Chapter 2: Working with Product X Reports

This section covers the following topics:

- **Creating New Reports, Data Files and Data Sources**
- **Editing Existing Reports**
- **Selecting Report Styles**
- **Report View Summaries**
- **Upgrading Reports**
- **Converting Charts to Product X**

NEW PRODUCT X REPORTS AND DATA FILES

There are two types of new items that you can create using the New option in the Product X menu:

- Reports
  Select Product X data to be imported into a Microsoft application spreadsheet (See page 3).
- Data Files
  For very large reports, you can bypass Microsoft application and create a comma or tab delimited.TXT or .CVS file, and import it into a Product X report (See page 4).

HOW TO: CREATE NEW PRODUCT X DATA OBJECTS

To access the Product X features used to create reports, follow the steps below:

1. Click the Product X option form the Microsoft application menu bar.
2. Select the New Option.
   A drop down menu appears listing the types of reports and data sources you can create.
   These are described in more detail below.

Creating Reports

Use the New→ Report option to create a report from a Product X database.

Creating Reports from Multiple Data Sources

You can create single reports from multiple data sources. The data sources can be in different formats (e.g., Express, MSAS, etc.).

HOW TO: CREATE MULTIPLE DATA SOURCE REPORTS

To build a report with multiple databases, follow the steps below:

1. Click the Product X option form the Microsoft application menu bar.
2. Select the New Option.
3. Select the Report Option.
   The Data Source window opens.
   An  icon displayed to the left of a data source indicates that it is enabled for reports that use multiple data sources.
4. Select the data sources that you will use to create the report.
5. Click OK.
   The Report Editor window opens. (The use of this window is described in detail in Chapter 3).
   The Dimension Members window for each dimension displays:
   - A folder for each data source you have used to create the report containing an expandable list of members
   - A folder named Common, containing a list of each dimension member included all of the data sources.

Notes: Working with a report with multiple databases requires extra attention while you edit the query that will generate a report with this data. Keep the following in mind when you are working in the Editor Tab of the Report Editor.

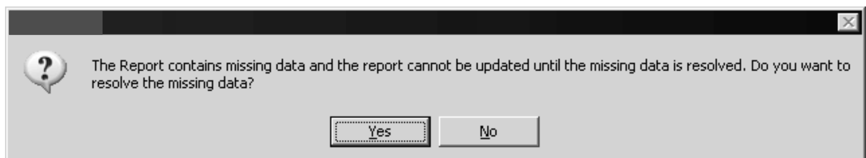
- You can select dimension members from either the data source hierarchy or the common listings.
- Dimension members that are not common to all data sources may contain some null data values.
- Any dimension members you select that are not common to all data sources show no data in the report.

Missing Data Handler

The missing data handler resolves processing errors that arise when selection steps in a Product X query call for data that is not present in the data sources used to build a report. This may occur if data sources are updated or if a report is run against a data source other than that which was used when the query was created in the Report Editor. In these situations, Product X is not able to generate the report.

The missing data handler assists you in finding and deleting the selector steps that call for data that is not in the data sources used to generate the report. After these steps are removed, Product X can complete the generation of the report.

If Product X encounters missing data while generating a report, the following error message window appears:



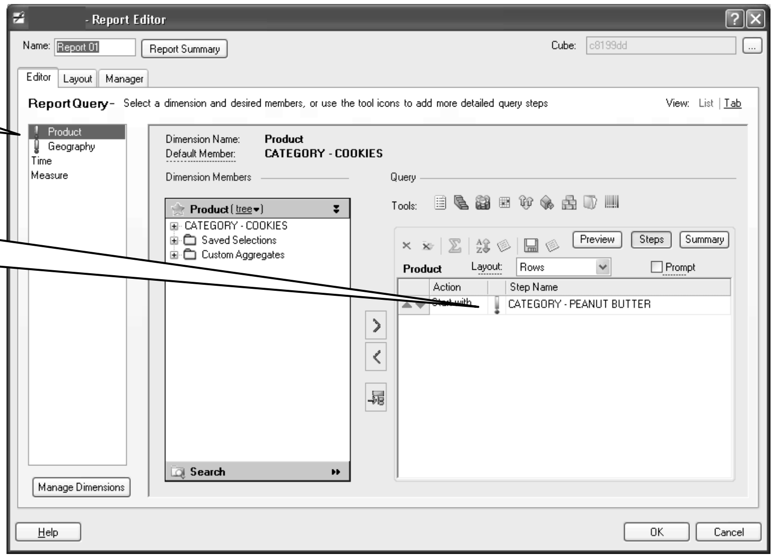
To resolve the missing data issue, follow the steps on the following pages.

