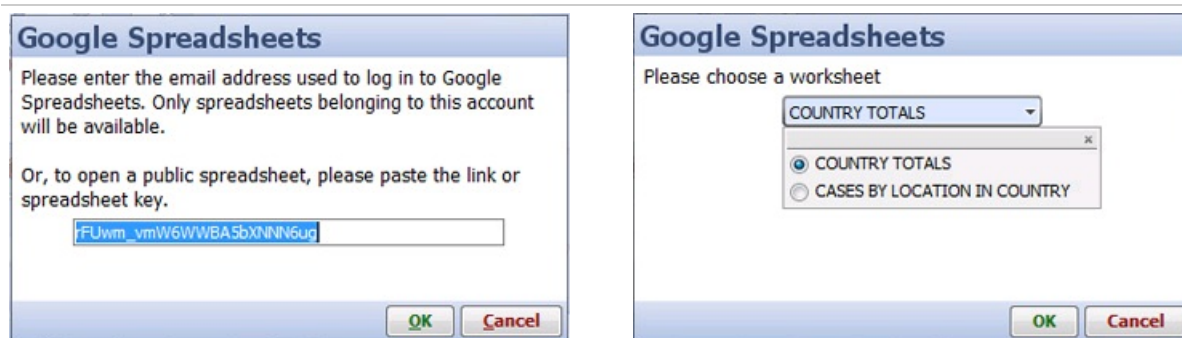
Creating Shareable Google Spreadsheets

When you create a new Google Spreadsheet, there are two ways of inviting others to help compile, edit and maintain the data. For data being published to the public, you can define a link or key allowing anyone with the link to connect to the data using Omniscope, and optionally help to edit the data. Once this link is embedded in the Omniscope file, this source worksheet will be remembered and data refreshable in activated Omniscope from the Omniscope file. For company internal data, you can use the more Google Docs **Share with others** dialog to determine who will have what type of access to the spreadsheet, who can make changes etc.



Importing Data from Google Spreadsheet Worksheets

To create an Omniscope file from a Google Spreadsheets worksheet (either private or public) as a linked data source, go to **File > Open online source > Google Spreadsheets**. Enter your account details for private spreadsheets, or the link or spreadsheet key to use public spreadsheets. Once you have logged into your account or connected to a public spreadsheet, select the worksheet that will be the linked data source for this Omniscope file.



Omniscope will automatically import the data and open in the default layout. You can further configure the layout of the Omniscope file, then save it as an .IOK/.IOM file. The default refresh behaviour with online data sources is 'Never', since you may want to open the file while offline. If you or your colleagues have activated Omniscope, while online you can use **Data > Refresh from source** for on-demand refresh, or you can go **Data > Automatic Refresh** to configure automated refresh based on frequency of polling timings you can configure. If you plan to always open the file while online, you may choose to save it with refresh set to 'Always'.

Refreshing Data from Google Spreadsheets

You can save an Omniscope file whose linked data source is a Google spreadsheet with the refresh behaviour set to 'Always', and the file will update itself with the latest data from the Google spreadsheet. You can also activate and configure Automatic refresh to keep the Omniscope file updated while open.

You can view the linked data source spreadsheet from the Omniscope file using the Web View. Files using the Google Spreadsheets connector open by default to display the linked spreadsheet in a Web View:

Google Spreadsheet "..." - Visokio Omniscop Enterprise 2.5 Everglades - build 199 (beta)

File Data Tab Layout Toolbars Settings Help

Google Docs **human_resources** dev@visokio.com | New features | Docs Home | Help | Sign Out

Search All
Type here

Level
1 to 5

First Name
Type here

Last Name
Type here

Address
Type here

Location
 Frankfurt (48)
 Hong Kong (7)
 London (56)
 Madrid (39)
 NY (19)
 Paris (11)
 San Francisco (20)

Sex
 Female (95)
 Male (105)

Race
 Asian (10)
 Black (26)
 Indian (3)
 Other (9)
 White (152)

Age range
 20 to 30 (103)
 30 to 40 (32)
 40 to 50 (24)
 over 50 (41)

Age
20 to 79

Level	First Name	Last Name	Address	Location	Sex	Race	Age range	Age	Org
1	Bill	Healey	Doncaster Central	London	Female	Other	over 50	52	Direct
2	Ted	Smith	Edinburgh East & Musselburgh	London	Male	White	over 50	68	Direct
3	Gordon	Gardiner	Dorset South	London	Male	White	over 50	53	Manager
4	Kevin	Savidge	Chester, City of	London	Male	White	40 to 50	44	Supervisor
5	Martin	Cunningham	Fermanagh and South Tyrone	NY	Male	White	30 to 40	35	Specialist
6	Jo	Stoate	Gainsborough	London	Female	Black	20 to 30	25	Specialist
7	Jackie	Brown	Greenwich & Wood	Frankfurt	Female	Black	20 to 30	22	Specialist
8	Clare	Soley	Hackney South & Frankfur	London	Female	Other	20 to 30	24	Specialist
9	Joanna	Stewart	Hampshire North	London	Female	Black	20 to 30	25	Specialist
10	Steve	Stoekeldorfer	Iford North	London	Male	White	20 to 30	24	Senior
11	Liam	Winkelheimer	Henley	London	Male	White	20 to 30	29	Manager
12	Gillian	Hoon	Cleethorpes	London	Female	White	20 to 30	26	Supervisor
13	Charles	Heyes	Clwyd West	London	Male	White	30 to 40	33	Specialist
14	John	Sibley	Clydesdale	London	Male	White	40 to 50	44	Specialist
15	Jeff	Mann	Corby	NY	Male	Black	over 50	52	Specialist
16	Jon	Lathrope	Cotswold	NY	Male	White	20 to 30	22	Specialist
17	Richard	Walker	Crosby	London	Male	White	40 to 50	43	Specialist
18	James	Field	Croydon North	London	Male	White	40 to 50	42	Specialist
19	Carol	Davis	Cunningham Nor	London	Female	White	30 to 40	34	Specialist
20	Philip	Mahmood	Cynon Valley	London	Male	White	30 to 40	32	Specialist
21	Richard	Stokes	Devon West and	London	Male	White	20 to 30	23	Specialist

Number of records Split by Location

Sn F... Paris NY Madrid London Hong Kong Frnk...

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Facebook Connector

Using Omniscop with Facebook

Download and visualise a network of your Facebook friends.

New in 2.5...page under development

Omniscop 2.5 and beyond provides a connector that allows you to download data from Facebook.

