



DATA→INFORMATION→ACTION

Tips and Tricks for End Users

Presented by Tanya Procknow
Technical Support Specialist
Dimensional Insight, Inc.



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In this course, we will cover Tips and Tricks for the following:

Report Creation

SubTotal

SubTotal - Others Total (Old vs New)

\$QVVAL(____)

Calcs

Calcs Driven by QV Values: Parameterized Calcs

Calcs Driven by Time Series Values

Scan

Report Formatting and Options

Templates

Marker Options

DiveBook Topic QuickViews



Report Creation: SubTotal Reports

Objective: Certain "metrics" must be calculated at a detail level but reported at a summary level.

customers or # people meeting certain criteria

WINE - WOODCHUCK - WOODCHUCK DRAFT			Thursday, May 20, 2010		
	Cases Prior3	Cases Current	New Placement		
House Account Total	1	0	0		
Jones, Simon Total	3	0	0		
Locarno, Leanne Total	1	0	0		
Pierce, Arthur Total	3	0	0		
Post, Mickey Total	4	0	0		
Roberge, Claude Total	0	3	0		
Total	12	3	0		

Salesperson	Customer	Cases Prior3	Cases Current	New Placement
Totals	Totals	4,588	3,385	7
Gorman, Benjmn	ITALIAN SPORTING CL (02561)	15	3	0
Grandier, Sam	BUJU PRODUCTIONS, I (00812)		21	1
Gull, Kate	BHARAT INC. S (00562)	5		0
Holmes, Jack	DOWD'S PUB & INN (01584)		32	1
Holmes, Jack	PLEASANT VIEW CITIZ (04029)	14		0
Holmes, Jack	ZORBA NEW YORK INC (05725)		946	1
Humphreys, Jerome	CHRIS ASSOCIATES I (01124)	470		0
Hurley, Gregory	DICE, INC (01522)	49		0
Inactive Acco	RATTLESNAKE BAR & G (04216)		689	1
Jones, Neil	J J'S SPORTS PUB IN (02585)	1,162		0
Jones, Simon	BUILDING TRADES (00611)	124		0
Jones, Simon	EMERALD TAVERN (01738)	61		0



Elements of the subtotal report

- "Product Groups" QuickView
- list of "Salespersons"
- columns showing sales for 2 periods
- column for number of New Placements
- Totals at bottom

A New Placement is a customer that purchased this period but not in a previous period.

The "New Placement" calc must be done at the customer level and can not be done at the salesperson level.

It is very useful to view the metric at the salesperson level without seeing all the detail.

You can not dive off this report since you are actually looking at a subtotal. Any dive will only show the last row in the underlying multi-tab.

Take a look at the calculation, this is what we needed to ask before its creation:

New Placement definition (what it IS and IS NOT):

If Cases were shipped the Last 3 Months and this Month, then it's not a New Placement.

If Cases were shipped the last 3 Months and not this month, then it's not a New Placement.

If Cases were not shipped the Last 3 Months and Cases were shipped this month, then it is a New Placement.



Workshop 1: Report Creation: SubTotal Reports

Key Elements

- Create calc field(s) for the “metric” (e.g. 0 or 1)
- “Metric” calc option – “Always Sum Total”
- Create multi-tab window
 - 1st dive is “summary” or reporting field (Salesperson)
 - 2nd dive is “metric” related field (Customer)
- Convert to subtotal report
- Delete items related to “metric” related field



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Workshop 1:

1. Launch ProDiver and open subtotalreport.mrk
2. **Display > Tabular** to convert to the underlying multi-tab

note: view the calc for "New Placement"
`|if(and(calc[Cases Prior3]<0,calc[Cases Current]>0),1,0)`

3. **Display > Report...**
4. Change Report Style to "Indented 2 Level MultiTab"
5. **OK**
6. Unlock the report
7. Highlight all items on the same row as the customer name
8. Delete these items
9. Highlight the salesperson name in large font
10. Delete these items
11. Continue to modify the Report appearance

Note:

You can not dive off this report since you are actually looking at a subtotal. Any dive will only show the last row in the underlying multi-tab.

Try it and see what you get.



Report Creation: SubTotal - Others - Total

Objective

On a "focused" Report show :

- Revenue SubTotal for displayed rows
- Revenue SubTotal for non-displayed rows
- Total Revenue for all rows
- Also show percentages !!!



Workshop 2: Report Creation SubTotal - Others Total (Old)

	Customer County	Revenue	Revenue % of Total	Parent Revenue	Revenue Other	Pct Other
1	NY, New York	457,443	52.3	875,062	417,620	47.7
2	NY, Queens	95,693	10.9	875,062	779,369	89.1
3	NY, Bronx	63,431	7.2	875,062	811,631	92.8
4	NY, Kings	61,635	7.0	875,062	813,427	93.0
5	NJ, Bergen	58,738	6.7	875,062	816,324	93.3
6	NY, Westchester	41,486	4.7	875,062	833,576	95.3
7	NY, Nassau	34,454	3.9	875,062	840,608	96.1
8	NY, Rockland	22,913	2.6	875,062	852,149	97.4
9	NY, Richmond	13,472	1.5	875,062	861,590	98.5
10	NJ, Essex	12,471	1.4	875,062	862,591	98.6
	Subtotal	861,737	98.5	875,062	13,326	1.5
	Others	13,326	1.5			
	Total	875,062	100.0			

Workshop 2:

1. Open ProDiver > sales.dvp
2. Dive on Customer County
3. Delete all current summaries and add:

```
Revenue = Total[Revenue]
Revenue % of Total = % Total[Revenue]
Parent Revenue = parent(Total[Revenue])
Revenue Other = calc[Parent Revenue]-Total[Revenue]
Options = Don't Show Total
Pct Other = 100-% Total[Revenue]
Options = Don't Show Total
```