HOW TO: RESOLVE MISSING DATA ISSUES

1. Click the OK button on the error message window.
   The Report Editor screen appears.

A. Indicator for dimension with missing data issue.

B. Indicator for a selector step that calls for missing data. This step must be removed.



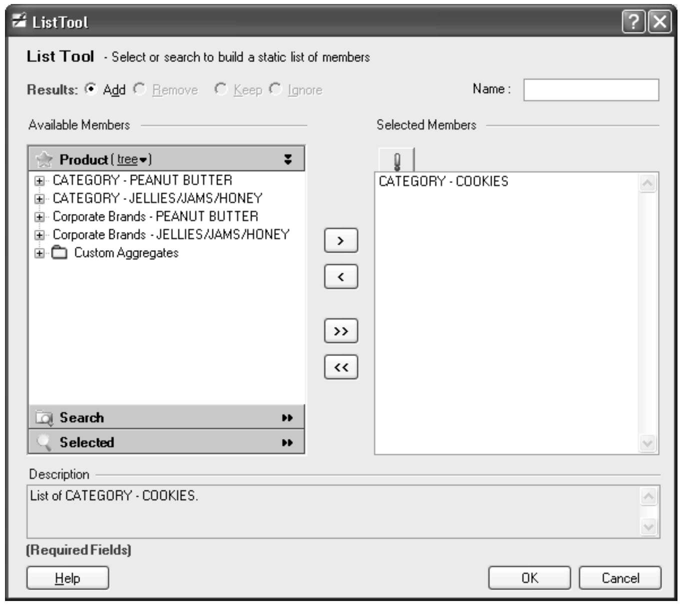
   Each dimension that has missing data issues is indicated by a red exclamation point in the Dimensions pane.
   (See A above.)

2. Select a dimension that has a missing data indicator.
   The step selector will indicate each step that calls for missing data with a red exclamation mark.
   (See B above.)

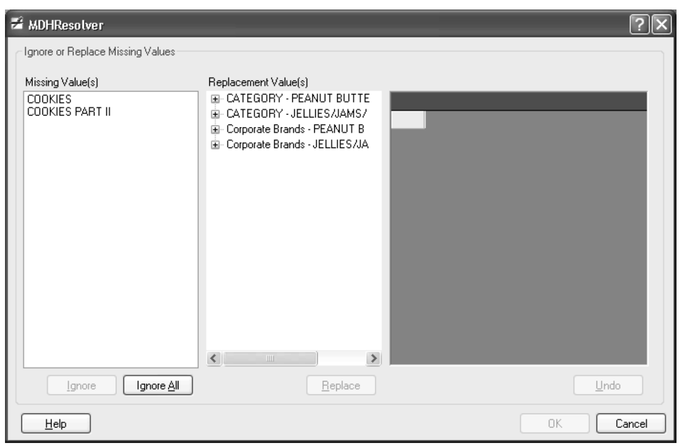
   Data issues for all of the steps in the tagged with an exclamation point must be resolved in order for Product X to successfully generate the report.

3. For each step with that has missing data, click the exclamation point next to it.

4. If the missing data is called for in a step that contains selections made using a selector tool, the window for that tool appears with a red exclamation point. An example is shown below.



Click the exclamation point on the selector tool window. The MDHResolver window appears.