To import data from a Facebook account, select **File > Open online source > Facebook**.

First, you must click on the link at the top of the dialog. This will take you to the Visokio Facebook application log-



in screen. Enter your Facebook username and password and click 'OK'.

Tokenise friend list -

Show user profile images -

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Google Analytics

Using Omniscop with Google Analytics & AdWords

Free web traffic digital marketing data compiled by Google, delivered in Omniscop

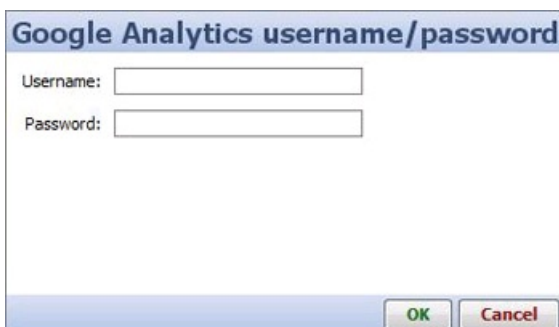
New in 2.5...this page is in progress

Omniscop 2.5 and beyond provides a connector that allows you to download Google Analytics data directly into Omniscop.

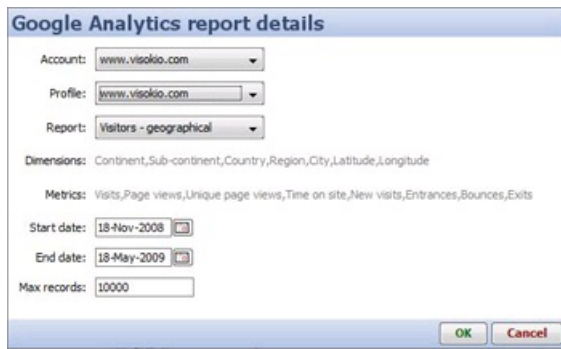
Google Analytics is a free online service provided by Google that allows you to monitor various statistics about visitors to your websites. In order to use Google Analytics you will need to sign-up and then configure your web-pages to generate the required information. Once you have signed up you can log-in to the Google Analytics website to view and analyse your website analytics data. To sign up for Google Analytics or to get more information click [here](#) [295].

Omniscop allows you to download Google Analytics data straight to your desktop. This means you can use Omniscop's powerful visualisation environment to quickly and effectively download and analyse **all** of the data for **any** Google Analytics report in one go.

To import Google Analytics data select **File > Open online source > Google Analytics**. A dialog will be displayed asking you to enter your Google Analytics username and password. Enter the same username and password that you use to log-in to the Google Analytics website.



Once you have entered your username and password click the 'OK' button. Omniscopel will attempt to contact the Google Analytics server. If the server was contacted successfully and your username and password are valid the report configuration dialog will be shown. This dialog allows you to specify what Google Analytics data you want to download.



Account - Select your Google Analytics account.

Profile - Select your website profile.

Report - Select from one of 8 pre-defined Reports or choose '**Custom**' to generate a custom Report. With Custom Reports you can specify the information you want to download and how you want it to be organised. To configure a Report, select a combination of dimensions and metrics. Dimensions determine how the data is segmented, such as browser type, visitor city or language. Metrics provide data for the selected dimensions, such as the number of visitors, unique page views and bounce rate.

Start date - Select the start date of your data.

End date - Select the end date of your data.

Max records - Define the maximum number of records you want to download at once.

When you are happy with the configuration click the 'OK' button to download the data from the Google Analytics server into Omniscopel.

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Web Site Mapping

Mapping Web Sites with Omniscopel

Enter a web URL and Omniscopel will crawl and map it, importing keywords and content

New in 2.5... [this page in progress](#)

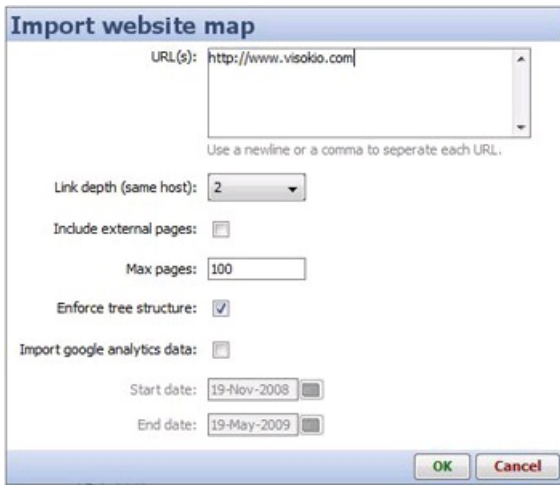
In Omniscopel 2.5 and beyond you have the ability to generate a website map and view the site and associated data on content and structure in Omniscopel.

To generate a website map you need to provide Omniscopel with one or more 'seed' URL's. Omniscopel will 'crawl' and then download the contents of each of these URLs and extract all the links. The content of each of the linked pages is then downloaded and the content extraction process is repeated. The resulting data set contains the details of all of the pages downloaded and the connections that exist between these pages. This can be visualised in Omniscopel using the Network View to show a 'map' of all the pages, with each node in the map representing a page and each line representing a link between from one page to another.

A website map can prove useful in many different scenarios:

- You can use the website map functionality to get a quick understanding of your site structure. For example, you can quickly determine which pages haven't been modified in the last few months or determine the number of 'clicks' a user has to use to reach a particular page.
- You can download and save a website map and use it as an 'Offline browser' for a particular website; allowing you to view the content for each page even when you're not connected to the internet.
- By selecting the 'Include Google Analytics data' option you can import Google Analytics information for each page inside the website map. This can be used to provide additional data such as the number of clicks on each page and the bounce rate.
- Omniscopel automatically extracts the top keywords in each page. You can use this to get an understanding of the themes in a particular page without having to read the content or you can filter the data by a particular set of keywords, allowing you to retrieve pages of interest.

To generate a web site map select **File > Open online source > Website map**.



URL(s) - Enter one or more URL's to use as a starting point for the website map.

Link depth (same host) - determines the maximum depth of the website map, i.e. the maximum number of pages out from a starting URL. Generating a website map for a very large site can take a long time. You can use this setting in combination with the 'Max pages' setting to reduce the number of pages processed and speed up the overall map generation time.

