

CUBE TRAINING: USING CUBES IN PANORAMA



Section 1: Getting Started	3
• Basic Concepts	3
• Web Access Workspace	4
• Page Setup	7
• Customizing View Properties	9
Section 2: Slicing a Dimension	11
• Slicers	11
• Slicing Crosstab and Chart Data	12
• Slicing In Multiview	13
Section 3: Exchanging and Nesting Dimensions	14
• Exchanging	14
• Nesting	15
Section 4: Drilling Down and Up	16
• A Dimension Member	16
• A Dimension	17
• Grouping Members	17
Section 5: Using Crosstabs and Charts	18
• Rotate Crosstab Axes	19
• Reorder Members in Crosstab	19
• Change Crosstab Properties	19
• Select View Layout	21
• Selecting Crosstab Data to Display Chart	21
• Displaying More Rows	21

- Performing Actions - Drill through21
- Different Chart Types21
- Controlling Series Properties22
- Displaying Chart Labels22
- Changing Chart Properties22

Section 6: Additional Display Features24

- Sorting Data24
- Hide/Show Members25
- Totals25
- Percentages26

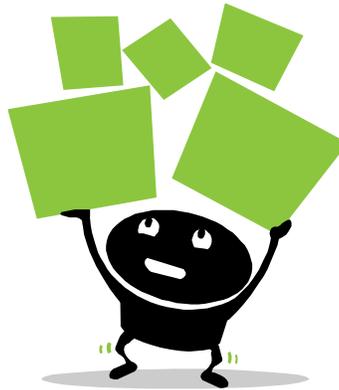
Section 7: Member Selection/ Value Filter27

- Member Selection Filter27
- Value Filter29

SECTION 1

Getting Started

- Basic Concepts
- Web Access Workspace
- Page Setup
- Customizing View Properties



Basic Concepts

Views

Views display multidimensional data in crosstabs and/or charts. The displayed data can be analyzed in many different ways using the tools available in menus and toolbars. Views can be changed, customized, and saved for future use.

Briefing books

A briefing book is the entity in which you work. Information for a briefing book is displayed in views. The idea is similar to workbooks in Excel.

Cubes

A cube stores a subset of data, usually constructed from a data warehouse. The data is organized and summarized into a multi-dimensional structure and defined by a set of dimensions and measures.

Dimensions

Dimensions of a cube represent distinct categories for analyzing data, such as time, product type, or location.

Dimensions are typically organized into hierarchies of information, which are grouped into levels. Each level consists of dimension members. For example, first-level members of the Store Location dimension can be states. Each state can have child members such as city locations, and so on.

You can summarize levels in a dimension to form the values of the next highest level. For example, in a Time dimension, months summarize to quarters and quarters summarize to years.

Measures

Measures represent the quantitative values in the database that you want to analyze. The measures are generally numeric and correspond to the *how much* or *how many* aspects of a question.

Slices

A slice is a cross-section of the data cube. Slicing a cube enables you to view and analyze multidimensional data for a specific set of members of another dimension. For example, if you have a data display of sales of different products in each store location, you can slice the data by the Under 20 member of the Customer Age dimension to view sales of products in each location by people under the age of 20. A slice can be a set of members as well as a single dimension member.

Crosstabs

A crosstab displays data in rows and columns in a tabular format for two or more dimensions. For example, a crosstab can display sales of various products by store location. The crosstab display is dynamic and can be sliced or drilled down to show detailed data for lower level members. Crosstab data can also be hidden, filtered, and sorted.

Charts

A chart displays data graphically. Different types of charts are suited to different types of data. Panorama Web Access offers many chart types, such as bar chart, line chart, pie chart and stacked bar chart.

Slicers

Slicers represent the dimensions, measures, and slices that can be viewed in the display. Slicers enable you to view and access all dimensions, measures, and their members, which are not displayed in the crosstab or chart.

Web Access Workspace

When you start Panorama Web Access, the Panorama Web Access workspace displays with the view. Additional components appear on the workspace.

Auto Hide Feature

The Panorama Web Access components can be set with the "auto hide" feature to conserve screen space for increased analytic activity. Each component contains the following icons in the upper window:

☰- **Pushpin**. When the pushpin is in the vertical position, the selected component pane is fixed on the screen. When the pushpin is in the horizontal position (⇄), the component pane automatically contracts against the side of the screen, ready to expand to its position when clicked upon.

