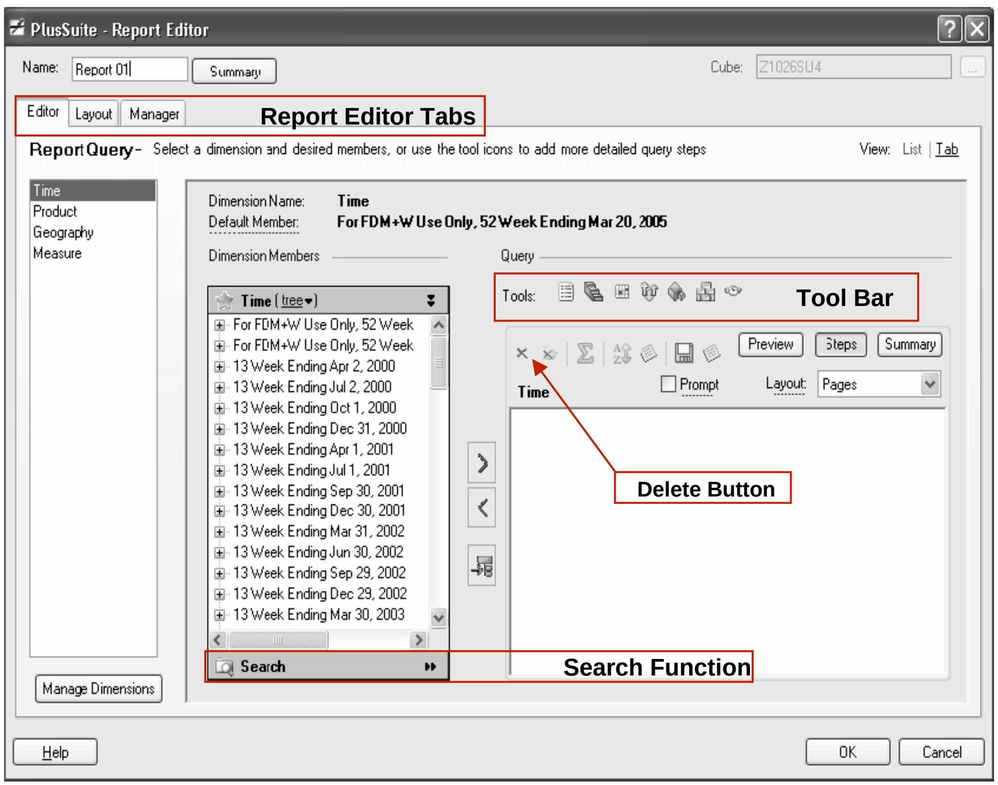
Customizing Reports with Report Editor

- **Select Members** – When building a report, select dimensions in the following order: Measure, Time, Geography, and Product. (M.T.G.P)
- **Select Members** – To select a member, double click on it or highlight it and use the > arrow.
- **Delete** – To delete something already selected, you must enable the delete button. Place your cursor between the up and down arrows to the left of the product you want to delete. Once the delete button is highlighted, click it and your member is now deleted.
- **Layout** – To change the Layout of a report, select the Layout tab at the top and move the dimensions around.
- **Measure** – select your measures manually from the list.
- **Time** – Manually select time periods or use the Range tool.
- **Geography** – double click on a member to select or use the search function to find specific geographies. (Hint: When searching, check your entry in the Level field to be sure that your query pulls data from the appropriate hierarchy level.)
- **Product** – expand on the category to get to lower levels of the hierarchy for quick data pulls, or use the Tools to easily manage and find products.
- **Add Report** – After you select all dimensions, click OK. The Add a Report screen appears. Click OK to download the data. If you would like the new report in the same workbook, uncheck the new worksheet button.

*See Tips and Tricks at right for more customization help. See the back panel for help after a report downloads.



Tips and Tricks

- **Dynamically Selected Data**
  Use PlusSuite Tools to make dynamic member selections, which automatically pull in the latest data when refreshed.

