



Aranda Query Manager

Aranda Query Manager AQM is a solution that allows you to manage, configure and design reports (dashboards and reports), based on consolidated information data from business processes, for a subsequent graphical visualization of the metrics required by the organization, facilitating the selection of relevant data and indicators, for analysis and intelligent business decision-making.



1. Installation and Access

Learn how to log in to the client console and identify application usage requirements.

2. AQM Operation

Learn how Aranda Query Manager and its components work.

3. Environment

Identify the AQM web interface with which you are going to interact in the different processes of administration, design and consultation of reports (Dashboards and Reports).

4. Roles

Learn about the roles defined in AQM and their scope in the management of the different processes of administration, design and consultation of reports (Dashboards and Reports).

¿Para quién es esta guía?

This guide is designed to familiarize the user with the elements necessary to interact with the functionality at a first level.

What is our documentation?

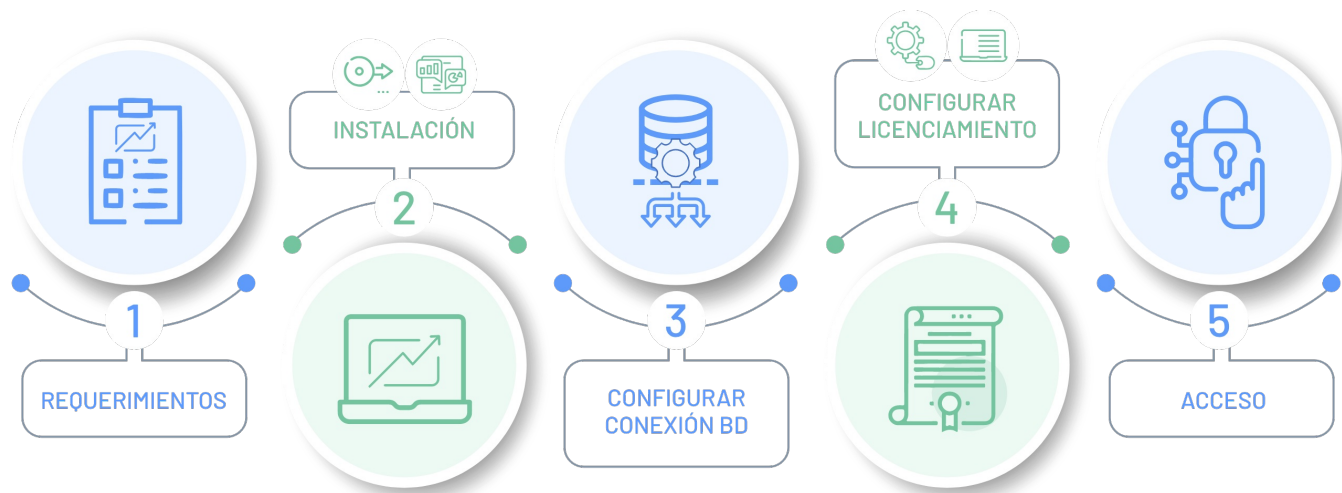
- Aranda Query Manager AQM Getting Started Guide (You are HERE)
- [User Manual Aranda Query Manager AQM ↗](#).

AQM Installation

Installation Path

Below is an overview of the software installation concepts and the different components used for the proper operation of Aranda Query Manager AQM.

The AQM installation process should consider the following stages:



⚠ Important: The Aranda Query Manager AQM web console installation process is only for OnPremise Environments.

1. Requirements

Validate the minimum hardware and software requirements for the installation and operation of Aranda Query Manager AQM.

For more information, please visit: [AQM ↗ Installation Requirements](#).

2. AQM Console Installation

In the installation process of the AQM Web console, different components are defined for the operation and management of reports (Dashboards and reports).

For more information consult [Installing the AQM ↔ Web Console](#)

3. Configuration of BD Connections

Configuration of the connection strings to the database of the sites and services, required for the operation of Arnada Query Manager AQM.

For more information, please visit: [Configuring AQM ↔ Services](#),

4. AQM License Configuration

Upload the license required for the operation of Aranda QUERY MANAGER AQM.

For more information, please visit: [AQM ↔ Licensing](#).

5. AQM Access

The authentication process to the AQM web console will be executed according to the role defined by the organization to develop the different tasks of management, consultation and design of reports (Dashboards and reports).

Login or access to the AQM web console must be done taking into account the authentication and password process described in the [Aranda Common ↔ Login module](#).

Requirements

Before starting the AQM installation process, make sure to uninstall any previous versions and check some additional points to ensure a correct installation.

The minimum installation ranges are as follows:

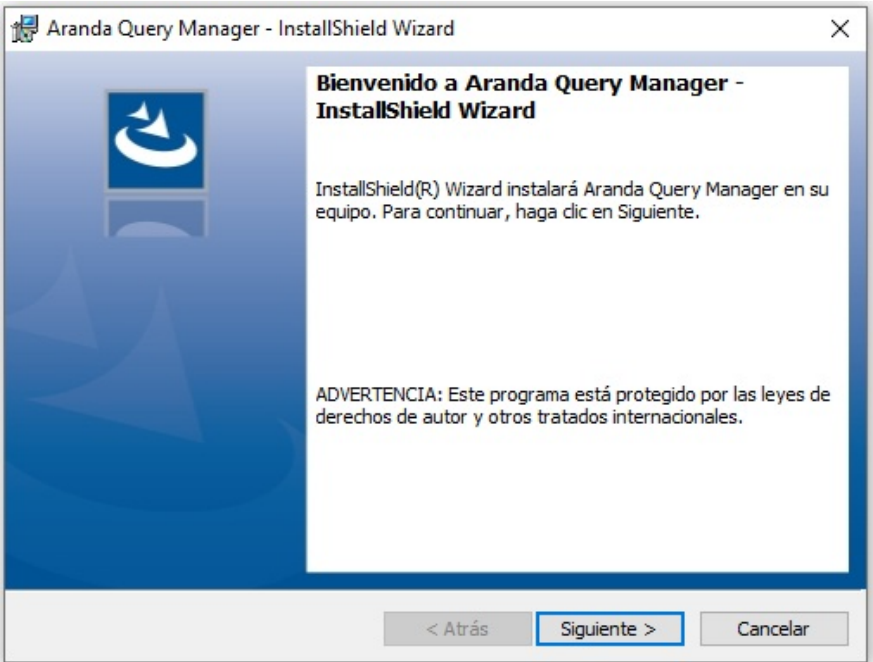
	IIS Application Server (5.0, 6.0- 10.0)	Database Server
Processor	Core i5	The processor will depend on the study of availability and required capacity of each installation. However, for Intel platform, Xeon is recommended
Memory	4 GB or higher	2 GB
Operating system	Windows Server 2012/ 2016/2019 Enterprise.Net Framework 4.8 ()	MS SQL 2014 or higher in Standard/Enterprise Datacenter version
Disk	1 GB	

▮ Note: versions 8 and 9 of Aranda Query Manager are supported and can coexist on the same server; however, it is necessary to verify additional points to ensure proper installation and operation.

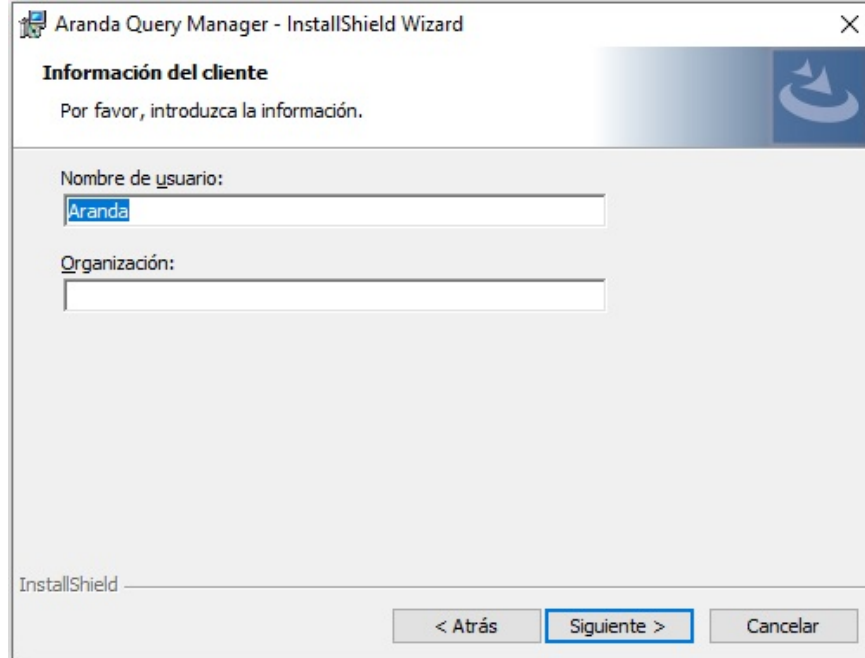
AQM Web Console Installation

⚠ Important: The Aranda Query Manager AQM web console installation process is only for OnPremise Environments.

1. Double-click on the installer file and you will see the welcome screen. Confirm the installation by clicking the Following.



2. In the window Customer Information, enter the user name, organization, and click Following.

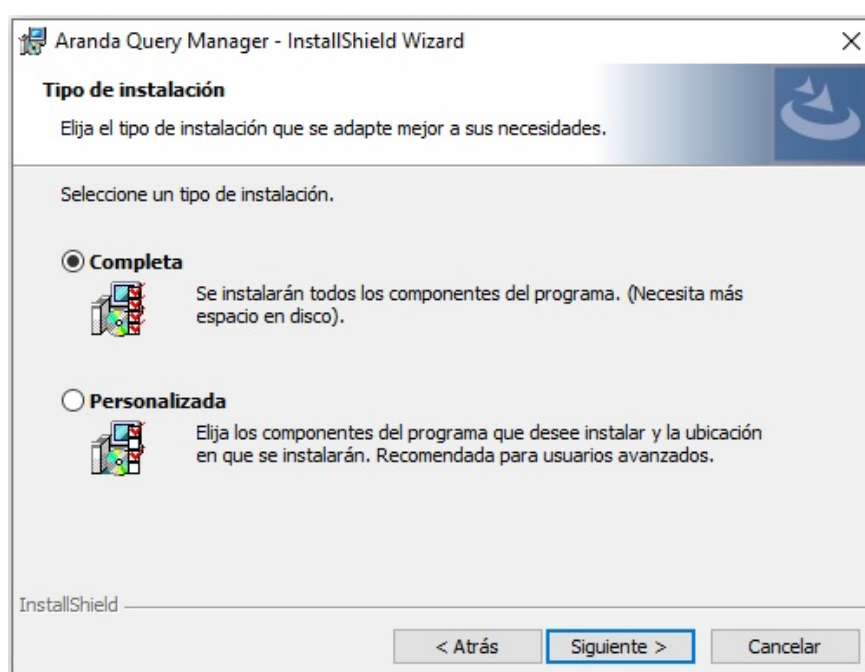


3. In the window Type of installation You can configure the following options:

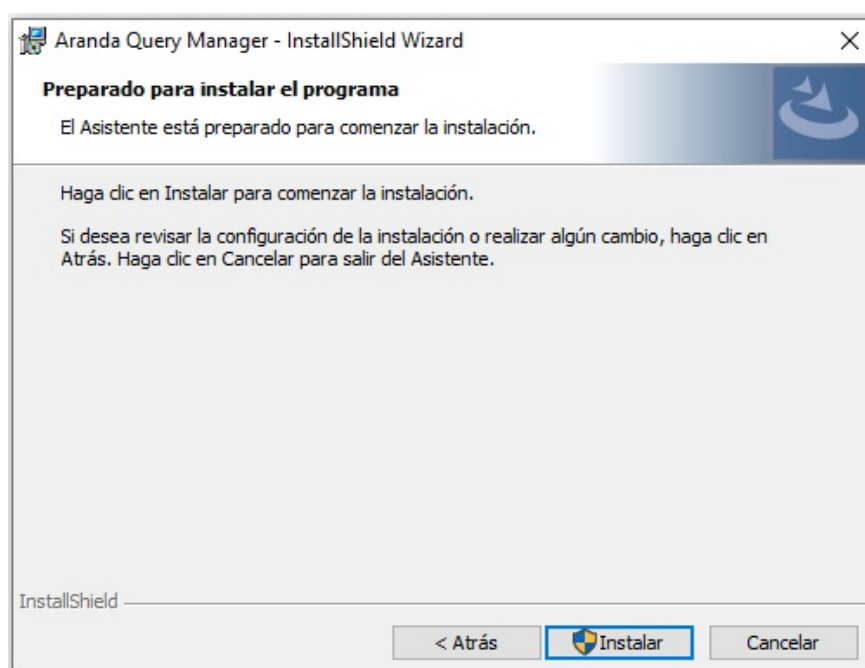
- Complete: All sites and services will be installed on the default routes.
- Custom: You will be able to select the sites or services you want to install.

📌 Note: By default, select the installation type Complete. In the case of separating the solution layers (Web, Application) on separate servers, select the Custom.

⚠ Important: If you are performing a custom installation, do not modify the installation path.



4. Setting the installation type, in the window Preparing to install the program, click Following and then on the Install.



5. When the installation process is finished, click the End.

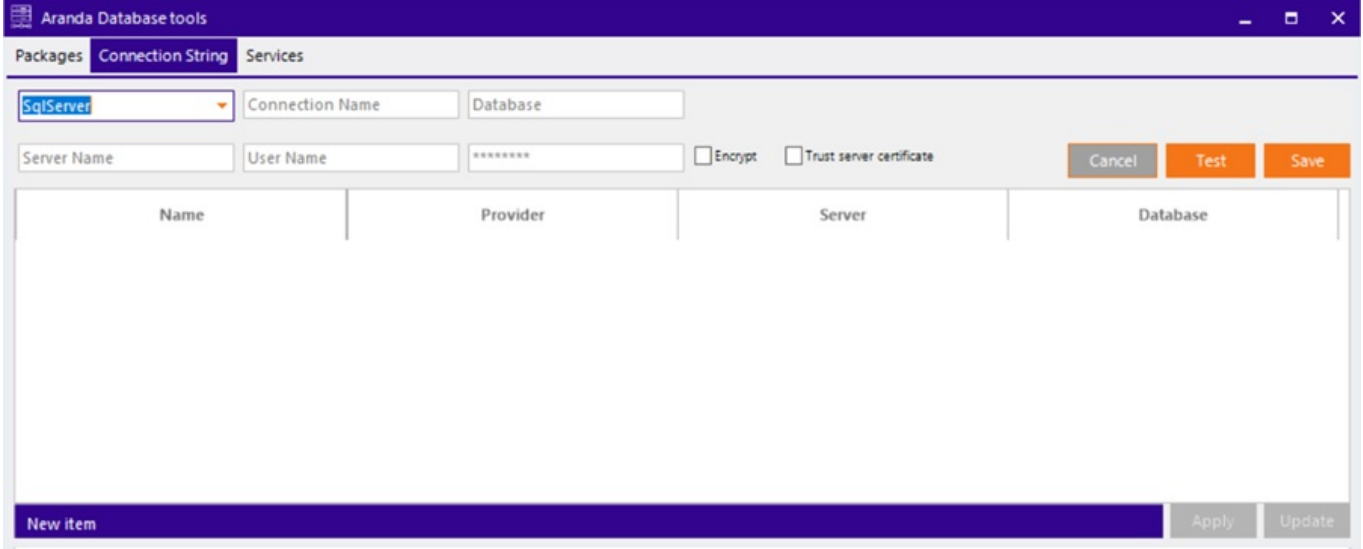
Common Services Configuration

⚠ Important: The Aranda Query Manager AQM web console installation process is only for OnPremise Environments.