✕- **Close**. Closes the component

The Briefing Book Pane

The Briefing Book pane displays the contents of the current briefing book in a hierarchical structure, in the same way as files display in Windows Explorer.

Clicking a folder in the Briefing Book pane expands the contents of that folder. Clicking a view displays that view on the view page to the right.

You can close the Briefing Book pane by clicking the close ✕ button of the pane or using the **Tools**  icon on the toolbar.

There are two types of briefing books:

- **Server briefing book** – This is a briefing book defined by the Panorama Web Access administrator, and is shared by all users. This type of briefing book is “read-only”, and users cannot modify it. A globe icon indicates a Server briefing book.
- **Private briefing book** – A private book is a user-owned briefing book where you can save your modifications of a server briefing book. Private books display in the Private Briefing Book pane below the Server briefing book.

The Private Briefing Book Pane

Use the **Tools**  icon on the toolbar to display or hide the Private Briefing Book pane.

You can use the private briefing book in the same way as you use any briefing book. You can open folders in the private book, and save views in them. You can rename the private book, the folders and the views.

When you right-click in the Private Briefing Book pane, a popup menu opens with a list of options you can use with that book. The following table describes the options:

Option	Description
New Folder	Allows you to create a new folder
Delete Folder	Deletes the selected folder after confirmation. You can also use the Delete key on the keyboard.
Rename	Allows you to change the name of the folder, in the same way as you rename a folder in Windows Explorer
Save Current View	Saves the current view under the selected folder
Delete View	Deletes the selected view from the private briefing book
Rename View	Allows you to change the name of the selected view

The Slicers Pane

By default, the Slicers pane displays on the left. You can move the pane to the top of the view page by right-clicking its heading and selecting **Slicers On Top** from the popup menu. The Slicers pane displays under the view title. While the Slicers pane is positioned at the top, right-clicking its heading and selecting **Slicers On Left** returns it to its default position on the left.

You can hide and display the Slicers pane by clicking the **Tools** icon  icon on the toolbar and selecting the Slicers option.

The Legend Pane

You can hide and display the Legend pane by clicking the **Tools** icon  icon on the toolbar and selecting the Legend option. The legend will allow you to see the name of the cube being used, the current slicers, and the dimensions in the columns and rows.

The Toolbar

The toolbar at the bottom of the workspace contains shortcut buttons for frequently used actions. To choose a toolbar button, click it with the mouse.

-  **Toolbar moderator.** Click on this arrow () to enable the static or dynamic toolbar mode. When in dynamic mode, the toolbar reduces to minimal form until you want to use it, where it expands. This feature enables the screen to be viewed in optimal mode, and fully display the view title. You can also maintain an open tool bar by clicking on the icon to achieve "pause" or "hold" mode (). The tool bar is locked and remains open. When deselected, the tool bar contracts automatically until the mouse hovers nearby, whereupon it expands () to its full capacity.
-  Exposes the Tools menu that governs screen options such as briefing book, private briefing book, Slicers, legend, and report properties. The pushpin icon  enables you to position a window.
-  Displays a menu of view layout options
-  Displays the **Chart Options** menu
-  Toggles between the Panorama Smart Reporting report view and normal Panorama view
-  Undoes the last action
-  Displays the **Save** options menu
-  Opens the view properties dialog box
-  Prints the current view
-  Displays the next set of rows (up to 30 rows each time) in the crosstab.

You can move the toolbar to the top of the view page by right-clicking on it and deselecting Show Toolbar On Bottom. The toolbar appears on the right of the view title bar, in "auto-hide mode". This means that it displays when you point to the toolbar arrow  and hides when you move away from it. To keep the toolbar visible at all times, click the toolbar arrow. The arrow changes to . Clicking this button returns the toolbar to auto-hide mode.

To move the toolbar back to its default position at the bottom of the view page, right-click on it and select Show Toolbar On Bottom.

The Title Bar

Panorama Web Access creates and displays the view title automatically. You can disable this automatic feature and change the title text manually.

To change title properties

1. Right-click on the view title.
2. Select **Properties** from the popup menu.
3. In the **Title Properties** dialog box, deselect the **Automatic Title** box and type in the text you want to use as the title.
4. Click **OK**.

The Status Bar

The Status bar displays at the bottom of a view, to the right of the toolbar. It displays the number of rows and columns in the crosstab.