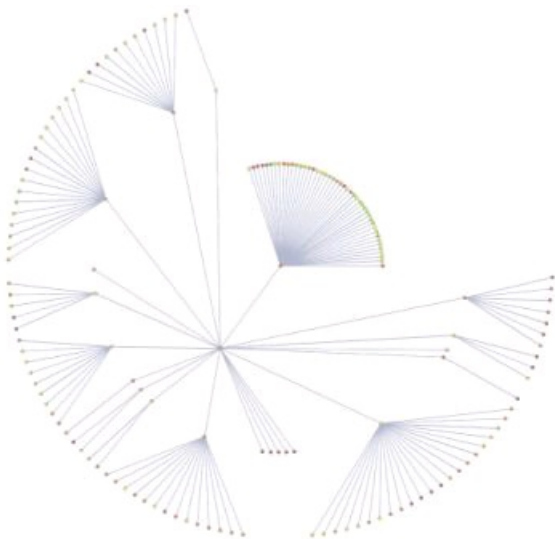
Include external pages - most web sites include links to pages on other sites. When ticked, this option includes pages from other sites referenced by links.

Enforce tree structure - when checked, Omniscopie will ensure the resultant map reflects a proper tree structure. If selected, and during the map generation process Omniscopie encounters a page that has already been processed, it is not added to the list of links. The diagram below shows the difference between an enforced and a non-enforced website map.

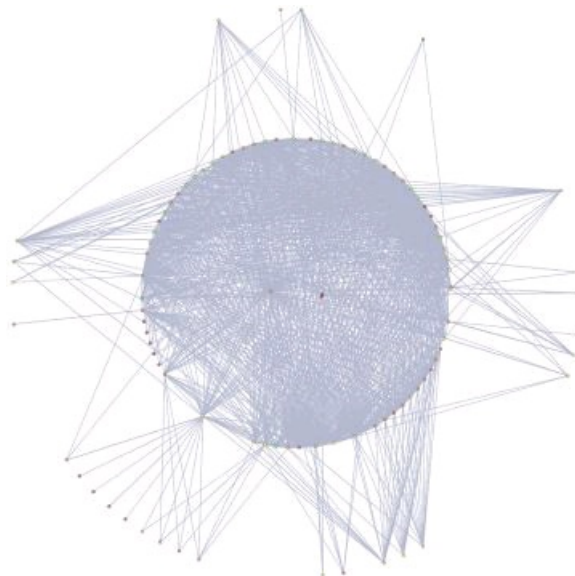
Import Google Analytics data - when checked Omniscopie will attempt to retrieve Google Analytics information for any of the pages encountered that belong to one of the sites associated with a Google Analytics account to which you have access. If you select this option then you will have to enter a Google Analytics username and password. More information on the Google Analytics functionality within Omniscopie can be found [here](#) [35].

Start date - only available if the 'Import Google Analytics data' option is checked. Select the start date for the Google Analytics data.

End date - only available if the 'Import Google Analytics data' option is checked. Select the end date for the Google Analytics data.



Enforce tree structure selected



Enforce tree structure unselected

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Salesforce

Using Omniscope with Salesforce

Adding the perfect desktop/web compliment to Salesforce

Omniscope provides a low-cost, low-risk route to business intelligence reporting and data quality initiatives involving data hosted in Salesforce. Omniscope tabbed presentation files contain a copy of all the data, open offline, are highly-visual and easily shared with others as presentations. Administrators with upload access to the free Visokio Reports web tab can use or modify the default templates for each Report. The constantly-evolving default templates are based on the general experience of various clients, but can easily be modified to create templates suitable for different classes of users in your organisation. Creating and uploading customised templates adds them to the future download options for each Report on the Visokio reports tab.

Install the Omniscope Connector for Salesforce tab from the AppExchange

Start by installing the free [Omniscope Connector for Salesforce 2.1](#) ^[67] (a certified, AppExchange-listed application) into your Salesforce user accounts. Salesforce Administrators can do this automatically from the AppExchange if your organisation has the Professional, Enterprise or the Unlimited editions of Salesforce. If your organisation uses Salesforce Group Edition, any Administrator can install the Connector tab manually by [following these directions](#). ^[296]

Installing the web connector will add a new 'Visokio Reports' tab to some or all of your user accounts. From this tab, users with the free [Omniscope Viewer](#) ^[297] installed can download, view, filter and query the data in their Reports. Default Omniscope file templates are provided for each Report or Data Object/Table. Using an activated Omniscope, the default templates can be modified and uploaded for others to use when downloading to the free Viewer. Users without the free Omniscope Viewer installed cannot open local copies of their data, but can still use the interactive Flash DataPlayer 'dashboards' exported from Omniscope to the Visokio Reports web tab. For more details, see [using the web connector](#). ^[288]

Use Omniscope 2.5 to access Salesforce directly and synchronise changes

If you install [Omniscope 2.5](#) ^[297], and you have Professional, Enterprise or Unlimited editions of Salesforce, you can not only modify templates, edit/merge data offline and save secured copies, you can also access Reports and Data Objects/Tables directly using the **File > Open online source > Salesforce** login and download option (you will need to paste-in your security token). Using Omniscope 2.5 Professional or Enterprise, you can add to/edit Data Objects/Tables offline and then synchronise your changes with Salesforce using the **File > Export > Synchronise with Salesforce** wizard. For more details, see [accessing Salesforce directly from Omniscope 2.5](#) ^[289].

Once your 30-day free trial period has expired, upgrading your Omniscope from free Viewer to the Professional Edition enables you to continue modifying and uploading customised templates and DataPlayer 'dashboards', integrating/merging in data from non-Salesforce sources, saving and sharing secured Omniscope files offline, and synchronising offline changes back to Salesforce. Non-activated Omniscope installations will revert to being free Viewers able to download and filter/query default or customised files using the free web connector tab installed in the user accounts. No need to uninstall.

Roadmap to 'the best of both worlds'

Installing the free Omniscope Viewer and the free Omniscope web tab from the AppExchange enables any organisation to embark on a simple, low-cost, low-risk, 'tiny-steps' progression of continuous improvements, while delivering users live, working reports with many useful visualisations of their data beginning on Day One:

1. Install free Omniscope Viewers and add the free Visokio Reports web tab to user accounts

- a. Download key reports/data objects from each user's account tab using the standard templates, enabling users to see, filter and sort all their data to find alert conditions, data errors & inconsistencies.
- b. Ask users to start flagging incomplete, out-dated and erroneous data records/fields online in Salesforce using the "!" character or similar
- c. Download key data objects as Omniscope files and consult the Flagged Errors tab to view all the records which have been flagged for online correction/completion either online via Salesforce, or offline using an activated Omniscope Professional and the direct connector for Salesforce, available in the free 30-day trial.
- d. Create custom reports containing the most useful joins...users can then download and view standard template versions of these reports using Omniscope.
- e. File refresh & security - the data in Omniscope files downloaded in templates is always fresh, and cannot be exported or copied (not even cut-and-paste). Users of free Viewers cannot save the files...they must always return to their Salesforce account Visokio Reports tab to download fresh copies of the data or view online DataPlayers in sub-tabs.

