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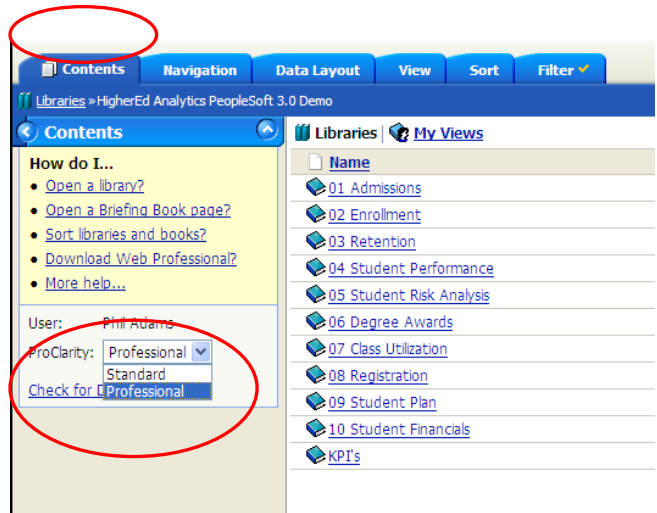
Getting Started:

Go to [http://\[iStrategyServerName\]/pas](http://[iStrategyServerName]/pas)

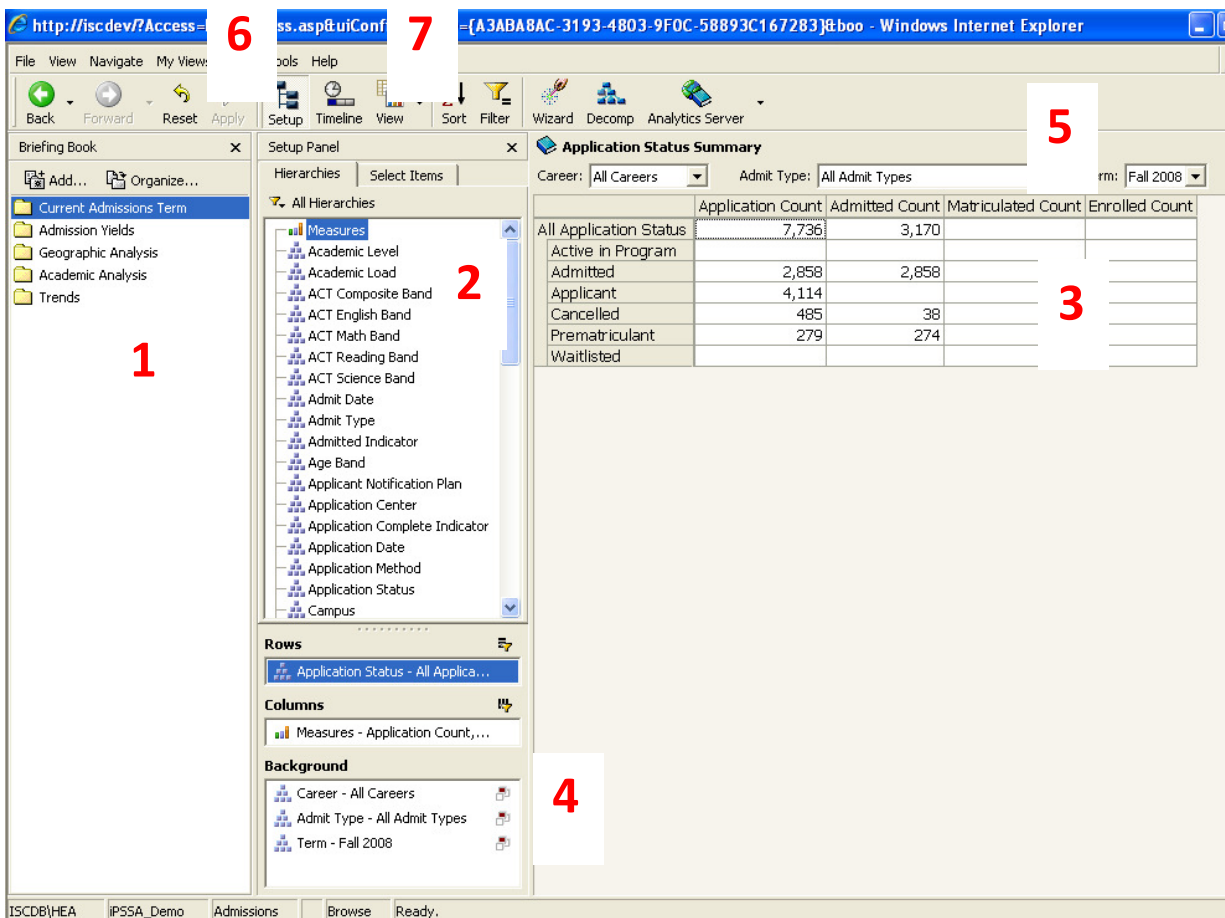
On the Contents Tab –

Click on ProClarity: Professional in the drop down menu on the left.

Choose a Report from the Library – Briefing (Professional will launch)



ProClarity Professional:



Key:

1. Briefing Book Panel - Report Briefings – Reports can be run from these folders.
2. Set Up Panel - Measures and Dimensions available in the Report
3. Report Display and Layout
4. Rows, Columns and Background Settings
5. Page Filters
6. Apply Button
7. View Button for Charts and Graphs.

Basic Navigation

1) Basic Navigation... Using Page Filters

- a) Run Report to display default report view
- b) Click on Page Filters to see list of Dimensional “slices” available in report (#5)
- c) Select specific value from list. Click Apply (#6) to re-run report for selected “slice”.
- d) Expected Result – return data for selected slice

2) Basic Navigation... Drill to Another Dimension

- a) Run Report to display default report view and Identify row of report for Drill down to another dimension.
- b) Right click on the “dimension row label” and Choose “**Drill Down**”.
- c) Click on the Dimension you wish to “**Drill Down To...**” in the menu box to the right.
- d) Expected Result – rows will be replaced with members from selected drill to dimension

3) Basic Navigation... Drill to Detail

- a) Run Report to display default report view
- b) Identify cell (a number) within the report for Drill to Detail, and right click on the number
- c) Click on “**Drill To Detail**”.
- d) Expected Result – new web page will open displaying the detailed records related to the stored measure from the cube.