To resolve a missing data issue that involves a selector tool, you may either:

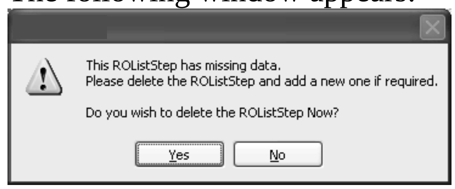
- Use the MDHResolver window to replace the missing data with specific dimension members.
  a) Select an item in the Missing Value(s) pane.
  b) Select an item in the Replacement Value pane.
  c) Click the Replace button.

d) Repeat as needed to address all values in the Missing Value(s) pane.

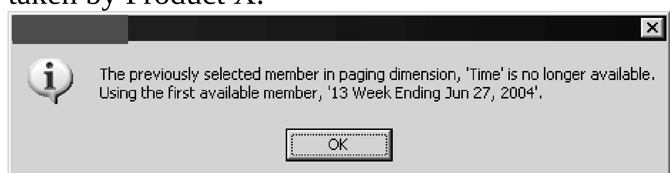
e) When all missing values have been replaced, click the OK button.

- Allow Product X to automatically select the a member that is included in all databases for this step in the query.

a) Click the Cancel button.
The following window appears:



b) Click the Yes button.
The following window appears to describe the action taken by Product X.



Creating Data Files

Use the New→ Data File option to create reports that may be too large to open in Microsoft applications. This option bypasses Microsoft application and creates a comma or tab delimited.TXT or .CVS file.

Note: Maximum Excel reports are 256 columns by 65,536 rows, with 1,000 vertical and horizontal page breaks.

HOW TO: CREATE A NEW DATA FILE

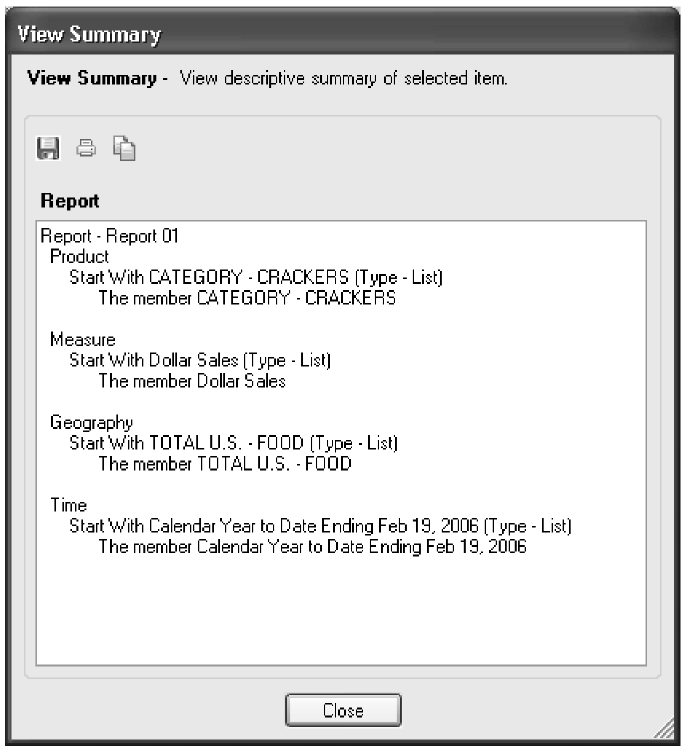
To create a new data file, follow the steps below:

1. Click the Product X option form the Microsoft application menu bar.
2. Select the New Option.
3. Select the Data File Option.
   The Report Editor opens.
   (The use of this window is described in detail in Chapter 3).
4. Select dimension members, and create the report as you would any other report in the Report Editor.
5. Use the Report Editor Layout tab to establish the structure of the data file.
   Keep the following points in mind as you use the Layout tab of the Report editor to specify the report output structure.
   - All dimensions will appear in either the Rows or Columns areas of the window.
   - Dimensions that were defined as Pages will be moved to Rows.
   - The Preview window will display a layout of the report in text format.
6. Select comma or tab as a delimiter.
   The Comma delimiter button is selected by default.
7. Click OK.
   The Create Delimited Data File window opens.
8. Enter the name of the file (browse to the correct location, if necessary).
9. Click the Download Data Now checkbox
10. Click OK to save the file. The report is saved by Product X as an .OVD file.

