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# PilotWorks Reporting 1.1

## Reporting Overview

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# Reporting Overview

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## Objectives

In this chapter, you will learn:

- About the Reports window
- About User-Defined Hierarchies

# Reports Window

The Reports window allows end-users to have one of two types of access to saved reports. Depending upon the controls set by your administrator, a user or group of users will have the ability to either examine reports without the ability to modify any settings or to have full modification control.

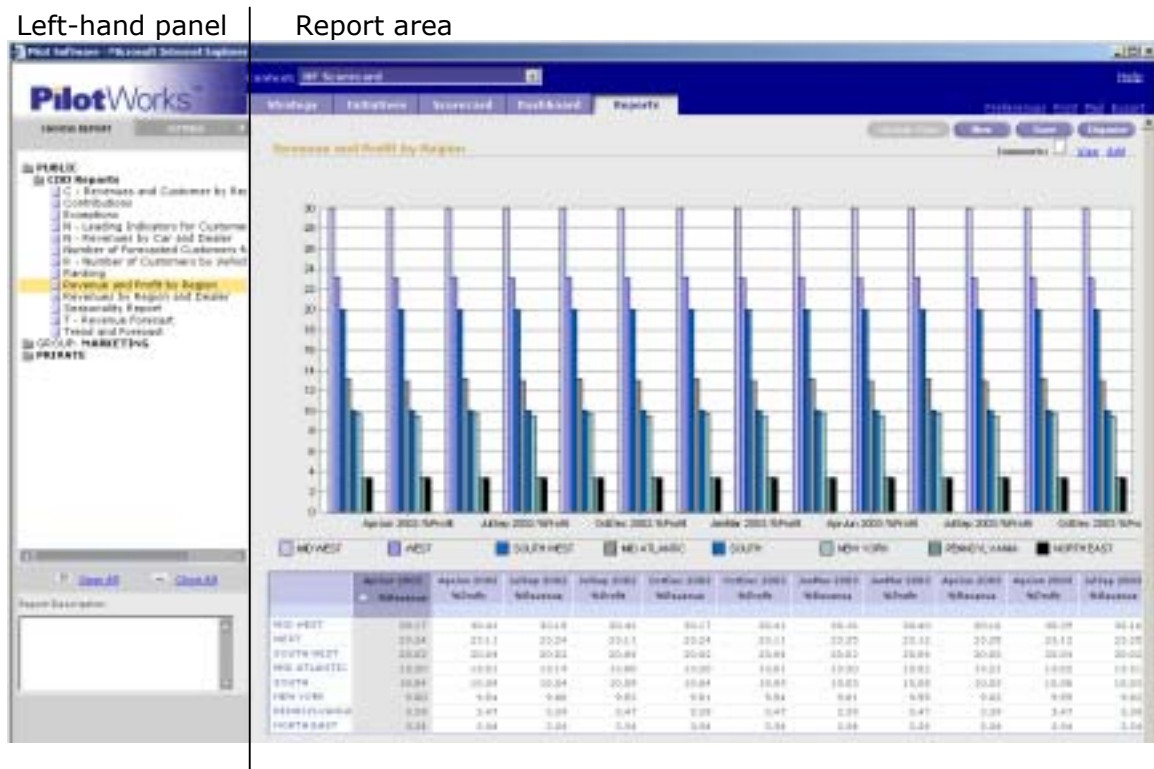
## What is a Report?

Reports provide an analysis of your business data in the form of tables of information and charts. Each report is created using one of the templates, either Navigator, Exceptions, Ranking, Contributions, or Trend and Forecast. These templates give each report a different analytical view into the data.

You can review the public reports available to all users. You can also review the group reports available to the members in your group.

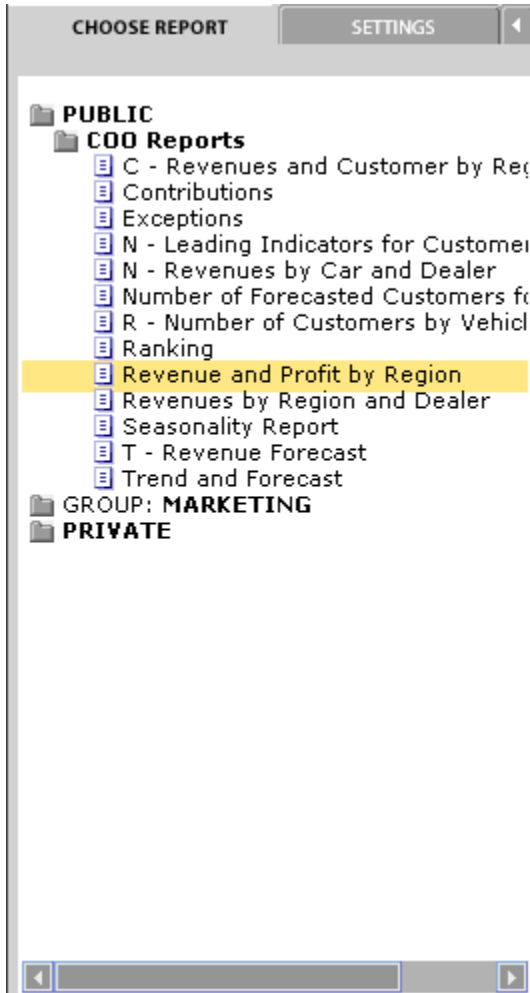
## Components of the reports window

The Reports window is made up of the left-hand panel and the report area. The left-hand panel is used to select a report to be displayed in the report area on the right and, if the user has been provided modification access, to set the different settings to view in the report.



## Users with viewing access only to Reports


For those users who have been provided the ability to only view reports without the ability to modify any settings, they will only see the Choose Report selection option within the left-hand panel of the window.




Use the Choose Report panel to select a report you want to display. This area displays the public, group, and private sets of reports. Select a folder to display the individual reports in that group.

The Report Description displays a more descriptive explanation of the contents of the report, if one was provided at the time the report was created.

### Hiding/showing the left-hand panel

To hide the left-hand panel of the Reports window, click on the  button. The left-hand panel is removed and the report is expanded to display fully across the width of the window.

To display the left-hand panel of the Reports window, click the  button. The left-hand panel appears again and the report is displayed in the remaining width of the window.

## Opening a report

1. In the Choose Report panel, select the folder containing the report you want to display.
2. Select a report within the selected folder. The report is displayed in the Reports window. A description of the report appears in the "Report Description" box.  
**Note:** If a description does not appear, it means that the user who saved the report did not add a description at that time.

