

EOS Thin Client vs. EOS Access

General Overview



What is EOS Access?

EOS Access is the Report Distribution System's (RDS) web application used to view reports and download into Excel spreadsheets, Word documents, and PDF file formats to help the user review and analyze financial information. EOS Access is the replacement application for the EOS Thin Client software. While most of the functionalities are the same, the table below identifies small changes the user will experience in EOS Access.

Task	EOS Thin Client	EOS Access
Software	Requires JAVA software and is only compatible with Internet Explorer.	EOS Access does not require JAVA software and is compatible with all browser types.
User Navigation	Layout is outdated and harder to view.	Layout is user friendly, intuitive, easy to view, and report information can easily be filtered and sorted within the users <i>Private</i> report list.
Column/Display Settings	Column and Display settings are located under <i>Customize</i> .	User can update Column and Display settings by selecting <i>User Settings</i> , located at the top <i>right</i> side of the <i>Workspace</i> .
Displaying Ready Reports	User has the ability to view one report at a time. The report occupies the full screen, and user must use the back button to return to <i>Workspace</i> .	EOS Access allows users flexibility to view more than one report at a time. Reports can be set to appear on the right side or bottom of the <i>Workspace</i> and can be closed by selecting the <i>X</i> in the top, right corner of report.
Actions	<i>Actions</i> are represented through icons and are located within the <i>Action Column</i> . <i>Actions</i> can only be applied to one report at a time.	All <i>Actions</i> are available from the <i>Actions</i> drop-down menu at top of <i>Workspace</i> and can be taken on more than one report at a time. User must select reports before the <i>Action</i> drop-down menu will appear.
Archived Reports	Report name displays in a bold, black format.	Report name displays in a gray, italic format.
Restoring Reports	<i>Restore</i> report icon appears in the <i>Action Column</i> .	<i>Restore</i> report action appears under <i>Actions</i> drop-down menu.
Version Control	Version Controls can be assigned using filters created by the user.	EOS has <i>Version Control</i> functionality, located at the top of the <i>Workspace</i> , which allows the user to control which versions of reports show in <i>Workspace</i> .
Email Report	The <i>Email</i> icon is located in the <i>Actions Column</i> , next to report name.	This functionality is not currently available in EOS Access. User will need to export the report to distribute via email.
Export Multiple Reports	User must individually export each report.	The <i>Export</i> functionality has not changed with EOS, but the user now has the ability to select more than one report to export the reports together. The selected reports will be combined into one .txt file.
PDF File Format	To export as PDF, the user must have <i>Print to PDF</i> software.	User can use the <i>MS to PDF</i> option, if available.
Export as CSV	User selects the <i>CSV</i> from output drop-down menu on Transform screen.	User selects the <i>CSV</i> from output drop-down menu on <i>Transform</i> screen. The text file must be opened in Excel to be converted to <i>Delimited Text</i> with <i>Semicolon Delimiters</i> .

What is a Transform?

A Transform allows users to format and extract selected report data as a spreadsheet, text, or CSV file. The transform output consists of records containing the fields specified in the transform template definition. While the overall functionality and application of Transforms has not changed, the table below identifies small changes the user will experience in EOS Access.

Task	EOS This Client	EOS Access
Creating a New Transform	User must create a new Transform by selecting the <i>Transform</i> icon from the <i>Actions</i> column.	Please see <i>Transform</i> job aid for guidance for creating a new transform.
Ruler	The <i>Ruler</i> functionality is located at top of report in Transform screen.	The <i>Ruler</i> functionality is not currently available when creating and updating Transforms.
Marker	Select the <i>New Marker</i> icon at top of Transform screen.	User will use the <i>Add Marker</i> button at the top left of the Transform screen.
Marker Pattern	The <i>Marker Pattern</i> is located above report in Transform screen.	The <i>Marker Pattern</i> is located above the report on the Transform screen, but this field is not clearly labeled and can easily be overlooked . Please see <i>Transform</i> job aid for guidance for creating marker patterns.
Limit Report Range	On Transform screen, the <i>Start</i> and <i>End</i> section is located at top of <i>Transform Tree</i> .	User must double-click on the <i>Transform Name</i> at the top of the <i>Transform Tree</i> . Once selected, a list of options will appear to the right of the <i>Transform Tree</i> . From here, user can assign the <i>Start</i> and <i>Stop</i> page to apply the Transform.
Moving Field or Marker within Transform Tree	User must select the field or marker, then select the <i>Up</i> or <i>Down</i> icon to move the selected field up or down the <i>Transform Tree</i> .	User can select desired field or marker to move, then drag and drop the field or marker in the preferred order.
Saving Transforms	The <i>Save</i> icon is located on the Transform screen, directly above the <i>Transform Tree</i> .	The <i>Save</i> button is located at the bottom <i>right</i> of the Transform screen.
Global Transform	The ability to create Global Transforms is not available.	User can request for a Transform to be shared globally by selecting the <i>Request for a Public Share</i> , within the Transform Screen. If the Transform is approved by Global Administrators, the new Transform will be available on the user's <i>List of Templates</i> available within the initial Transform screen.