

IVISION BROWSER

for Decision Makers

Quickstart Guide



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Suite 502, 265 Carling Avenue, Ottawa, Ontario, Canada K1S 2E1
Tel.: (613) 563-3993 Fax: (613) 563-7233

WORKING WITH TABLES

What is IVISION?

IVISION™ software provides simple, large-scale information management, analysis and distribution for information providers and their customers.

Build, update and document multi-dimensional data tables and extracts with the IVISION BUILDER™. Then provide fingertip access to tables and extracts via LAN, or deliver them on diskette or CD-ROM.

Search and explore tables with the IVISION BROWSER™. Then select and subset data, and quickly browse through the information in tables, charts and maps. Or, use the BROWSER to create tables from extracts.

Use the IVISION DISTRIBUTOR™ to deliver the BROWSER, along with tables and extracts, to large audiences inside and outside your organization.

This Guide

This Quickstart Guide contains the information you need to start using the BROWSER, given data tables or extracts prepared with the BUILDER. For more details on using the BROWSER see the On-line Help or the IVISION BROWSER User's Guide.

IVISION Concepts

A *dimension* describes an attribute of the table data. Examples of dimensions are sex, geographical region and time. IVISION tables can have up to eight dimensions. An *item* is an element of a dimension. For example, June is an item of the time dimension, and Male of the sex dimension. A *label* is a title or display heading for an item. An item can have more than one label although you only see one at a time.

Starting the BROWSER

To start the IVISION BROWSER double-click on its icon. IVISION will open and the Find Table dialog box will appear.

Finding a Table

If you're not already in the Find Table dialog box, click on the Find Table button in the Tool bar.



Find Table Button

Clear all the categories in the Find Table dialog box by choosing the None button; then click on the category that you would expect to contain the table you're looking for. If you want to see more information about what is in a particular table, click on its name in the Tables box to highlight it; then choose the Summary button. You can also use the Search button to search for tables containing specific words or phrases.

Opening a Table

Open an IVISION table by double-clicking on a table name from the Find Table dialog box.

Table Browsing

Once you have opened a table, you can browse through the items in any dimension. First select the *Active Dimension* by clicking on your choice of dimension tile in the Dimension bar. You'll notice that the dimension is now shown in the *Active Dimension box*. Then, click on the Previous Item button or the Next Item button to browse through the data for the items in that dimension. Note that each dimension tile shows the dimension name and the code or label of the item whose data is currently displayed.

The screenshot shows the IVISION software interface with a data table. The table has columns for 'REGION', 'UNITED Employee Count', 'DISCOUNT', 'UNITED Revenue', 'UNITED Profit', 'UNITED Assets', and 'UNITED Liabilities'. The 'REGION' column is highlighted in red. A yellow callout box points to the 'Active Dimension Box' which displays 'REGION'. Other labels point to the 'Note Indicator', 'Previous Item Button', 'Next Item Button', 'Dimension Bar', and 'Dimension Tiles'.

REGION	UNITED Employee Count	DISCOUNT	UNITED Revenue	UNITED Profit	UNITED Assets	UNITED Liabilities
North America	2,589	2,614	2,734	2,896	3,076	
Canada	915	943	971	1,021	1,058	
Mexico	29	28	28	28	28	
South America	64	79	90	114	131	
Europe	270	282	294	308	328	
Asia	137	144	149	156	162	
Australia	553	564	555	571	588	
United States	1,521	1,553	1,610	1,595	1,669	
Middle East	394	395	390	386	403	
Central US	491	491	499	492	515	
Northwest US	75	75	75	75	81	

Viewing Notes

Notes tell you about the data you've received. *Table notes* explain what's in a table; they can be viewed by selecting Summary from the File menu. A small dot in the corner of a dimension or item tile indicates that there is an associated note. See *dimension notes* by choosing Notes from the Dimension menu. Likewise, see *item notes* by choosing Notes from the Item menu.

Switching Table Dimensions

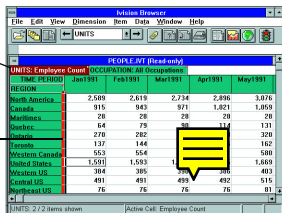
Once you have opened a table, you are in the *table view*. You can change your view of the table by dragging and dropping (one at a time) the dimension tiles with the mouse. Referring to the example on page two, if you want to see Units across Time for the current region, United States, drag the Units dimension tile and drop it on the Region dimension tile. This will show the Units dimension along the rows, with Time remaining across the columns.