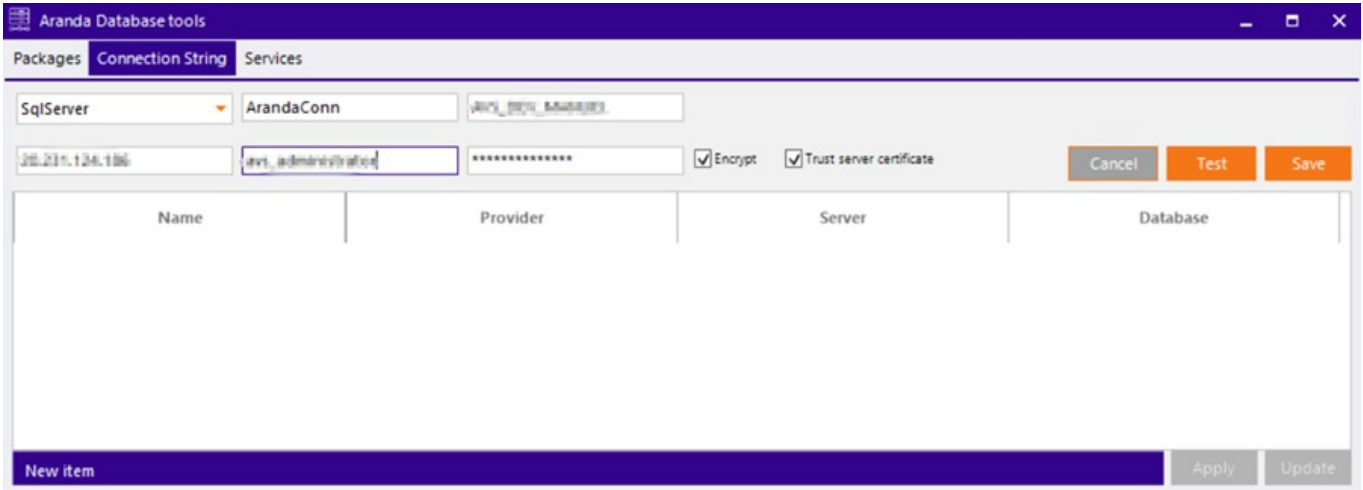
Once the installation of Aranda Query Manager, proceed to configure the connection strings to the database of the sites and services.

To configure the Common and Licensing services, it is done through the Aranda Database Tools v9. To do this:

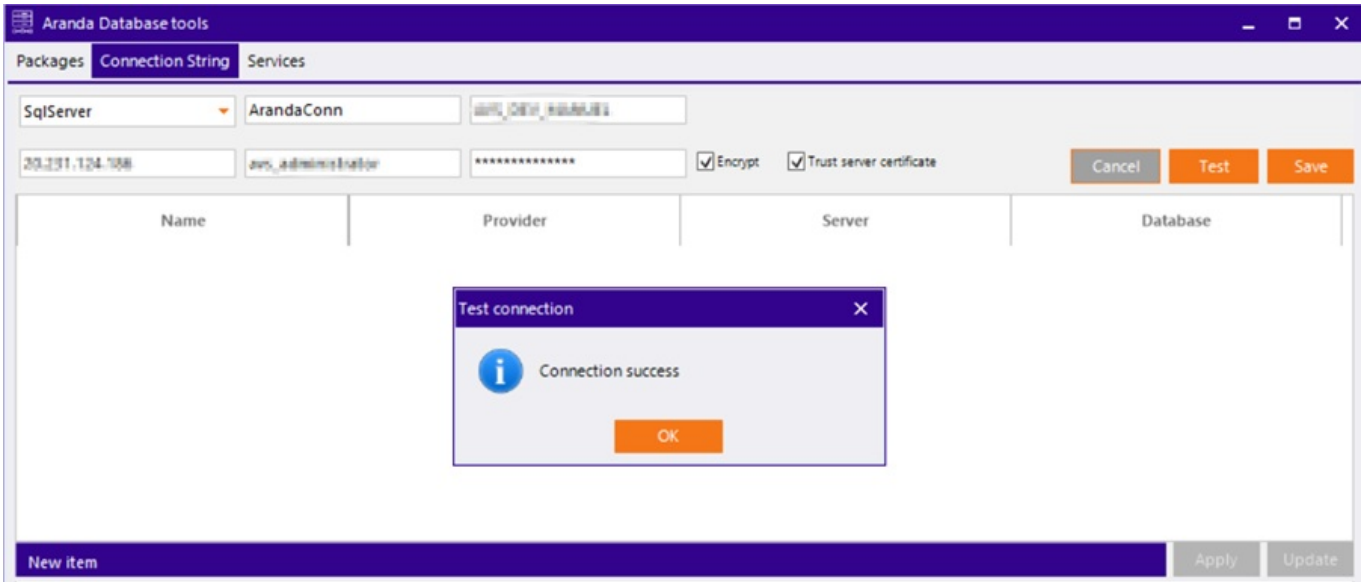
1. Run the module and click on the Connection String.



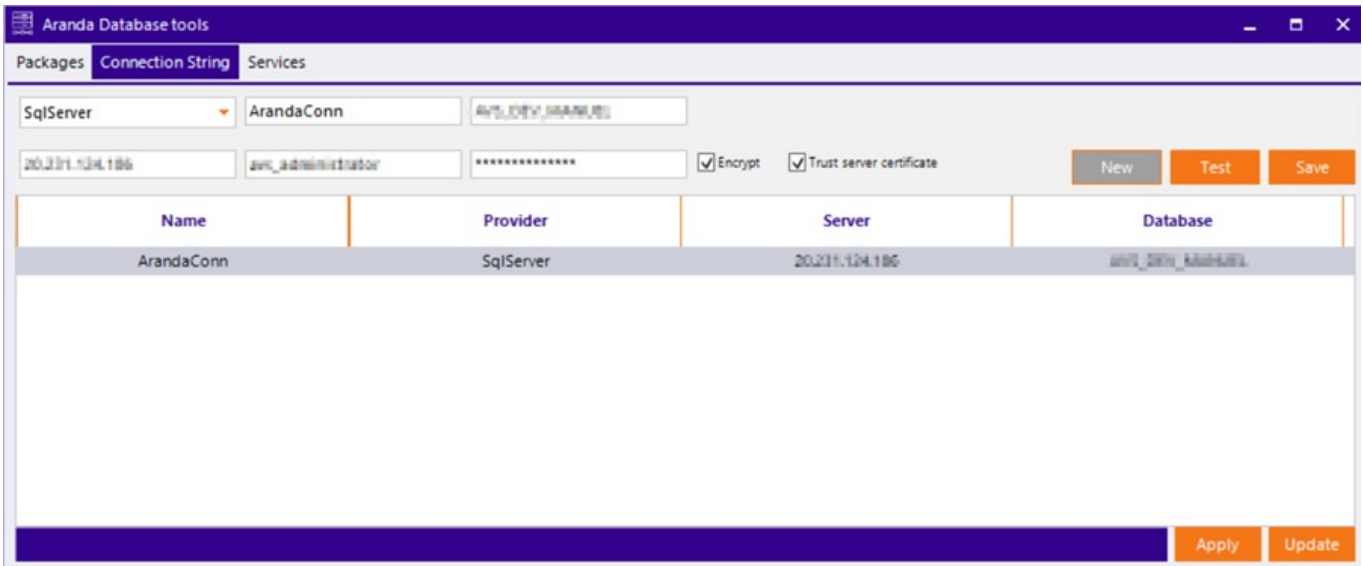
2. Fill in the requested data.
- Select the database engine (SQL Server).
 - Give it a name to identify the connection.
 - Record the connection data (database name, server name or IP address, and if required username and password).
 - In case the database port is different from the default port (1433 for SQL Server), the server must be written as servername:port (e.g. ARANDADBSERVER:5555)
 - By default, the “Encrypt” option should be checked to ensure that the connection between the solution and the database is encrypted.



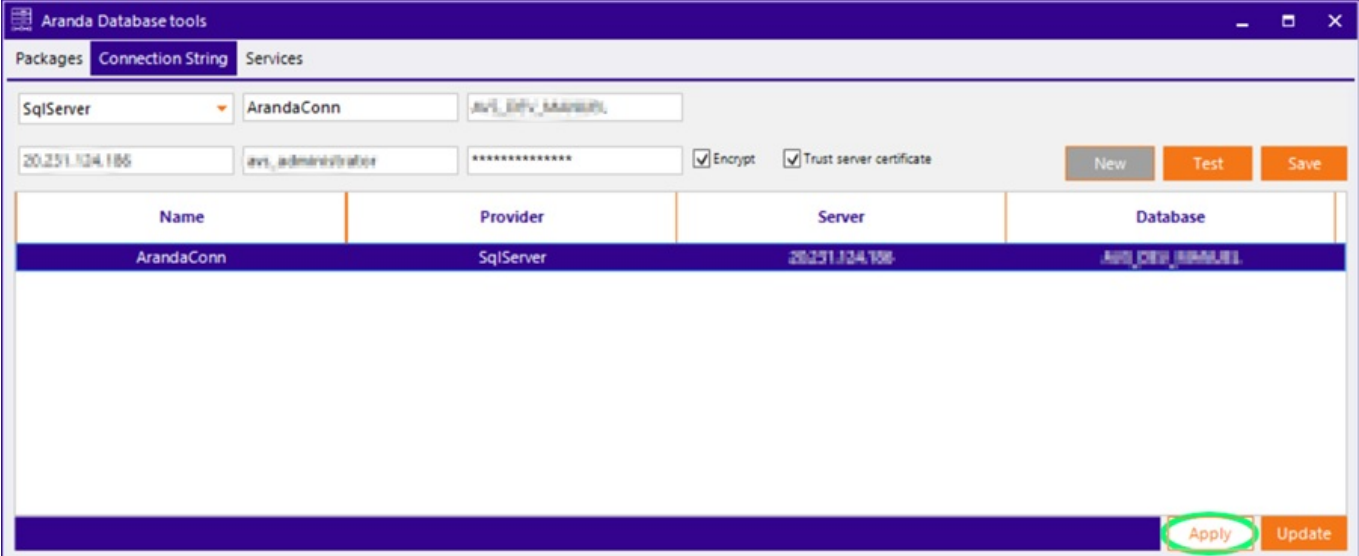
3. Click the Test to check the connection.



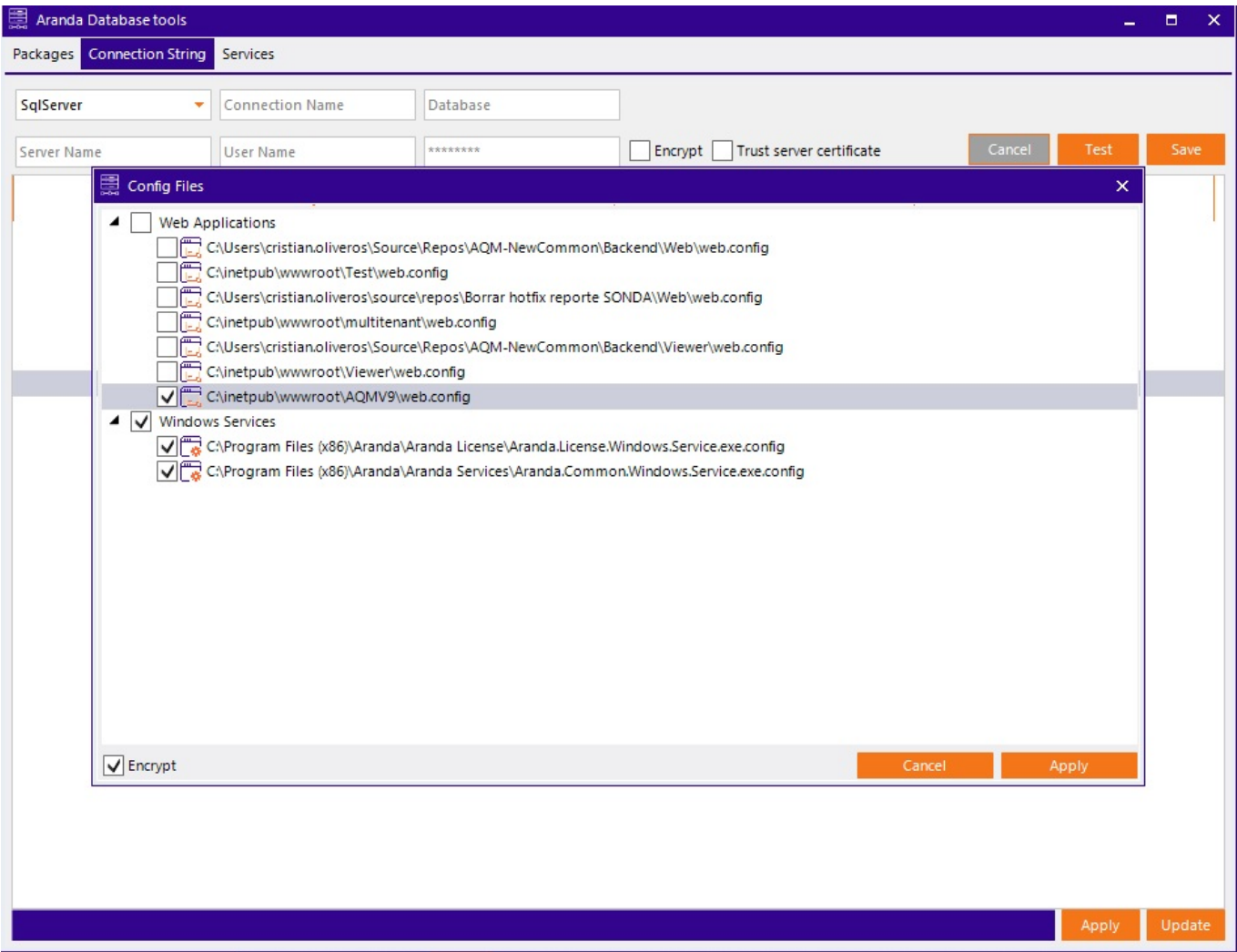
4. To finish click on the Save to save the connection.



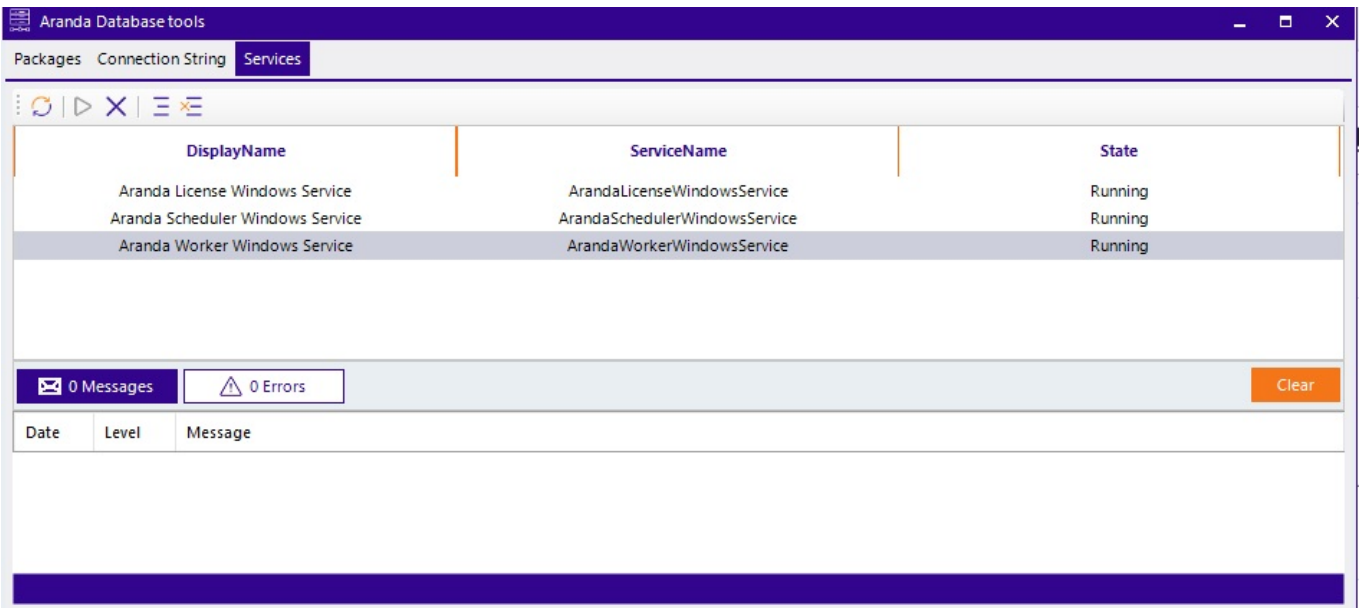
5. To apply connection strings to installed services, select the previously created connection and click the Apply.