Page Setup

The **Page Setup** option is used to adjust page settings, including orientation, scaling, margins, headers and footers, and other printing options such as paper size for PDF. Via page settings, you can also customize the appearance of the view printout by adding features such as annotations, background elements, and grid lines.

To define the page setup

1. Click the **Print** icon  on the toolbar and select Page Setup from the popup menu. The **Page Setup** dialog box displays.
2. Modify the page setup, as needed, using the options in each page as described in the following paragraphs.
3. Click **OK** to apply the selections and exit.

Print Legend

Displays or hides the chart legend while printing.

Print Annotations

Displays or hides the annotations while printing.

Print Extended Grid Information

Prints the filter/formula icons as part of the report.

Direct Printing

Select this option to print the view in case the standard printing option does not work properly (a situation that might occur rarely).

Grid Font Size for Printing

Select a font size for printing view data. The default is the same size as the screen font.

Chart to Grid Ratio

Specifies the crosstab to chart ratio to be used when displaying both elements. For example, a 1:2 ratio means that the crosstab will display twice as large as the chart.

Page Order

Select from the following options:

Down, then Over: Specifies to print the selected view from top to bottom.

Over, then Down: Specifies to print the selected view from left to right.

Chart on the Whole Page

Displays the chart on the entire page.

Print Axis X Chart Titles

Prints the captions on the X-axis of the chart.

Print Chart Grid

Prints vertical or horizontal lines on the chart. Select the lines to print: vertical lines, horizontal lines or both.

Print Chart Columns

Prints the chart columns according to the selected option: on multiple pages (if the chart does not fit on a single page), only the columns that are visible on the screen, or all on one page (condensed format).

Header & Footer

The **Header & Footer** option enables you to create a customized header and footer.

Click the **Header & Footer** button to display the **Header & Footer** dialog box.

To customize the header/footer

1. You can determine the elements to display in the left, center and right sections of the header and footer. Position the cursor in the relevant box and click the buttons on the right to insert the elements you want. For example, to insert the page number at the center of the footer, position the cursor in the Center Section of the footer and click the Insert Page button.
2. To customize the font settings for the header and footer, click the **Edit Font** button.
In the **Font Properties** dialog box, select the requested font, size and style.
3. To modify the font color, click the **Select Color** button. Use the color sliders to achieve the color you want. The results show in the **Sample** area.
4. Click **OK** to close the open dialog boxes and apply the settings.
5. To use the header and footer settings from your local computer, check the **Use Local Settings** box.

Background & Logo

Click the **Background & Logo** button to add a background picture to the view and choose the logo that should appear in the top-left corner of the screen. The background picture displays when creating a view printout in PDF format or via the printer.

To choose a logo, check the **Use Logo** box. Then, select a picture file from the list of available pictures. The Sample area shows the picture you have selected.

To choose a background picture, check the **Use Background** box. Then, select a picture file from the list of available pictures. In **Background Display**, select the position/layout for the background picture.

PDF Settings

Click the PDF Settings button to set options for saving views in PDF format. In the PDF Settings dialog box, select the paper size and the orientation of the document: portrait or landscape.

Set Page Margins

Click the **Set Page Margins** button to open the **Set Page Margins** dialog box.

To set page margins

1. Check the **Manual Margins Setting** box to enable the margin boxes.
2. Enter the requested values for the Left, Right, Top and Bottom margins.
3. Use the **Print Test Page** option to print a test page.
4. Click **OK**.

Print

The **Print** option opens the Print dialog box to choose print options before printing.

Customizing View Properties

The **Properties** option from the toolbar lets you determine several default features for a view, including fonts, background, language, and skin.

To customize view properties

1. In the toolbar, click the **Properties**  icon. The **Properties** dialog box displays.
2. Select one or more options. See property descriptions in the paragraphs below.
3. Click **OK** to apply the selections and exit.

The following paragraphs describe the properties in the view **Properties** dialog box.

Background

From the **Background** dropdown list in the **Settings** tab, select the component whose background color you want to change. Click **Edit Color**. In the **Select Color** dialog box, choose the color from the palette. The **Sample** area shows the result of your selection.

Use the **Default All** button to restore all components to default settings. Use the **Default** button to restore the currently selected component to the default color.

Chart Series

From the **Chart Series** list box in the **Settings** tab, select the data series whose color you want to change in the chart. Click **Edit Color**. In the **Select Color** dialog box, choose the color from the palette. The **Sample** area shows the result of your selection.

