

**Publishing Your  
Axys Release 2 Reports  
on the Internet**



**Advent Software, Inc.**

# PUBLISHING YOUR AXYS RELEASE 2 REPORTS ON THE INTERNET

## Advent Software, Inc.

### Introduction

Communication is critical to the success of your business; that is why you rely on Axys™ to provide sophisticated, customized, and comprehensive reports—reports that help you retain a loyal client base and effectively support investment management decisions within your firm.

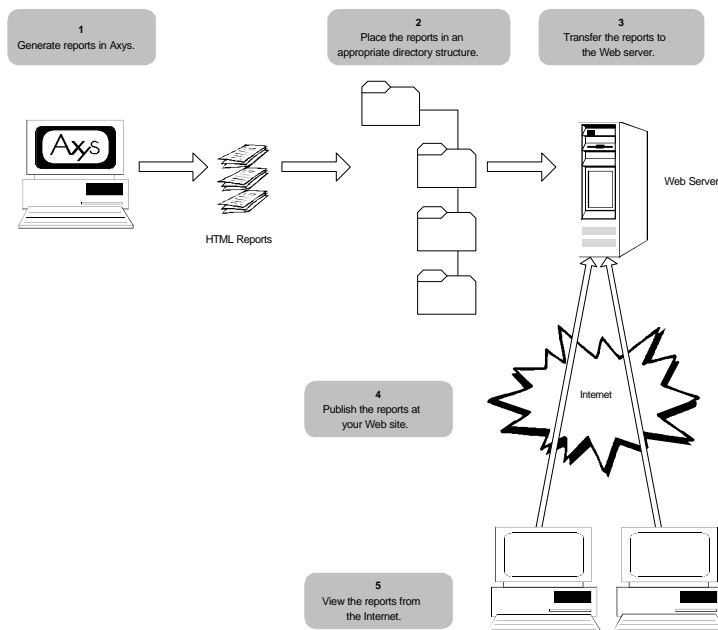
The Internet has changed communication. Your clients expect to get the information they want instantly, on their schedule and customized to their needs; your firm needs to communicate faster and more efficiently to compete effectively and give a high level of customer support. Advent understands these demands and has added the Web Writer feature to Axys Release 2 to provide a way for you to get your reports onto the Internet. This white paper will show you how to take advantage of the Web Writer feature, automate generation of your Axys reports, and post them on the Internet in a secure fashion.

### Overview

To make information available on the Internet, you need to have a secure Web site. You can host a Web site in several ways, including in-house or through a Web site hosting service.

After you have established a Web site, you follow these steps to publish your Axys reports on the Internet:

1. Generate your Axys reports in the Hypertext Markup Language (HTML) format. HTML is the standard language of the Internet and the format that Web browsers can view.
2. Place your HTML reports in an appropriate directory structure for use on your Web server.
3. Transfer the directory structure to your Web server.
4. Publish reports at your Website.
5. Let your users view the reports from the Internet.





## Setting up Your Web Site for Secure Access

Before making Web Writer reports available on the Internet, you need to set up your Web site to ensure the security of report information so that only users you specify can see certain reports.

Advent recommends the following security measures:

- Use Web server security software such as Verisign™ to ensure that no one can intercept the reports while your users are viewing them.
- Store each user's reports in a separate directory.
- Create a username and password for each user to restrict access to the individual directories and ensure that viewing reports is secure and confidential.

## Generating Internet-Ready Reports

Information on the Internet is usually published in HTML. A Web Writer report is any Axys report that the Axys feature Web Writer saves in the HTML format (*Example: jn\_buyse.htm*). You can create Web Writer reports from any Axys report including catalog, custom, and Report Writer reports.

### Working with Web Writer

1. Run your report or report macro in Axys. The report output appears.
2. Choose File ► Export As.
3. In the Save File as Type field, select HTML(\*.htm).
4. In the File Name field, enter the name of the file with the extension HTML (*Example: jn\_buyse.htm*).
5. In the Drive field, select the drive that contains the directory where you want to save the report.
6. In the Folders field, select the folder where you want to save the report (*Example: c:\webwrite\jones\063097*).
7. Click OK. Web Writer saves your report in HTML format (Release 2).
8. Repeat steps 1-7 for each Web Writer report that you want.