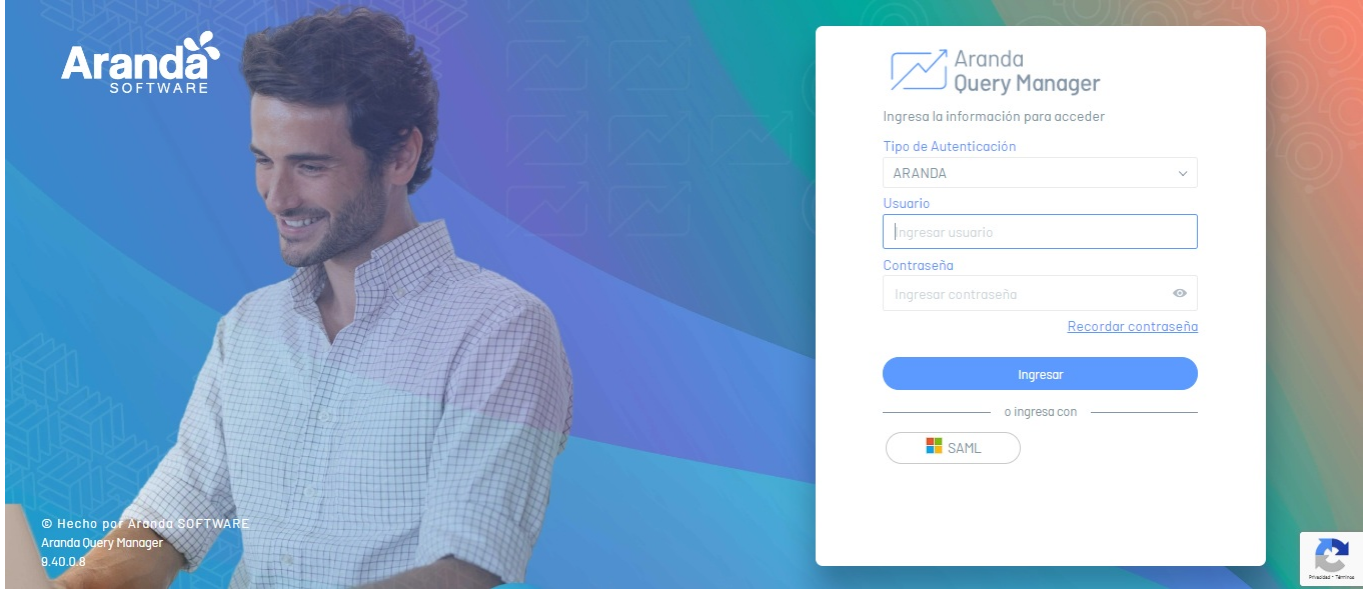
6. A window is enabled with the list of applications and services available on the server. 7. Select the appropriate services and click the Apply, If you want to encrypt the connection, check the box Encrypt in the lower-left corner. An alert message may be displayed because encryption is not supported for JSON files.



8. To finish, click on the Services and start all services.



9. Once the connection is established, you will be able to access the AQM website where you can start with the configuration of Aranda Query Manger through the following URL: HTTP://[server]/AQMv9/



AQM Operation

AQM Operation

The report management process and the tool’s configuration tasks are performed from the Query Manager Web console. From AQM’s web environment, an administrator or specialist processes the information that can be used to provide information on the product.

For the operation of Aranda Query Manager you must take into account the following components and their scope:



Database

The information from the report management is stored in a database, as well as all the configurations of the processes that relate to the reports.

Web Console

Through a web environment, the user, according to the established role, will be able to manage the different processes of administration, creation, editing, updating, exporting and viewing of reports (Dashboards and Reports).

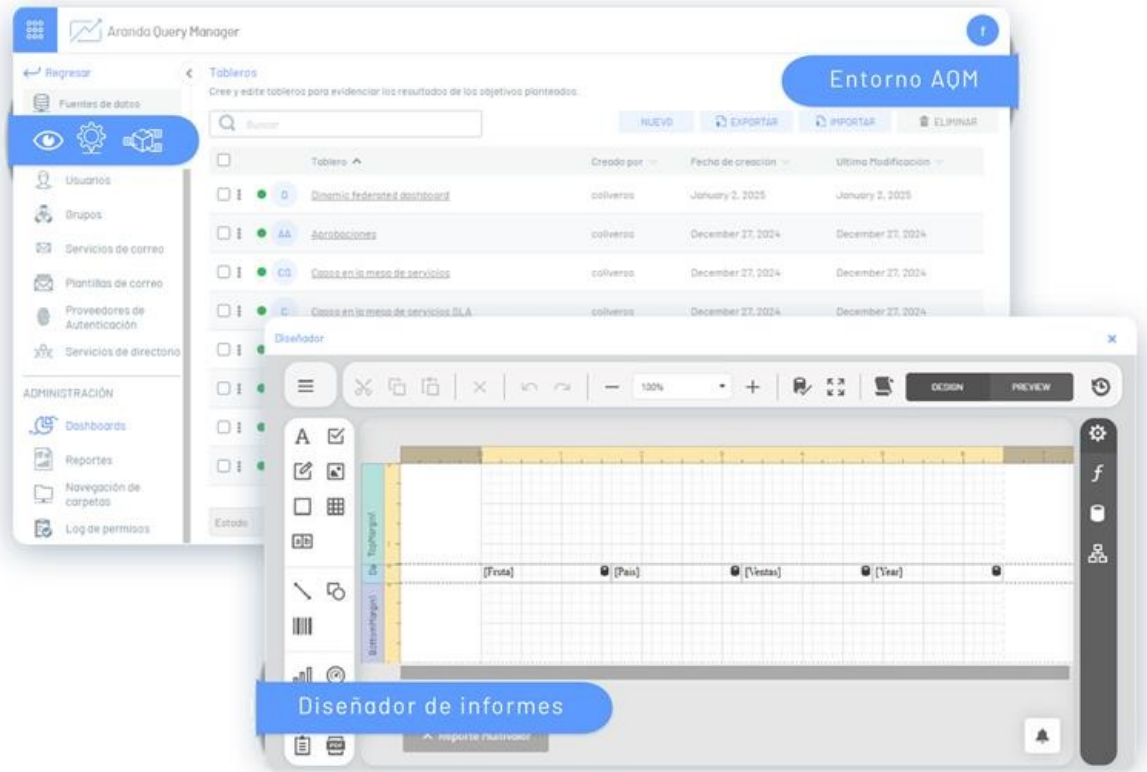
Reports

Reports correspond to dashboards and reports that enable different ways to consult information.

AQM Environment

AQM Environment

By installing Aranda Query Manager you will be able to access a work web environment where report management and design tasks are carried out as follows:



Web Console

The AQM web console unifies the tasks of viewing, configuring and managing reports (dashboards and reports). The web environment can be divided into three sections:

- The Main Menu in the AQM web console groups the different categories of AQM configuration, Traversal configuration and the main concepts of AQM Administration and Management.
For more information, please visit: [AQM ↪ Web Console Main Menu](#).
- In the Information View The related data is displayed in the main menu for consultation and access to the different report management tasks.
For more information, please visit: [AQM ↪ Web Console Information View](#).
- In the Detail View the administrative tasks (consultation, creation, editing and deletion, printing) of the management of AQM are developed and executed.

Report Designer (Dashboards and Reports)

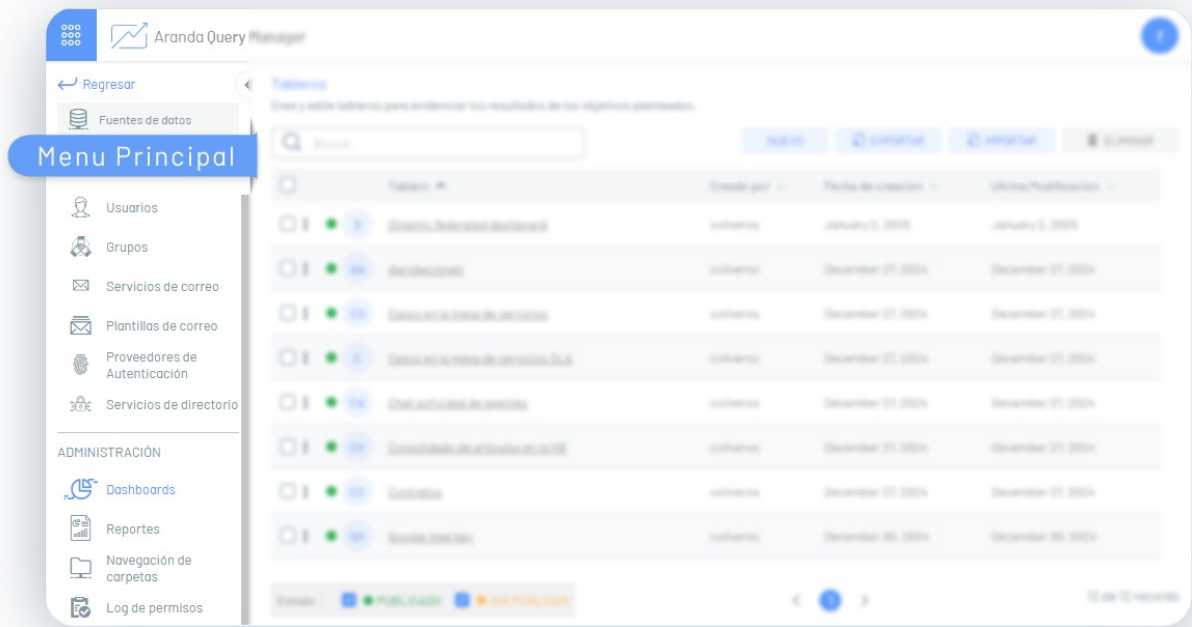
The AQM web console has a designer for the creation of reports (dashboards and reports), a tool used to graphically model queries based on data sources, relating pertinent information (tables, values), configuring parameters, filtering data, to present metrics and indicators required by the organization.

For more information, please visit: [AQM ↪ Board Designer](#).

For more information, please visit: [AQM ↪ Report Designer](#).

Web Console/Main Menu

1. After logging in, log in to the AQM web console with the role set (administrator, specialist, users).
2. From the Item of SETUP/DISPLAY of AQM, when you select a module from the main menu, the information view is enabled with the related management or query information.



The AQM main menu for the CONFIGURATION Item, you'll find sections such as: Settings, General Settings, and Administration.

Main Menu/AQM Settings

Modules	Description	icon
Global Settings	This module configures the cache and access paths, as appropriate.	
Data Sources	In this configuration module, the database connections used during the management of Reports (Dashboards and Reports) are established.	

Main Menu/General Settings

Common Modules	Description	icon
Users	In this Aranda Common configuration module, you manage users and define AQM roles.	
Mail Server	In this Aranda Common configuration module, mail servers are managed.	
Directory Services	In this configuration module of Aranda Common, you manage the directory services that can be used by AQM.	
External Authentication	This Aranda Common configuration module manages external authentication providers.	

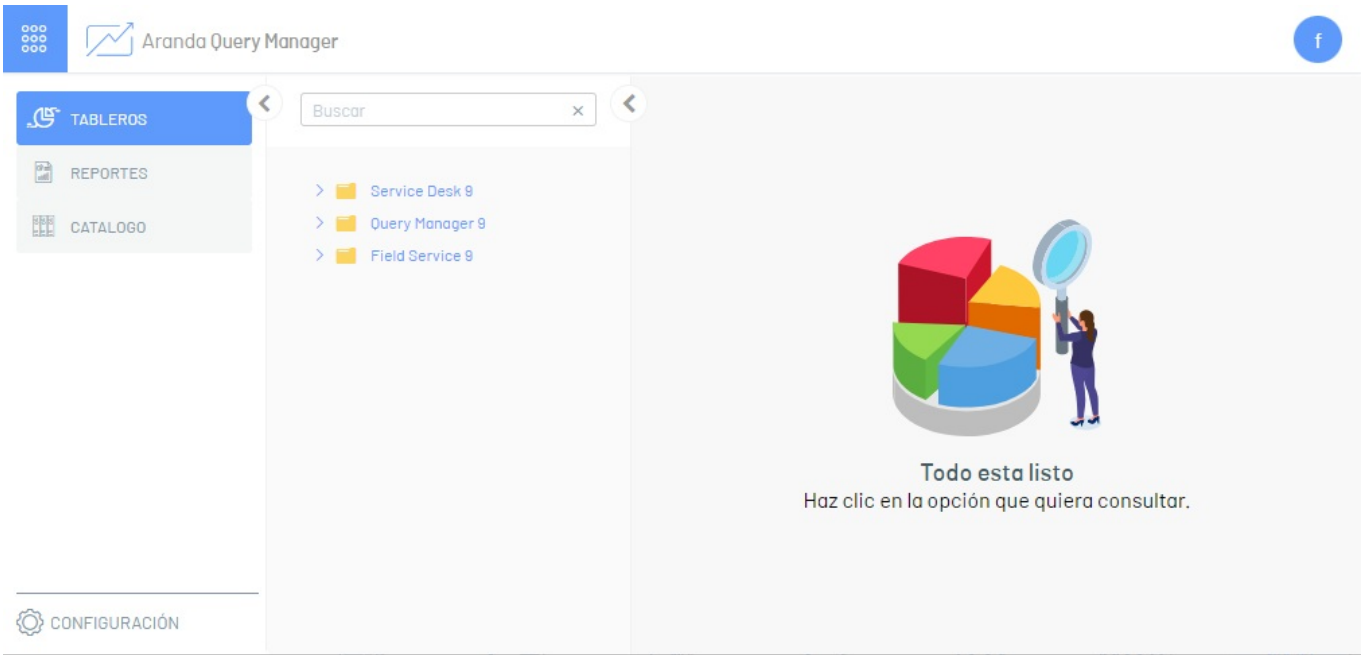
Main Menu/Administration

Modules	Description	icon
Boards	In this module, the processes of managing Boards (create, edit, delete, export, import) are carried out in AQM.	
Reports	In this module, the processes of managing Reports (create, edit, delete, export, import) are carried out in AQM.	
Folder Navigation	In this management module, you can create, organize folders, and assign access levels to users.	
Permissions Log	In this management module you can consult the compliance of the configured activities.	

