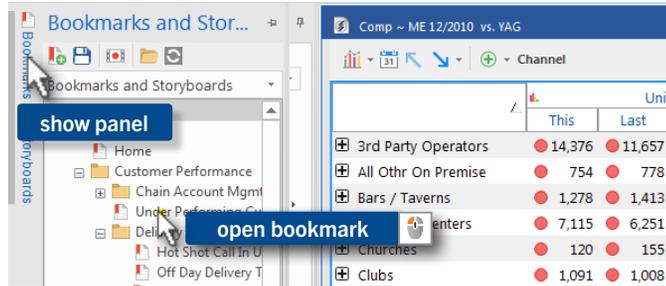




# Choose a Starting Point

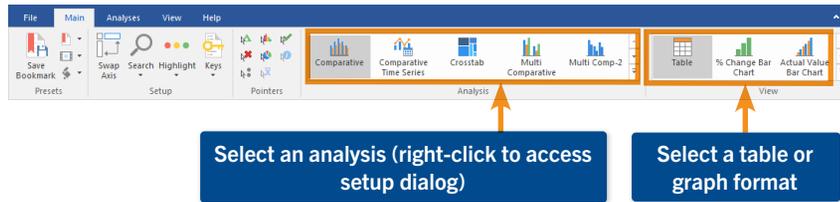
## Option 1: Start from a bookmark

To access the bookmarks panel, mouse over the tab (if it's in autohide mode). Then, click on a bookmark to open it.



## Option 2: Choose an analysis

Select a mode of analysis based on what you want to find out (e.g., compare, identify trends, find outliers, etc.).



### Analysis types

#### Date comparisons

- Compare members (1 or 2 date ranges)
- Compare over 2 date ranges
- MTD and YTD comparison
- 1 week, 4 weeks, 13 weeks & year vs YAG
- Any number of date comparisons
- Compare by 2 attributes

#### Exceptions and outliers

- Exception (pass/fail) test
- Exception (pass/fail) over time
- Distribution over ranges
- Scatter by 2 data fields (key level)
- Plot by 2 data fields (attribute level)
- Average per passing member
- Average per member over time

### Analysis types (continued)

#### Trends over time

- Trend over time
- Share trend over time for multiple members

#### Mix or share

- Mix (percent of total) for two date ranges
- Mix (percent of total)
- Mix (percent of total) over time

#### Other

- P&L format/scorecard
- Geo location intelligence
- Line item details
- Non-transactional details

### Examples

	Units Sold		Net Revenue	
	This	% Chg	This	% Chg
SouthEast Area	69,324	7.12	\$622,179	5.16
SouthWest Area	65,067	6.87	\$553,981	3.97
East Area	58,896	6.98	\$464,027	2.26
NorthWest Area			7.32	
Near West Area			5.84	

**Comparative Time Series - performance over two date ranges**

**Mix**

	Totals	Passed	% Passed
All Others	5,498	901	16.4
College Full Service	173	71	41.0
Lakeside Garage	36	22	61.1
D & C Group	33	19	57.6

**Exception - pass/fail test**

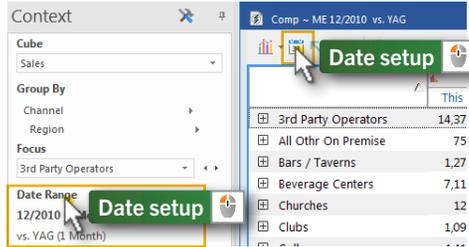
**Normal Trend - performance metrics over time**

**Share Trend - performance comparison over time**

# 1 Select the Dates

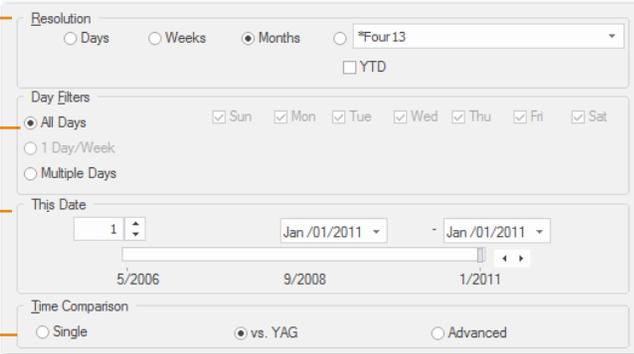
# 2 Group By and List

Click the Period button in the analysis toolbar or Date Range in the context panel.