REPORT SUMMARY FEATURE

This feature allows you to view a summary of the steps currently included in the query for each dimension to be included in the Product X report.

To use this feature, open the Product X report you wish to use and select the Report Summary option from the Product X menu. The View Summary window will appear. This window displays a summary of the selection rules for each step in the query, by dimension.



SELECTING PRODUCT X REPORT STYLES

You can select the style for an XLeratePlus report using the Product X Report Styles feature.

HOW TO: SELECT A REPORT STYLE

To access the Product X report style options, follow the steps below:

1. Open the XLeratePlus report for which you want to change the style.
2. Select the Report Style option from the Product X menu.
   A sub menu appears with the available reports styles.
3. Select a style from the sub menu.
   You can choose from one of three styles:
   - Normal (see page 10).
   - Pivot Table Ready (see page 11).
   - Stacked Output (see page 12).

   The report style is applied to the report.

Normal Report Style

The default style of the report is Normal. Normal reports arrange dimensions in columns and rows, with page level dropdown menus that allow you to select a page dimension member to be displayed on the report.

Note: Large Product X reports are subject to size limits. Product X reports must be comprised of less than 100,000 spreadsheet cells. The number of cells required for a report can be determined as follows:

(# of Products) x (# of Measures) x (# of Geographies) x (# of Time Periods)

Pivot Table Ready Report Style

Changing the style to Pivot Table Ready changes the report to an Microsoft application list. Microsoft application lists are tables with columns of information. The first row contains header labels for each column. You can use a Pivot Table Ready report to create a pivot table using Microsoft PivotTable feature. If the report has page information, only the page that is visible will be used.

HOW TO: USE THE PIVOTTABLE READY REPORT STYLE

To use the PivotTable ready report style, follow the steps below:

1. Choose the page information you want to use from the drop-down(s).
2. Select an active cell in the Product X report.
3. Select Report Style→ Pivot Table Ready from the Product X menu.
   The report title and page information are hidden and the report can then be made into a pivot table.
4. Save the PivotTable another worksheet as a copy of the original report.
5. Return the original report to the Normal report style to recreate the report's page and title information.

Stacked Output Report Style

Changing the style to Stacked Output will use all of your page dimensions to create separate reports that will be “stacked” on top of each other in one MS Excel file. Instead of clicking on a page dimension drop-down to view a report’s dimension, all versions of the report will be visible for you to use. The Stacked Output report will not contain page filters.

If a report is set to Stacked Output, the Refresh option for the report will automatically be changed to All Pages and will not be editable.

The Format / Layout option for the report will still display the paging dimensions in the Page Filters field, but they are now used to designate how the reports are organized. If you move a Page Filter dimension in Layout, the stacked reports will adjust accordingly.

You can turn off the Stacked Output feature at any time by choosing another option (Normal or Pivot Table Ready) from the Report Style menu.

CSV

Changing the Style to CSV will put all data in the report into comma separated value (CSV) format (also known as comma delimited format). A CSV file does not have any dropdown filters. While CSV format has limited end-user features, it is useful for transmitting extremely large reports which are then processed after transmission to format the data in a user-friendly structure/format.

EDITING PRODUCT X REPORTS

You can edit existing reports to change the way in which data is extracted and structured.