### Generating Reports Automatically

If you want to publish many reports on the Internet, you may want to automate the creation of Web Writer reports by creating a script file that records this information:

- Name of the portfolio(s) or group(s) for which you run the Axys reports
- Date to run the Axys reports
- Name of the report macros that record the Axys reports saved in HTML format
- DOS path of the directory that contains the output of the script file

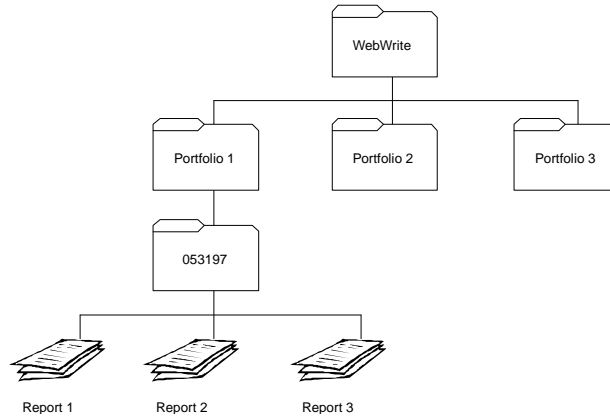
**Note:** When working with script files, use the "vh" argument after the report command line to save report output to HTML format. For example, to run the macro aman.mac for the equity group and save the output in HTML format, use this statement:

```
rep.exe - maman.mac - p@equity -s - vh -u
```

For details on script files, refer to *Using Axys Release 2*, Chapter 9, Automating Axys.

## Creating an Appropriate Directory Structure

To keep your Web Writer reports organized and ready for their transfer to the Internet, we suggest that you create a directory structure that is made up of these directories: webwrite (the top level directory), one directory for each portfolio or group (off of webwrite), and one directory per date (off of the portfolio or group directory). This illustration shows a typical directory structure.



Using this directory structure helps ensure that each user's reports are secured behind a separate username and password on your Webserver.

## Transferring Reports to Your Web Server

The transfer method you use to transfer your Axy's reports to your Web server depends on your Web server. If you are using an in-house Web server that is accessible over a Local Area Network (LAN), a simple file transfer may work. If you are using a Web site host, contact your host to determine the best transfer method. One example is the File Transfer Protocol (FTP).

Before you transfer reports, Advent recommends that you:

1. Compress the directory structure with the Web Writer reports using a utility such as WinZip or PKZIP.
2. Encrypt the ZIP file for a secure transfer to your Webserver.

Following these steps ensures that you transfer a single, compressed, and secure file to your Webserver.

## Publishing Reports at Your Web Site

After you transfer the directory structure with the reports to your Web server, you need to publish the reports at your Web site before users can access them on the Internet. As each Web site is unique, you need to discuss this process with your Web site administrator. You also need to obtain the Web address or Uniform Resource Locator (URL) of the published reports.

## Creating Advanced Reports

One of the advantages of publishing information on the Internet is that you can link data to other data via hyperlinks. Axy's reports do not include hyperlinks. However, Advent has added new functionality to the Report Programming Language—the language in which Axy's reports are written—to enable you to create hyperlinks.



Understanding Advanced Reports

Advanced reports are reports that include hypertext sensitive elements. To turn a report element into a hyperlink, you precede it with the \* label. The \* label links the report element to HTML documents that you create. The \* label is activated in the Web Writer version of the report. There, users click highlighted report elements to jump to the linked HTML documents.

Through hyperlinks, you can communicate additional information of value to your users, making your reports more flexible and dynamic.

Examples of hyperlinks in reports include the following:

- Header hyperlinks (\*:file ), which link the portfolio name that appears in the header of the Web Writer version of the report to an HTML document with the information of your choice.
- Security hyperlinks (\*:smb1 ), which link security names that appear in the Web Writer version of the report to an HTML document with additional information on your securities.

**Example:** Pat, a portfolio manager at Ace Asset Management, publishes the Web Writer version of a Portfolio Appraisal report for Terry, a client, on the Internet. When Terry reviews the report, he can click his name in the report title to jump to Pat’s comments on the performance of his portfolio. Then, he can click a specific security to jump to Pat’s analysis of that security.

To add hyperlinks to a report, you need to know how to use the Report Writing Language. If you do not know the Report Writing Language, Advent recommends that you purchase custom reporting services from Advent’s Custom Engineering Services at 800-285-4111, extension 186.

To Create an Advanced Report

To create an advanced report, you follow these steps:

1. Select the report elements that you want to link to additional information.
2. Add hyperlinks to the report.
3. Create the HTML documents that the report links to.
4. Add the advanced report to your Custom Report menu.
5. Create a report style for the advanced report.
6. Edit axys2.ini.
7. Add the advanced report to your script file.

Details for each step follow below.

**Caution:** Advent does not support any report that you modify on your own. In addition, Advent does not guarantee that modified reports will work in future releases of Axys.

To Select Report Elements for Linking

Determine which report elements you want to provide additional information for (Example: portfolio name, securities).