The AQM main menu for the VISUALIZATION Item, groups the following modules:

Main Menu/Display

Modules	Description	icon
View Dashboards	In this module you will be able to view and consult the reports (Dashboards) generated.	
View Reports	In this module you will be able to view and consult the generated reports (Reports) and additionally define actions such as scheduling, publishing or sending reports.	
View Folders	In this module you will be able to view and consult the catalog of predefined reports (Dashboards and Reports).	

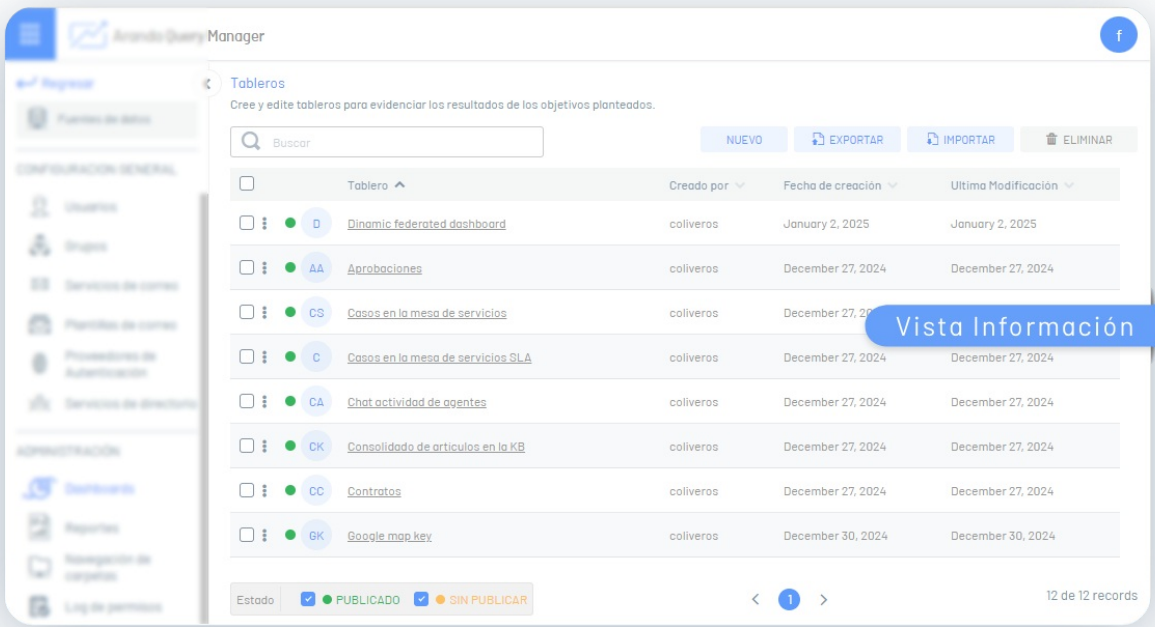


Web Console/Information View and Detail View

Visualize Environment

1. After logging in, log in to the product’s web console with the role set (admin, specialist, users).
2. In the main menu of the Aranda product, from the CONFIGURATION/ADMINISTRATION, select a module (global settings, data sources, dashboard, reports, folder navigation, and permissions log)and doing so enables the information view with the related data.

▮ Example: In the following image you can see the configuration section of the Aranda Query Manager product, with the Dashboards option defined.

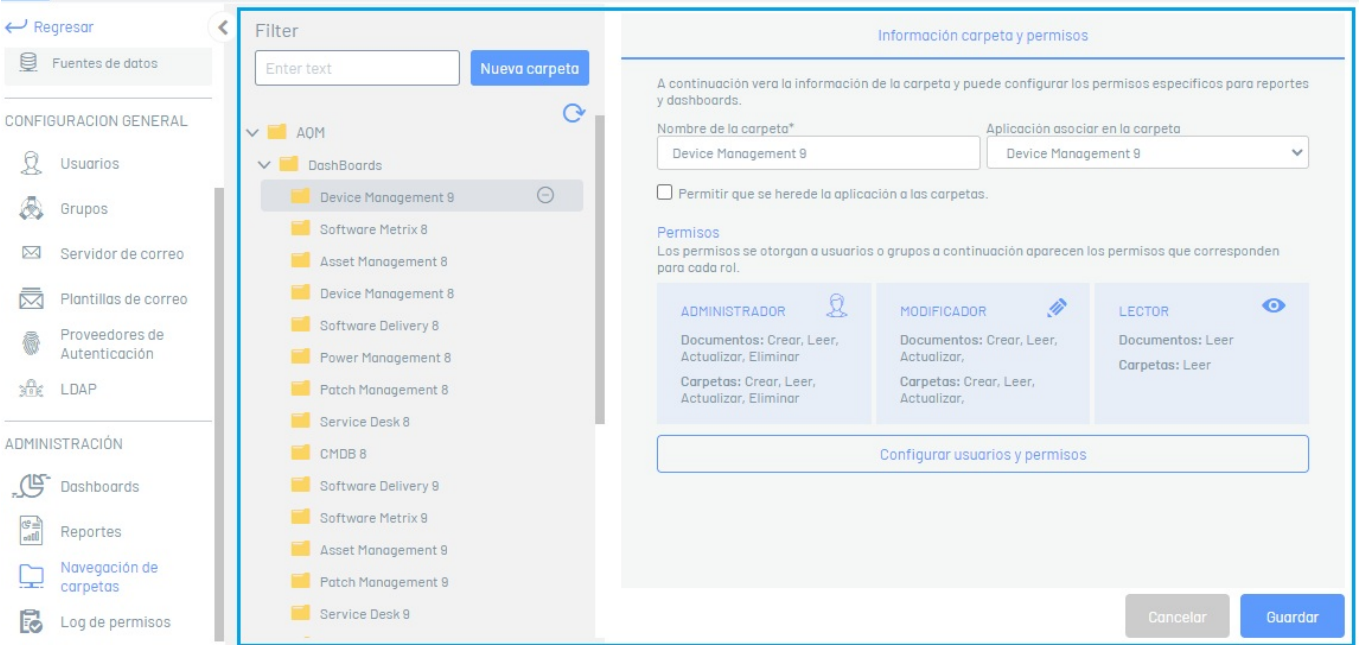
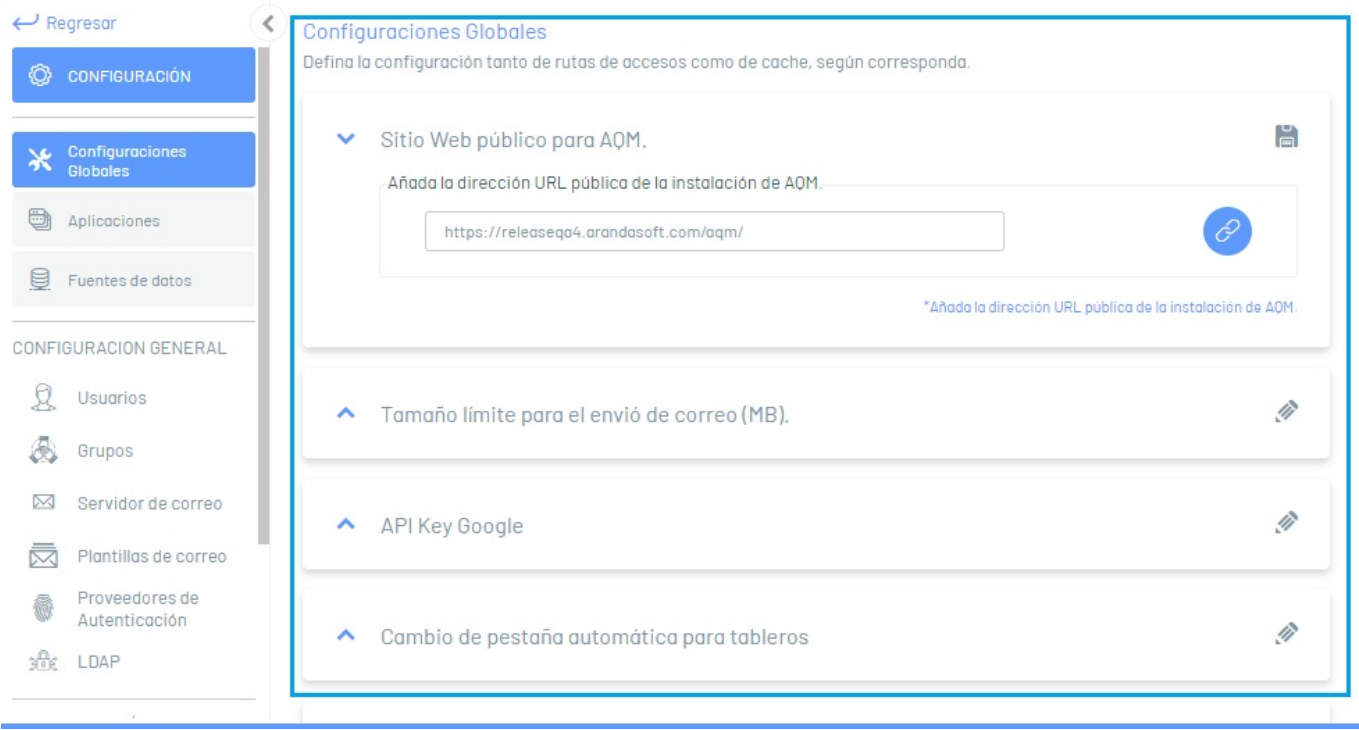


Info View/ Item CONFIGURATION/ADMINISTRATION

3. In the information view, the configuration and/or administration modules (Data Sources, Dashboards, Reports and Permissions Log) share transversal actions that complement management tasks such as:

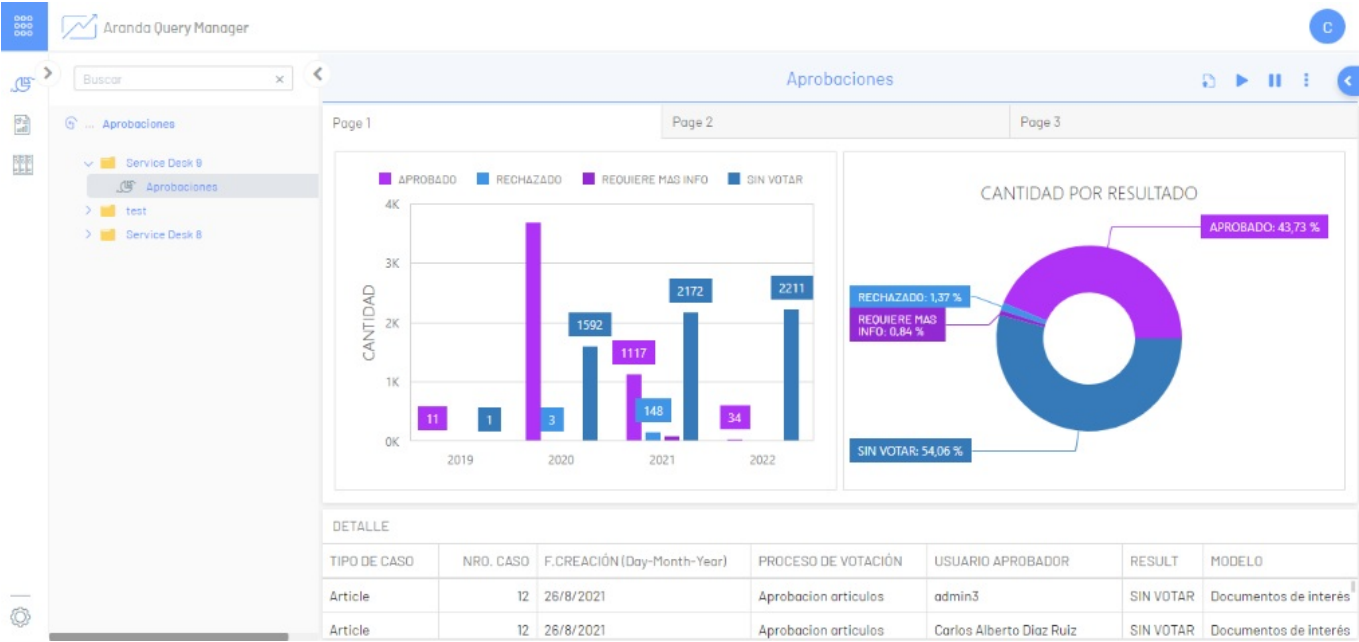
Management Tasks	Description	Section/AQM
Search	It allows you to search for the records created according to the selected module or concept. You can search by the name of the defined fields of each associated concept. Buscar por todos los conceptos	

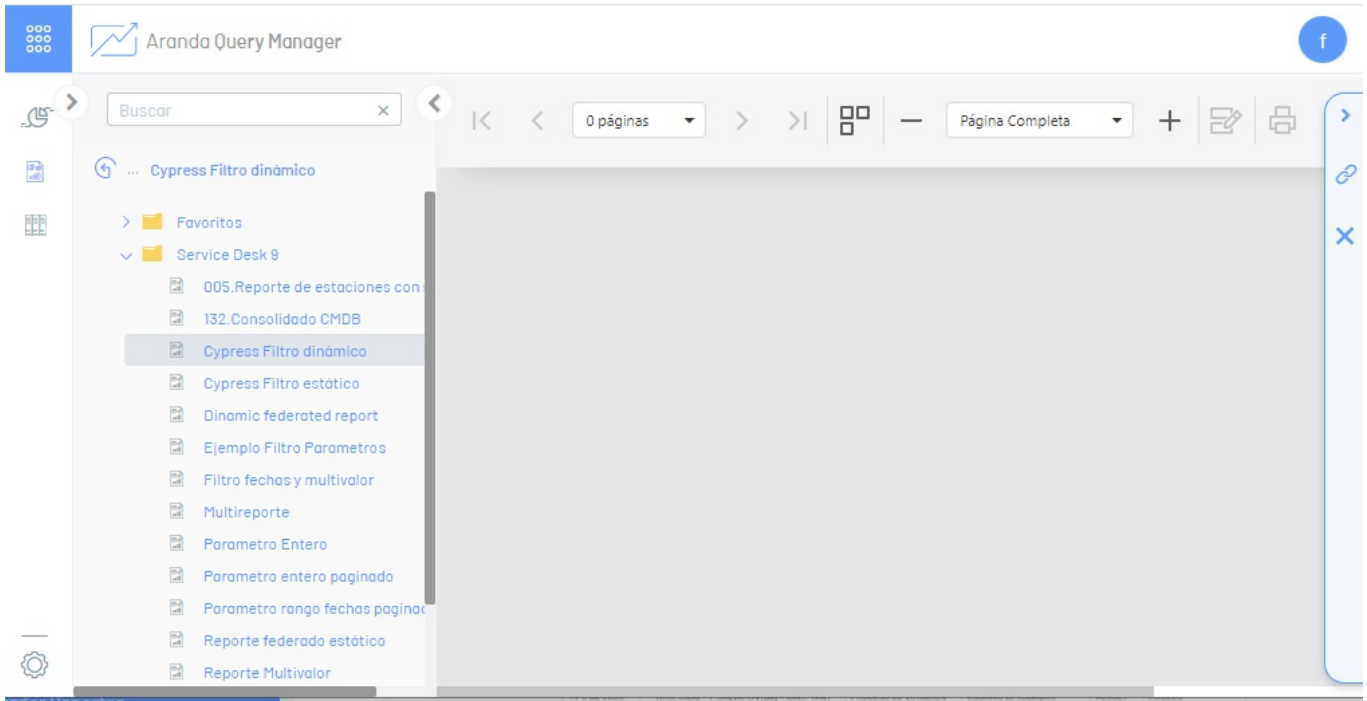
📌 Note: The information view of the configuration and/or administration modules (Global Settings and Folder Browsing) presents a different environment:



Info View/ Item VISUALIZATION

4. In the information view for the VISUALIZATION modules (DASHBOARDS, REPORTS and CATALOG) they share transversal actions that complement management tasks such as:





Management
Tasks

Description

Section/AQM

Allows you to search for records created within a folder structure for the selected module or concept

The search result presents a list of matches.