4. FIND top 10 Customer County
Sort Down (Revenue)
Find > First 10 Items
Focus + Group
Find All

Note :

- the value for "Parent Revenue" does not change
 - on Subtotal row, all values except Parent Revenue have changed
5. Convert to report window
 6. Unlock report window

Workshop 2: Report Creation SubTotal – Others Total (Old)

Workshop 2 continued:

7. Insert item -

- same properties as "Subtotal"
Click "Subtotal" and choose Add Item
- change item type text from "\$TOTAL_STRING" to "Others"
- vertical offset of 20
- remove line above "Others"
Edit Item > Style > Top Line= None

8. Insert item -

- same properties as "Subtotal"
- change item type text from "\$TOTAL_STRING" to "Total"
- vertical offset of 40
- remove line above "Total"

9. Insert item -

- same properties as "Revenue" Subtotal value (the number)
- change Summary Name from "Revenue" to "Revenue Other"
- vertical offset of 20
- remove line above value

10. Insert item -

- same properties as "Revenue" Subtotal value (the number)
- change Summary Name from "Revenue" to "Parent Revenue"
- vertical offset of 40
- remove line above value

11. Insert item -

- same properties as "Revenue % of Total" Subtotal value (the number)
- change Summary Name from "Revenue % of Total" to "Pct Other"
- vertical offset of 20
- remove line above value

12. Insert item -

- same properties as "Total"
- change item type text from "Total" to "100.0"
- change position to column "c"
- right align

13. Change report to TOP 5, then TOP 10

Note: all the subtotal values and % change appropriately

14. Delete these columns on final report :

Parent Revenue
Revenue Other
Pct Other



Workshop 3: Report Creation: SubTotal - Others Total (New)

Customer County	Revenue	Revenue % of Total
NY, New York	457,443	52.3
NY, Queens	95,693	10.9
NY, Bronx	63,431	7.2
NY, Kings	61,635	7.0
NJ, Bergen	58,738	6.7
NY, Westchester	41,486	4.7
NY, Nassau	34,454	3.9
NY, Rockland	22,913	2.6
NY, Richmond	13,472	1.5
NJ, Essex	12,471	1.4
Subtotal	861,737	98.5
Others	13,326	1.5
Overall Total	875,062	100.0

Workshop 3:

1. Open ProDiver > sales.dvp
2. Dive on Customer County
3. Delete all current summaries and add:
Revenue = Total[Revenue]
Revenue % of Total = % Total[Revenue]
4. Sort Down on Revenue
5. Find > First 10
6. Focus > Group with Others
7. Select Display > Report
8. Tabular with Others > Totals = Bottom
9. Click OK



\$QVVAL(____)

Objective : Place selected QuickView value in a Report title or column header

- Not all QuickView names appear in Parent Dimension Item Types area
 - External Model QVs
 - Time series wizard QVs
- \$QVVAL(____) where ____ = QV name
- QV name Edit > Edit QuickViews...

Workshop 4: External Model: \$QVVAL(____)

Metric Revenue

Metric Selected - Revenue Thursday, May 20, 2010

Company	Metric	Decimal Cases	Revenue	Cases	Bottles
	78.75	1.00	78.75	1	0
Alpha Brands	113,355.92	1,403.00	113,355.92	1,383	240
Delta Brands	373,276.33	21,912.00	373,276.33	21,912	0
Omega Brands	388,351.26	4,156.50	388,351.26	3,649	6,090
Total	875,062.26	27,472.50	875,062.26	26,945	6,330

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Workshop 4:

1. Open ProDiver
 2. Open sales.mrk
 3. Unlock report
 4. Click <Add Item>
 5. Select Item Type = Parent Dimension Value
 6. Click "One Parent" radio button
 7. Click down arrow
- Note: - absence of "Metric" QV
8. Exit ProDiver

-
1. Open ProDiver
 2. Open sales.mrk
- Note:
- Metric QV contains 4 values
 - Metric column contains data for Metric selected
 - Metric selected is contained in title
3. Unlock report
 4. D-click title "Metric Selected = ..."
- Note: - \$QVVAL(metric)
5. Exit ProDiver




Workshop 5: Time Series \$QVVAL(____)

Rolling 12 Months Ending 2004/10

Sales Manager: English, Shane - 084

(Months in reverse order)



Salesman	2004-10	2004-09	2004-08	2004-07	2004-06	2004-05	2004-04	2004-03	2004-02	2004-01
Bray, Francis - 057	2,934	2,789	3,192	3,234	3,334	3,086	2,694	2,900	2,877	1,991
Sawyer, Jessie - 058	2,652	2,529	2,809	2,842	3,203	2,806	2,078	2,253	2,177	1,945
Vega, Troy - 052	8,442	7,930	11,672	10,919	11,471	9,713	8,584	8,322	7,660	6,742
Total	14,028	13,248	17,673	16,995	18,008	15,605	13,356	13,475	12,714	10,678

Workshop 5:

1. Launch ProDiver
2. Open ts-qvval-sales.mrk
3. Unlock Report
4. Click <Add Item>
5. Select Item Type = Parent Dimension Value
6. Click "One Parent" radio button
7. Click down arrow
8. Change position > Column A
9. Note: - absence of "Time Series Current Date" QV
10. Exit Diver

-
1. Launch ProDiver
 2. Open ts-qvval-sales.mrk
Note: - End Date QV contains 4 values
 3. **Edit > Edit QuickViews...**
Note: - The name of the QV is actually "Time Series Current Date"
 4. Close
 5. Unlock Report
 6. Add item > \$QVVAL(Time Series Current Date)
 7. Select text and add: Rolling 12 Months Ending
 8. Lock Report and change the End Date Quickview Value > Go
Note: - the change in the Title Bar
 9. Exit Diver



Calcs Driven by QV Values

Objective: Have QV value determine contents of summary column/calc

Normally you would create multiple Markers if wanted to have a report for Revenue and Units. Now you can think of a Marker as a program with a variable and a QV as a way to pass that variable's value into the program.