2. Upgrade to Omniscope Professional 2.5 (requires activation)

- a. If your 30-day free trial has expired, [contact us](#) ^[86] for a licensed activation key to upgrade from free Viewer to Omniscope Professional.
- b. Now you can save and modify files downloaded from your Salesforce account tab to fit the needs of your organisation-

adding/changing report tabs to highlight key messages, introducing corporate branding, etc. Make multiple versions of each report/data object template to suit the needs of different classes of users.

c. Save your changed .IOK file(s), then upload one or more of your modified files from the Visokio Reports tab in your Salesforce account. Note: you can upload the file empty, with all data deleted... data in the uploaded template file(s) will not be synchronised with the online data.

d. Modify the standard Flash DataPlayers shown in the DataPlayer View tab of each template file downloaded, then export your new customised DataPlayer 'dashboard' to web pages (including Salesforce tabs) and/or internal documents such as PowerPoint, Excel or .PDF.

e. The custom templates/DataPlayer configurations uploaded will be selectable for future downloads from the Visokio Reports tabs of authorised users, whether using the free Viewer or a Professional.

f. Data integration projects: download custom versions of your reports/data objects and then use Omniscopes to merge in related data from other sources (spreadsheets, ERP databases, etc.) to create combined reports (using any number of joins) that can be circulated to users with the free Viewer.

g. Using Omniscopes 2.5 or later, you can also login to your Salesforce account from inside Omniscopes, connecting directly to reports or data objects using **File > Open Online Source > Salesforce Table/Report**

h. Use the powerful data cleansing/scrubbing and editing capabilities of Omniscopes to make changes to your data and save local copies of files.

i. Using Omniscopes 2.5 or later, use the **File > Export > Synchronise with Salesforce** command to make changes to both your local copies and the corresponding user-editable fields within your Salesforce organisation.

j. File refresh & security- Users with Professional Editions will be able to refresh directly from source on opening. Offline files sent to users with the free Viewer show configurable opening screen ensuring they do not use stale files.

k. Continue to optimise the configuration of templates for all your reports and data objects based on user feedback and the evolving needs of your business...enjoy the total flexibility of the hybrid solution you have created.

3. Automate refresh and distribution with Omniscopes Enterprise Edition

a. Omniscopes Enterprise edition is designed to automate the entire process of refreshing and distributing Omniscopes reports and Flash DataPlayer inserts from a central 'always-on' server with access to all the required data sources, including Salesforce.

b. A single Enterprise Edition allows automated refreshes of files with data from Salesforce and other sources, plus distribution (via e-mail or FTP) of refreshed .IOK files and DataPlayer dashboards either according to a defined schedule or on-demand using the Scheduler or the Generator, two automation tools included with Enterprise Editions.

c. File refresh & security - Enterprise installations offer the full range of file security options, including domain-locking of files (files will not open if user is not logged into specified site and download page e.g. Salesforce)

Getting started:

For the quickest start, maximum flexibility and lowest average cost-per-user in deploying your solution, use both types of connector:

Using the Salesforce **web connector** ^[288] (download and forward templated reports installed in your online Salesforce account by your Administrator)

Using the Salesforce **direct connector** ^[289] (login to Salesforce directly for data import/editing/refresh; requires login, password and security token to paste in)

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Install in Salesforce

Using the Salesforce Visokio Reports Tab



Install this free service in any Salesforce Edition, including Group Edition

The Omniscopes web connector for Salesforce is a certified, AppExchange-listed free service ^[67] that can be installed by your Salesforce Administrator in any Edition of Salesforce, including Group Edition. Once installed, the new web connector tab provides your users with one-

click downloads of pre-formatted, filterable, highly-visual, offline copies of Salesforce Reports and Data Objects/Tables. The downloaded files can be shared as presentations with anyone using the Omniscope free Viewer. Each file download contains not only all the data [298], configured as multi-tabbed visualisations and reports, but also an exportable interactive Flash DataPlayer 'dashboard' [193] that can be displayed on the Salesforce tab, or exported from the downloaded file for display on other web pages and/or in documents such as PowerPoint, Excel and .PDF, with full interactivity.

Get It Now [67] **Install from the AppExchange**



[299]

If you are running the Professional, Enterprise or Unlimited Edition of Salesforce, and you are logged into an Administrator account, you can install the free web connector service just by clicking the [Get It Now] [67] button.

If you are running Group Edition of Salesforce, you can still install the web connector manually following these instructions [300].

Once installed, the web connector tab appears at the right-most end of your opening tabs, usually with the label 'Visokio Reports'.

Click on the tab

At the top of the tab is a link for all users to install a free Omniscope 2.5 [297] Viewer, with free 30-day trial of Omniscope Professional authoring capabilities anyone can use to modify the default templates and DataPlayers.

Select Report or Data Object/Table to download

The web connector tab includes 3-4 sub-tabs:

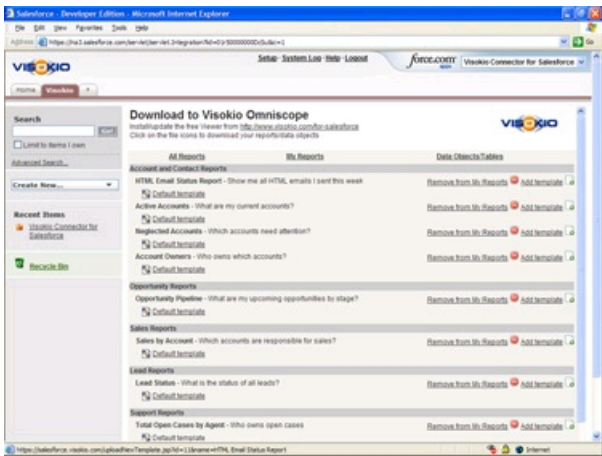
All Reports - lists all standard and custom Reports available to the account. The one-click Omniscope icon next to each Report downloads the data using the default template. At right are options to add/remove Reports to/from the My Reports shortlist on the next tab, and to upload a new, modified template, added as a new file icon and option for future downloads.