## Sort on a column

N - Revenues by Car and Dealer  
LATEST DATE 29 Nov 2003

October 2003

	Number of Customers	Revenue	Profit
<b>TOTAL DEALER</b>			
TOTAL VEHICLE	43,417	1,400,749	194,534
CAR	36,292	701,269	96,185
TRUCK	6,767	226,116	28,264
SUV	12,258	333,707	41,968
VAN	7,712	227,656	26,717
<b>HBO ATLANTIC</b>			
TOTAL VEHICLE	8,436	196,666	24,034
CAR	4,907	92,692	11,295
TRUCK	900	20,036	2,677
SUV	1,820	44,080	5,399
VAN	1,009	30,051	3,738

Click on the column label you want to sort.

### Notes:

- The column is displayed with a grey background to quickly identify which column is sorted.

N - Revenues by Car and Dealer  
LATEST DATE 29 Nov 2003

October 2003


	Number of Customers	Revenue	Profit
<b>TOTAL DEALER</b>			
TOTAL VEHICLE	43,417	1,400,749	194,534
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- An arrow appears in the column next to the column label. The arrow points in the direction in which the information is being sorted. If the arrow is pointing down, the information is displayed in descending order. If the arrow is pointing up, the information is displayed in ascending order.
- Sorting is not available in all reports.
- Understanding the results of a sorted column is relative to what you are measuring. For example, if you are sorting the products sold in descending order, the product on the top of the list would be interpreted as a success. If you are sorting the products with the highest cost, the product on the top of the list would be interpreted as a problem area.

- If you sort on a column in Navigator, any indentations of dimension levels that may have been showing are cleared and all dimension members appear vertically aligned.
- If you sort on a column in Navigator while the "Order dimension" drop-down list has Hierarchical or Alphabetical selected, the selected column will be sorted. The dimension member ordering will be adjusted based on the sorted column, rather than the hierarchical or alphabetical order.

### Drilling on data



**C - Revenues and Customer by Region**  
 TIME PERIOD Latest Month LATEST DATE Nov 2003

	Revenue	% Total	%Customers	% Total
<b>ACTUAL</b>				
<b>Yulcan</b>				
MID WEST	18,888	30.06	100.00	16.67
WEST	14,639	23.30	100.00	16.67
SOUTH WEST	12,570	20.01	100.00	16.67
MID ATLANTIC	8,245	13.28	100.00	16.67
SOUTH	6,291	10.01	100.00	16.67
NORTH EAST	2,095	3.32	100.00	16.67
<b>Yulcan</b>	<b>62,828</b>	<b>100.00</b>	<b>600.00</b>	<b>100.00</b>
<b>Fencer</b>				
MID WEST	19,501	30.13	100.00	16.67
WEST	15,060	23.27	100.00	16.67
SOUTH WEST	12,955	20.01	100.00	16.67
MID ATLANTIC	8,566	13.23	100.00	16.67
SOUTH	6,490	10.02	100.00	16.67
NORTH EAST	2,159	3.34	100.00	16.67
<b>Fencer</b>	<b>64,738</b>	<b>100.00</b>	<b>600.00</b>	<b>100.00</b>


To drill down on the data in the report, click on the dimension member on which you want to view more detail data.

**Notes:**

- You can drill on any dimension member in the row that is not colored black. You cannot drill on a date or on a metric.
- In Contributions, you can only drill down on the last down dimension.


To drill up, click on the  button at the top of the report to drill up one level on the last dimension that was drilled. In turn, click the  button again to continue drilling up a level.

**Notes:**



- When you click the  button, the last item that was drilled down is the one that drills up. For example, if you are displaying two dimensions down the table and you drill down on one and then the other, and then you drill up, the last dimension you drilled on will drill up.
- You can drill up only as high as the level at which you started drilling.


## Users with full modification access to Reports



When given the appropriate access by the administrator, users have the ability to choose between five templates to create reports that analyze your business data. Each template explores your business data in a different way to give you different perspectives into your data.

Additionally, the administrator controls which user groups are allowed to save reports. If you see a  button on your button bar, it means that you can save reports.

### Hiding/showing sections of the Settings tab

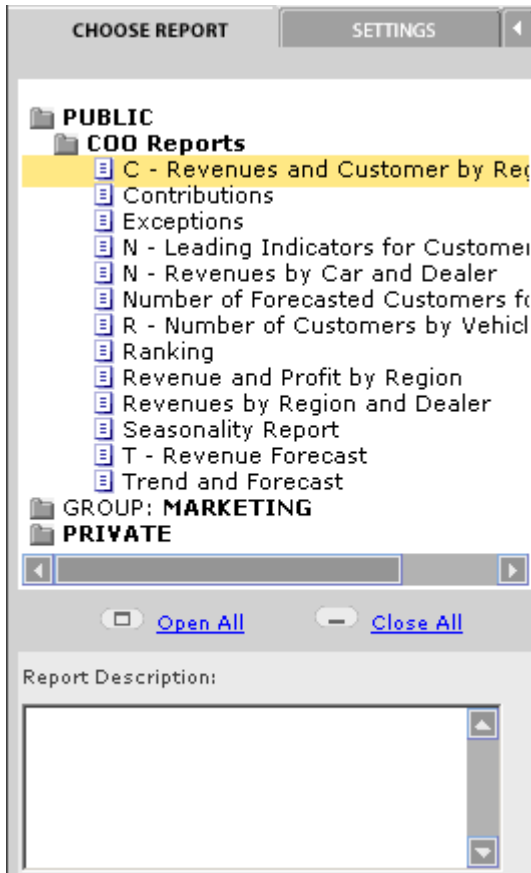
To hide a section of the Settings tab, click the  (close) button in the section that you want to close. The section is collapsed to display only the section title and the icon changes to .

To hide all sections of a panel, click the  button at the bottom of the panel. All sections are collapsed.

To display a specific section of a panel, click the  (open) button in the section that you want to display. The section is displayed and the icon changes to .

To display all sections of a panel, click the  button at the bottom of the panel. All sections are displayed.

## Choose Report panel



Use the Choose Report panel to select a report that you want to display. The list displays the public, group, and private sets of saved reports. Select a folder to display the reports in that folder.

## Settings panel

The settings panel will be slightly different depending upon the particular template being used. All features within each of the sections are explained within the individual templates as each feature behaves slightly differently depending upon the template being used. Below is an example of the settings panel for the Navigator template:

CHOOSE REPORT
SETTINGS

**ADJUST DATA** ? -

Edit: [Metrics](#) [Rows](#) [Filters](#)

Data Source: **PMPBA**

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**TIME** ? -

Show time by: Relative Dates

Date Range: Latest Quarter

Time Period: Quarterly

---

**PRESENTATION** ? -

Edit: [Layout](#) [Limit](#)

Limit total rows to: 100

Display label characters: All

No suppression

Order dimensions hierarchical

Show Parents

Column Totals  Show %

Row Totals  Show %

User-defined hierarchies:

Myself only (Private) [Edit](#)

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**GRAPH** ? -

Display Graph

[Graph items](#) [Reset Graph Defaults](#)

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[Open All](#)
- [Close All](#)

## Managing Reports

### Overview of saving reports


When a user saves a report or dashboard, the user has these options:

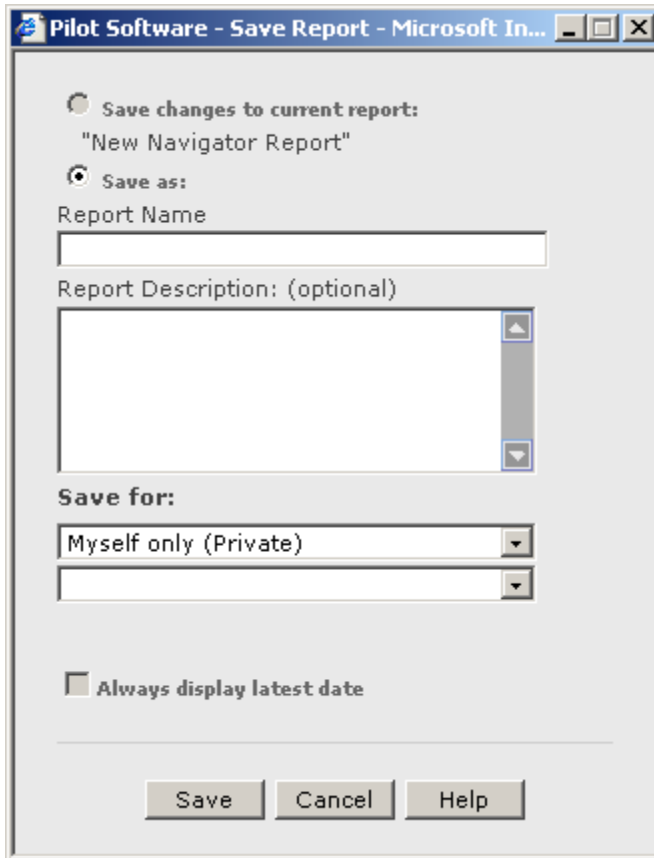
- To save it privately. You can edit, rename, and delete your own reports, dashboards, and scorecard views. The private reports and dashboards are available only to the end-user who created them.
- To save it to a group in which you are a member. The group reports, dashboards, and scorecard views are available to the users in the group. Both the author and the administrator can edit, rename, and delete these reports, dashboards, and scorecard views.
- If the administrator has given your group the permission to save to public sets, you can also save reports, dashboards, and scorecard views to public sets. These items will be available to all PilotWorks users. Both the author and the administrator can edit, rename, and delete these reports, dashboard, and scorecard views.

You may want to create user groups by department. For example, you might want to use a group that contains all the members of the finance department so you can share reports that the same audience would be interested in. The reports and dashboards will only appear in selections lists for members of the group. Groups allow users to show relative or sensitive reports and dashboards to just the right audience.

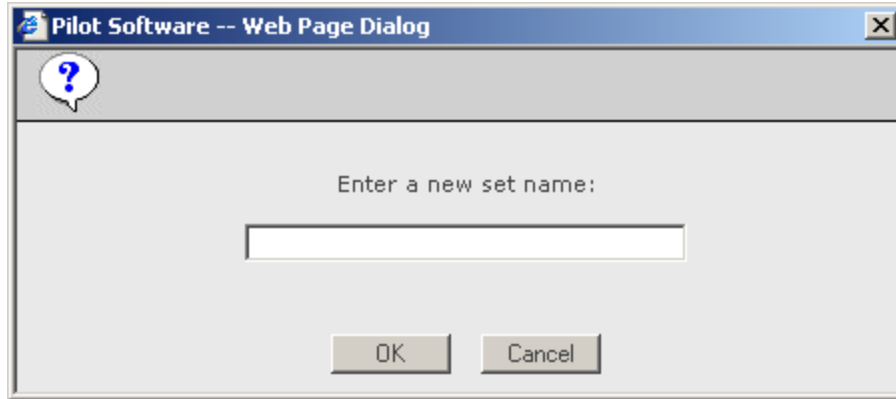
**Note:** If you do not have a Save button, it means your administrator did not set up your group with the ability to save views.

#### Steps for saving a report:

1. With the report displayed in the Report window, click the  button to display the Save Report dialog box. The dialog box appears below.



2. Do one of the following:
  - Select "Save changes to current report" if you want to save the changes to a report that has already been saved.
  - Select "Save as" to save the changes to a new report name. Then in the "Report Name" text box, type a name for the report. **Note:** You cannot use the asterisk (\*), slash (/), or exclamation point (!) in a report name.
3. (Optional) In the Report Description box, type a description for this report. The description will appear in a box in the Choose Report panel when you select this report.
4. In the "Save for" section, select whether you want to save the report in your private set or to a group that you are a member of. If your administrator has given your group "Save Public" permissions, you can also save to a public set.
5. The drop-down list of set names is refreshed to show only the sets based on the "Save for" option you selected. Do one of the following to specify the set in which to save the report:
  - To save the report to an existing set, from the drop-down list, select the appropriate set.
  - To save the report to a new set, from the drop-down list, select "...Create New Set" to display a dialog box. Type the new set name, and then click OK.



6. (Optional) Select the "Always display the latest date" option to display the latest date for which there is data every time you open the report. Or, deselect this option to display the same end date specified in the Time section of the Settings panel every time you open the report. **Note:** This option is not available in the Navigator template if you are showing time by the "Specific Dates" option in the Time section of the Settings panel.
7. Click save.

**Notes:**

- If the administrator has provided "Save Public" access to your user group, you can save reports to the public set for all users to access. Only the user who created the report and the administrator can edit, rename, or delete a report.
- Reports and sets are organized alphabetically.
- In Internet Explorer, if you change any chart properties and then save the report, certain properties are saved and others will return to the default settings the next time you open the report. The following items from the Chart Properties dialog box are saved:

General tab: Chart type

Scale tab: Minimum, Maximum, Scale unit, Decimals, Increment

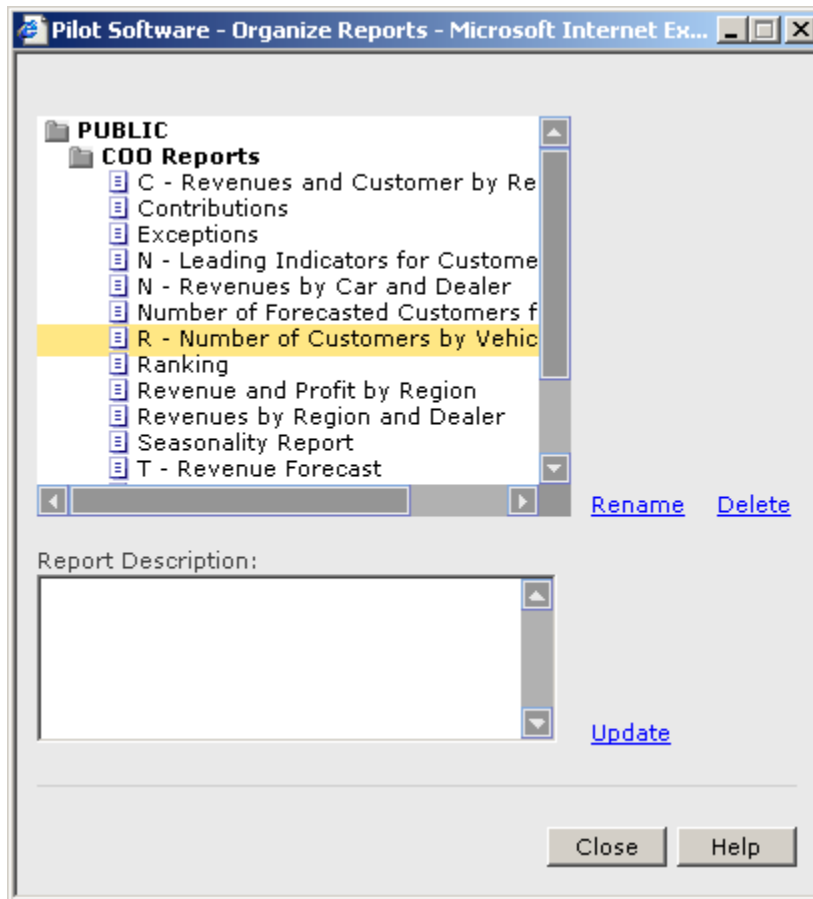
Titles tab: Top, Bottom, Left, Right

Legend: on/off, Top, Bottom, Left, Right

Series Legend: on/off, Top, Bottom, Left, Right

To rename or delete a report or set:

1. With the report displayed in the Reports window, click the **Organize** button to display the Organize Reports dialog box.



2. Select Public, Group, or Private depending on the location of the set or report you want to rename. The folder contents are expanded to show set names in that folder.
3. Do one of the following:
  - To rename a set and all the reports in the set, select the set and then click Rename.
  - To rename a report, select the set where the report resides, and then select the report from the expanded list. Then click Rename.
4. At the message box, click OK.
5. Click Close.

**Note:** The user who created the report and the administrator are the only users who can edit, rename, and delete the report.

## Creating Reports

### Which template to use?

The Reports window has five templates you can work with to create reports. Each template explores your business data in a different way to give you different perspectives on your data. Use the templates to present critical data in visually meaningful and insightful formats.

You chose a template based on the types of questions you need or want answered.

**Ranking** - Ranks dimension members in ascending or descending order. Can also include cumulative percentages.

What are my top or bottom performers for the designated time frame?

Are my top or bottom performers consistent, or have they fluctuated since the last period?

What is the percentage of a best and worst performer's contribution to the total business result?

Are my top or bottom performers in one area also top or bottom performers in other areas of the business?

Do dimension members follow the old 80/20 rule, where 20% of the sites account for 80% of the activity?

**Navigator** - Provides ad hoc reporting of multiple dimensions and metrics in a flexible layout.

How can I review multiple dimensions and metrics across and down a page?

How can I explore my business in a flexible ad hoc manner?

**Exceptions** - Calculates the variances and percentage variances in the data and colors the data above and below expectations.

How has performance changed over time and where does this relate to my expectations?

How can I sift through similar types of information to get a true reading of performance?

How can I quickly flag increases and decreases in information?

How can I find exceptions in two items, metrics, or time frames and apply the exceptions to view any outliers in the data?

**Contributions** - Pages up to three dimensions down the table. Calculates members' percentage contribution to the total result within a page.

What percentage do my top dimension members contribute to the total sum of all dimension members on a page?

How do the values of one row compare to all the values in the row on a particular page?

**Trend and Forecast** - Identifies trends in a certain area of your business, and performs forecasts based on those trends.

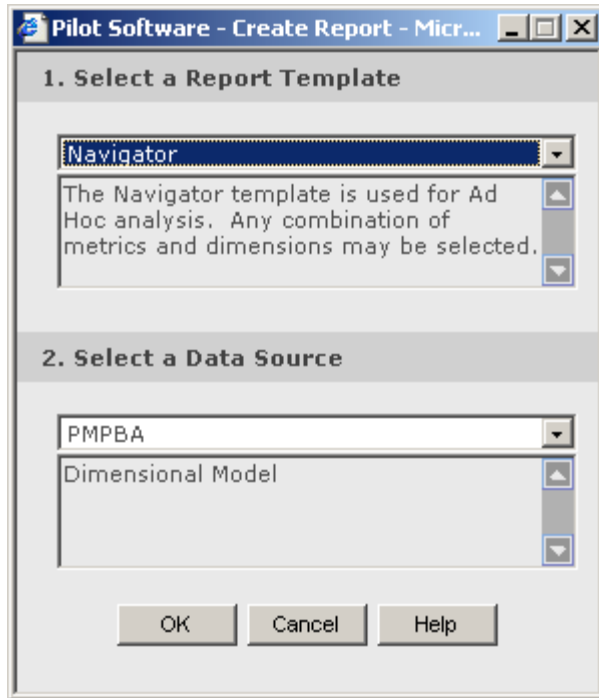
Which products are showing consistent sales increases?

What will be the likely demand for a particular product next month?

**To create a new report:**

Once you determine which template will best fit your needs, you are ready to create your report.

1. In the Reports window, click the  button to display the Create Report dialog box as shown below.




2. From the "Select a Report Template" drop-down list, select the template for the type of report you want to create.
3. From the "Select a Data Source" drop-down list, select the model to use for this report.
4. Click OK. The template appears with a default view.
5. Change the settings. For more information, review the individual template topics to learn how to change the settings based on the template you are using.

**Notes:**


- Each dimensional model has a default dimension that is displayed down the table in the templates. By default, the members one-level-down from the top are displayed down the table. Each dimensional model also has a default metric that is used in the initial view.


### To create a report from a saved report:


1. In the left-hand panel of the Reports window, click on the  tab to display the Choose Report panel.
2. Select the appropriate folder and click on the saved report that the new report will be based upon.
3. Change the settings.
4. (Optional) Save the report as a new report.


### Explanation of the navigational buttons

Each of these buttons are located in the top right-hand corner of the Workspace window.

 - Refreshes the report with any changes you have made since the last time you selected this button.

 - Displays the Create Report dialog box where you can create a new report.

 - Displays the Save Report dialog box where you can save the report to a private or group set.

 - Displays the Organize Reports dialog box where you can delete and rename reports and sets that you created.

[Print](#) - Displays the Print dialog box where you can select a printer on which to print the report.

[Mail](#) - Displays a report preview window where you can choose File, then Send, then Page as E-mail to send the report to an email user address.

[Export](#) - Displays the Export Options dialog box where you can export data to a Word file or Excel spreadsheet.


[Preferences](#) - Displays the Set Preferences dialog box where you can specify which context and tab to display as the active window whenever you start the user interface.