Choose timeframe options in the dialog.

Set the resolution (days, weeks, etc.)



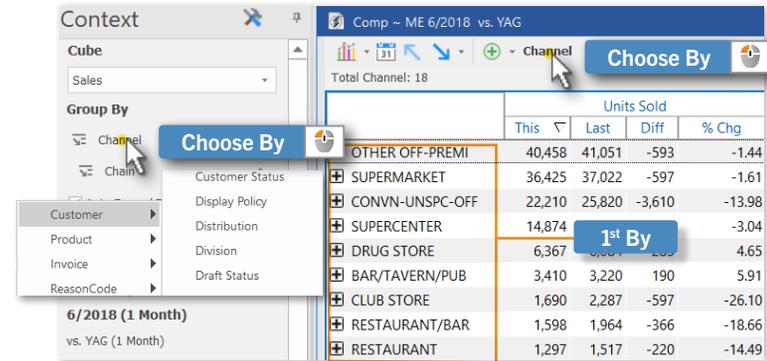
Filter on certain days (optional)

Choose the timeframe ("This" date range)

Select previous period to compare against ("Last" date range).

*Options may be disabled based on the current mode of analysis.*

The "Group By" controls how data is organized into categories for comparison. The top-level of groupings is called the 1st By.



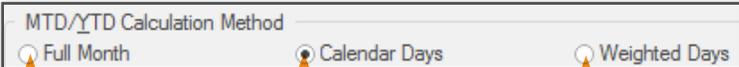
**Tip:** To list out key members (e.g., customers), choose a "list" as the 1st By.

You can expand data into additional levels (2nd By, 3rd By, etc.) to see more details. You can expand rows individually or auto-expand all rows of a dimension.

## Incomplete month options



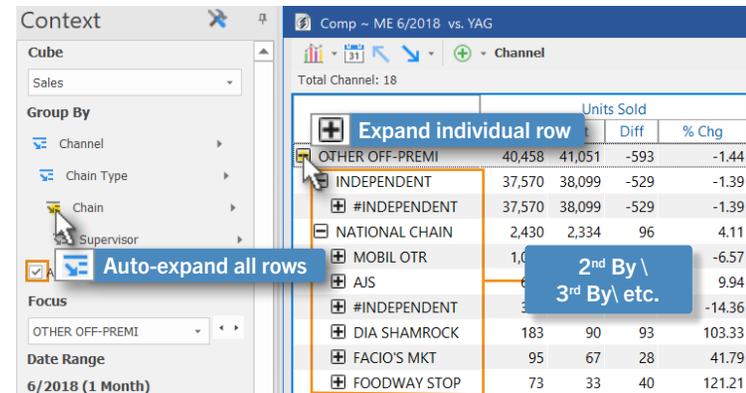
In the context panel, click on Modifiers; then select an MTD/YTD calculation method (only available if the date range is set to the current month).



Incomplete month vs. complete month last year—"gap" or "goal" perspective.

Compares same number of days this year and last—most precise "gain/loss" vs last.

Must be set up by your system administrator.



### 3 Insert Data Fields

### 4 Narrow Down

**In tables:**

Insert data fields by clicking in the Context panel or right-clicking a column heading.

**Tip:** The menu might be organized by custom groups (e.g., Sales) or built-in data types (e.g., Volume).

**Insert**

**Variance, mix and other computations:**

Click on a pointer tool in the ribbon control and then click on the column.

**Pointers**

Net Revenue	
This	Last
\$228,339	\$226,194
\$269,553	\$193,949
\$265,975	\$320,415

**In graphs:**

Open the tools menu or click the label to access options for selecting the data.

**Tip:** Sometimes columns must be marked using the graph pointer to show them in the graph.

**Drill down:**

	Net Revenue			% Chg
	This	Last	Diff	
⊞ SUPER				-4.67
⊞ CONVN-UNSPC-OFF	\$5,616,571	\$5,578,650	\$37,921	0.68
⊞ SUPERCENTER	\$3,521,630	\$3,158,492	\$363,138	11.50
⊞ DRUG STORE	\$1,432,300	\$1,093,225	\$339,076	31.02
⊞ SERVICE ORGANIZ	\$615,884	\$599,467	\$16,417	2.74
⊞ OTHER OFF-PREMI	\$653,030	\$714,314	(\$61,285)	-8.58

**Double-click on a member**

**Add filter:**

Click the "Add Filter" button in the Context panel or analysis toolbar. Then pick what to show.