So... you should be able to reduce the number of Markers

- Must be External QuickView (e.g. Metric)
- \$(____)____ = QV name
- Total[Revenue] or Total[Units] → Total[\$(Metric)]
- External QV Model
 - *must be open when creating calc*
 - *remember to close prior to saving Marker*
- Try not to include "\$" in a field name - confusing



Workshop 6: Calcs Driven by QV Values:

Metric: Revenue

Company [Untitled.mdl-Dive A]			
Company	Revenue	Units	Metric
Totals	875,062.26	26,945	875,062.26
	78.75	1	78.75
Alpha Brands	113,355.92	1,383	113,355.92
Delta Brands	373,276.33	21,912	373,276.33
Omega Brands	388,351.26	3,649	388,351.26

← Metric = Revenue

Metric: Units

Company [Untitled.mdl-Dive A]			
Company	Revenue	Units	Metric
Totals	875,062.26	26,945	26,945.00
	78.75	1	1.00
Alpha Brands	113,355.92	1,383	1,383.00
Delta Brands	373,276.33	21,912	21,912.00
Omega Brands	388,351.26	3,649	3,649.00

← Metric = Units



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Workshop 6:

1. Launch ProDiver
 2. Open sales.mrk
 - Note: Metric column equals column with same name as the Metric QV (e.g. Units)
 3. Select "Revenue" in Metric QV
 - Note: Metric column values change
 4. D-click Metric column header
 - Note: definition = Total[\$(Metric)]
-
1. Launch ProDiver
 2. Open sales.mrk
 3. **Edit > Add QuickViews... > Add**
 4. Check Skip "All Values"
 5. Select "External" DivePlan Type
 6. Browse...
 7. Select "metric.mdl"
 8. Open
 9. **OK > Close**
 10. Open sales.dvp
 11. Dive on Company
 12. **Edit > Edit Columns... > Add**
 13. Key "Metric" into Name box
 14. Key "Total[\$(Metric)]" into definition box
 15. OK
 16. **Edit > Select Columns...**
 17. D-click "Metric"
 - Note: it should now be in Selected box
 18. **OK**
 - Note: Metric column = Revenue column
 19. Select "Units" in Metric QV
 - Note: Metric column = Units column
 20. In Console, r-click "metric.mdl" and Close
 21. **File > Save Marker...**
 22. File > Close
 23. Reopen Marker just saved and re-test



Calcs Driven by QV Values

Company	Revenue
	78.75
Alpha Brands	113,355.92
Delta Brands	373,276.33
Omega Brands	388,351.26
Total	875,062.26

Option 1
- create 1 Marker per
variation

Company	Units
	1.00
Alpha Brands	1,383.00
Delta Brands	21,912.00
Omega Brands	3,649.00
Total	26,945.00

Option 2
- modify existing Marker to
allow user to select desired
metric



Workshop 7: Calcs Driven by QV Values:

Metric: Revenue	
Revenue Report	
Company	Revenue
Alpha Brands	78.75
Delta Brands	113,355.92
Omega Brands	373,276.33
Total	388,351.26

Metric: Units	
Units Report	
Company	Units
Alpha Brands	1.00
Delta Brands	1,383.00
Omega Brands	21,912.00
Total	3,649.00

Workshop 7:

1. Open ProDiver
2. Open qv-metric-sales-report.mrk
3. Delete all Summaries
4. Add a Summary named "Summary"
5. Define it as calc[Metric]
6. Change to Report View
7. Unlock the Report
8. Edit Item = Summary
9. Change to Item Type: Text
10. Definition: \$QVVAL(Metric)
11. Add Item
12. \$QVVAL(Metric)
13. Text > Trailing Text > Report > Click OK
14. Update the QuickView and see the Report change!



Calcs Driven by Time Series QVs

What can Time Series do for me ?

- Similar to "Calcs Driven by QV Values" but with a twist
 - *Marker is a variable program controlled by a QuickView*
 - *Reduce the number of Markers*
- Time Series Control Panel is THE interface
- Creates QuickViews ; but ...
 - *YearMonth Current Date* *time series = YearMonth*
metric = Current Date
- Creates Named Groups ; but ...
 - *ts YearMonth p YTD* *ts = time series = YearMonth*
p = period = YTD
- Time Series Control Panel is THE interface