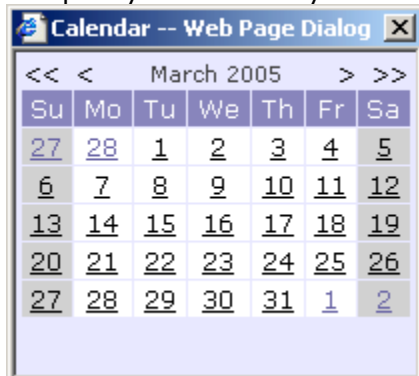
### Adding Comments

1. To add a new comment, do one of the following to display the New Comments dialog box in any tab:
  - Select the item you want to comment on. Then click on the [Add](#) link to display the New Comments dialog box for the selected item.

**Note:** Depending on the tab and view you are currently displaying, you may not see an [Add](#) link. In this case, click on the [View](#) link as described next.

- If you want to comment on an item not currently selected, click on the [View](#) link to display the Comments dialog box. Then filter the list to select the item you want to comment on, then click on the New button to display the New Comment dialog box.

2. In the "Subject" text box, type the name of the comment. The asterisk (\*) identifies that this information is required.
3. In the "Comment" text box, type the full comment. The asterisk (\*) identifies that this information is required.
4. (Optional) Do one of the following to specify whether this comment will expire or not. Do any of the following:
  - If you do not want the comment to expire, select the "This comment doesn't expire" option.
  - To specify a date that you want the comment to expire, click the  button.



Use the > arrow key to select the next month. Use the >> arrow key to select the next year. Use the < arrow key to select the previous month. Use the << arrow key to select the previous year.

**Note:** If a comment expires, it will no longer appear in the Comments dialog box unless you select the "Include expired" option.

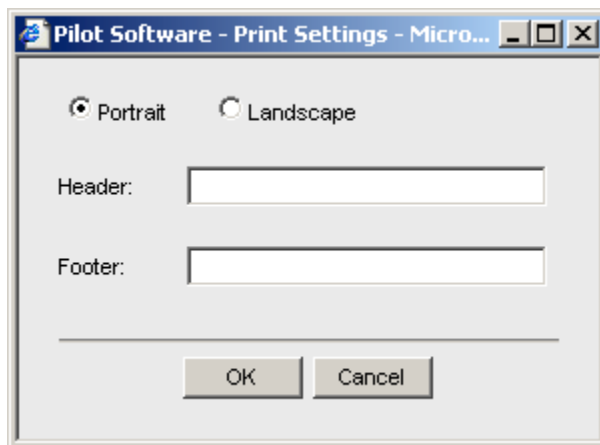
5. In the "URL" text box, type a URL you want to associate with this item. Then in the "Title" text box, type a title that represents the URL. This live title link will appear in the information window when you select the comment in the Comment dialog box. If you click on it, you will go directly to the URL address. Continue adding up to three associated links for this comment.
6. From the "Groups" list, select a group who can view this comment, and click the >> button to add the group to the list of selected groups. Continue selecting groups, if desired. The asterisk (\*) identifies that this information is required.

Notes:

- This list shows all groups, even the ones you are not a member of.
  - When you select a group, you and the members of the selected group can see this comment. You can see this comment even if you are not a member of the group for which the comment was intended. Only you or the administrator can delete a comment that you create.
7. Click the Save button to save the comment. You receive a confirmation box. Click OK.


## Printing Reports

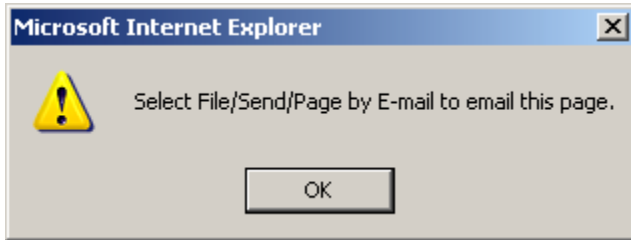
1. In the Reports window, click the  button to display the Print Settings dialog box.



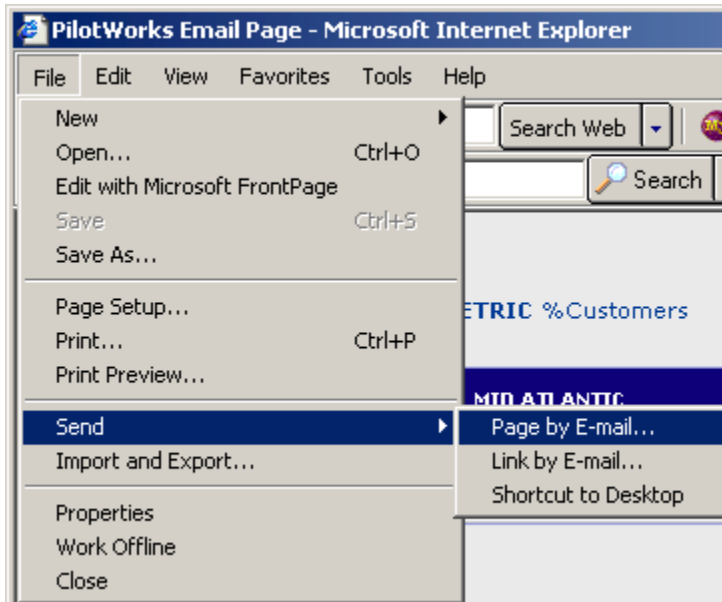
2. Click either the "Portrait" or "Landscape" option depending on whether you want to print the page in Portrait or Landscape.
3. (Optional) In the Header text box, type a header for the report.
4. (Optional) In the Footer text box, type a footer for the report.
5. Click OK. A preview window appears with the report displayed in it. Then the Print dialog box appears.
6. In the Print dialog box, select the printer and click OK. The report is printed.