HOW TO: EDIT EXISTING REPORTS

To edit an existing Product X report:

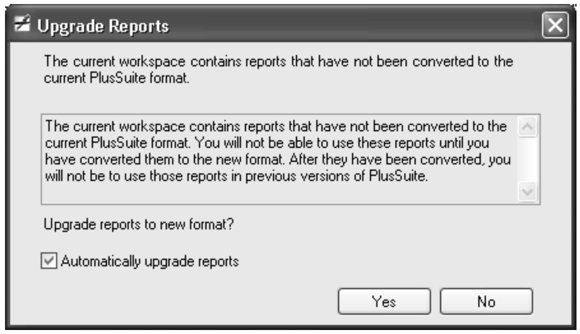
1. Open the report to be edited.
2. Select the Edit Report Option from the Product X menu.
   The Report Editor opens, which allows you to edit the query that generates the report.
   Detailed information on the function and use of the Report Editor is covered in Chapter 3 and Chapter 4.

Note: The Report Editor is used to design/edit the query that is used to generate a report. This should not be confused with the functions and features available on the Product X menu that can be applied to individual reports.

Upgrading Reports from Product X 1.3

The Upgrade feature converts reports that were created in Product X 1.3 for use in Product X 2.3.

This function is invoked if a 1.3 report is opened. When this happens, the following widow opens.



Follow the steps below to use the Upgrade feature.

1. Click Yes on the Upgrade Reports screen (shown above).
   The Environment List window opens.

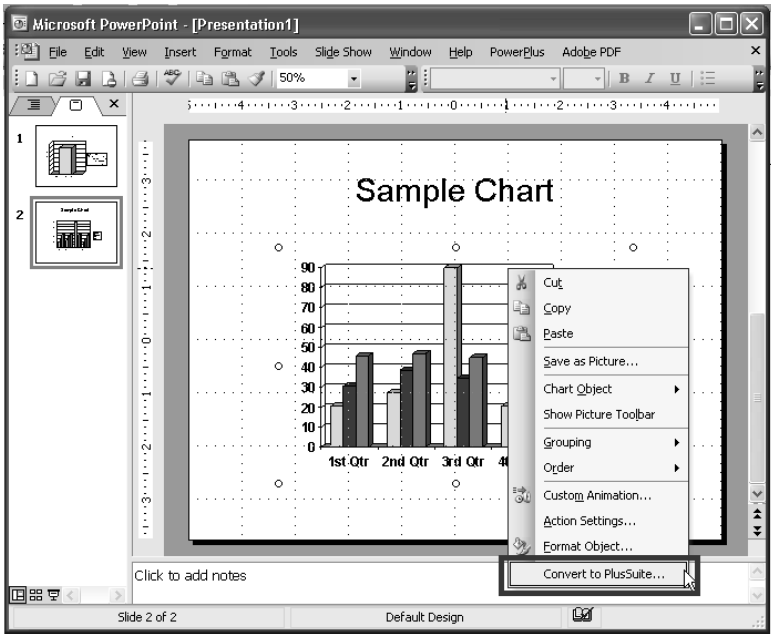
2. Select the desired Environment.

3. Click the OK button to complete the upgrade process.
   The report is converted to Product X 2.3 and is ready for use.

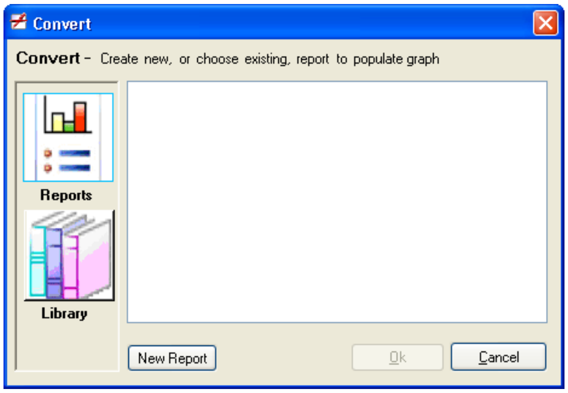
Linking PowerPlus Charts to Product X Data Sources

You can convert a chart in power plus so that it is linked to a Product X data source.

To do this, right click on the chart table in PowerPoint and select Covert to Product X from the pop up menu.



The Convert window will appear.



- You can link to an existing data source by selecting it in this window, and clicking OK.
- You can put the converted chart into a new report by clicking the New Report button.