Workshop 8: Calcs Driven by Time Series QVs

Rolling 12 Months

Thursday, May 27, 2010

Salesman	2005-05	2005-04	2005-03	2005-02	2005-01	2004-12	2004-11	2004-10	2004-09	2004-08	2004-07	2004-06
Battle, Judy - 044	8,871.00	8,059.00	7,607.00	6,367.00	6,390.00	7,924.00	8,955.00	8,536.00	8,621.00	11,656.00	10,533.00	11,970.00
Bowman, Lucy - 054	1,987.00	2,011.00	1,965.00	1,937.00	1,522.00	1,933.00	2,217.00	1,951.00	2,252.00	2,272.00	2,382.00	2,355.00
Bray, Francis - 057	2,628.00	3,089.00	3,347.00	2,890.00	1,827.00	3,309.00	2,663.00	2,934.00	2,789.00	3,192.00	3,234.00	3,334.00
Carr, Velma - 046	1,629.00	1,807.00	1,550.00	1,111.00	1,448.00	2,060.00	1,050.00	1,117.00	1,339.00	1,293.00	1,452.00	1,566.00
Diaz, Ira - 061	65.00	27.00										
Everett, Freddie - 047	4,021.00	3,313.00	3,481.00	2,926.00	1,712.00	4,493.00	3,626.00	3,229.00	3,658.00	3,399.00	4,877.00	4,342.00
Green, Cristina - 053	4,308.00	4,549.00	4,447.00	3,630.00	2,991.00	4,250.00	4,857.00	5,422.00	5,508.00	5,444.00	6,270.00	5,949.00
Harding, Gina - 099	25.00		16.00	36.00	20.00	40.00	23.00	37.00	28.00	36.00	37.00	41.00
Howe, Eric - 056	529.00	589.00	517.00	549.00	364.00	846.00	608.00	591.00	875.00	886.00	1,078.00	991.00
Joyner, Carolyn - 050	553.00	596.00	581.00	413.00	396.00	517.00	487.00	539.00	537.00	630.00	609.00	731.00
Mcintosh, Lorena - 045	3,517.00	3,760.00	3,450.00	3,188.00	2,535.00	4,357.00	3,841.00	3,695.00	4,024.00	3,863.00	4,049.00	4,530.00
Morton, Theresa - 049	1,227.00	1,025.00	1,440.00	1,132.00	621.00	1,315.00	1,354.00	1,475.00	1,061.00	1,720.00	1,463.00	1,796.00
Nieves, Andre - 051	10,291.00	9,368.00	9,443.00	7,732.00	7,575.00	9,366.00	9,393.00	9,131.00	9,978.00	11,602.00	11,671.00	12,158.00
Richard, Wendy - 062												5.00
Sawyer, Jessie - 058	2,471.00	2,961.00	2,652.00	1,827.00	1,476.00	3,086.00	2,507.00	2,652.00	2,529.00	2,809.00	2,842.00	3,203.00
Sosa, Emanuel - 060	371.00	560.00	361.00	403.00	363.00	476.00	370.00	445.00	357.00	431.00	409.00	436.00
Tanner, Patti - 055	2,162.00	2,154.00	1,917.00	1,653.00	1,427.00	2,056.00	1,983.00	1,958.00	1,958.00	2,582.00	2,589.00	2,989.00
Vega, Troy - 052	9,205.00	8,086.00	9,136.00	7,678.00	5,746.00	9,608.00	8,748.00	8,442.00	7,930.00	11,672.00	10,919.00	11,471.00
Wiley, Elaine - 048	3,185.00	3,835.00	4,012.00	3,802.00	2,723.00	3,705.00	3,938.00	3,302.00	3,833.00	2,931.00	3,442.00	4,551.00
Total	57,045.00	55,789.00	55,922.00	47,274.00	39,136.00	59,341.00	56,620.00	55,486.00	57,277.00	66,418.00	67,856.00	72,418.00



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Workshop 8:

1. Open ProDiver > rolling-sales.mdl
2. Dive on "Year Month"
3. Define "Year Month" as a period
4. Remove all Summary fields from dive window
5. Edit > Time Series Control Panel...
6. Add...
7. Name time series same as Dimension with spaces removed: "YearMonth"
8. Uncheck "Include Time Series Label in QuickView Bar"
9. Name current date same as time series with "Current" appended: "YearMonth Current"
10. Select Date Definition: Date Set by QuickView
11. Next >
12. Select "Rolling Periods" Template
13. Change Number of Periods to 12
14. Note : naming convention
14. Next >
15. D-click "Cases"
16. Finish
17. OK

Workshop 8: Calcs Driven by Time Series QVs

Workshop 8 continued:

18. Review what just happened :

One QuickView was created

- name is "YearMonth Current Date"

Edit > Edit QuickViews...

- QV label is "YearMonth Current"

12 Named Groups created

ts YearMonth p Current Period

ts YearMonth p Previous Period

ts YearMonth p Current Period -2

...

ts YearMonth p Current Period -11

12 Calcs/Columns created

Cases Current Period = calc[Cases,Year Month="ts YearMonth p Current Period"]

Cases Previous Period = calc[Cases,Year Month="ts YearMonth p Previous Period"]

Cases Current Period -2 = calc[Cases,Year Month="ts YearMonth p Current Period -2"]

...

Cases Current Period -11 = calc[Cases,Year Month="ts YearMonth p Current Period -11"]

QuickViews -

- can be re-ordered in Edit QuickViews box
- are not editable in Edit QuickViews box

Named Groups -

- are visible in Edit Column box
- are not editable in Edit Named Group Box

19. Check cell values for correctness

20. Close "Year Month" window

21. Dive on "Sales Manager"

22. Convert to Report; provide title of "Rolling 12 Months"

23. Unlock Report

24. Edit each Summary column in turn

- Item Type = Group Value

25. Review column headers for correctness

26. Select different values and check for correctness

27. File > Page Setup > Landscape

28. Save Marker



Calcs Driven by Time Series QVs

- The Future is Now
 - Freedom of choice
 - Fewer Markers
 - Re-think your current Reports

- Prepare
 - Invest some time now
 - Self-study
 - DI Training
 - KISS applies as you start out



Scan

Objective: Allows user to get a portion of a string when you know the separator but not the length.

Customer

Totals
449 MAIN STREET INC (00001)
4577 ARSENAL ST COR (00002)
495 PAGE BOULEVARD (00003)
5 CLUB (00004)
5 FAB GUYS 8 SWELL (00005)
5 L'S INC B (00006)
5 O CLOCK CLUB INC (00007)
5-88 CLUB INC. A (00008)
544 LOUNGE,INC. (00009)
57 & ONE CLUB OF M (00010)

Separate Customer Name and Customer Number from Dimension "Customer."