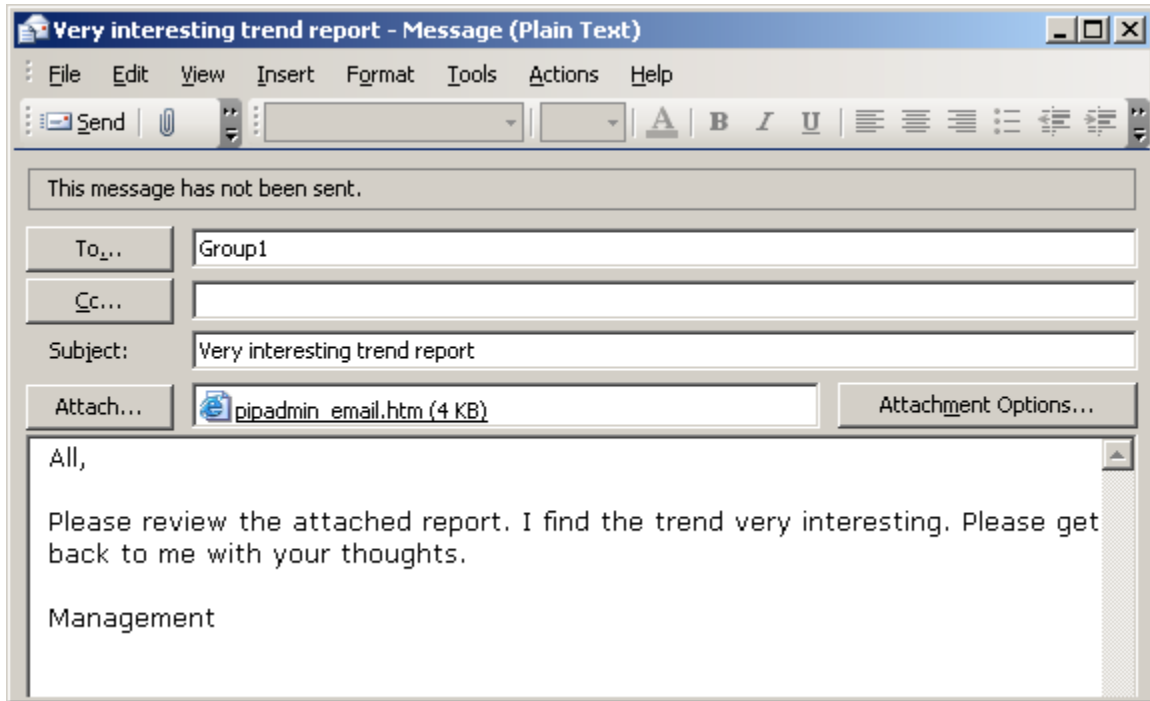
## Sending Reports By Email

1. In the Reports window, click the  button. A preview window appears with the report displayed.
2. At the information box that explains how to send the email, click OK.



3. In the preview window, from the File menu, choose Send, and then choose Page by E-mail. An email message box is displayed with the report, and a subject matter.





4. In the "To:" box, type the email address where you want to send this report.
5. (Optional) Change the text on the "Subject" line and/or enter a text message in the body of the email.
6. Click the Send button.
7. Close the preview window by clicking the Close button on the top-right corner of the browser window.

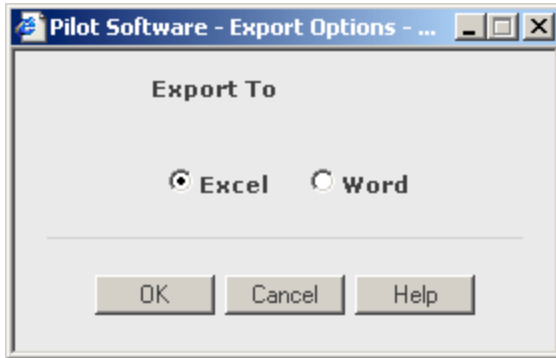
## Exporting a Report

The exporting feature in PilotWorks requires that you have either Microsoft Excel or Microsoft Word installed, and that your browser's Internet options are set up to enable or prompt for the acceptance of Active X controls.

Review your browser's Internet options to make sure you have security set to allow the prompting or enabling of Active X controls. For example, on Windows 2000, in the browser window, you would do the following:

- Choose Tools and then choose Internet Options to display the Internet Options dialog box.
- Click the Security tab.
- Then choose the Local Intranet icon, and then click the Custom Level button to display the Security Settings dialog box.
- Scroll through the list and make sure all the Active X-related options are set to either "Enable" or "Prompt". Click OK To save the settings.

Click the  button to display the Export Options dialog box.



Do one of the following:

- Click "Excel" and then click OK. The Microsoft Excel program is opened and the report data is displayed in an Excel file.

**Note:** If you do not have Excel installed, you will receive a message stating that you cannot proceed with this function unless you have Microsoft Excel.

If you set up your Internet options to prompt for Active X controls, you will be prompted. Click Yes to accept the Active X control. Excel will be opened and the report contents will appear in the Excel file.

If you set up your Internet options to disable Active X controls, you will receive a message stating that you cannot proceed with this function unless your Internet options are set to accept Active X controls.

- Click "Word" and then click OK. The Microsoft Word program is opened and the report data is displayed in a Word file.

**Note:** If you do not have Word installed, you will receive a message stating that you cannot proceed with this function unless you have Microsoft Word.


If you set up your Internet options to prompt for Active X controls, you will be prompted. Click Yes to accept the Active X control. Word will be opened and the report contents will appear in the Word file.

If you set up your Internet options to disable Active X controls, you will receive a message stating that you cannot proceed with this function unless your Internet options are set to accept Active X controls.

## Working with User-Defined Hierarchies

A User-Defined Hierarchy is a named selection of members, all from the same dimension. User-Defined Hierarchies are an easy way of displaying members you frequently analyze in a report.

You can select a User-Defined Hierarchy in a Select dialog box and display the User-Defined Hierarchy in the report similar to the way you select a dimension member and have it appear in a report. The only difference is that the User-Defined Hierarchy represents a group of members rather than one single member.

The "User-Defined Hierarchies:" drop-down box and  button in the Data section of the Settings panel allows you to create, rename, edit, and delete User-Defined Hierarchies.

If you are the administrator who will be creating public User-Defined Hierarchies, see the topic about creating User-Defined Hierarchies in the PilotWorks Admin Groups Help or PilotWorks Administrator information about configuring your Web server.

### Levels of User-Defined Hierarchies

#### Public User-Defined Hierarchies

Administrators can create public User-Defined Hierarchies that are available to all users. The administrator can include the public User-Defined Hierarchy in a public report.

Users can display the public report and view the public User-Defined Hierarchy.

Users with the ability to save reports can create a private or group report that includes the public User-Defined Hierarchy as a selection.

Users who also have the "Save Public" permission selected for their group can create a public report that includes a public User-Defined Hierarchy.

#### Group User-Defined Hierarchies

Administrators can create group User-Defined Hierarchies that are available to the users in a group.

Users with the ability to save reports can create private or group reports and use the group User-Defined Hierarchy in those reports.

#### Private User-Defined Hierarchies

Users with the ability to save reports can create private User-Defined Hierarchies that are available for use in their private reports.

#### From a user perspective

Administrators can create, edit, rename, and delete public, group, and private User-Defined Hierarchies.

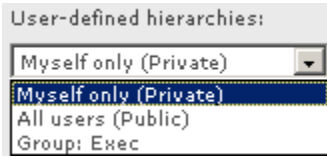
Users can select public User-Defined Hierarchies and include them in their own private reports, group, or public reports.

Users can select group User-Defined Hierarchies and include them in their own private reports or group reports.