My Reports* - a user-managed shortlist of the more important and more frequently-accessed reports. You can add or remove Reports from this page using the option on the page.

Data Objects/Tables - a listing of standard and custom (un-joined) Data Objects/Tables available to the account, which can be joined and edited and synchronised with Salesforce using Omniscope Professional.

DataPlayers - Clicking on an online DataPlayer icon will display the interactive DataPlayer (default or customised) generated on-demand with current data.

* not available when installed in Group Edition



[301]

Your data will open in your installed Omniscope



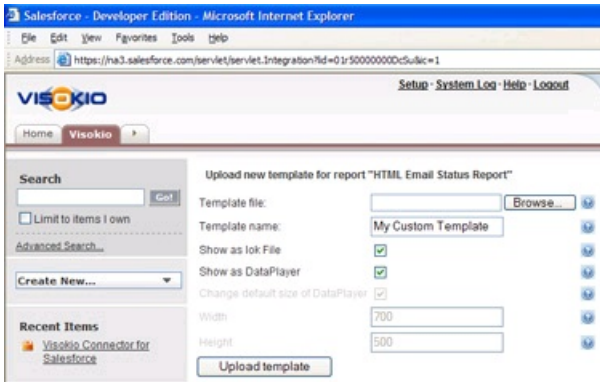
[302]

Your data will open in your installed Omniscube

If you clicked on a default template icon, the opening configuration of the downloaded file will be a general-purpose default provided to all users of the web connector. Default template file may not anticipate custom reports or data objects or custom fields (columns) in your data. If you send us your own versions, (scramble, disguise or delete the data in the file) we may modify and post additional templates as you suggest.

There is also a template file containing the configuration of the DataPlayer automatically displayed just by clicking on the DataPlayer icon next to the Report.

You can customise and export DataPlayers using Omniscube Professional, save and upload new templates and add icons to display one or more as new options on your Visokio Reports tab in Salesforce.



[303]

If you like, customise templates and upload

If you customise either the default template file or the template file for the DataPlayer automatically displayed online, you can make your customised download template and/or online DataPlayer template available for future use with refreshed data. The Add template option enables you to upload the new file, assign a new name, and specify whether to display the additional Omniscube .IOK template or the modified automatically displayed .SWF DataPlayer file as additional download/display options.

Use Omniscube Professional to customise template files and DataPlayers for different purposes or user groups. All template .IOK files can be downloaded and interacted with using the free Viewer, dramatically reducing average cost-per-seat of your Business Intelligence and reporting solution for Salesforce.

Installing in Group Editions

WARNING: due to limitations imposed by Salesforce, when installed in Group Edition accounts, the Omniscube web connector does not support upload of customised templates, and displays All Reports, rather than the custom "My Reports" tab by default.

Group Edition installs are not done using the [Get it Now] button on the AppExchange. they must be done manually following these instructions:

To begin, go to www.salesforce.com [286] and make sure to login to an account with a System Administrator profile

Click "**Setup**" at top of screen

In left side panel under "**App Setup**" click "Create" to expand menu

In expanded section under "**Create**" click "**Tabs**"

In the middle "**Web Tabs**" (not "Custom Object Tabs" above or "VisualForce Tabs" below) box, inside the Web Tabs header, click the grey "New" button centre

Step 1. Choose Tab Layout, choose "2 columns with Salesforce sidebar"
Click "Next"

Step 2. Define Content and display properties > Tab Content definition > "Tab Type" choose "URL" from drop-down list

Under Display Properties:

1. In "Tab Label" type "Visokio Reports" or whatever label you want to appear on the new tab
Leave "Tab Name" blank
2. "Tab style" click magnifier to open a list of icon/style choices
Choose any style, for example, a desk indicating desktop reports
3. Leave the Content Frame height set to '600'

leave splash page set to None

4. Fill in the Description field with something that reminds users what the application does, like:

"Delivers Omniscopes files to desktop"

Click "Next"

Step 3. Enter the URL Details

In the big white box with the title "Button or Link URL" paste:

`https://salesforce.visokio.com/index2.jsp?sid==={!User.Session_ID}&apiurl={!API.Partner_Server_URL_70}`

(clear the space first, and make sure to delete any duplication of the initial letters 'http')

Leave the encoding setting Unicode (UTF-8)

Click "Next"

Step 4. Add to Custom Apps make sure ALL options are ticked

Click "Save"

Make sure your users have Omniscopes installed. They can now click on the new Visokio Reports tab and choose a default template to download.

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Improving Default Files

Default Configured Reports and Data Objects

Download Reports and Data Objects in the default configuration

Salesforce is a highly flexible platform that allows you to create custom fields, custom Reports and custom Data Objects. We are working to improve the default templates available when you first install the web connector to better anticipate the most common data sets for each Report, so that there is less customisation to do before you can give users access to the files on the Visokio Reports tab.

New in 2.5...this page in progress...

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Upload New Templates

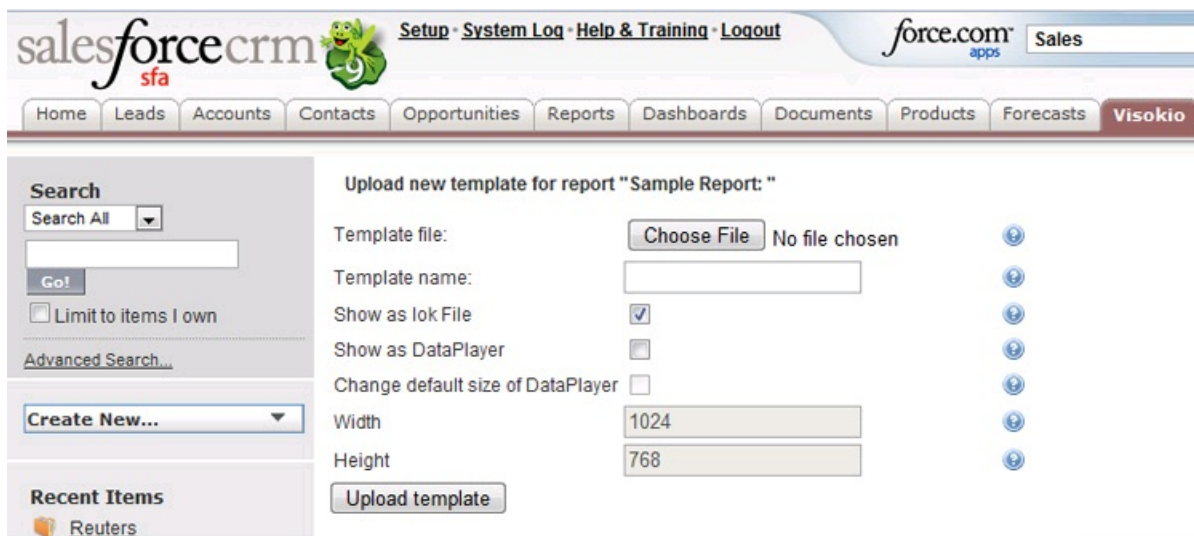
Modifying & Uploading Templates

Uploading customised templates and designating DataPlayers for online display

Using an activated Omniscope Professional, anyone can modify and save a downloaded file for use as a new template, then upload it (not available for Group Editions of Salesforce) back to the Salesforce Visokio Reports tab to serve as an additional template option for future downloads of that Report or Data Object/Table.