Casos en la mesa de servici...

Casos en la mesa de servicios

Tablero de casos por franja...

[Ver mas resultados](#)



Search

It allows you to view the folders by module and select a record of the created concept. The related information can be displayed graphically according to the configuration

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Aprobaciones

Service Desk 9

Aprobaciones

Casos en la mesa de servicios

Tablero de casos por franja de tie

Tareas de la mesa de servicios

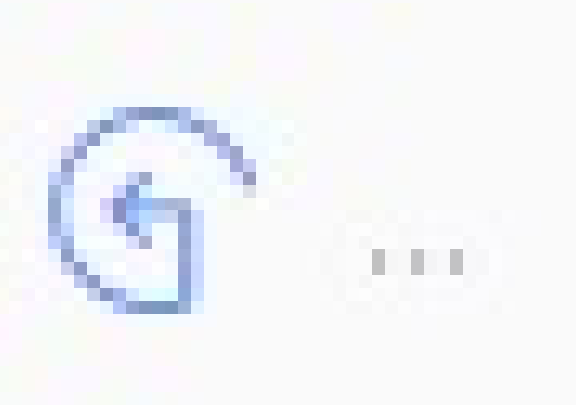
Query Manager 9

Field Service 9



Folder
Structure

The action of Return



It is triggered when the query is started in the folder structure and reflects the record or folder where it is located. Clicking on the action will take you back to a preview.

The activated buttons define actions to be performed on selected records in the folder structure.

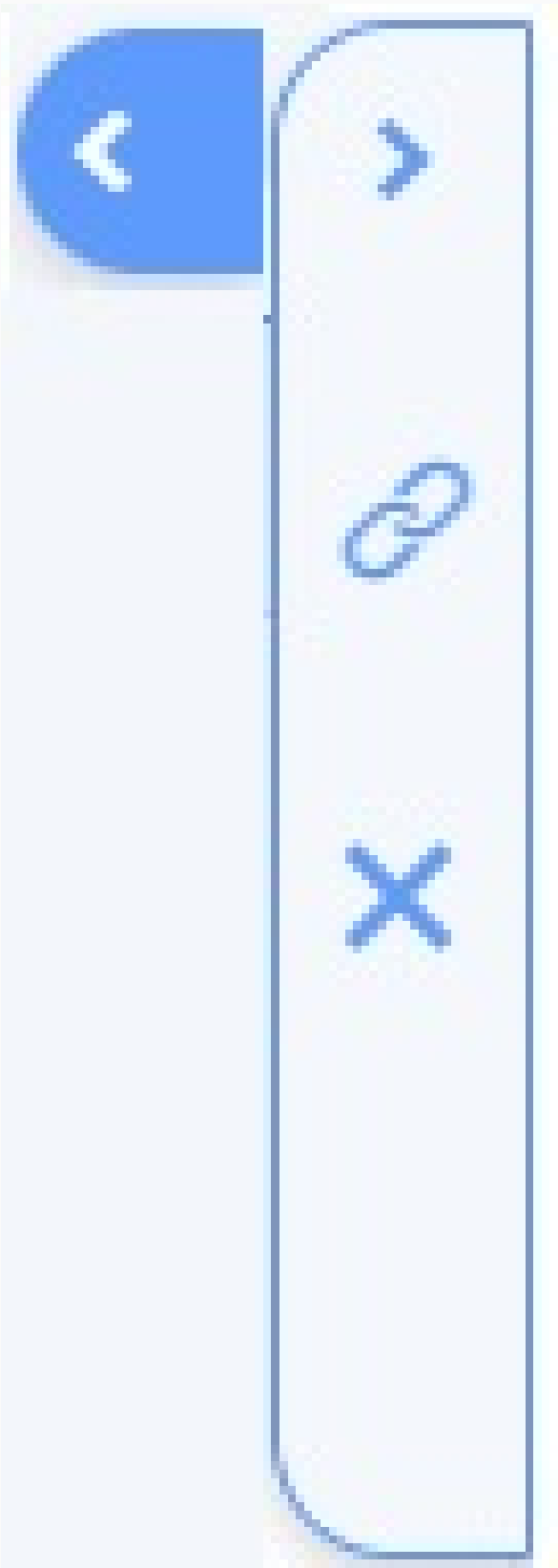


Stock tab



- The available actions are:
- Export records.
 - Parameters per concept if they have been previously configured.
 - Automatic tab playback and pause.
 - List of last records consulted.

Additional options define actions to be performed on selected records in the folder structure.



Additional



- The available actions are:
- Copy Query Link.
 - Close the query for the selected record

Selecting a folder in the query enables actions to be carried out such as:



Share card



- Publication of the record.
 - Registration programming.
 - Sending registration.
 - Favorite Folder
- Selecting a query record enables a toolbar where you can perform actions such as:
- Bar

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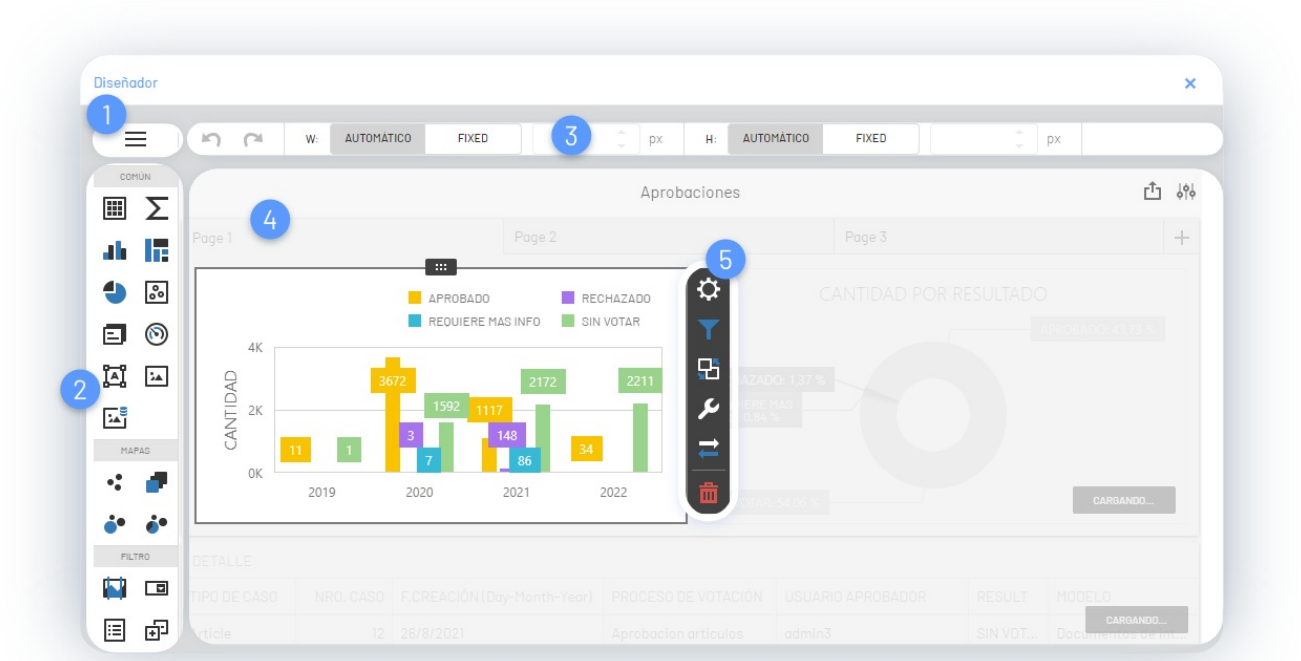


This view presents the detailed information of the reporting concepts in AQM. Example: Details of data entities, dashboards, reports, among others.

1. To access the dashboard designer, log in to the AQM web console, in the Administration from the main menu, select the Boards. In the information view, select a record from the list of existing boards, and in the detail view, click the Modify Dashboard.

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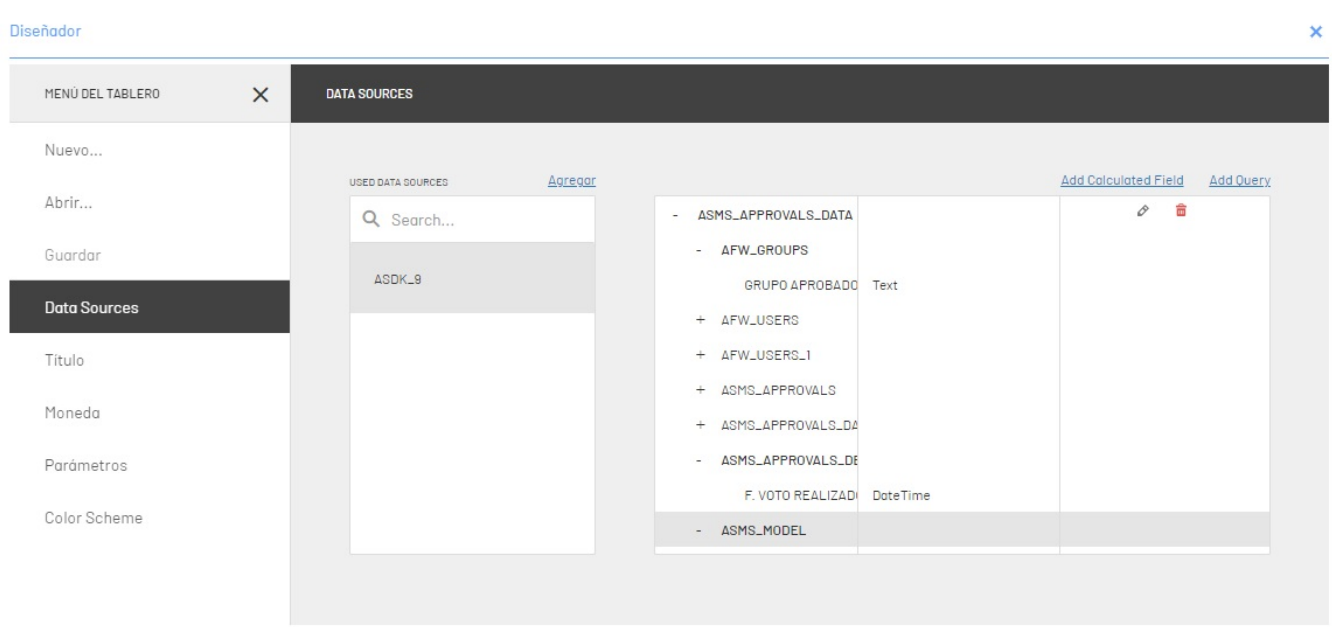
2. The dashboard designer is enabled where you can customize the information generated. The most representative elements of the board designer and their initial scope are described below.



1. Dashboard Menu

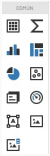
This option allows you to manage (open, create, save) dashboards; You can define board titles and colors. The most prominent feature of this menu is the management of Data Sources and the configuration of parameters.

Data Source: With this option you can add or access a data fund, create a query using the stored data.

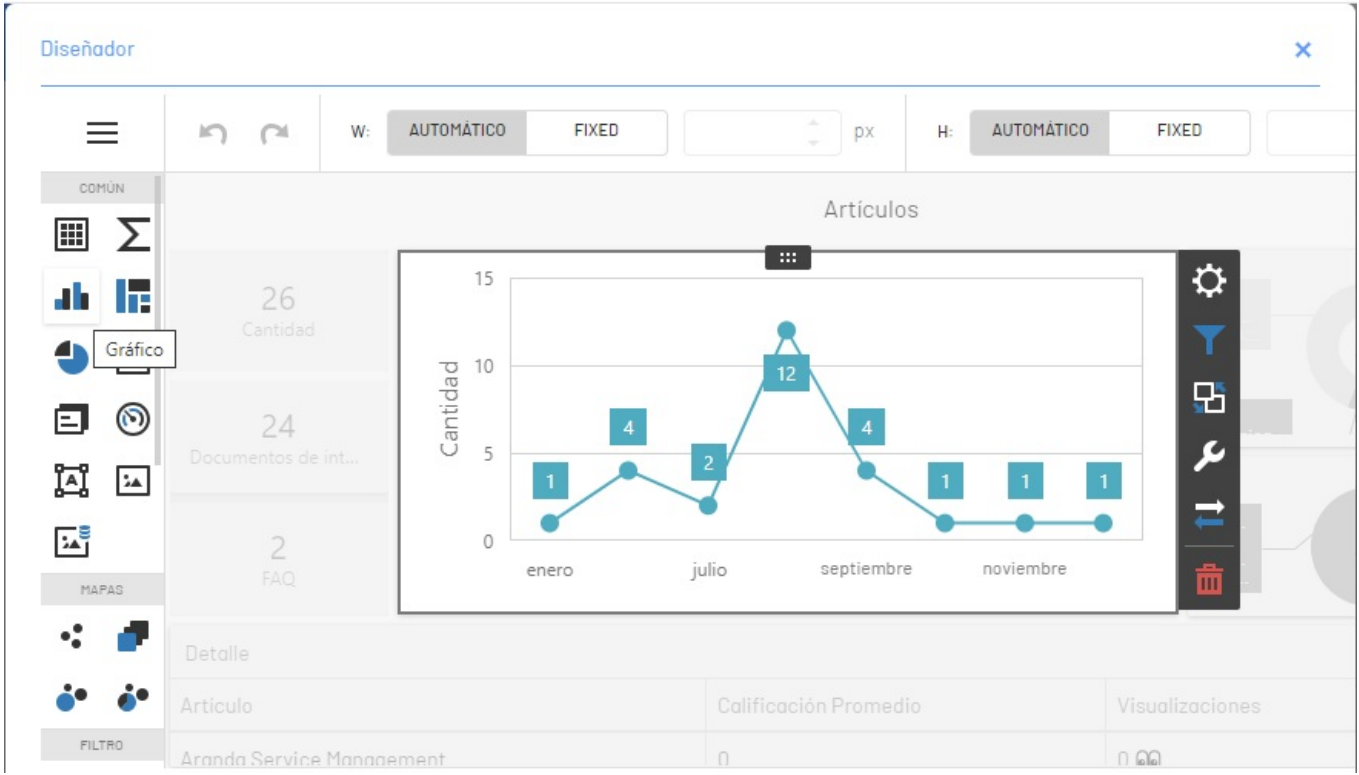


2. Toolbar

The toolbar offers different options for the layout of the board where they stand out