Use the **Default All** button to restore all the series to default colors. Use the **Default** button to restore the currently selected series to the default color.

Fonts

From the **Fonts** list box in the **Settings** tab, select the component whose font settings you want to change. Click **Edit Font**. In the **Font Properties** dialog box, choose the font, style, size, and the color from the palette. The **Sample** area shows the result of your selection.

Use the **Default All** button to restore all the components to default fonts. Use the **Default** button to restore the currently selected component to the default font.

Skins

The **Skins** tab lists several skin options for changing the appearance of your view page. Select a skin and click OK to apply the change.

Advanced Settings

This option enables you to set right to left conversions and set and determine the HTTP proxy setting and port.

Slicer Settings

To customize the slicer buttons on the Slicers pane, click the **Slicer Settings** button and check the relevant parameters:

Flat slicer buttons - By default, the slicer buttons display in 3D mode, having a 3D appearance. Check this parameter to display the buttons in 2D mode with a flat appearance.

Use fixed button height - By default, the height of the slicer buttons changes dynamically to fit the space available in the Slicers pane. Check this parameter in order to keep the height static.

Languages

To choose the language you want to work in, click the **Languages** button and select a language from the list that displays.

SECTION 2

Slicing a Dimension

- Slicers
- Slicing Crosstab and Chart Data
- Slicing in Multiview



Slicers

The slicers represent the dimensions, measures and slices that can be viewed in the display.

Slicer Default Setting

You can revert back to the default slicer setting. This option is useful when refreshing the screen and resetting the view without re-importing or restarting the program. You can select the current slicer, or all the slicers displayed.

To reset the slicer default settings:

- Right click on the slicers and select the **Go to default member** option, and select the appropriate option.

Use the **Slicers** option in the Tools  icon on the toolbar to display or hide the Slicers pane.

The Slicers pane has color attributes so that you can see which dimensions have been sliced. The background color of the dimension changes and the text bolds when you slice a dimension.

The Slicer Dialog Box

The **Slicer** dialog box opens when you click on a slicer or right-click on a slicer and select Edit from the popup menu. It displays the members of the selected slicer in a tree format.

You can drill down or up any slicer member, at any level.

The Slicer dialog box allows you to search for a member within the slicer.

To drill down a member

Do one of the following:

- Double-click on a member.
- Click the plus sign by the member's name. The tree expands to show information for the next hierarchical level for that member. You can continue drilling down until the plus sign does not show anymore.

To drill up a member

Do one of the following:

- Double-click on a member
- Click the minus sign by the member's name

To search for a slicer member

- In the Slicer dialog box, click the **Search** button. The Search <Slicer> dialog box displays.
- Search for members by:
 - Typing a precise name and selecting the Exact Search option. This search will yield only those members whose name matches the specified string (fastest search).
 - Typing a few letters and selecting the Starting With option. This search will yield all members whose names start with the specified string (medium).
 - Typing a pattern with wildcards (e.g. S*B - names starting with S and ending with B) and selecting the Anywhere Within option (slowest search).
- To search at a specific level, make sure the **Search At Level** option is selected and then select the requested level from the list.
- To search for more than one member, type in the member names using the semicolon (;) separator.
- Do one of the following:
 - Click **OK**. The Slicer window displays the members that meet the search criteria. You can slice the data by any of the displayed members. Select one or more members and click **OK**.
 - Use the **Preview** option to fine-tune your search results. Click **Preview** to open a dialog with the list of members that met the search criteria. Select the members you want to work with and click **OK**. Your narrow selection will now appear in the Slicer window. You can now slice with one or more of the members.

Slicing Crosstab and Chart Data

You can slice with one or more members, in the following ways:

- Slice with a single member
- Use two or more members to slice on the aggregation of selected members
- Expand a dimension to lower levels and then select lower level members to slice

As you slice, if the chart is displayed, the chart display automatically reflects crosstab changes.

To slice a crosstab

- Click the slicer with which you want to slice. The Slicer dialog box opens and displays the dimension members.