In addition, if at least one DataPlayer is configured in the file, and the file saved with a DataPlayer tab as the open tab, then the file can be designated as the template for the DataPlayer to be displayed online whenever users click on that template. Also, to save storage space in your Salesforce account, you can upload the template file empty of all data...the file will be populated with the latest data each time a user downloads it.

To upload a new template file, click on **+Add Template** from the **All Reports** or **My Reports** pages and the upload new template dialog will appear:



The screenshot shows the Salesforce CRM interface with the 'Visokio' tab selected. A dialog box titled 'Upload new template for report "Sample Report: "' is open. The dialog contains the following fields and options:

- Template file:** A 'Choose File' button and the text 'No file chosen'.
- Template name:** An empty text input field.
- Show as IOK File:** A checked checkbox.
- Show as DataPlayer:** An unchecked checkbox.
- Change default size of DataPlayer:** An unchecked checkbox.
- Width:** A text input field containing '1024'.
- Height:** A text input field containing '768'.
- Upload template:** A button at the bottom of the dialog.

Choose file - opens a browse dialog that enables you to select the saved file that you want to upload.

Note: If you plan to use a DataPlayer configured in the file as an online displayable DataPlayer, you must save the file with the DataPlayer tab containing the preferred DataPlayer open.

Template name - choose a name that everyone will see on the tab...try to make clear who the template is intended for and avoid using spaces in the file name...like this: MyNewTemplateforSales.iok

Show as .IOK file - when ticked, this refreshable template file will be shown as a downloadable Omniscope option, which can be navigated in the free Viewer offline.

Show as DataPlayer - when ticked, this file will be displayed with the option of viewing the configured DataPlayer 'dashboard' online, just by clicking on the template icon. If you want this option to be available, you MUST save the file with the DataPlayer tab you want to display as the open tab.

Change default size of DataPlayer - DataPlayers can be sized in terms of pixel budgets for height and width. If you make larger DataPlayers, make sure you set the pixel budget associated with the DataPlayer in the file being uploaded big enough to display it properly on the web tab, but not so big that user have to scroll sidebars to see and interact with it.

Upload template - your template should appear next to the Report or Data Object/Table it applies to. You cannot delete the default templates, but we welcome suggestions on how to improve the defaults to better serve your needs.

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Export DataPlayers

Displaying and Exporting Flash DataPlayers

Interactive visual 'dashboards' for web tabs and offline documents

There are two default template files for every Salesforce Report and Data Object/Table, each containing a tab with an exportable Omniscopes DataPlayer interactive Flash 'dashboard'. The default DataPlayer template file contains the DataPlayer on the top tab. This DataPlayer configuration is used to generate the DataPlayer displayed online on the Visokio Reports tab in your Salesforce account. You can modify the default DataPlayer template file and upload a new version for automatic refresh and display if you have an activated Omniscopes and a Salesforce Edition higher than Group Edition. You can also use the **Save/export** menu options on the DataPlayer view toolbar of either template file to export DataPlayers to non-Salesforce web pages or offline documents, with full interactivity.

Direct Connector

Direct Connection & Synchronisation with Salesforce

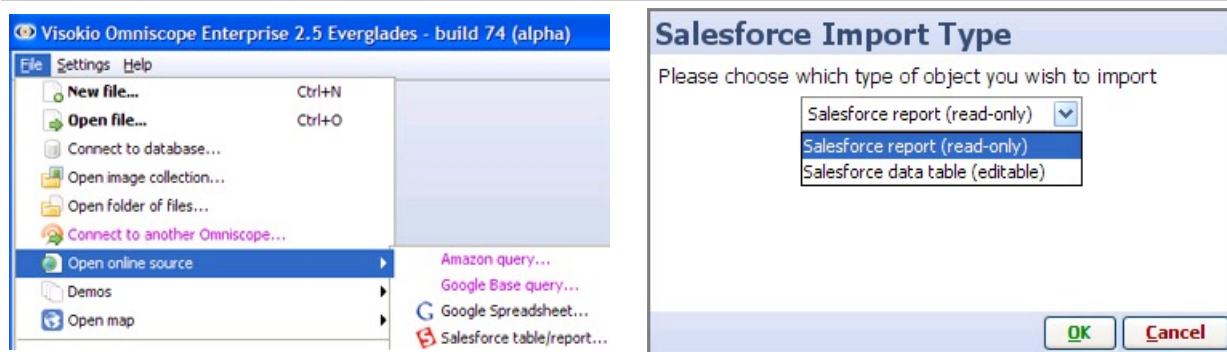


Omniscopes 2.5 or later (all Salesforce Editions except Group Editions)

If you use the Professional, Enterprise or Unlimited Editions of Salesforce, and you have installed Omniscopes 2.5 [297], during the free 30-day trial period you can access your Salesforce Reports and Data Objects/Tables directly. Using Omniscopes 2.5, all standard and custom Reports can be accessed directly and most fields (columns) in the Data Objects/Tables can be edited/completed offline and changes synchronised back to Salesforce. Omniscopes files scale to millions of records, yet are very compact, easily-shared and re-purposed interactive files with comprehensive multi-tabbed visual overviews. Omniscopes is the perfect complement to Salesforce and Force.com 'cloud-based' solutions for improving data quality, facilitating local offline data management and providing end-users with refreshable analytic reports, highly-visual final management presentations, and interactive Flash DataPlayer 'dashboards' [193] exportable to web pages and documents like PowerPoint, Excel and Adobe .PDF.