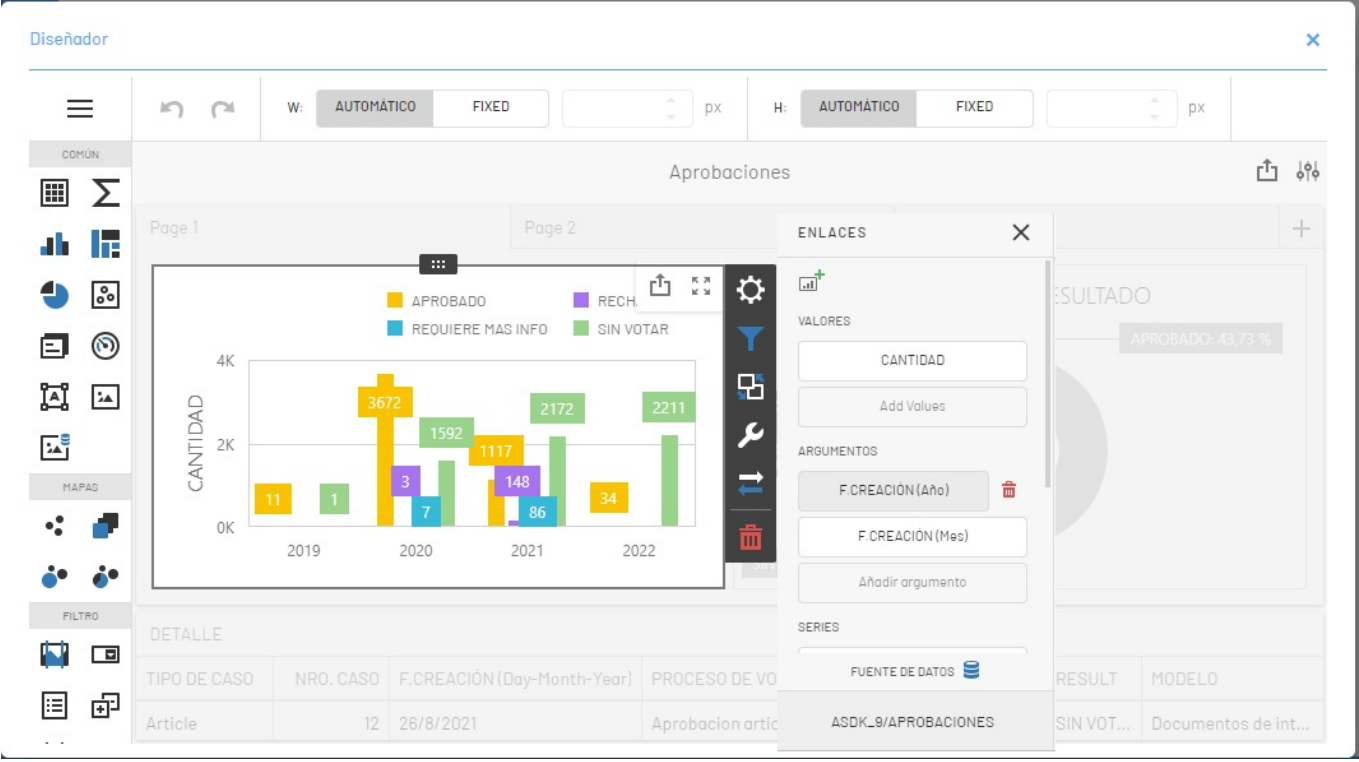
Groups	Items	Image
Common	This grouping brings together design items such as: Tab-Cube-Graph, TreeMap, Pies, Scatter Charts, Tabs, Gauge, Text Box, and Bound Image.	
Maps	This grouping brings together design items that present the information using georeferencing elements such as maps: Geo Point Map, Choropeth Map, Bubble Map, Cake Map.	
Filter	This grouping brings together design items to filter information, such as: Range filter, combo box, list box, tree view, and data filter.	
Design	This grouping brings together design items such as group and tab container	
Customized	This grouping brings together customized design items such as: Online map, webpage, kpi number, donut, kpi icon, circular gauge, linear gauge, bar gauge, just gauge, kpi icon bar, extreme chart, funnel chart	

Selecting a design item from the tool group will see it reflected in the workspace, where you can customize it using the options in the Item Menu.



3. Item Menu of Boards

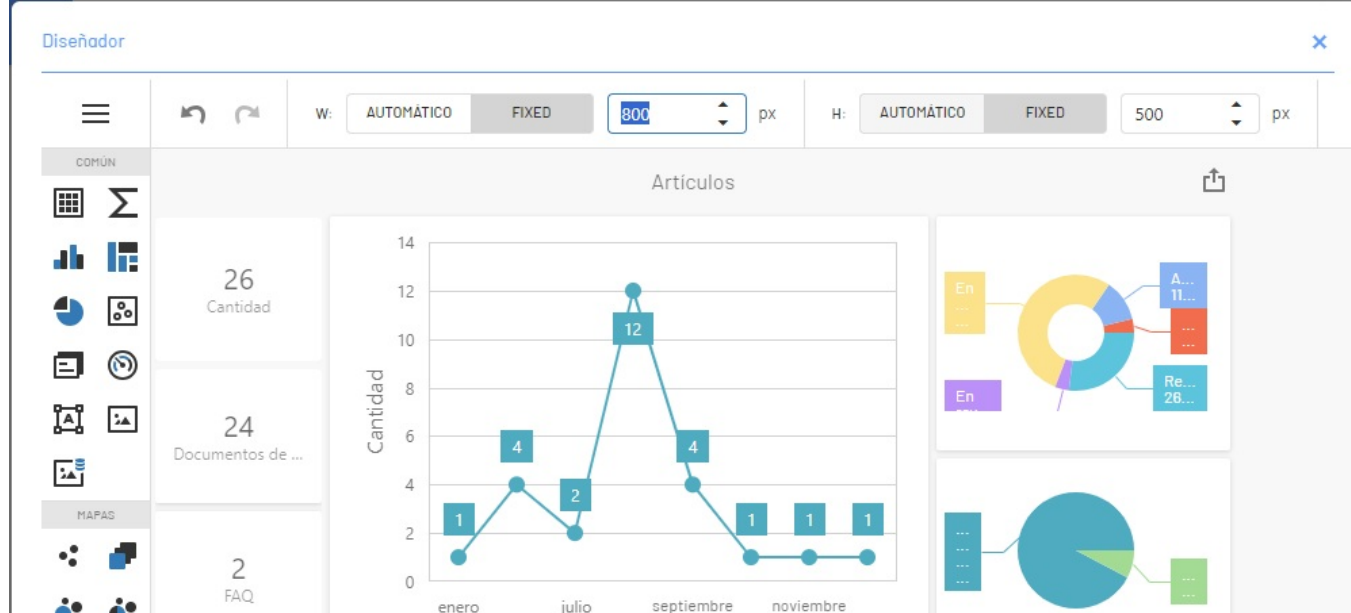
The Item menu presents the design tools for customizing a dashboard and configuring different features and relating information for later viewing. The Item menu groups different buttons that define actions such as:



Button	Name	Description
	Move	This option allows you to customize the design of the item, enlarging or restoring the size of the board in the workspace.
	Links	This option allows you to create and modify the links and relationships with the data sources of the item of the selected board.
	Filters	This option allows you to apply filters to an item on the board.
	Interactivity	This option contains settings affected by interaction between multiple items on the board.
	Options	It allows you to define and configure common characteristics of the dashboard. Settings such as legend, format, indicators, colors, among others.
	Convert to	This option allows you to convert or duplicate the current board to items of the common grouping, such as grid, tokens, indicators; as well as items from other groups such as maps or filters.
	Eliminate	This option removes the item from the dashboard from the designer's workspace.

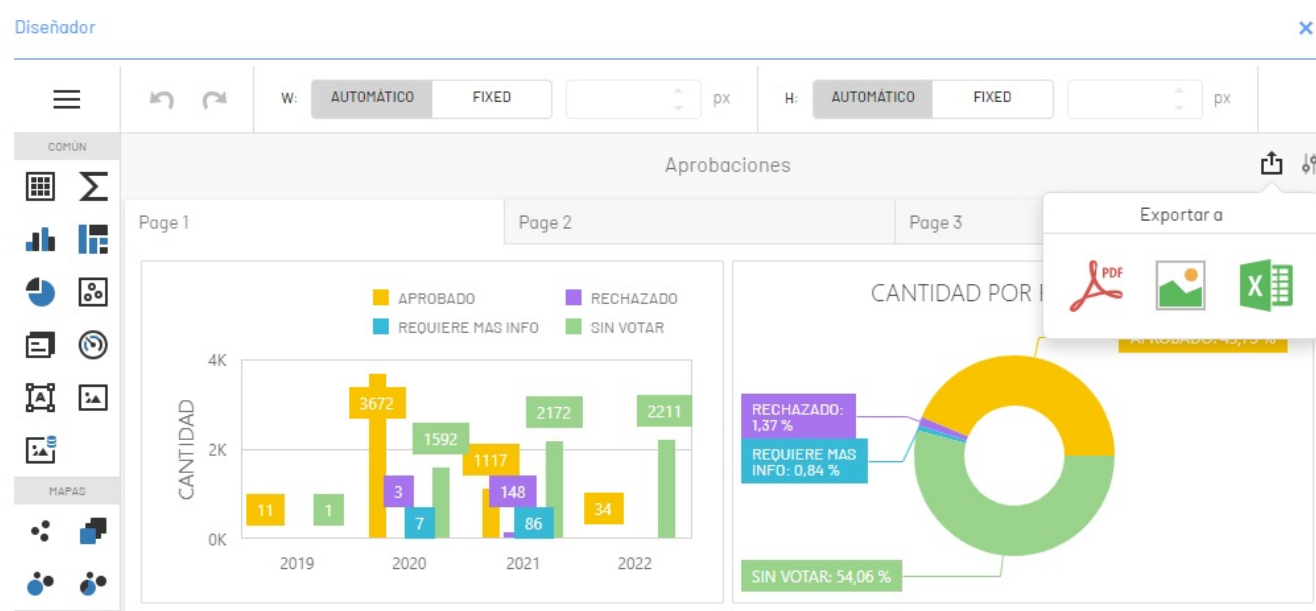
4. Designer Toolbar

The Designer Toolbar allows you to customize the display of boards with respect to their size.



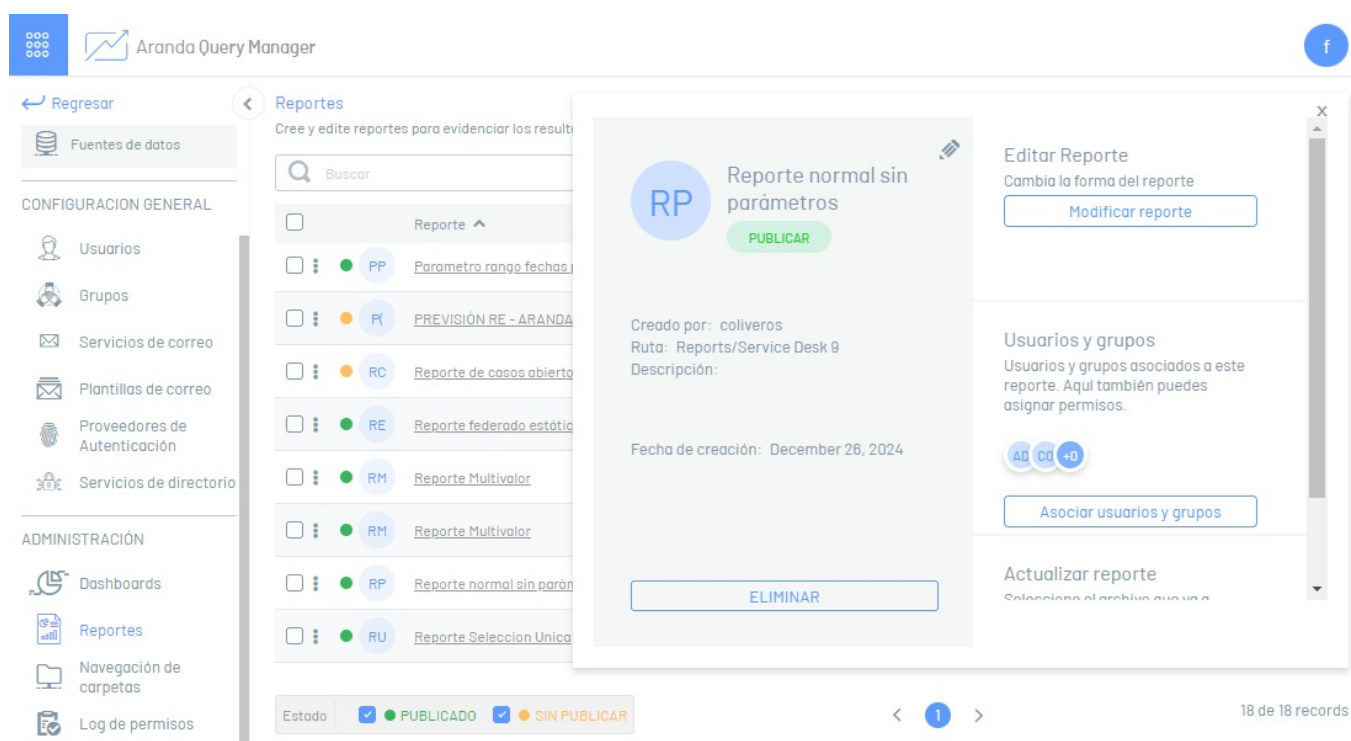
5. Work Area

It is the workspace where the necessary elements are added, configured and designed to build a graphic proposal of a board.

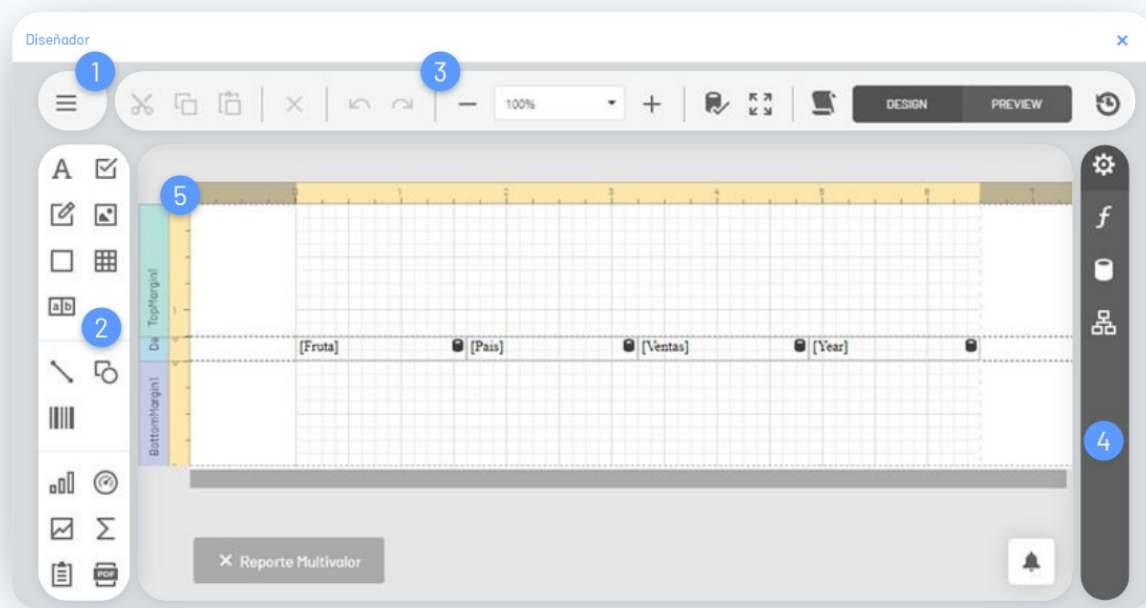


Report Designer

1. To access the dashboard designer, log in to the AQM web console, in the Administration from the main menu, select the Reports. In the information view, select a record from the list of existing reports, and in the detail view, click the Modify Report.