- e) To Export to Excel: Click on Export in the upper left corner of the data window.

Notes:

- i) You can only Drill to Detail on stored measures....drill to detail cannot be performed on calculated measures such as Percentages and Averages.

- ii) The records selected are based on the dimension in the report view, not measure values.

4) Basic Navigation... Other Foreground Navigation (Hide, Show Only)

- a) To Remove a Dimension Member from the Report
 - i) Right click on the "dimension row label"
 - ii) Click on "**Hide**"
 - iii) Choose the current Item or select item from list. To choose multiple values, Control Click on each item then click "Okay".
 - iv) Expected Result – selected dimension member(s) will be removed from the report
- b) To Remove all except a single Dimension Member from the Report
 - i) Right click on the "dimension row label" of the member you want to keep
 - ii) Click on "**Show Only**".
 - iii) Choose the current Item or select item from list. To choose multiple values, Control Click on each item then click "Okay".
 - iv) Expected Result – all except selected dimension member(s) will be removed from the report

5) Other Basic Features... Sorting

- a) Run Report to display default report view
- b) Right click anywhere in the report (#3)
- c) Click on "**Sort**".
- d) In the Drop Down Box – select the column to Sort and Ascending or Descending.
- e) Select Preserve Peer Groups to preserve the hierarchy levels and only sort items within a level
- f) Click "Okay"
- g) Expected Result – rows will be resorted

6) Other Basic Features...Views: Charts vs. Reports

- a) Run Report to display default report view
- b) Click on the **View Button** (#7)
- c) To change the type of view (grid, chart, both) Right click on the chart.
- d) Click on "Chart Type" (e.g., bar, line, pie)