Connecting to your Salesforce account data

Open Omniscopes and go to **File > Open online source > Salesforce**. You will be presented with a log-in sequence requesting your User ID, password and security token, which you should copy-paste. All applications that connect directly to Salesforce must present a security token at login. You will need to set your own security token from your Salesforce account. Salesforce will send you the digital text string via e-mail. Save your token in a Notepad file, because you will have to paste it into Omniscopes each time you login.



Once you have successfully logged in to your Salesforce account, you can choose to import either an existing standard or custom Report data set, or an existing standard or custom Data Object/Table. Report data sets can be configured, saved and shared with others, including additional data merged in from other non-Salesforce sources. However, copies of the data in Reports files cannot be edited offline such that the changes are synchronised back to Salesforce. Un-joined Data Objects/Tables contain many fields (columns) which can be filtered and corrected offline in Omniscopes, and the changes synchronised back to Salesforce.

Note: some fields (columns) in every Data Object/Table are Salesforce system-generated and cannot be edited offline. In addition, some records (rows) in Data Objects/Tables which have become interconnected with other Data Objects/Tables, such as converted Leads, cannot be edited/synced back to in their original Leads Data Object/Table, but the user-editable fields related to unconverted leads CAN be edited and the changes synced back to the Leads Data Object/Table.



Improving Data Quality and Reporting

Use Omnisciope to filter records (rows) for blanks, variations in spellings, inconsistencies among different records relating to the same account, and other typical data quality problems. Make systematic corrections, even across thousands of records, very quickly and easily in Omnisciope, then synchronise the changes with Salesforce (see below). Regularly archive copies of all Reports and Data Objects/Tables. Quickly perform data integration by merging in data from other systems and/or stand-alone or collaborative spreadsheets.

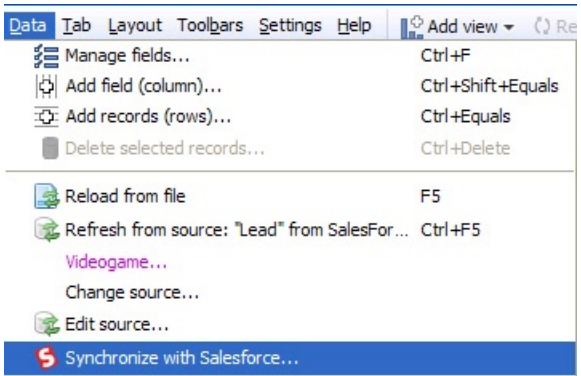
Configuring/Uploading Customised Template Files

If you open an online Report or Data Object/Table for the first time using the direct connector in Omnisciope Professional 2.5, you will have to configure the Omnisciope file report tabs yourself. However, if you have installed the free [Omnisciope \(web\) Connector for Salesforce](#) in your account(s), you can download an existing templated file for each standard Report or Data Object/Table from the 'Visokio Reports' tab, then follow these directions to [change the file data source](#) so that you can start from an already templated reporting file. Once you have fully customised your copy of the pre-templated file, and synchronised any changes to the data with Salesforce, you can upload the file back to the Visokio Reports tab, adding a new, customised template download option for each Report or Data Object/Table. Colleagues will be able to download future fresh views of the data using the now customised template, even with the free Viewer.

Note: Uploading a populated customised file to the 'Visokio Reports' tab as a new template does not synchronise the data. Only the layout, report tab configurations and overall look and feel of the file is remembered. Each future download is fully re-populated with the freshest data from Salesforce.

Editing, Adding and Synchronising Data with Salesforce

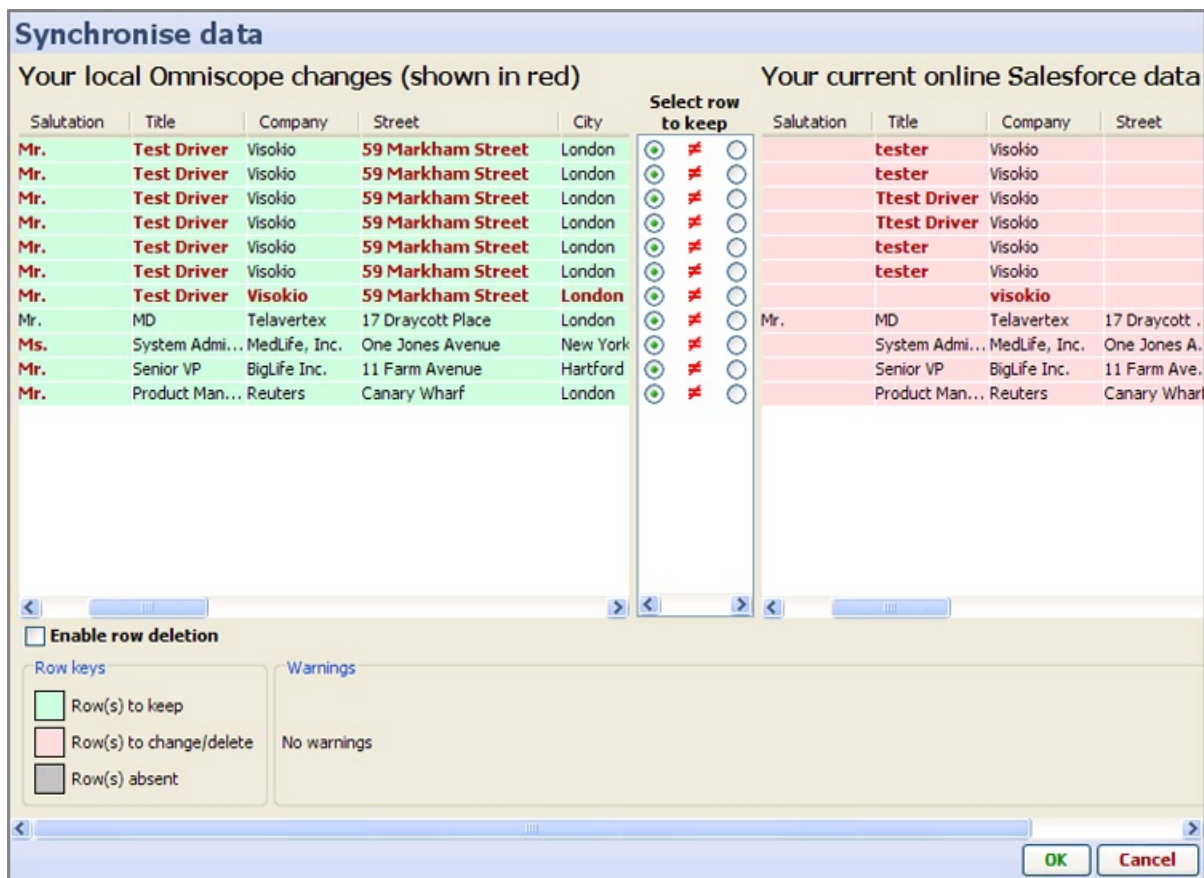
Once you have downloaded and added to or edited user-editable fields (columns) in Omnisciope, you must synchronise these changes with Salesforce in order for your changes to become persistent in the online data. When you are ready to commit your changes to the online version of the Salesforce data, go to **Data > Synchronise with Salesforce** to launch the synchronisation wizard.