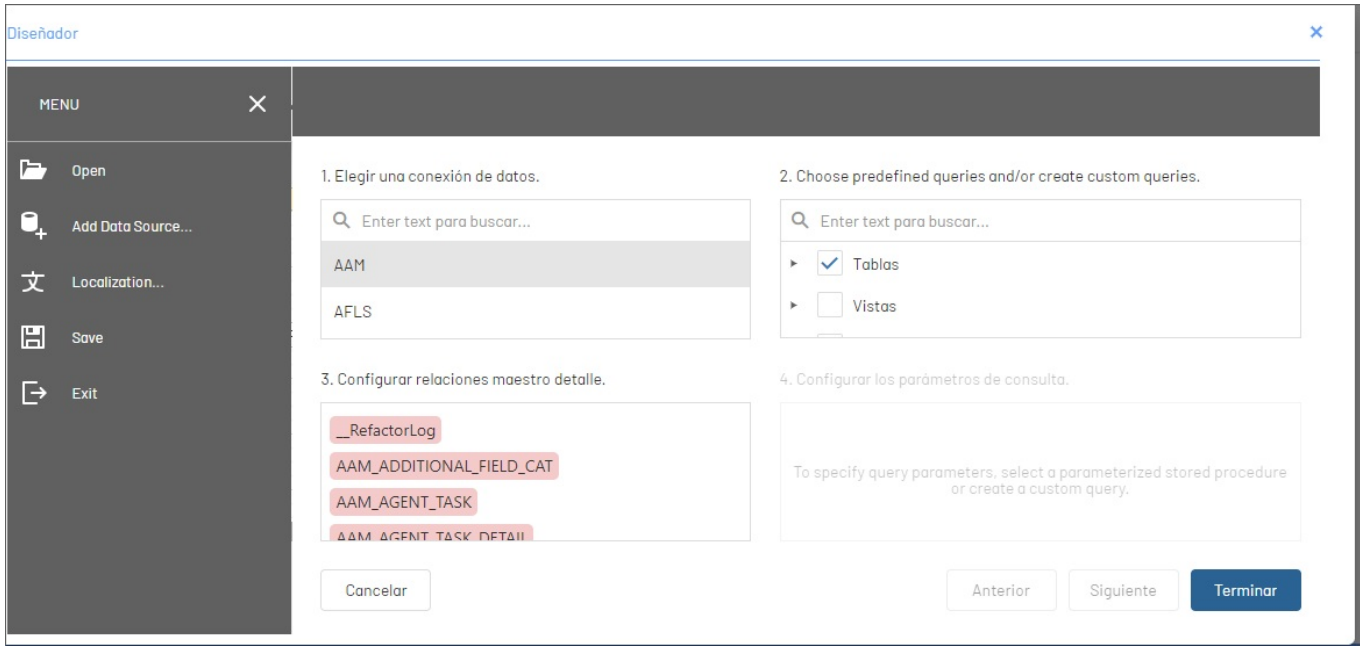
2. The report designer is enabled where you can customize the information generated. The following describes the most representative elements of the report designer and their initial scope.



1. Report Menu

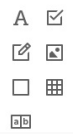
This option allows you to manage (open, save) the reports. You can customize the language of the report presentation. The most prominent feature of this menu is the management of Data Sources.

Add Data Sources: This option allows you to query or aggregate the information according to the source of the data. When selecting a record from the data source, choose a predefined query, define the master detail relationships, and query parameters.

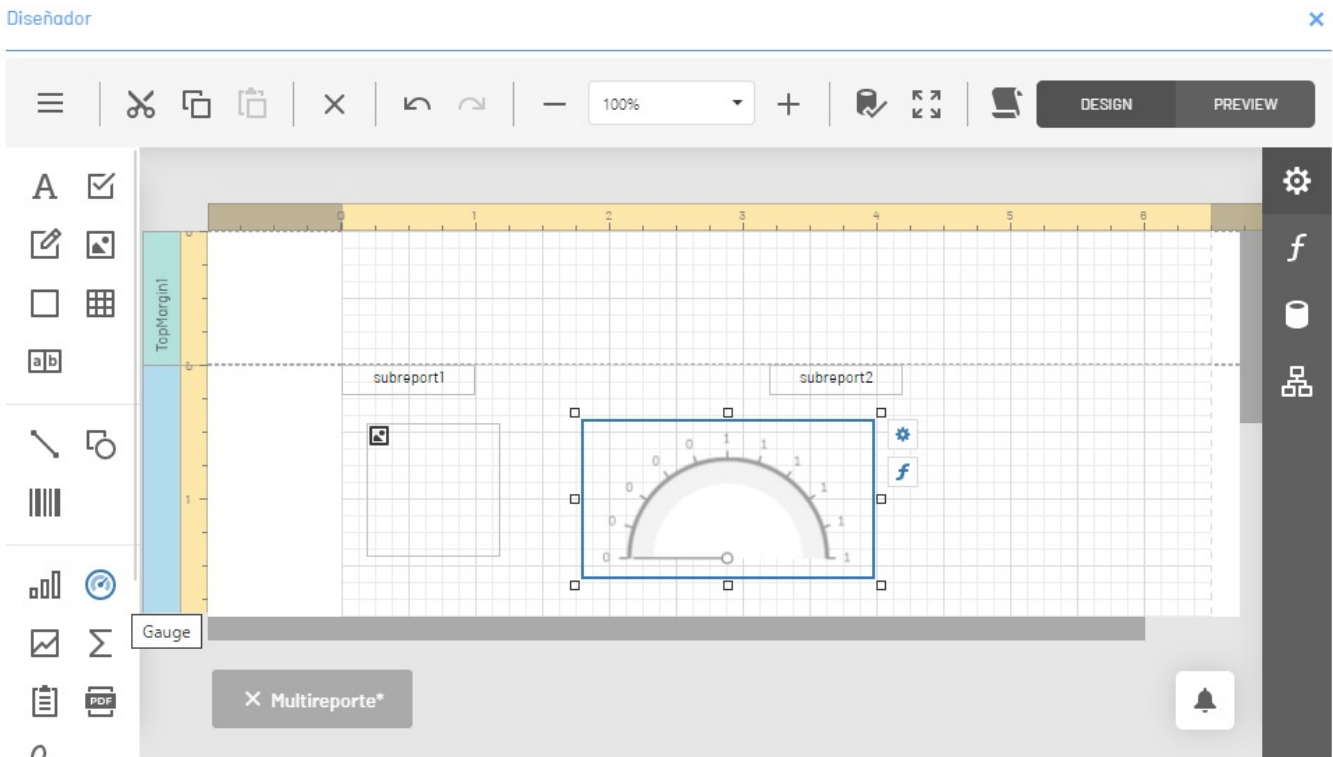


2. Toolbar

The toolbar offers different controls to include in the report layout.

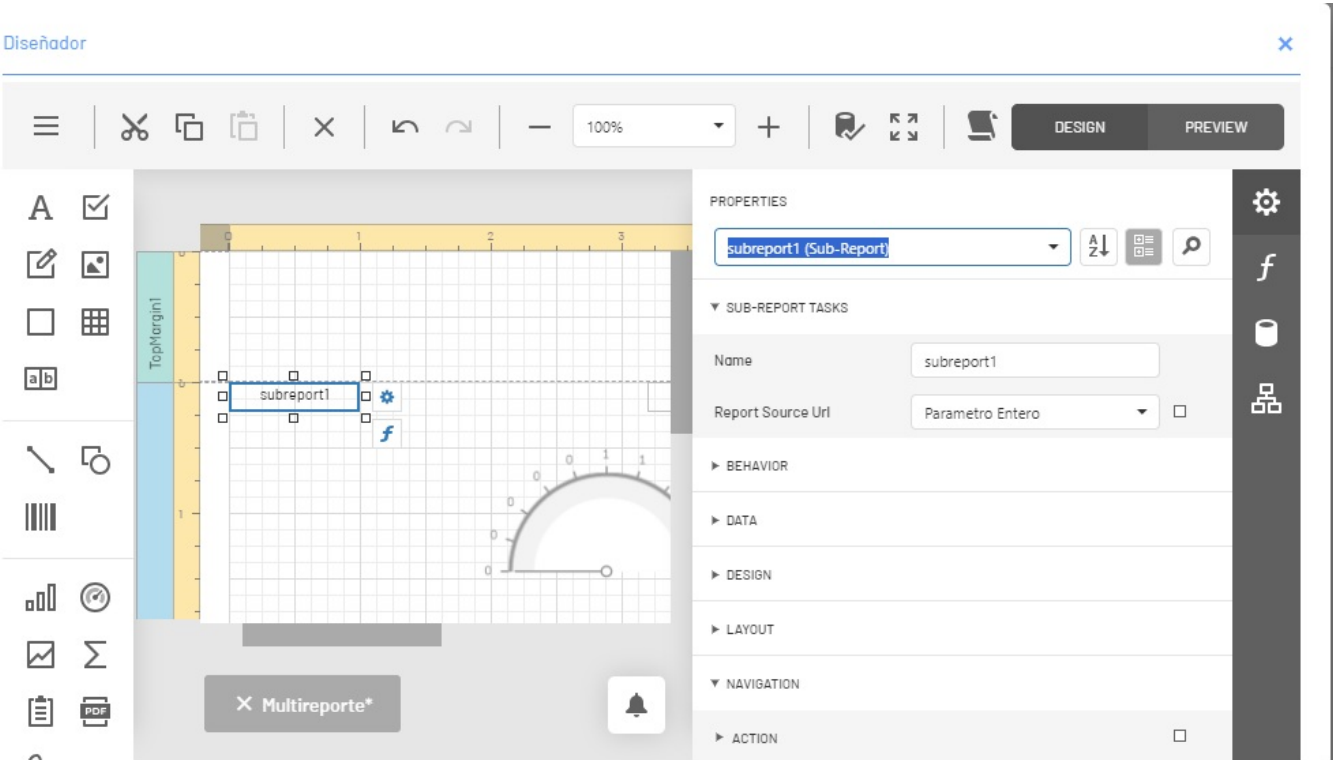
Controls	Items	Image
Common	This grouping brings together layout controls such as: Labels, check box, rich text, image box, panel, table, and combo characters.	
Additional	This grouping brings together design controls such as: Line, Shape, Barcode.	
Independent Data Source	This grouping brings together design controls such as: Table, indicators, minigraph, cross-tab, sub-report, PDF container, PDF signature.	
Design and Auxiliary Content	This grouping brings together layout controls such as: Content Table, Page Info, Page Break, Cross-Band, and Cross-Band Box.	

Selecting a design item from the tool group will see it reflected in the workspace, where you can customize and design the report.



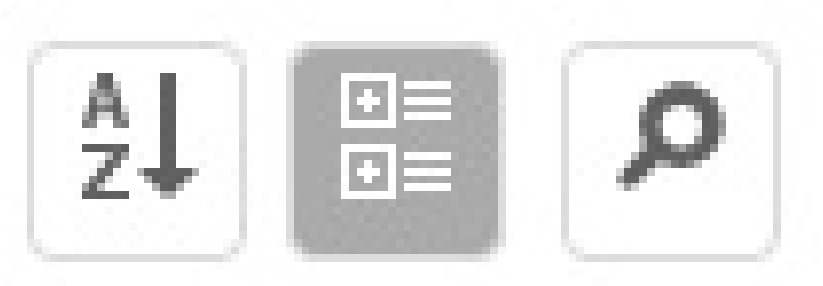
3. Side Panel

After selecting an element from the report design area (band, data from a table, toolbar control), you can access the side panel where you will find design tools to customize the report and configure different features and relate information for later viewing. The Side Panel groups different options that define actions such as:

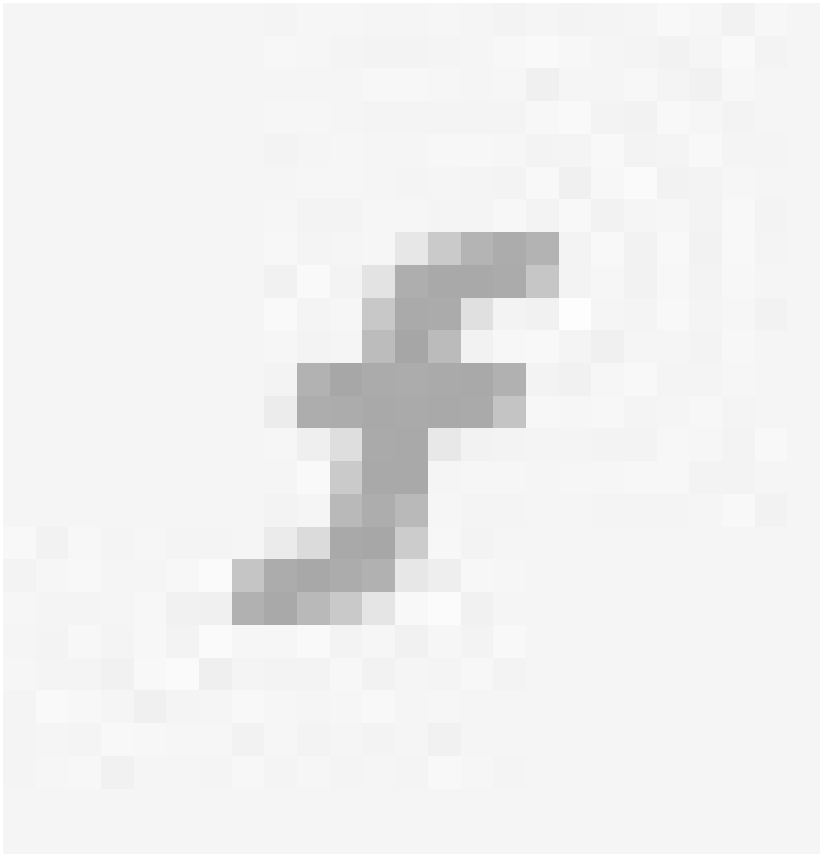


Button	Name	Description
	Properties	This option allows you to customize properties of report controls such as layout, dimensions, styles, editing options, font, padding, scripts, summary, size, text.
	Expressions	This option allows you to assign expressions to various properties of report items. Expressions are evaluated at runtime before a document is generated. This panel option will be visible if expression bindings are enabled.
	Fields	The Field List presents the schema of the report's data sources, and you can manage the report's data sources and parameters, add calculated fields, and create linked report controls.
	Reports Explorer	This item allows you to know the structure and configuration of the report.

▮ Example Side Panel/Properties: Depending on the selected report item, specific properties are enabled, where you can change the required values. This section highlights options for changing the mode of display of the information



or to access the Expression Editor



PROPERTIES

BottomMargin1 (Bottom Margin)

A

Z

Border Dash Style

Solid

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Border Width

1

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Borders

f

FONT

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Foreground Color

rgba(0, 0, 0, 1)

f

PADDING

f

Text Alignment

Vertical

f

Horizontal

BEHAVIOR

DATA

Expression Editor

Background Color

Border Color

Border Dash Style

Border Width

Borders

Font

Foreground Color

Height

Padding

Style Name

Tag

Text Alignment

Visible

1

Report Items

Fields

Constants

Functions

Operators

Variables

Enter text to search...