Nesting Table Dimensions

You can view more than one dimension at the same time along either the rows or the columns by nesting dimensions. *Nesting* means showing one dimension within another. With the left mouse button depressed, slowly drag the desired dimension tile from the Dimension bar to the top or bottom edge of the column labels, or to the right or left edge of the row labels, until a thick line (or highlight) appears. Release the mouse button, and the dragged dimension will be nested.

Dimension
Bar

Highlight



PEOPLE INT (Read only)

UNITS: Employee Count	Jan1991	Feb1991	Mar1991	Apr1991	May1991
REGION					
North America	2,589	2,619	2,734	2,896	3,076
Canada	915	943	971	1,021	1,058
Mexico	28	28	28	28	28
Other	64	79	35	111	131
United States	278	282	300	311	330
Western Canada	137	144			162
United States	553	554			580
United States	1,503	1,493			1,469
Western US	384	385			403
Central US	491	491	499	492	515
Mountain US	76	76	76	76	81

UNITS: 2 / 2 items shown Active Cell: Employee Count

In the example above, the Units dimension tile is dragged until it hits the right edge of the row labels and the highlight appears.

The left mouse button is released, and the Units dimension is nested inside the Region dimension. See below.

Nested Dimension

PEOPLE BY Occupation					
TIME BY (BY)	Jan1991	Feb1991	Mar1991	Apr1991	
BC coast	137	144	149	156	
Manitoba	67	68	67	71	
Quebec	64	79	90	114	
Ontario	164	205	229	290	
Prince	270	282	294	308	
Toronto	825	856	883	913	
Toronto	337	344	349	356	
Western Canada	553	554	559	571	
United States	1,204	1,332	1,343	1,371	
United States	1,581	1,583	1,616	1,595	
United States	3,931	3,967	4,029	3,984	

With your selection highlighted, click on the right mouse button for the shortcut menu. Then select the desired operation. You can Hide the selected items from your current view, Show only the selected items in your current view, or Copy your selection to the Clipboard to move it to another application.

Displaying Alternate Item Labels

Frequently, there is more than one set of labels available for the items in a dimension. For example, there may be alternate labels in a second language. To select the next set of labels for a dimension:

1. Make the dimension active by clicking on the appropriate dimension tile.
2. Click on the Change Labels button in the Tool bar.




Selecting Data from a Table

To reduce the amount of displayed data, to move data to another application, or to chart or map data, you first need to select it.

- To select a row or a column of data, click on the corresponding row or column heading.
- To select multiple consecutive rows or columns, drag the mouse across the row or column headings.
- To select disjoint rows and/or columns, press the CTRL key while you click on the row and/or column headings.

Searching for Items Along a Dimension

You can reduce the items shown along a dimension by displaying only the ones you want. To search for items along a dimension:

1. Make the dimension active by clicking on the appropriate dimension tile.
2. Click on the Search Dimension button in the Tool bar. 
3. In the Search dialog box, click on the Data field if you want to search the data, then enter minimum and/or maximum values to constrain your search. When you choose OK, IVISION will search the active items and show only those items that have satisfied your criteria.

OR


In the Search dialog box, click on the field you want to search. Then enter the text string that you want to search for in the Text to Find box. When you choose OK, IVISION

will search the field you selected and will show only those items that contain the text string you entered.

Note: To jump to a desired item along a dimension, choose Find Next.

Sorting Data Across a Dimension

You can sort items across a dimension to reorder the way that they are displayed in the table view. To sort items across a dimension:

1. Make the dimension active by clicking on the appropriate dimension tile.
2. Click on the Sort Dimension button in the Tool bar. 
3. If you want to sort the dimension based on the data values, click on the Data field in the Sort dialog box. Then click on either Increasing or Decreasing, and choose OK.

OR

If you want to sort the dimension based on the codes or labels associated with a dimension, click on the field that you want to use to sort, then indicate the Sort Option and choose OK.