- Define a slice in the Slicer dialog box in one of the following ways:
 - To select a single member, click on the member and click **OK**.
 - To select sequential members, click on the first member you wish to select. Press and hold the Shift key. Click on the farthest member you wish to select. The two members you selected and those in between are selected. Click **OK**. The crosstab and chart automatically display the updated information.
 - To select non-sequential members, click on a member. Press and hold the Ctrl key. Click on one or more additional members. Click **OK**. The crosstab and chart automatically display the updated information.
 - To slice by a lower level member, click on the plus sign next to a member in the Slicer dialog box. The tree expands to display lower-level members. Continue to expand or select one or more members, as described in the previous steps.

Slicing in Multiview

The Multi View mode enables you to scroll through a set of pre-selected dimension members.

The following is an example of slicers in Multi View mode.



Clicking on the arrows scrolls through a dimension's or measure's members.

By default, applying Multi View scrolls through the set of members, which are the siblings of the currently selected member and its ancestors. For example, enabling Multi View mode in the Product dimension when the current slicing is Drink lets you scroll through Drink, Food, and Non Consumable, which are the siblings of Drink, and All Products, which is its ancestor.

To create a Multi View

- Right-click on a slicer (dimension or measure). A popup menu appears.
- Select Multi View. The slicer appears with up and down arrows, letting you scroll through the dimension members.

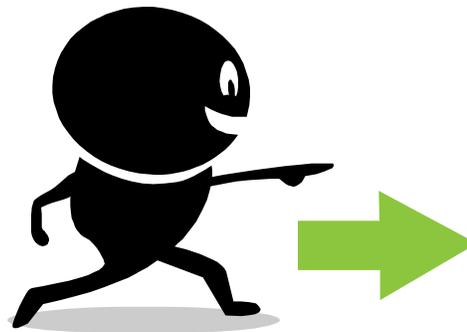
To slice in Multi View mode

Click on the dimension arrows <-> in a slicer. The next member is displayed in that dimension box. The crosstab and chart display the data sliced by this member.

SECTION 3

Exchanging and Nesting Dimensions

- Exchanging
- Nesting



Exchanging Crosstab Dimensions

You can exchange a crosstab dimension with another dimension. In addition, you can replace a member of a dimension with another dimension. The resulting crosstab will display information for the new dimension sliced by the replaced member.

The following sections describe how to do the following:

- Replace a dimension, meaning you can exchange dimensions and slice the new information by the default member of the replaced dimension (usually the top member of that dimension).
- Replace a dimension member, meaning you can exchange dimensions and slice the new information by the replaced member.

To exchange dimensions

Do one of the following:

- Choose a dimension from the Slicers pane and drag it to the row or column header in the crosstab.
 - When the cursor is in the correct position (the  con appears at the pointer) release the mouse button.
 - From the popup menu that appears, select one of the following options:

- **Replace <Member>** – The member in the crosstab will move out into the Slicers pane. The crosstab data is sliced by the selected member.
 - **Replace <Dimension>** – The Product dimension moves out into the Slicers pane. The crosstab data is sliced by the selected dimension.
- In the Slicers pane, right-click on the dimension and from the popup menu and select **Move Into Crosstab**. The **Move To** dialog box opens. Select the dimension axis you want to replace.
 - Choose a dimension from a crosstab column or row header. Drag the dimension onto the dimension you want to replace in the Slicers pane. From the popup menu that appears, select one of the following options:
 - **Replace slicer with <Dimension>** – The crosstab is sliced by the dimension
 - **Replace slicer with <Member>** – The crosstab is sliced by the member

Nesting Dimensions

A crosstab typically displays one dimension on the horizontal axis and one on the vertical axis. Nesting a dimension enables you to add another dimension or measure to either axis.

You can nest a dimension or measure on either axis before or after any dimension that already exists in the crosstab. The nesting order affects the way the crosstab data can be drilled down.

There is no limit to the number of nested dimensions.

To nest a dimension in a crosstab

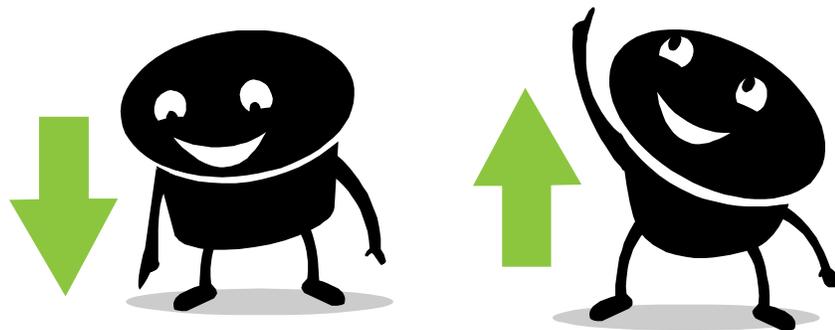
- Drag a dimension from the Slicers pane to the horizontal axis (column header) or to the vertical axis (row header).
- When the cursor is in the correct position, release the mouse button.
- From the popup menu that appears, select one of the following options:
 - **Replace <Product>** - Replace the selected crosstab
 - **Replace Product** - Replace the entire crosstab with the selected dimension
 - **Nest Before (dimension)** - Drop a dimension before the current dimension
 - **Nest After (dimension)** - Drop a dimension after the current dimension