- e) Choose the chart type in the menu box to the right.
- f) Expected Result – report will redisplay in selected view type

7) Other Basic Features...Automatic Totaling

- a) Run Report to display default report view
- b) Right click anywhere in the report (#3)
- c) Click on "**Totals**"
- d) In the Menu to the right, choose Column or Row Grand Totals
- e) Choose Subtotals if multiple dimensions are used
- f) Expected Result – report will redisplay with appropriate totals as selected

8) Other Basic Features...Flatten Row/Column Headers

- a) Run Report to display default report view
- b) Right click anywhere in the report (#3)
- c) Click on Flatten Row Headers or Flatten Column Headers
- d) Expected Result – All Levels of the Hierarchy will display without indentation or spacing.

9) Other Basic Features...Filter Empty Rows or Columns

- a) Run Report to display default report view
- b) Right click anywhere in the report (#3)
- c) Click on "**Filter**" Choose Empty Rows or Empty Columns (as desired)

10) Advanced Analysis...Data Layout (Changing the report layout)

- a) Run Report to display default report view
- b) To Remove an Existing Dimension
 - i) Click on the Dimension name in either the **Row** or **Column** box (#4)
 - ii) Drag the item to the Background or Hierarchies box
 - iii) Click Apply (#6)
- c) To Add a Dimension to the Row Orientation
 - i) Click on the Dimension name in the **Background** or **Hierarchies** box
 - ii) Drag to the **Row** box (#4) and Click Apply (#6)
- d) To Add a Dimension to the Column Orientation
 - i) Click on the Dimension name in the **Background** or **Hierarchies** box
 - ii) Drag to the **Column** box (#4) and Click Apply (#6)
- e) To Select Specific Dimension Members to Display in the Report
 - i) Double click on the Dimension name in the **Row, Column, Background** or **Hierarchies** box(es)
 - ii) Note you are taken to the Select Items Tab (#2)
 - iii) Expand menu as needed. Select all members you wish to include by CNTRL clicking on each item.
 - iv) Click Apply (#6)
 - v) Click on the Hierarchies Tab (#2) to return to main menu.
- f) To Add a Dimension to the Page or "Slicer" Orientation
 - i) Double click on the Dimension name in the **Hierarchies** box (#2)
 - ii) Note you are taken to the **Select Items** Tab (#2)
 - iii) Expand menu as needed. Select all members you wish to include by CNTRL clicking on each item.
 - iv) Click Apply (#6)
 - v) Expected Result – dimension filter will be automatically added above the report (#5)
 - vi) To Remove a Slicer – Repeat Steps i and ii. Click on the Default item at the top of the box
 - vii) Click Apply (#6). Slicer should be removed.
- g) To Combine Items for calculations (ie: Show count for 18 and 19-20 year olds)
 - i) To select items you wish to combine, repeat steps f) i through iv.
 - ii) In the **Background** Box (#4), right click on the item and choose **Combine Items**.
 - iii) Click Apply (#6). Totals will display as combination of the items.

11) Advanced Analysis... Decomposition Tree

- a) Run Report to display default report view
- b) Identify cell (a number) within the report for Analysis, and right click on the number
- c) Click on **"Analyze in Decomposition Tree"**
- d) Click on any box in the tree and the report will automatically drill to the hierarchies within the data for that dimension.
- e) To **Drill to** a specific dimension, right click on any box in the Decomposition Tree
- f) Click on **"Drill Down"** and click on the dimension you wish to **"Drill Down To..."** in the menu box to the right.
- g) Next Steps:
 - i) Continue Drill Down to additional dimensions
 - ii) Return to a level above by clicking on a box in the level you wish to return to
- h) To **Remove** the "Decomposition Tree", click on the highest level box, then click on the "View Button" drop down menu (#7)
- i) Click on "Grid" and Choose "Grid Only" in the menu box to the right.