  In the Product Dimension:

  --Attribute lets you select members in multiple hierarchy levels, based on one or more attributes. Example: to select all Brand X Soda UPCs, Add all UPCs for Soda category, and then Keep all Soda Category UPCs where brand is Brand X.

  --**Top/Bottom/Exception** lets you Keep or add members based on your criteria. Make it dynamic in the "For" step by clicking on the geography or time hyperlink. When the window appears, select the "Determine for each member" option.

  In the Time Dimension:

  --Range lets you select time periods three ways. Select the Latest X time periods, create a dynamic start from time period, or create a range of time periods for use in analyzing promotional events.

  In All Dimensions:

  --Level lets you add any level in the database (For example, you can quickly add in all Categories, all 1 Week Time Periods, or all Markets)

- **Copying a report**
  Right click within a report, select Operations>Copy. In a new worksheet, click XLeratePlus on the Excel menu bar, then Operations>Paste.

- **Iterating a report**
  To distribute dimension members across a set of worksheets, right click within a report, select Operations>Iterate>Report. Select a dimension in the Page Filter box and drag it to the Worksheets box. Click OK to populate new worksheets (the original sheet stays intact).

- **Creating Custom Aggregates**
  Click the Custom Agg icon in the dimension to be aggregated. Use the Custom Aggregate window tools to create an aggregate with dynamic members that updates with new data each month. Save the agg as either Report Only (one-time use) or Personal (multi-use). Enter a name in the Query Name field, click OK.

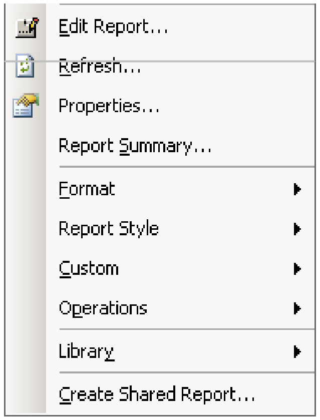
- **Maintaining Custom Aggregates**
  --Modifying: Go to the Manager tab at the top of the Report Editor. Locate the agg you want to change and click the "retrieve" button. Make any changes and click OK.

  --**Publishing to another database:**, click the Publish icon. Select the database you want to publish to and then click the Publish button.

- **Creating Saved Selections**
  Use saved selections for frequently used members (e.g., for reports that always use the same measures, or use the same list of items.) Select items to be included, then click the Saved Selection icon to open the dialog box. Name the selection a name and click OK. Saved selections are stored in a folder at the bottom of your picklist. They can be maintained the same way that custom aggregates are.

PlusSuite Menu

To access the PlusSuite menu right click in the active area of a report, or select PlusSuite from the Excel menu bar.



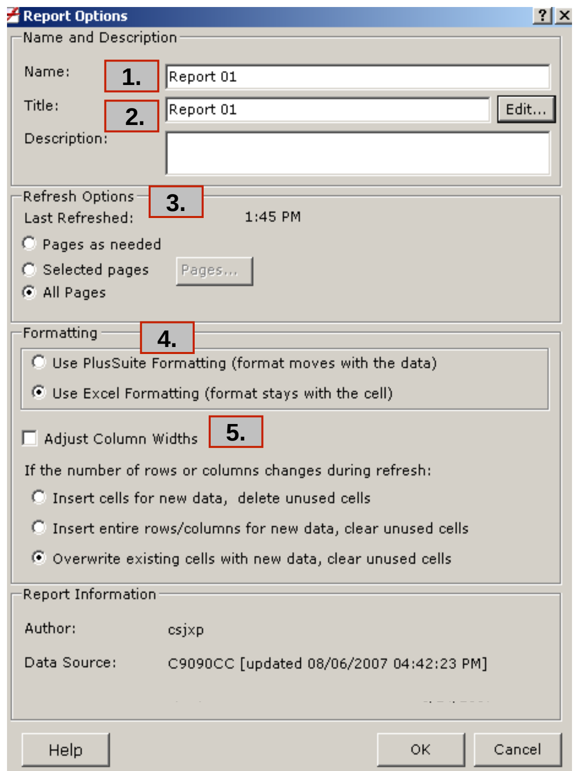
- **Edit Report** will take you to the Report Editor so you can make changes to an existing report.
- **Refresh** allows you to refresh a report once the new database is available.
- **Properties** – Set report properties. See back panel for more detailed information.
- **Report Summary** shows the parameters for the report and how the dimension members were selected. This is a great way to learn how to build reports.
- **Format*** – options include:
  - **Layout** - change dimension location in report.
  - **Report** - change the appearance of a report when it downloads. (Font, color, row formatting, etc.)
  - **Data** - change measure formats, product names, r highlight any dimension member.
  - **Hide/Show** – members can be hidden from a report by clicking on the sunglasses icon.
  - **Sort** –after a report is refreshed you can sort data directly in XLeratePlus 2.6.
  - **Filter** – Top/Bottom or Exception filtering after report is run.
  - **Conditional** – format members similar to Excel functionality.