"(" is the separator.

Syntax: scan(string,token number,delimiters)

In the example above, the "(" is a separator. In a Patient Name, it might be " , " as in: "Smith, Janet".

A token is a segment of the string; delimiter is the separator.



Workshop 9: Scan

Customer	Customer Number	Customer Name
Totals		
LIBISZEWSKI&HOGDEN((03002)		LIBISZEWSKI&HOGDEN
449 MAIN STREET INC (00001)	00001	449 MAIN STREET INC
4577 ARSENAL ST COR (00002)	00002	4577 ARSENAL ST COR
495 PAGE BOULEVARD (00003)	00003	495 PAGE BOULEVARD
5 CLUB (00004)	00004	5 CLUB
5 FAB GUYS 8 SWELL (00005)	00005	5 FAB GUYS 8 SWELL
5 L'S INC B (00006)	00006	5 L'S INC B
5 O CLOCK CLUB INC (00007)	00007	5 O CLOCK CLUB INC
5-88 CLUB INC. A (00008)	00008	5-88 CLUB INC. A
544 LOUNGE,INC. (00009)	00009	544 LOUNGE,INC.
57 & ONE CLUB OF M (00010)	00010	57 & ONE CLUB OF M

Workshop 9:

1. Open ProDiver > divebook.dbk > Ad Hoc Analysis: 2 Years MTD
2. Double click an empty column header to create a new column
3. Name the column Customer Number
4. Definition: `substr(scan(Dimension[Customer],2,""),2,5)`
 - ** Because you know the length is 5 characters for the Customer Number and want just the NUMBER without the “(“
5. Sort the column ascending by highlighting the column and clicking the sort up icon in the tool bar
6. Double click an empty column header to create a new column
7. Name the column Customer Name
8. Definition: `scan(Dimension[Customer],1,"(")`
 - ** Because the length varies
9. Sort the column ascending by highlighting the column and clicking the sort up icon in the tool bar



Report Templates

Objective

- Format Report
- Save Report Template
- Load (apply) Report Template



Report Template - Report Examples

Attending Physician Stats

Thursday, May 06, 2010

Hospital: Brown County Hospital
M3 DRG: Med
Product Line: Oncology
DRG: All Values (28)

Number of Discharges	Pct Discharges	Avg Chrg per Disch	Avg Chrg per Day	Attending Physician	Total Charges	Total Disch Days	Avg LOS	Avg Severity (4-6 to 1- Low sev)
875	100.0	4,469	828	Total	3,901,638	7,394	8.5	1.2
222	25.4	5,804	334	Glover, Christina (149873217)	1,288,573	3,861	17.4	1.0
81	9.3	7,824	443	Sanchez, Henry (318889334)	445,950	997	12.3	1.1
36	4.1	6,047	452	Starford, Leigh (05220055)	217,879	452	13.4	1.0
32	3.7	4,797	1,862	Walker, Wilson (80926298)	281,588	289	9.3	1.3
27	3.1	4,815	599	Velasquez, Bryan (827632484)	124,596	265	7.7	1.2
26	3.0	4,812	1,024	Michael, James (81622034)	126,161	176	7.2	1.3
23	2.6	9,340	1,719	Madanet, Ota (532753713)	214,826	125	5.4	1.3
20	2.3	6,322	1,838	Garner, Lisa (84643826)	126,235	168	8.8	1.8
17	1.9	5,06	200	Snyder, Michael (754761406)	8,597	43	2.5	1.1
15	1.7	1,390	788	Blanchard, Robert (85843795)	20,528	148	3.8	1.8
14	1.6	6,307	735	Cass, Oscar (562056445)	88,294	111	7.9	1.1
12	1.4	865	224	Radford, Jonathan (888281299)	10,438	46	4.6	1.8
10	1.1	84	84	Neese, Brandon (175632232)	843	10	1.0	1.0
10	1.1	85	85	Mooney, Loren (452448843)	850	10	1.0	1.0
10	1.1	812	313	Valenzuela, Guillermo (692429234)	8,120	10	1.0	1.1
9	1.0	3,137	389	Barraza, Juan (466424728)	28,275	9	8.3	1.1
8	0.9	7,909	3,290	Greer, Jodi (219930209)	71,719	22	4.4	2.2
8	0.9	78	78	Savaria, Ted (90900138)	626	8	1.8	1.8
8	0.9	2,613	1,900	Beck, Harvey (431621520)	20,900	11	1.4	1.3
7	0.8	1,033	1,033	Gray, Nicholas (67988203)	7,032	7	1.0	1.8
7	0.8	587	587	Vease, Jonathan (78192252)	4,105	7	1.0	1.0
7	0.8	869	869	Langley, James (28029584)	6,096	7	1.0	1.8
7	0.8	6,800	3,014	Rutledge, Grace (507562073)	48,719	10	2.3	1.4
6	0.7	339	339	Blair, William (818081868)	2,186	6	1.0	1.8
6	0.7	89	89	Decker, Ginger (10681468)	590	6	1.0	1.0
6	0.7	85	85	Blanchard, Robert (85843795)	582	6	1.0	1.8
6	0.7	3,177	1,589	Sard, Marvin (47317654)	19,064	12	2.0	1.0
5	0.6	1,818	84	Carroll, Leah (40779296)	7,086	118	2.8	2.0
5	0.6	84	84	Carrillo, Wilson (42964503)	269	5	1.0	1.8
5	0.6	2,184	2,184	Marwick, Robert (137427328)	10,918	5	1.0	1.8
5	0.6	90	90	Stevens, Robert (13742732)	440	5	1.0	1.0
5	0.6	174	174	Kang, Lian (87289256)	889	5	1.0	1.8
5	0.6	1,310	1,310	Stall, Mike (44506542)	26,549	5	1.0	1.0
5	0.6	824	83	Mullins, Leanne (68479188)	2,868	48	8.0	1.3
5	0.6	11,590	3,863	Garner, Santiago (812724929)	57,952	15	3.0	1.4
4	0.5	808	808	Blanchard, Robert (85843795)	2,418	4	1.0	1.8
4	0.5	2,084	1,667	Shastri, Wendy (540455462)	8,334	5	1.3	1.3
4	0.5	284	284	Johnson, Lisa (68613338)	1,176	4	1.0	1.8

Page 1



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Look at the details of this Report.

