

AtlasBI and Aeon Statistics

Genie Powell genie@atlas-sys.com

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Notes About Layout

- Feel free to remove any modules that you don't need
- The parameter icon in top right allows you to change the number of days in the past to query. Each report has a different default number of days.
- You can also shrink the date range in the filter itself.
- One filter will show to the right of the title
- More than one filter will be in a menu to the right of the title
- You can clear filters by clicking the filter icon with the red X on each module
- Filtering doesn't re-query the database but does update the data viewed immediately
- Exporting is possible in the top right icon. Excel is the most common format.
- We recommend including filters and parameters in the export and show them on a separate sheet (versus below).

Designer View Dashboard Menu

- Switch to Designer in top right (if you have permissions to design)
- Can choose to Save As a new name or Save to overwrite the existing file
- Can change the group to create folders in the Dashboard menu
- Any of the default dashboards can be re-imported from the Gallery
- You can export a dashboard as an xml file to share with other sites
- Can change title
- Can change parameter defaults

Designer View Components

- Can click and drag any of the components onto the dashboard
- Cog icon on a component is where to change settings
- Wrench icon is where you can change layout, colors, captions, etc.
- Horizontal arrows allow you to change the component to another type
- Two boxes with arrows is how you set the ability to filter by items in that component

Data Sources and SQL Hints

Click on the pencil icon to the right of the query to edit it.

I highly recommend copying the text into a text editor to better view it.

You can create aliases for tables to make it easier to type/read.

You can also include “as Blah” to rename a field that you have queried to something more logical in the output. Here are some examples:

```
SELECT Transactions.TransactionNumber, Users.Username
FROM Transactions INNER JOIN Users
ON Transactions.Username = Users.Username
WHERE Users.Username = 'atlas'
```

```
SELECT t.TransactionNumber, u.Username
FROM Transactions t INNER JOIN Users u
ON t.Username = u.Username
WHERE u.Username = 'atlas'
```

```
SELECT t.TransactionNumber, u.Username , u.UserInfo1 as FaveColor
FROM Transactions t INNER JOIN Users u
ON t.Username = u.Username
WHERE u.Username = 'atlas'
```

Transaction and Tracking info for statuses is a number, so remember to link to the Queues table to see the queue name

Getdate() is a SQL term that means “right this second” and you can subtract days from it
Getdate()-1 is yesterday at this exact time

Time zones are handled by the function:

```
Dbo.ufn_Aeon_ConvertUTCDateTimeToLocal(datetime field from Aeon)
```

Where datetime field from Aeon is something like ReadingRoomHistory.TimeIn

Common syntax errors

- Forgetting a comma or typing a period instead of a comma
- Adding a field in the select at the top and forgetting to put it in the “group by” at the bottom of the query

AtlasBI Help

Click on the question mark at the very top right of AtlasBI and that will open:

<https://help.bi.atlas-sys.com>

Text Editors

Visual Studio Code and Notepad++ are both free text editors that will color code .sql files as well as try to assist with typing fieldnames based on other text in the file. It does not connect to the actual database.

Tips and Tricks

- I recommend banded rows in the “wrench” format section to make the grid easier to read
- Options allow you to rename the column or pie chart description
- You can do a count of fields and it will show that number
- Remember to click on Format for that column with numbers in it to change the format type to Number, Unit to Ones, and Precision to 0. This will display 2195 instead of 2.2K.

Q&A

- AtlasBI has access to everything in your database. So you can go back as far as you have data
- Two fields with the same name in a grid could be either blanks versus NULL values. trailing spaces, or different capitalization
- Contact support@atlas-sys.com if you would like the two new appointment dashboards added to your AtlasBI
- You should be able to see the query used for custom search in the Aeon client and use that as a place to start in AtlasBI. Contact Atlas support for help with that.
- Custom fields are “hard” to add to a dashboard, because you have to link to CustomFieldValues based on a particular ID from CustomFieldDefinitions. Contact Atlas support and we can write those in for you.