  *Special PlusSuite formatting is only available when you view and update reports in "Normal" mode.
- **Report Style** – choose between Normal, Pivot Table, or Stacked. Default is Normal. Stacked is output similar to XLeratePlus 1.3.
- **Custom** – create totals or attributes.
- **Operations** – Copy and Iterate. See Tips panel for more detailed information.

After a Report Downloads

Once a report downloads always right click within the report and select the **Properties** option.

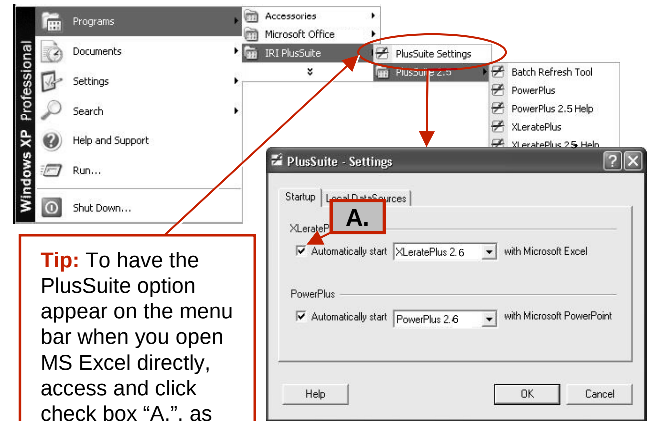
1. In the Name field, enter text for report name.
2. In the Title second box allows you to give the report a title with Smart Text. Click Edit, highlight Geography and click Add, then highlight Time and click Add. (Smart Text automatically updates the report title with the Geography and Time period you have selected.)
3. In the Refresh Options section, select All Pages. PlusSuite only refreshes the front page of a report, therefore you must refresh All Pages to bring in all data.
4. In Formatting, choose between PlusSuite or Excel formatting. (PlusSuite formats stay with the data while Excel formats stay with the cells.)
5. Click the "Adjust Column Widths" checkbox to ensure that cell text appears on a single line. **Note:** This cancels PlusSuite indentation settings
6. Select OK again to download the remaining data.



XLeratePlus
ACCELERATED INTELLIGENCE

Getting Started

Once the software has been installed, go to **Start > Programs > IRI Plus Suite > PlusSuite 2.6 > XLeratePlus** to open the program.



Tip: To have the PlusSuite option appear on the menu bar when you open MS Excel directly, access and click check box "A.", as shown at right.

You must register the software prior to your first time using it. To register, click XLeratePlus on the Excel menu bar and select the Register Online option.

Creating a Report

•Open a blank Excel workbook.

•Go to **XLeratePlus > New > Report**.
The Data Source Screen appears.

•In the Data Source screen, use the Environments dropdown box to select IRI North America.

•Select the Database you want to access.
Note:
if you do not see any databases listed or do not see the one you want to access, select the All Databases tab.

•Highlight the database to be accessed and click OK.
The Report Editor opens.
(Open this brochure to see the Report Editor window).