You can format colors, fonts, to have or not to have dates, page numbers, and aligning text left, right or center.

You can also specify decimal places.



Report Template - Report Examples

Thursday, May 06, 2010

Sales by Sales Manager

	YTD Cases Total	Last YTD Cases Total	YTD Revenue Total	Last YTD Revenue Total
BENETT				
Agate, Paul	1,447	1,289	3,940.27	3,472.09
Anderson, Benjamin	1,264	1,289	3,397.63	3,438.95
Asante, Andrew	2,047	1,806	5,824.55	4,971.50
Asprey, Clarence	1,305	1,153	3,437.46	3,024.29
Baker, Thomas	1,153	1,302	3,103.17	3,424.62
Bates, Claire	1,103	1,257	2,687.00	3,365.31
Bennett, William	1,459	1,521	3,845.94	3,938.40
Bowen, Frank	2,064	2,576	5,550.37	6,870.39
Catlin, Richard	2,224	3,253	5,869.53	8,855.80
Calhoun, Jack	9,393	9,016	26,182.79	25,136.10
BENETT Total	23,469	24,462	64,038.71	66,497.45
BOWEN				
Cuttler, Brian	3,559	3,043	9,535.62	8,054.86
Donnofrio, Angelo	3,363	3,066	8,473.51	7,722.96
Daniels, Avery	2,326	2,435	6,199.71	6,567.57
Davis, Timothy	8,548	7,760	23,392.14	21,104.40
Dead Accounts	2,885	4,183	7,616.51	11,351.18
Donnelly, Kevin	1,798	2,408	4,875.91	6,595.71
Dudley, G. H.	2,922	3,049	8,042.22	8,226.69
Durant, Jackson	2,603	2,699	7,003.73	7,355.19
Edwards, Beverly	2,726	2,902	7,254.96	7,498.87
Everly, Kevin	3,441	3,297	9,053.15	8,550.68
BOWEN Total	34,172	34,842	91,447.46	93,028.11

Look at the details of this Report:

Alignment, indenting of lines, decimal places, coloring and font.



Report Template - Report Examples

Company: All Values (4)
 Supplier: All Values (196)
 Label: All Values (1909)

Revenue (\$000's)

Thursday, May 06, 2010

Customer Chain		TOT	YTD	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	Last Yr	21,143.6	8,992.4	1,807.5	1,788.9	1,726.9	1,820.1	1,849.1	1,814.7	1,663.1	1,805.3	1,770.1	1,666.6	1,749.7	1,681.7
	This Yr	8,802.2	8,802.2	1,714.5	1,736.2	1,710.1	1,809.8	1,831.7							
	Pct Var	-58.4%	-2.1%	-5.1%	-2.9%	-1.0%	-0.6%	-0.9%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%
LYONS GROUP/ ZINC (064)	Last Yr	707.5	354.0	75.0	76.4	60.7	100.6	32.6	65.6	43.6	64.8	55.3	26.7	31.4	46.0
	This Yr	416.5	416.5	82.2	57.0	152.6	23.4	101.3							
	Pct Var	-41.1%	17.6%	8.5%	-25.4%	151.2%	-78.4%	211.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%
VILLAGE RESTAURA GROUP (100)	Last Yr	436.6	159.0	27.1	29.9	38.4	25.3	38.3	40.2	67.1	34.2	37.5	32.2	40.8	25.5
	This Yr	165.9	165.9	18.5	37.9	22.8	37.3	49.4							
	Pct Var	-62.0%	4.4%	-31.7%	27.0%	-40.6%	47.7%	28.8%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%
MARRIOTT/ HOJO'S (066)	Last Yr	354.5	158.9	19.5	55.7	16.9	18.3	48.5	19.5	22.6	39.7	35.1	16.2	36.1	26.3
	This Yr	169.1	159.1	25.2	78.4	23.4	18.0	14.1							
	Pct Var	-55.1%	0.1%	29.2%	40.8%	38.7%	-1.5%	-70.9%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%
ZORBA RESTAURA (105)	Last Yr	279.0	124.2	18.0	38.0	31.9	17.8	18.4	25.5	28.1	19.4	22.7	15.9	22.7	20.5
	This Yr	134.9	134.9	29.5	39.7	20.6	12.8	32.4							
	Pct Var	-51.6%	8.7%	63.8%	4.3%	-35.6%	-28.1%	76.1%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%



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Look at the details of this Report:

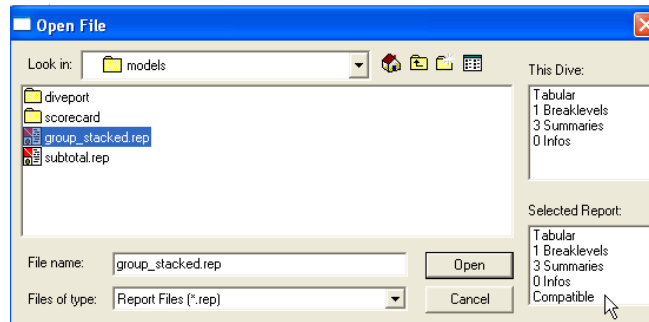
Grid lines, decimal places, bold font, alignment text, and inclusion of the date.