**Add filter**

**Add filter**

**Add Brand[Product] Filter**

Members 272 [Checked (2)]

Alphabetically

- ARCADIA WHITEWATER
- BEST BEER
- BEST BEER ALE
- BEST BEER BLOCKED
- BEST BEER CHECKERED

**Collections (saved sets of members):**

In the Context panel:

**Create an Of These (test-based) collection**

**Turn on a collection (filter or show by title)**

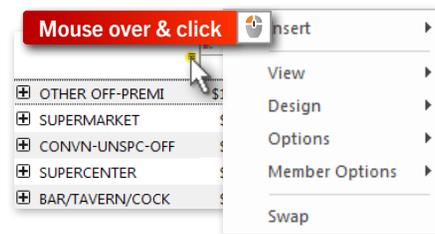
**Create a classic collection**

## 5 Customize

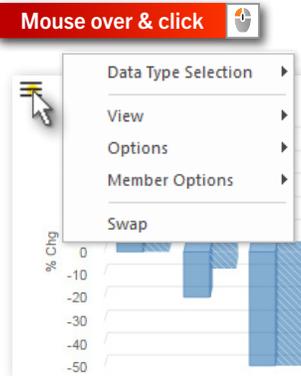
## 6 Save and Share

### Tools menu

To access in tables:



To access in graphs:



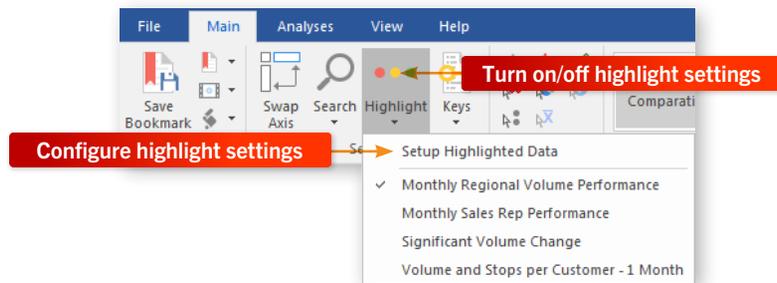
### Sort

	Units Sold			
	This	Last	Diff	% Chg
OTHER OFF-PREMI	41,114	39,832	1,289	3.24
SUPERMARKET	23,088	26,272	-3,184	-12.12
CONVN-UNSPC-OFF	6,737	6,521	216	3.31
SUPERCENTER				
DRUG STORE				

Click column heading

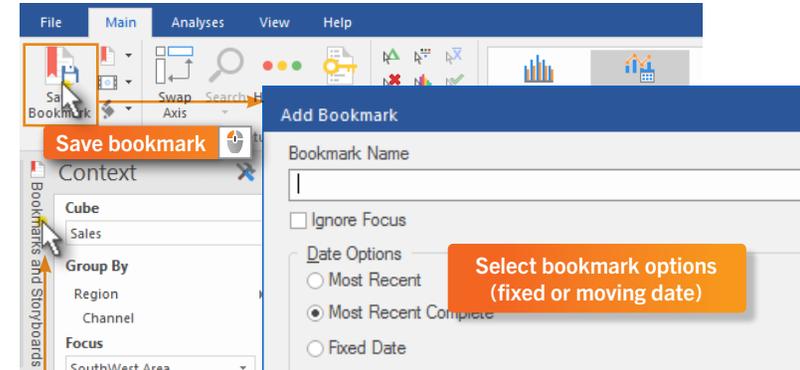
Click again to reverse sort

### Highlight



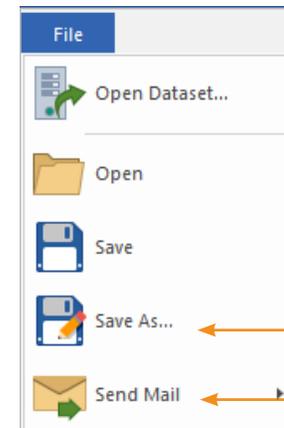
### Bookmarks

Configure a view and then add it as a bookmark to re-use it and/or share it with other users.



Tip: Mouse over the tab to access the bookmarks panel.

### Export and Email



Several different formats are available depending on whether you are exporting a table or graph. Options may be restricted by user ID.

Tip: You can set up macros to automatically export and email data.