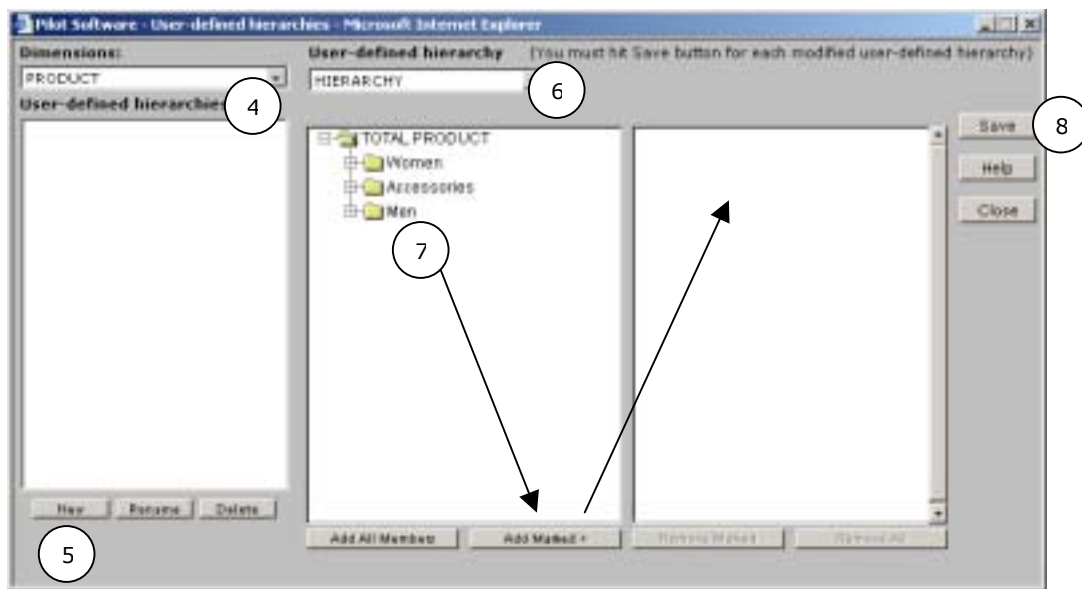
Users can create, edit, rename, and delete private User-Defined Hierarchies and use them in their own private reports.

### Creating a User-Defined Hierarchy

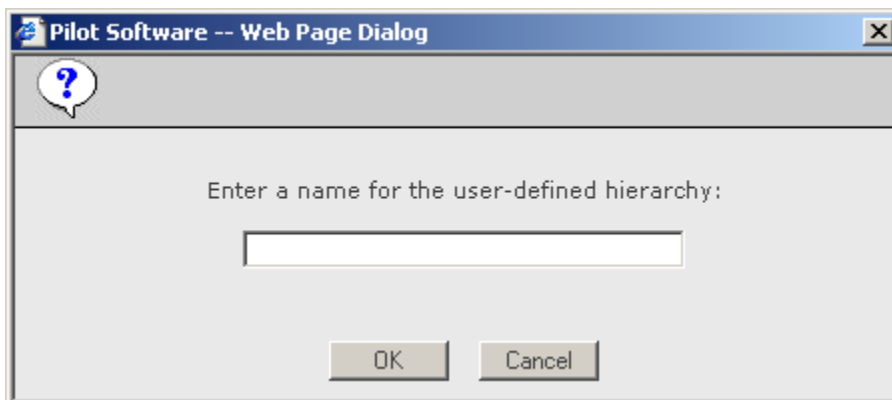
1. In the left-hand panel of the Reports window, click the **SETTINGS** tab to display the Settings panel.
2. (For administrators) In the Presentation section, select whether to create the User-Defined Hierarchy for private use, public use, or for group use.



3. In the Presentation section, select the User-Defined Hierarchies Edit link to display the User-Defined Hierarchies dialog box.



4. From the "Dimensions" drop-down list, select the dimension whose members you want to include in the User-Defined Hierarchy.
5. Click the New button. In the text box that appears, type a name for the User-Defined Hierarchy and click OK. The name can be up to 24 characters. The new User-Defined Hierarchy name appears in the "User-Defined Hierarchies" list box.



6. From the "User-Defined Hierarchy:" drop-down list, specify how you want to view this dimension.
  - Select Hierarchy, the default, to view the dimension members by hierarchy. **Note:** If the dimension contains multiple hierarchies, then you can also select which hierarchy to display. If you do not specify which hierarchy to display, then the default hierarchy will be used.
  - Select User-Defined Hierarchies to view the User-Defined Hierarchies defined for this dimension, if there are any. **Note:** You can select a User-Defined Hierarchy to be a member in another User-Defined Hierarchy as long as they are part of the same dimension.
  - Select Find to search for members based on a string. Then in the "Search String" text box, type a string to search, and click the Search button. See the notes at the end of this topic for rules about entering wildcards and reserved characters.
7. Do any of the following to select members from the left-hand list:
  - To mark a single item, click the item, and then click the Add Marked button.
  - To mark a range of adjacent items, click the first item in the range, hold down the Shift key, and click the last item in the range, and then the click Add Marked button.
  - To mark multiple nonadjacent items, hold down the Ctrl key while clicking each item, and then the click Add Marked button.
  - To mark all items currently displayed, click the Add All Members button.  
**Note:** If you are selecting members for a dashboard panel, you can select up to five members.
8. Click Save to save the User-Defined Hierarchy, then click Close. You will get a confirmation box indicating the hierarchy change has been successfully completed.



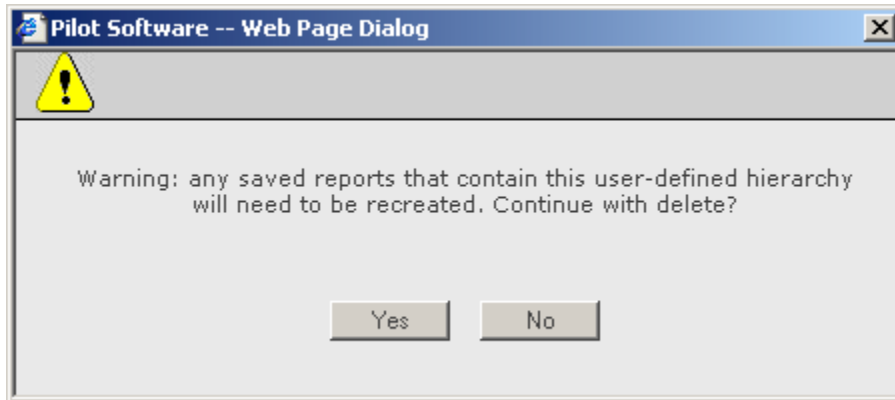
You can now use this User-Defined Hierarchy in your report by selecting it in a Select dialog box the same way you select a dimension member.