Workshop 10: Report Template - Compatibility

If a Report has previously been defined, and its Report Template saved, this Template can be used to create a Report from a different dive.

Compatible



Workshop 10:

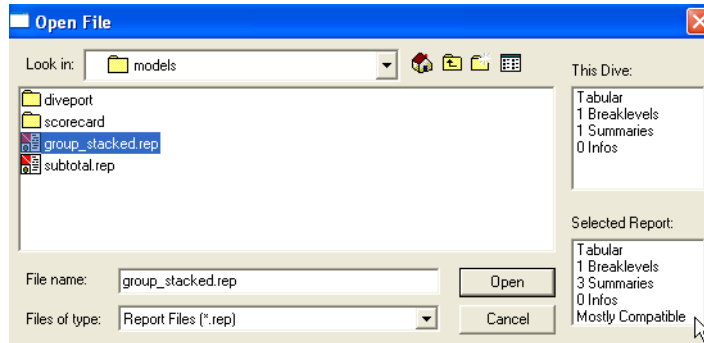
1. Open ProDiver > divebook.dbk
2. Ad Hoc Analysis: 2 Years: MTD
3. Dive on Sales > Salesperson
4. Revenue and Cases exist as Summaries
5. Add Cost
6. Choose > Display Report (or Report icon)
7. Choose Tabular
8. Edit Summary Layout > Stack By Group
9. Keep Defaults
10. Click OK
11. File > Save Report Template > MT_stacked.rep > Save
12. Dive on Time > Ship Month
13. Choose > Display Report (or Report icon)
14. Load Template > group_stacked.rep
15. (Review Compatible)
16. Open
17. File> Save Marker > Revenue by Ship Month

Compatible means the same number of Dimensions, Summeries, Infos.



Workshop 11: Report Template - Compatibility

Mostly Compatible



Workshop 11:

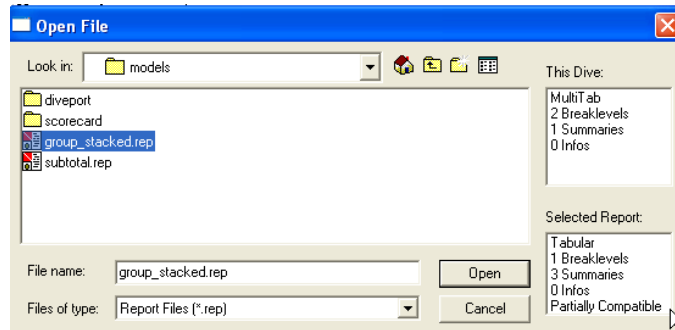
1. Open ProDiver > divebook.dbk
2. Ad Hoc Analysis: 2 Years: MTD
3. Dive on Sales > Salesperson
4. Revenue and Cases exist as Summaries
5. Remove Cases
6. Choose > Display Report (or Report icon)
7. Choose > group_stacked.rep > Save

Mostly Compatible means the number of Dimensions are the same, but the number of Summaries or Infos differ.



Workshop 12: Report Template - Compatibility

Partially Compatible



Workshop 12:

1. Take back to Tabular
2. MT Sales > Sales Manager
3. Choose > Display Report (or Report icon)
4. Load Template > group_stacked.rep
5. (Review Partially Compatible)
6. Open
7. Take a look at the Report, incomplete information (missing Sales Manager)

Partially Compatible means that the number of Dimensions differ.

You may need to select a different Template if the current dive contains more Dimensions than the selected template.



Marker Options

Objective

- Save customized Marker settings
- Remove redundancy, and speed up the Marker's performance
- Apply Report templates to tabular Markers

Dive A - Dive D

- Save a Marker with multiple Dive Windows

Save Marker Options

Dives

Save As: Dive A

Dive A: Dive A [Browse...]

Dive B: Don't Save [Browse...]

Dive C: Don't Save [Browse...]

Dive D: Don't Save [Browse...]

External DivePlan

Dive DivePlan

Application Template [Browse...]

Close All Models when opening [] Remove Redundant Actions []

MultiTab Dive Report Template [Browse...]

MultiCrossTab Dive Report Template [Browse...]

Area Name: [] Topic Name: []

Marker Info: []

OK Cancel

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DATA - INFORMATION - ACTION

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Dives - When saving a Marker, the Dive path(s) in that Marker can be set to open in Any Dive, open in a specific Dive (A, B, C, or D), or not save at all. When a Marker is being saved, the Dive A option is set to Dive A, the Dive B option is set to Dive B, etc. by default. At least one dive must be saved in the Marker.

Multiple dives cannot be saved to the same Dive letter.

External DivePlans

Centralize calcs,
named groups,
timeseries, etc.

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INSIGHT
DATA - INFORMATION - ACTION

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External DivePlans: Using the External DivePlan option, DivePlans can be saved external to a Marker rather than being included in the Marker file.

Roger will be covering OLD vs NEW External DivePlan behavior in detail, but the idea is that the Internal and External DivePlans get merged into the Marker's over all DivePlan.