Report

TopMargin1

Detail1

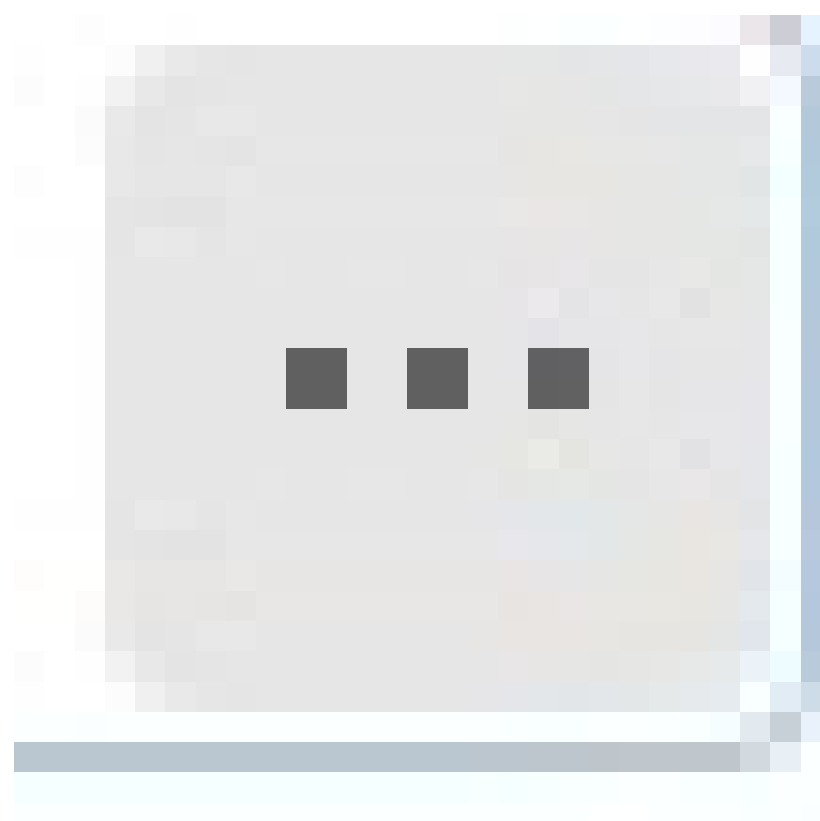
BottomMargin1

OK

Cancel

Apply

Example Side Panel/Expressions: Depending on the selected report item, specific properties are enabled, where you can change the required values. This section highlights options for consulting and customizing expressions, accessing the Expression Editor



EXPRESSIONS

tableCell2 (Table Cell)

Visible

...

Bookmark

...

Tag

...

APPEARANCE

Style Name

...

Text

[id]

...

Accessible Descrip...

...

Navigate Uri

...

⚙️

f

🗄️

🏗️

Example Side Panel/Fields: Depending on the selected report item, specific properties are enabled, where you can change the required values. This section highlights options for managing fields(rename, edit, update include field, add query or delete field)



, to add a Data Source



or to access the query builder or access the option to add or edit parameters.

FIELD LIST

+ Add Data Source

🔍 Enter text to search...

SDK9

AI

↺↻

✎

⌘+

⌘⌘

🗑️

grupo

ab group_name

Sujetosestado

ab state_name

calculatedField2

calculatedField3

✎

🗑️

Parameters

⚙️

f

🗄️

🏗️

Data Source Wizard

Create a query or select a stored procedure.

Query Name:

AAM_EMA_USER

☒ Query ☐ Stored Procedure

SQL string:

```
select "AAM_EMA_USER"."user_id","AAM_EMA_USER"."user_ema_id","AAM_EMA_USER"
    .",sync","AAM_EMA_USER"."password","AAM_EMA_USER"."user_name"
    ,",ADM_CONFIGURATION_GATEWAY".*",",ADM_CONFIGURATION_GATEWAY"."id" as
    "ADM_CONFIGURATION_GATEWAY_id","ADM_CONFIGURATION_GATEWAY"."name"
    ,",ADM_CONFIGURATION_GATEWAY"."address","ADM_CONFIGURATION_GATEWAY"."port"
    ,",ADM_CONFIGURATION_GATEWAY"."is_ssl","ADM_CONFIGURATION_GATEWAY"
    .",is_default","ADM_CONFIGURATION_GATEWAY"."is_active"
    ,",ADM_CONFIGURATION_GATEWAY"."creator_user_id","ADM_CONFIGURATION_GATEWAY"
    .",creation_date","ADM_CONFIGURATION_GATEWAY"."update_date"
    .",ADM_CONFIGURATION_GATEWAY"."update_user_id","AAM_EMA_USER"."id" from
```

Cancel

Previous

Next

Finish

Add Parameter

×

Name

parameter1

Description

Parameter1

Orientation

Horizontal

▼

Type

String

▼

Visible

Yes

▼

f

Enabled

Yes

▼

f

☐ Allow null value

☐ Allow multiple values

☐ Select all values

Tag

Expression

...

Value

Value Source

(none)

▼

OK

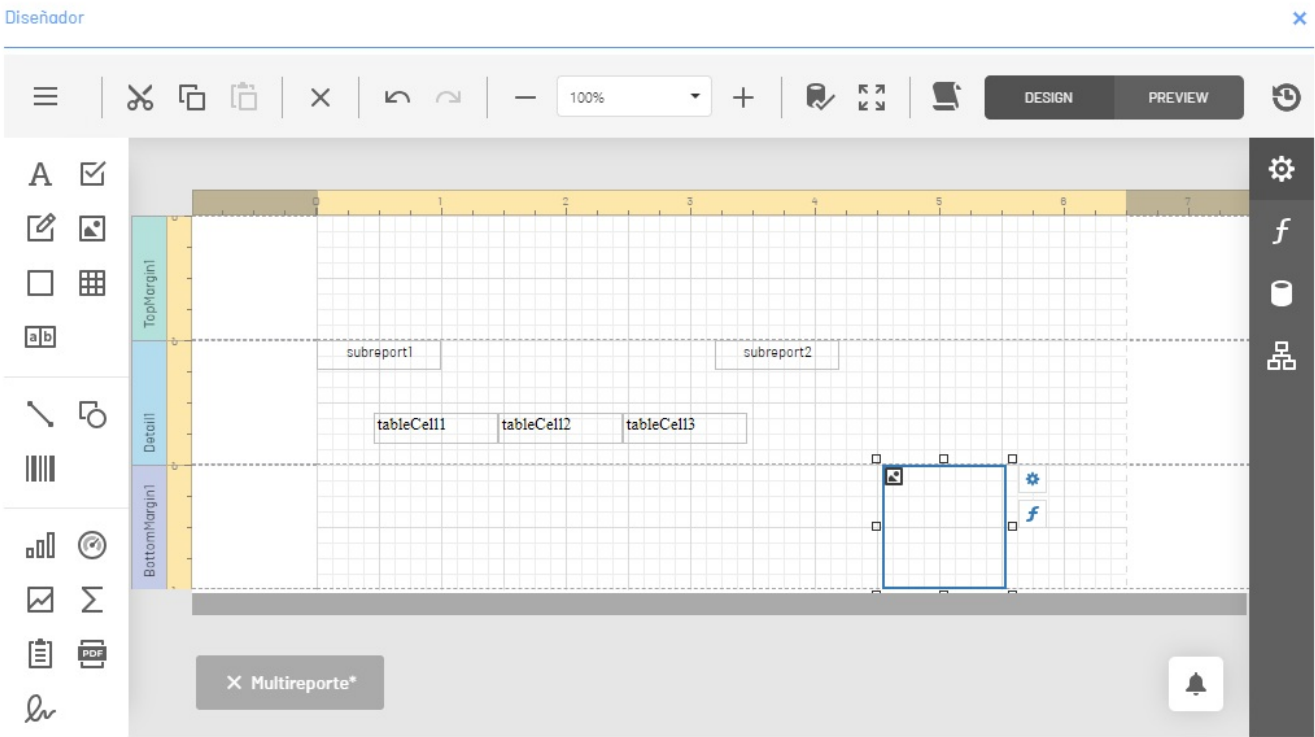
Cancel

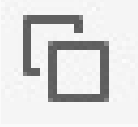
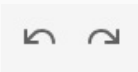
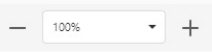
Example Side Panel/Explorer Reports: This item allows you to visualize the structure and configuration of the report; Elements of the report design area such as band, toolbar controls, table data, and more. By selecting any element of the report structure, you will be able to access the editing or deletion of the component.

[illegible]

4. Main Toolbar

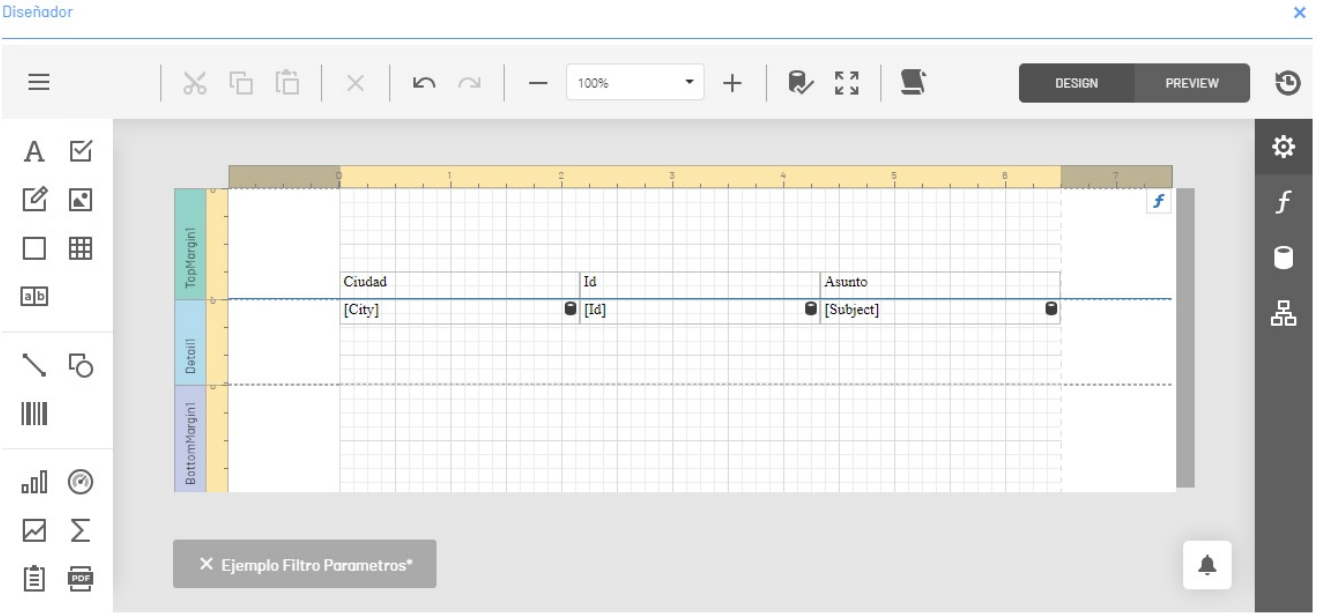
The main toolbar of the designer allows you to edit and customize the reports according to each selected control. The commands used for editing the report are:

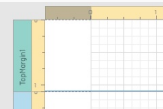
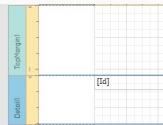
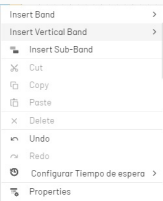
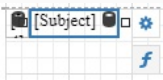


Button	Name Command	Description
	Cut	This option allows you to cut a selected control in the report design area.
	Copy	This option allows you to copy a selected control in the report design area.
	Hit	This option allows you to paste a selected control into the report design area.
	Erase	This option allows you to remove a selected control in the report design area.
	Undo and Redo	This option allows you to undo or redo an action generated during the report design.
	zoom	This option allows you to expand or reduce the design area of the report.
	Data validation	This option allows you to highlight report controls with invalid data bindings and incorrect expressions.
	Design/Preview	These options allow you to preview the report or return to the report design view.
	Waiting time	This option allows you to configure the timeout for the execution of queries in the report data sources.

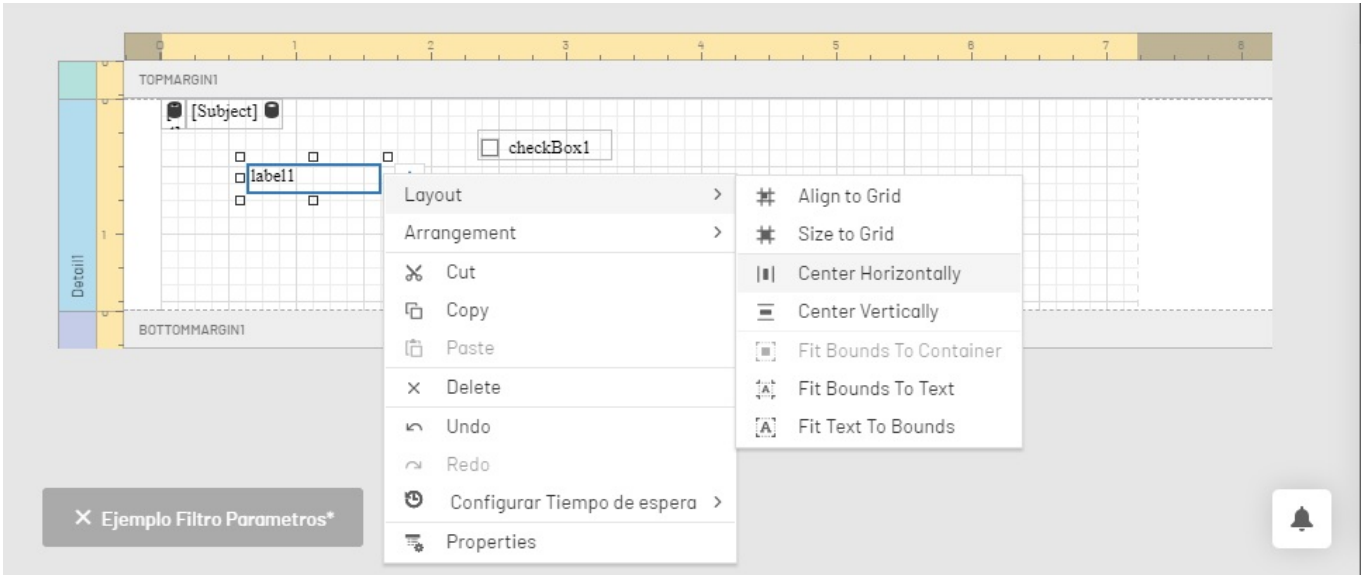
5. Designer’s Workspace

It is the workspace where the necessary elements are added, configured and designed to build a graphic proposal of a report. The most prominent elements of the designer's workspace are:



Element	Name	Description
	Rules	Horizontal and vertical rulers display check marks on the specified units of measure in the report. Click on a report item to evaluate its size and location with the rulers.
	Bands	Each band in the report includes a title, the title of the tab, and a color, which depends on the type of band. Titles are not printed in the final report and are only visible during design.
	Context Menu	Context menus provide quick access to the actions of the selected item or control. Right-click a report item to open the context menu.
	Smart Tags	Depending on the control of the selected report, the smart tag is enabled where you can edit the characteristics of the control or access the Expression Editor.

▮ Example Workspace/Context Menu: Selecting the Toolbar Label control in the workspace and right-clicking on the item enables the options available to customize the control.



Roles AQM

Roles AQM

Aranda Query Manager AQM has designed specialized user roles to carry out different tasks of managing the reports (Dashboards and reports) associated with data consolidated by the client for its analysis and assessment of the different metrics.



General Administrator Role

The general administrator is the role in charge of managing reports and defining configuration items. In AQM the general administrator is in charge of the following functionalities:

- Configure the paths to access the console and the reports catalog (dashboards and reports).
- Create, update, delete, export, and import reports (dashboards and reports).
- Define the folders or repositories to store the reports (dashboards and reports) and configure the respective permissions.
- View configured activity compliance to understand important actions taken by authorized users
- Configure and manage Aranda Common modules such as users, user groups, mail server, authentication providers, and directory services.

Rol	Módulos	Permisos

📌 Note: The Admin User must configure the additional folder permission for the first time.

Specialist Role

The Aranda Query Manager specialist will be able to create, update, delete, export and import reports (dashboards and reports). Additionally, you will be able to access the AQM Visualization section, to make the respective queries of previously configured dashboards, reports and catalogs.

Rol	Módulos	Permisos
	     	      

User Role

The user in Aranda Query Manager will be able to access the AQM Visualization section, to make the respective queries of previously configured dashboards, reports and catalogs.

Rol	Módulos	Permisos
	  	 