12) Advanced Analysis... Advanced Filters (Rankings & Exceptions)

Note: this feature will apply filters to the dimension members in the row orientation of the report.

- a) Run Report to display default report view
- b) Right click anywhere in the report (#3)
- c) Click on **Filter** and Choose Filter 1 – Show or Hide Rows
- d) In the Drop Down menu, select a type of filter based on two general filter types:
 - i) Top and Bottom are relative selections or rankings (i.e., select the top/bottom x members or % of members based on criteria)
 - ii) Above, Below and Between are absolute criteria for selection
- e) To add a second criteria, select Filter 2
- f) Click Apply (#6) to Run Report
- g) Expected Result – report will redisplay with selected dimension members based on filter criteria

13) Advances Analysis... Exceptions Highlighting

- a) Run Report to display default report view
- b) Right click anywhere in the report (#3)
- c) Click on Exceptions Highlighting
- d) Follow wizard to define the highlighting criteria.

- e) Click Add to create multiple conditions – Click Delete to remove a condition
- f) Expected Result – Rows or Columns will reflect the desired Highlighting.

14) Building New Reports from Existing Reports ...Saving as “My Views”

- a) Select a report that is close in format to the desired report
- b) Utilize the interactive features to modify the report (**Steps 1 – 11**)
- c) Click on **My Views** menu (above #6) Choose “Add to My Views”
- d) Rename the report and click “Okay”

15) To List and Run “My Views” Reports

- a) Click on **My Views** menu (above #6)
- b) Choose “Show My Views” These reports will be displayed in the My Views Panel replacing the Briefing Book Panel (#1)
- c) Click on the Report you wish to run (#1)
- d) To return to the Briefing Book Panel (#1), click on the Book Menu (above #6)
- e) Choose “Show Briefing Book” and Panel will reappear replacing the My Views Panel (#1)

16) Creating a New Report from a Blank Page

- a) Click on **File** Menu and Choose “**Open Cube**”
- b) Select the desired Cube/Perspective for your report Click “Okay” and Choose “Grid”
- c) Use Steps **5-13** to modify, design and save your report.

17) Custom Ordering Column and Row Headers

- a) Open the desired report
- b) Click on the Tools Menu and Select Custom Order Members
- c) Use the Up and Down Arrows to Order the Members for Columns and Rows
- d) Click OK

18) Creating New Measures

- a) Double click on Measures
- b) Right click in the Setup Panel (#2) and choose **New Measure**
- c) Follow the Wizard to create a formula using the Simple Relationship.
- d) The new Item will be saved in the My Items Folder
- e) To Rename or Delete Item – Right click on Item and choose Rename or Delete.
- f) To share the Item with others, Right Click on New Item and choose Copy to

- g) In the location tab, choose the desired Library and hit okay
NOTE: the New Item is now displayed in the Shared Items Folder and is available for anyone using the selected library.

19) Creating New Members and Sets

- a) Click on a Dimension in the Setup Panel (#2)
- b) Choose the items to be included in the Set (refer to 10 e for directions)
- c) Once selected – right click and choose **New Member or Set**.
- d) Name the New Member or Set – the new Item will be saved in the My Items Folder.
- e) To Rename or Delete Item – Right click on Item and choose Rename or Delete.
- f) To share the Item with others, Right Click on New Item and choose Copy to
- g) In the location tab, choose the desired Library and hit okay
- h) NOTE: the New Item is now displayed in the Shared Items Folder and is available for anyone using the selected library.

20) Change the Report Display Properties – (Grid Properties)

- a) Run Report to display default report view
- b) Right click anywhere in the report (#3)
- c) Click on **Grid Properties**
 - i) Modify or change the Values to display including:
 - (1) Value formatting: currency, numbers or custom display
 - (2) adding percentages: of total grid, of row or of column
 - ii) Modify column, row and data background colors and fonts
 - iii) Modify or change the Report Title, fonts and colors.
 - iv) Control drill to detail values to display (Default returns 1000 rows)