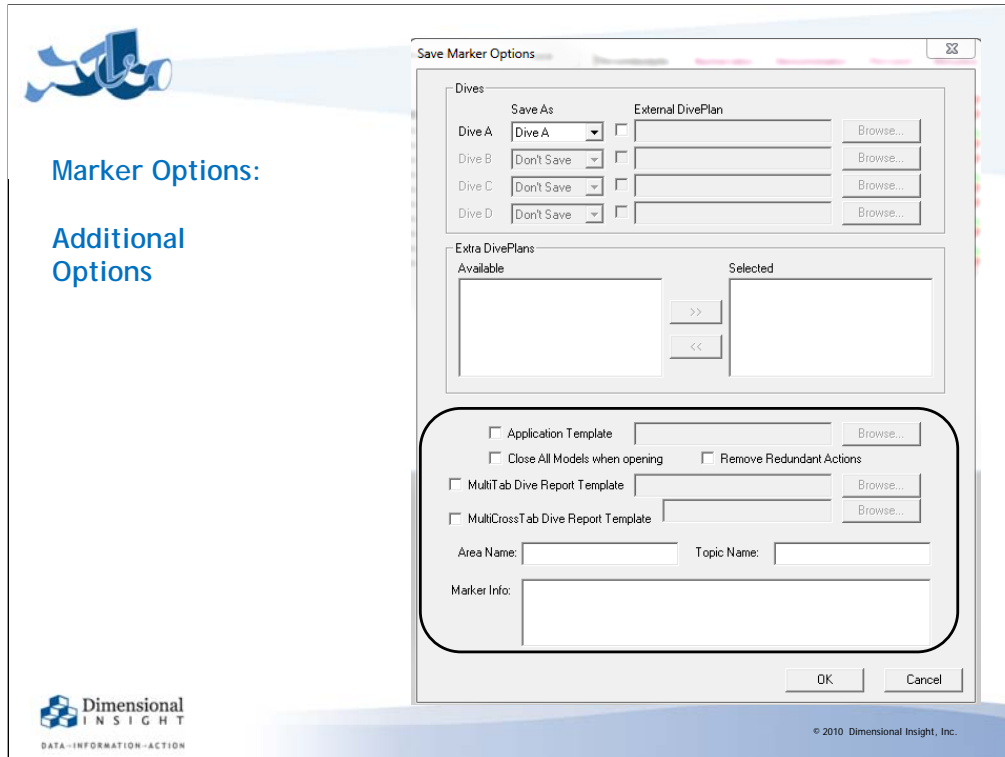
Extra DivePlans

- Save a .dvp with a Marker
- Useful in JUMP - NetDiver, ProDiver

Dimensional INSIGHT
DATA—INFORMATION—ACTION

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The **Extra DivePlans** option allows you to save the Marker so that when it is opened, additional DivePlans that were not used to create the Marker will also be opened. This feature is useful when using Jump.



Marker Options:

Additional Options

The **Application Template** option controls exactly how your screen looks, and which toolbar and menu items can be used.

* Not easy to return to default Toolbar/Menus.

The **Close All Models when opening** helps prevent a “Too Many Models” error if you frequently work with a large number of Models.

* Reduces Clutter in Console.

Remove Redundant Actions option may help speed Marker open time on large dives.

* Cleans up Marker internals.

The **MultiTab and MultiCrossTab Dive Report Template** options allow a Tabular dive from the MultiTab or MultiCrossTab Report to have the formatting specified in the saved Template, rather than in the default Tabular Report formatting.

The **Area Name** and **Topic Name** sections allow you to specify a DiveBook Area and Topic in which to save the Marker, DivePlan, or link.

The **Marker Info** area allows you to save a comment in the Marker and it will appear in the DiveBook’s Topic Info area.

- Four lines of comments allowed; does not apply to DivePlans or Models.

Markers: You can view info in the File > Open > Select Marker info section.

DiveBooks: Open DiveBook and choose Marker Topic, there’s a notes section for review



DiveBook Area and Topic QuickViews

Objective

Customer is asking to view Sales numbers based on 3 criteria: Customer County, Product, and Supplier

Option 1

- Create 1 Marker per variation
- Save in DiveBook to be used as bookmarks to be accessed through the DiveBook

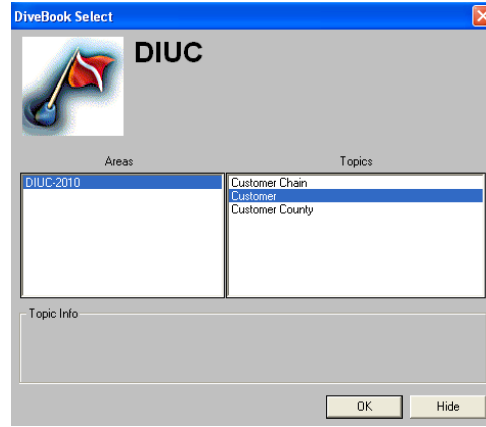
Option 2

- Create 1 Marker per variation
- Save in DiveBook
- Add a DiveBook Area and/or Topic QuickView for easy access

Using the DiveBook Area and Topic QuickView types allows an alternate way to present DiveBooks. It also allows direct access to open a DiveBook topic, rather than requiring that you first display the DiveBook.



Workshop 13: QuickViews: DiveBook Area and Topic



Workshop 13:

1. Open ProDiver
2. Open divebook1.dbk
3. Review All 3 Topics by opening the DiveBook Icon and choosing them separately.
4. Close ProDiver.



Workshop 14: QuickViews: DiveBook Area and Topic

Customer	Revenue Total	Current Month	Current Month
449 MAIN STREET INC (00001)	Revenue Total		129
	Revenue Total	167	
	Revenue Total	-22.6	
4577 ARSENAL ST COR (00002)	Revenue Total		
	Revenue Total	17	
	Revenue Total	-100.0	
495 PAGE BOULEVARD (00003)	Revenue Total	2	-98.7
	Revenue Total	170	79
	Revenue Total	179	
	Revenue Total	-56.2	

Workshop 14:

Now, review the same DiveBook Area and Topics via a Marker with the DiveBook Topics as a QuickView.

1. Open ProDiver
2. Open db-qv.mrk

Choose Edit > Edit QuickViews and take a look at how this is set up.