**Notes:**

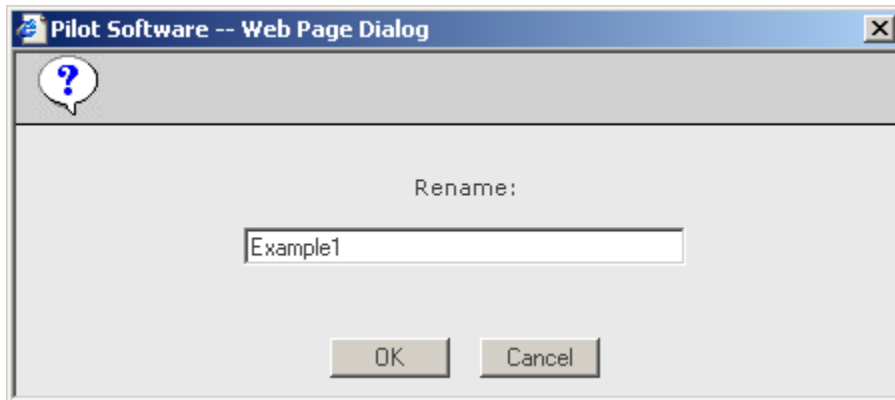
- Each dimension has a maximum number of User-Defined Hierarchies that can be created. Your administrator sets this up. You can create one less than the maximum number of User-Defined Hierarchies allocated for each dimension. If you exceed this limit, you receive a message.
- You can create User-Defined Hierarchies for a dimension, but not for attributes.

## Editing, Deleting, and Renaming a User-Defined Hierarchy

1. In the Presentation section, select the User-Defined Hierarchies Edit link to display the User-Defined Hierarchies dialog box.
2. From the "Dimensions" drop-down list, select the dimension whose User-Defined Hierarchies you want to edit, rename, or delete.
3. From the "User-Defined Hierarchies" list box, select the User-Defined Hierarchy you want to edit, rename, or delete.
4. Do one of the following:
  - To edit, add and remove members from the User-Defined Hierarchy as desired and click the save button.
  - To delete, click the  button to display a confirmation box. Click OK in the confirmation box. Then click OK in the confirmation message box.



- To rename, click the  button to display a text box. Type a new name and click OK.



5. Click the  button to save the information, and then click Close.

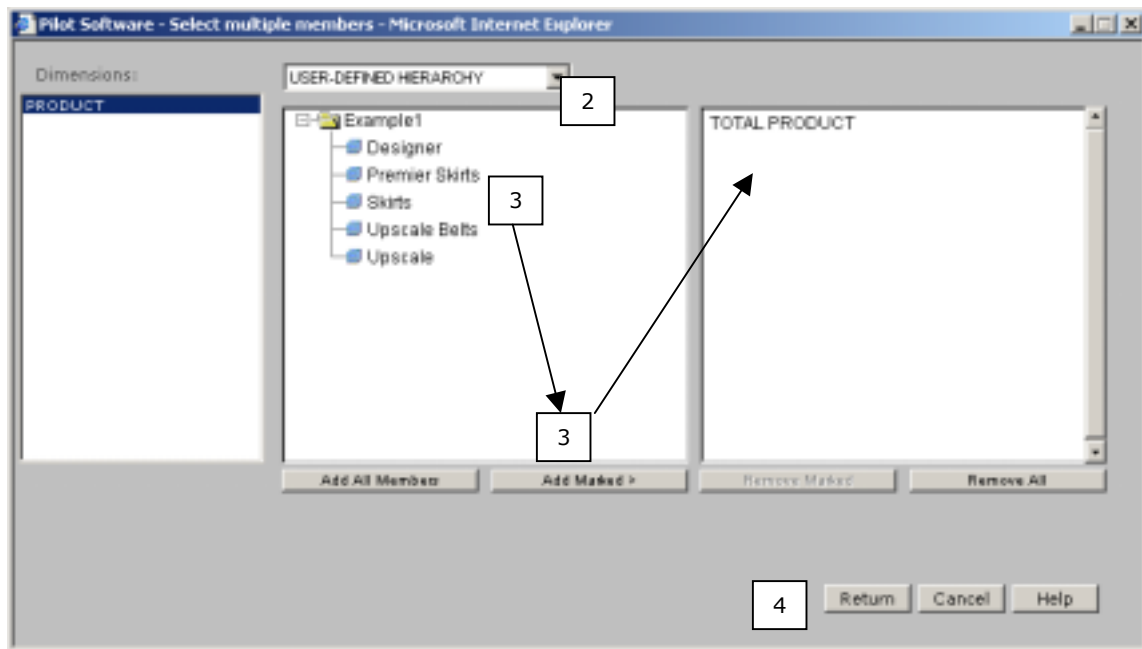
### Notes:

- If you edit a User-Defined Hierarchy that is displayed in the current report or in a saved report, the report is refreshed with the changes.

- If you delete a User-Defined Hierarchy that is displayed in the current report, you receive a message informing you that the User-Defined Hierarchy is currently being used in the report. If you continue with the deletion, the report displays the same view without the User-Defined Hierarchy selection. If this is a Navigator report, the report is reset to time appearing across the page and metrics appearing down the page.
- If you delete a User-Defined Hierarchy that is displayed in a saved report, when you reopen the report, the report displays the same view without the User-Defined Hierarchy selection.
- If you rename a User-Defined Hierarchy that is displayed in the current report or in a saved report, the report is refreshed with the new name.

## Selecting a User-Defined Hierarchy for a Report

1. In the left-hand panel of the Reports window, click the "Rows:" **Select** button to display the Select dialog box for a dimension.
2. From the Hierarchy drop-down list, select "User-Defined Hierarchy". The list of available User-Defined Hierarchies will appear in the left-hand list box.



3. Select a User-Defined Hierarchy to display in the report and click Add Marked.
4. Click Return.
5. Click the **Update View** button to refresh the report.

## Exercise R.1

Familiarize yourself with the Reports window.

1. How do you determine if the report being viewed has been updated with the current selections?
2. How do you choose a different saved report?
3. How do you rename or delete a saved report?
4. How do you set the Reports window as the default view?
5. How do you export a report to Excel?

## Review

You learned the following about the PilotWorks Reports windows:

- Depending upon access provided by the administrator, the Reports window provides an interface for users to either examine reports without the ability to modify any settings or have full modification access to all reports
- The Reports window provides an interface to choose between five templates to create reports that analyze your business data
  - **Ranking** - Ranks dimension members in ascending or descending order. Can also include cumulative percentages.
  - **Navigator** - Provides ad hoc reporting of multiple dimensions and metrics in a flexible layout.
  - **Exceptions** - Calculates the variances and percentage variances in the data and colors the data above and below expectations.
  - **Contributions** - Pages up to three dimensions down the table. Calculates members' percentage contribution to the total result within a page.
  - **Trend and Forecast** - Identifies trends in a certain area of your business, and performs forecasts based on those trends.
- Printing a report
- Emailing a report
- Exporting a report
  
- Understanding User-Defined Hierarchies
- Managing User-Defined Hierarchies
- Knowing when to use User-Defined Hierarchies