WARNING: If you close and open your local Omniscopy file before you have successfully synchronised with Salesforce, be sure to skip or cancel the refresh, since this will overwrite any changes you made in the local file with values from the current online data set. You can avoid this risk by saving local copies with un-synchronised changes with the refresh option set to 'Never' until all changes have been successfully synchronised.

Synchronisation

The Synchronisation wizard opens comparing the status of your local Omniscopy version of the data with the then-current version of the Data Object/Table downloaded in Salesforce. In the example below, no new rows were added online while the file was being edited locally in Omniscopy. Had new records been added by someone else online, they would show on the right current Salesforce pane in green, with the option to download the new records (rows) during synchronisation.



By default, there is a protective setting preventing online records from being deleted if they are not present in the local Omniscopy copy. To change this, tick the option to **Enable row deletion** below the local changes listing.

[More detail on synchronisation](#) [305], best practices and common warning and error messages.

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Changing Data Source

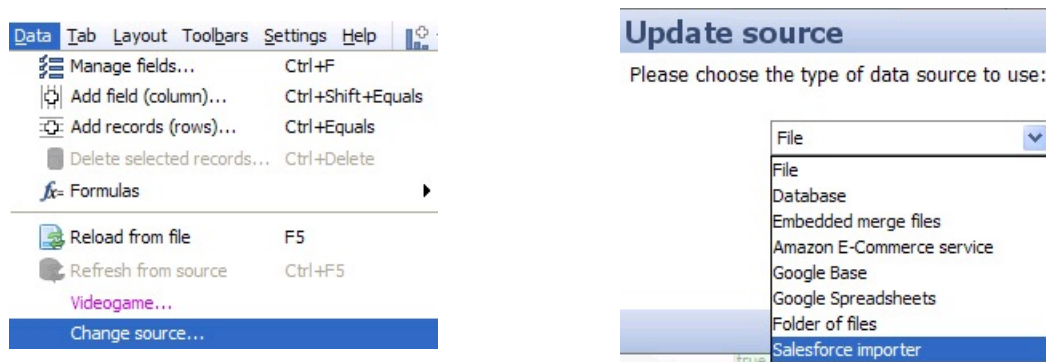
Changing the Data Source of Template Files

Save time by starting from default template files for standard Reports & Data Objects

You can save time configuring Omnisciope files for all your Reports and Data Objects/Tables if you start by downloading a copy of your data using the default templates available on the 'Visokio Reports' tab of the Omnisciope (web) Connector for Salesforce, a certified, free AppExchange-listed application [67] your Administrator can install.

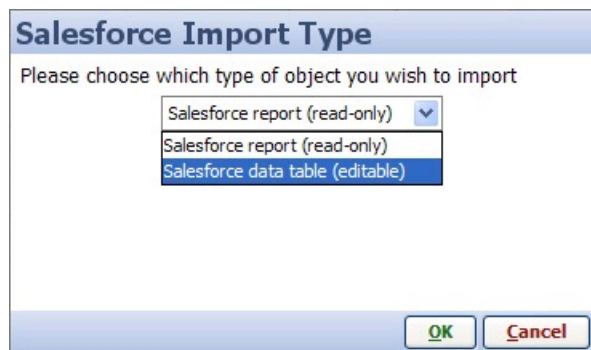
The templated files available via the web connector are downloaded without a linked source. To add/edit and synchronise data saved locally in Omnisciope 2.5+ with your online instance of Salesforce, you first need to associate each downloaded file with the corresponding Salesforce online Report or Data Object directly.

Changing the linked data source of a file is done from **Data > Change source** by selecting select **Salesforce importer** as the type of data source.



If you are working with a downloaded Report file, and are interested in live refresh of the data in the Report file, choose **Salesforce report**. The data in Reports cannot be edited directly, but can be refreshed on demand into Omnisciope, and the configuration of the Omnisciope file changed and saved/forwarded assuming you have an activated edition of Omnisciope (not the free Viewer).

If you are working with a downloaded Data Object/Table, and you wish to add/edit data then synchronise the changes with Salesforce, choose **Salesforce data table**, which are editable. You will then be prompted to login to your Salesforce account and asked to paste-in your security token. Note: Salesforce Group accounts do not support direct connections.



Please note:

Some fields (columns) and some records (rows) within each Data Object/Table are not directly editable from outside of Salesforce. They may need to be edited from inside the web interface of Salesforce, or by reference to another Data Object/Table.

Fields which are not editable are indicated in the heading. Rows which are not editable are usually screened out by filters set in the editing tab of the default template.

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Synchronising Changes

Editing Data Locally and Synchronising Changes with

Salesforce

(in progress...)

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Roadmap/Best Practices

Making the most of Omniscopes and Salesforce

(In progress...)

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Source URL (retrieved on 08/14/2009 - 18:50): <http://www.visokio.com/omniscope-user-guide>

Links:

- [1] <http://forums.visokio.com>
- [2] <http://www.visokio.com/print/book/export/html/103>
- [3] http://www.visokio.com/files/Resources/OUGuide/999_PDF/OmniscopeUserGuide-09-08-14.pdf
- [4] <http://www.visokio.com/kb>
- [5] <http://www.visokio.com/quick-start>
- [6] <http://www.visokio.com/install-activate>
- [7] <http://www.visokio.com/using-files>
- [8] <http://www.visokio.com/using-views>
- [9] <http://www.visokio.com/viewing-details>
- [10] <http://www.visokio.com/queries-subsets>
- [11] <http://www.visokio.com/open-data>
- [12] <http://www.visokio.com/configure-data>
- [13] <http://www.visokio.com/main-toolbar>
- [14] <http://www.visokio.com/controls>
- [15] <http://www.visokio.com/report-pages>
- [16] <http://www.visokio.com/formula-fields>
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