Changing the Frequency of the Displayed Data

Many tables have time as a dimension. You may want to decrease the display frequency by aggregating the data. For example, if your table contains monthly data, you can choose to average or sum the monthly values to produce annual data.

To change the frequency of displayed table data:

1. Choose Time Series from the View menu.
2. Click on the desired Display Frequency.
3. Click on the Aggregation Method you want IVISION to use to compute the new data.
4. Choose OK.

Creating Distributions

To see numeric values distributed as a percentage of row, column or table totals, choose Distributions from the View menu. If you want IVISION to compute distributions for dimensions in addition to those on display in the rows and columns, select those additional dimensions from the Include Dimensions box. When you choose OK, IVISION will add a new dimension to the table called Distributions, which will contain one item for each type of distribution you selected.

Charting Data

You can choose from many chart types to display table data. To create a chart:

1. Select the rows and/or columns that you want to chart.
2. Click on the Display Chart button in the Tool bar.



Display
Chart
Button

3. With the mouse pointer in the chart view, click on the right mouse button to see the Charting shortcut menu.
4. Choose Chart Options to change the current chart type.
5. Make a selection and click on OK to return to the chart view.

ChartBrowsing

The ChartBrowsing™ feature lets you create a series of charts in rapid succession. To ChartBrowse™:

1. With the mouse pointer in the chart view, click on one of the headings in the title of the chart to make that dimension active.
2. Use the Previous Item and the Next Item buttons to chart the previous or next item.



Mapping Data

Some tables that have a geographic dimension have maps associated with them. To view the table data on a map:

1. In the table view, move the cursor to the item that contains the data you want to display on a map.
2. Click on the Display Map button in the Tool bar.



Display Map Button

Zooming In and Out of a Map

To zoom in to a region on a map, double-click on the region or the value representing that region.

To zoom out to a higher level on a map, double-click on the white space near the border of the map window.

Enlarging Part of a Map

1. While in a map view, move the mouse cursor to the upper left corner of the section you wish to enlarge.

2. While holding the **SHIFT** key down, drag the cursor to the lower right corner of the section you wish to enlarge.
3. Release the mouse button.
4. To return to the original view, use the right mouse button to see the shortcut menu, and click on Restore.

Changing Map Colors

1. With the mouse pointer in the map view, click the right mouse button to see the Mapping shortcut menu.
2. Choose Map Options.
3. Click on the radio button in the Range Definition box that corresponds to the range definition you want on your map.
4. Use the Range Color popdown menus to select the colors that you want to appear on your map.

MapBrowsing

The MapBrowsing™ feature lets you create a series of maps in rapid succession for data tables that support mapping. To MapBrowse™:

1. With the mouse pointer in the map view, click on one of the headings in the title of the map to make that dimension active.
2. Use the Previous Item and the Next Item buttons to display the previous or next item on the map.



Previous
Item
Button



Next
Item
Button

Copying a Chart or Map to Another Windows Application


1. While in the chart or map view, click on the right mouse button to see the shortcut menu.

2. Choose Copy to copy the chart or map into the Windows Clipboard.
3. Use the ALT + TAB keys to make the target application active.
4. Choose Paste from the Edit menu in the target application.

Printing a Table, Chart or Map

To print a table view, a chart view, or a map view, click on the right mouse button to see the shortcut menu and select the Print option.

Saving a Table

To save a table, or a subset of one, as a new IVISION table, use the Save As option from the File menu. You can also save IVISION table data in several other formats including DBF, CSV and WKS. When saving to any non-IVISION format, you'll need to nest all the dimensions along the rows or columns before you save, if you want to retain the data for all dimensions. (See Nesting Table Dimensions.) 



CREATING YOUR OWN TABLES

Table Creation Overview

An extract is a special type of database file that is created with the IVISION BUILDER. Extracts provide complete data documentation and are optimized to permit rapid table creation with the BROWSER. You can create a table by opening an extract file, defining the dimensions and contents of the table, and clicking on the Go button. The next four sections outline these steps in detail.