To Add a Hyperlink to a Report

To add hyperlinks to a report, you need to know how to use the Report Writing Language. If you do not know the Report Writing Language, Advent recommends that you purchase custom reporting services from Advent’s Custom Engineering Services at 800-285-4111, extension 186.



**Important:** The *Report Writing Language Programmer's Guide* was created mainly for Advent's in-house use. Upon request, Advent distributes it to clients who have knowledge of programming. The *Report Writing Language Programmer's Guide* is not an Advent product, and no support is offered.

You can add hyperlinks to standard and catalog reports. Only Advent's Custom Engineering Services can add hyperlinks to custom reports.

**Caution:** Advent does not support any report that you modify on your own. In addition, Advent does not guarantee that modified reports will work in future releases of Axy's.

To add a hyperlink to a report:

1. Using any text editor, open the report program file that you want to add a hyperlink
2. Save the report program file with a new filename.
3. Insert the \* label before the report element that you want to link to your HTML documents.
4. Close the report program file, saving your changes.

To Create HTML Documents

1. Start your HTML editor (Example: Microsoft Word for Windows 97).

**Note:** When saving an HTML document, use only lower case letters for the filename and the extension and place the document in the same directory as the Web Writer report that is linked to the document.

2. Create an HTML document as follows, saving each document in the appropriate directory:

Each portfolio name you want to provide additional information for	An HTML document with the same filename as the portfolio followed by the .htm extension. Example: You run reports forte_jones.cli and ja_smith.cli and want to link the reports to letters that analyze the performance of each portfolio. Create a separate HTML document for each portfolio, using these names: te_jones.htm and ja_smith.htm.
Each security you want to provide additional information for	An HTML document with the name of the security symbol—without the security type—as defined in Security Information in Axy's followed by the .htm extension. Example: The portfolios you run the reports for hold Coca Cola Co. and Harley Davidson. Create a separate HTML document for each security, using these names: ko.htm and hdi.htm.
Other report elements you want to provide additional information for	An HTML document with the name of the report element followed by the .htm extension.

To Add an Advanced Report to the Custom Report Menu

You need to add advanced reports to the Custom Report menu in Axy's. For details, see *Using Axy's Release 2*, Chapter 1, Understanding Reports.

To Create a Report Style

You need to create a new report style for each advanced report that you create, using the same name as for the report (Example: If you name your advanced report Web Appraisal, name your report style Web Appraisal too). For details, see *Using Axy's Reports, Release 2*, Chapter 3, Formatting and Printing Reports



To Edit axys2.ini

axys2.ini contains a list of all the report styles that you create. For each advanced report that you create, you must add a statement to axys2.ini that resolves the reference to the hyperlinks.

In this example, Pat creates webcar.rep, an advanced Portfolio Appraisal report with a header hyperlink. She then adds the report to her Custom Report menu and creates a new report style, using the name WebAppraisal.

1. Using any text editor, open axys2.ini, which is located in inc:\windows.
2. Search for [WebAppraisal].
3. Add the following line under [Web Appraisal] URL \$: file=%s.htm
4. Close the file, saving your changes.

To Add the Advanced Report to Your Script File

1. Create a new report macro or add the advanced report to the appropriate report macro.
2. Update your scriptfile.

Getting Help with Advanced Reports

No support is offered for advanced reports. However, you can purchase custom reporting services from Advent's Custom Engineering Services at 800-285-4111, extension 86.

**Viewing Axys Reports on the Internet**

After you publish your reports at your Web site, your clients and employees can access the reports. To do so, they must have an Internet connection and a standard Web browser. You need to supply the following information to your users:

- Uniform Resource Locator (URL), the address of your Web site
- Username and password

Users can then view and print their Axys reports from the Internet.

**The Axys WebView Service**

This white paper has given you the basics of what it takes to put your Axys reports on the Internet, but Advent understands that scripting, report editing, file transfer, and Web site administration are not the primary focus of your business. However, you need to be on the Internet; you need your clients to have 24 hour a day, 7 day a week access to their customized reports; you need your traveling managers to get their client reports on-site; you just need help getting it all set up. That is why we created The Axys WebView Service—a one-stop, consulting service that assists you with everything you need to put your Axys reports on the Internet. This service includes Advent consulting, customized Axys reports and scripts, and automatic file transfer to your Web site. If you do not have a secure Web site, The Axys WebView Service can establish one for you through Advent's partnership with USWeb, a nationwide provider of Internet services and solutions.

For more information about The Axy's WebView Service,  
visit our Web site at <http://www.advent.com> or call us at 800-727-0605.



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