Opening an IVISION Extract

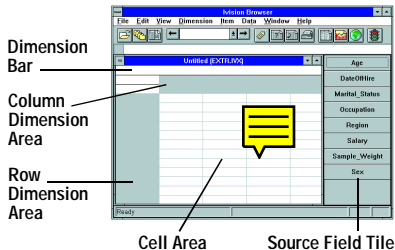
To locate and open an IVISION Extract:

1. Click on the Open File button in the tool bar.
2. Set the List Files of Type box to Extract Files (*.ivx)
3. Set the directory to the location of your Extract and select, or enter, the name of the Extract.
4. Choose OK.

Extract notes can be viewed by choosing Extract Summary from the Data menu.

Defining the Dimensions of a New Table

As soon as you've opened an extract file, the BROWSER displays an empty table view and a number of *source field tiles* to the right. Each source field tile represents one of the fields in the original data file. *Source field notes* can be viewed by choosing Field Summary from the Data menu.



Define the dimensions of your new table by dragging your choice of source field tiles, one at a time, into the cell area. First, drag a source field tile

into the Row Dimension area. You'll see that the BROWSER highlights acceptable areas where the tiles can be dropped. Then, drag a second tile into the Column Dimension area. Finally, drag up to six more source field tiles into the Dimension bar. Note that where you position the source field tiles determines the default display position for the dimensions of the new table. If you make a mistake, you can drag a tile back to its original position. Or, you can replace a dimension by dragging and dropping a new source field tile onto it.

Filling a Table With Units

If you want the table values to be counts, you can create the table now by clicking on the Go button. However, you may want to have other items aside from counts in the Units dimension. Just drag and drop tiles associated with numeric values into the cell area of the table view. IVISION creates a new dimension called Units contain-

ing one item for each tile you move into the cell area. As you drop the tiles, IVISION lets you choose which statistical value related to the source field will be used to fill the table. For example, you can choose sums, averages, minimums or maximums for source fields such as Age or Salary.

Creating a New Table

Once you've defined the table, create it by clicking on the Go button.



Go
Button

Saving a New Table

To save your table for other BROWSER users:

1. Choose Save As from the File menu.
2. Enter up to eight characters to name the table. When you choose OK, the BROWSER prompts you to enter summary information.


3. Enter the Table Title and Category which will be displayed in the Find Table dialog box.
4. If you wish, enter Keywords and Table Notes to help you find the table later.
5. Choose the OK button.

Other Table Creation Features

The Data menu contains options that you can use to further customize your table.

- The **Define Recode** option lets you create a new source field tile based on an existing coded field such as occupation or marital status. Use this feature to combine items from an original source field. For example, for the source field tile Marital Status, the codes for Single, Divorced and Widowed could be combined to form a new code called Unmarried.

- The **Define Bands** option lets you create a new source field tile based on an existing numeric field. Use this feature to redefine the default bands of an existing source field. For example, if Age is a source field tile, then you may wish to change five year bands to ten year bands.
- The **Derived Field** option lets you create a new source field tile using arithmetic operations on one or more existing source field tiles. For example, given Net Income and Taxes as two source field tiles, you can add them to create a new tile called Gross Income.
- The **Record Constraint** option lets you create a table subject to a constraint. For example, if Sex is one of your source field tiles, you could create a table that contains only female data.

See the On-line Help or the BROWSER User's Guide for information on how to use these options. 

Need More Information About IVISION?

Call Ivation Datasystems in Ottawa at
(613) 563-3993.

IVISION BROWSER Features Summary

You'll find the IVISION BROWSER™ very simple to learn and use.
Look at what you can do:

- Browse data tables with up to eight dimensions.
- Work with up to 32,000 items per dimension.
- Group data tables by category.
- Search tables by keyword.
- Work with several tables at once.
- Switch and nest data dimensions.
- Aggregate time series data.
- Select and hide data.
- Search and sort data.
- View data distributions.
- Chart and map data.
- ChartBrowse™ and MapBrowse™.
- Zoom in and out of maps.
- Print tables, charts and maps.
- Copy tables, charts and maps to other Windows applications.
- Save tables in several formats including DBF, CSV and WKS.
- Browse dimension notes and item notes.
- Set your language preference.

*And Now, Create Your Own Data Tables
From IVISION Extracts.*

IVATION
DATA SYSTEMS INC.

Suite 502, 265 Carling Avenue, Ottawa, Ontario, Canada K1S 2E1
Tel.: (613) 563-3993 Fax: (613) 563-7233