The selected dimension appears nested in the crosstab. The chart and crosstab reflect the modified data.

SECTION 4

Drilling Down and Up

- A Dimension Member
- A Dimension
- Grouping Members



Drilling Down and Up a Dimension Member

You can drill down a member to display information for its child members. Drill up a member to display summary information for a higher level.

You can drill down all levels of a member in a single step. Use this option to view all lower level descendants of a dimension member.

To undo a drill, click the **Undo** icon on the toolbar.

Note: If you double-click on a crosstab member at the lowest level, the **Select A Dimension To Drill By** dialog box opens, prompting you to drill into a different dimension.

To drill down a member

Do one of the following:

- In the crosstab, click the plus sign by the member's name

- Double-click on the crosstab member's name
- Right-click on a crosstab member, and select **Expand Member to Level** and the level to expand.

The crosstab display expands to show information for the next hierarchical level for that member. You can continue drilling down until the plus sign does not show anymore.

To drill up a member

Do one of the following:

- Click the minus sign by a member's name
- Right-click on a crosstab member. Then, select **Collapse <Member>**.

Drilling Down and Up a Dimension

You can drill down a dimension to display information for lower dimension levels. You can choose how many levels to drill down.

You can drill up a dimension to display summary information at the highest level.

To drill down or up a dimension

- Right-click the crosstab dimension you want to expand.
- From the popup menu, select **Expand Dimension to Level**. From the submenu select the level you want to drill up or down. The crosstab display expands or collapses as selected.

Grouping Members

You can create (and dismantle) virtual groups of crosstab members. The newly created and named group includes the selected members, and you can drill the group and display its children.

To group crosstab members:

- Using the Ctrl keyboard key, select crosstab members.
- Right click the mouse and select the **Group** menu option. The **Enter Group Name** window appears.
- Name the new group and click **OK**. The selected members are merged and named as desired on the crosstab.

To ungroup a virtual group:

- Right click on the virtual group, and select the **Ungroup <member>** option. The crosstab members are ungrouped.

SECTION 5

Using Crosstabs and Charts

- Rotate Crosstab Axes
- Reorder Members in Crosstab
- Change Crosstab Properties
- Select View Layout
- Selecting Crosstab Data to Display Chart
- Displaying More Rows
- Performing Actions – Drill through
- Different Chart Types
- Controlling Series Properties
- Displaying Chart Labels
- Changing Chart Properties



Rotate Crosstab Axes

You can switch the column and row axes in a crosstab to change the way you view information. This can also be referred to as rotating, such as rotating rows and columns.

To rotate axes in a crosstab

- Drag a dimension from the column or row header to the other axis. The crosstab axes are rotated. The crosstab and chart reflect the changes.

To rotate chart axes

- Click the **Chart Options**  icon on the toolbar or right-click in the chart area and select **Rotate** from the popup menu. The chart axes are rotated. The crosstab axes remain unchanged.

Reordering Members in a Crosstab

You can change the order of column and row headers in a crosstab to change the way you view information.

The **Reorder** option is disabled when a member on the opposite axis is sorted or if hierarchies are broken. You can reorder only within sibling groups.

To reorder dimension members in crosstabs

Right-click in a crosstab header and select **Reorder** from the popup menu. In the **Reorder** dialog box perform the following steps:

- To reposition a selected dimension member, click the **MoveUp** and **MoveDown** arrows, or drag the member to the requested position
- To restore the default order of the current group, click **Reset**
- To restore the default order of all member groups in the dimension, click **Reset All**

Changing Crosstab Properties

You can use the Crosstab Properties dialog box to customize crosstab properties.

To change crosstab properties

- Right-click in a crosstab header, select **Crosstab Properties > All Properties**. The **Crosstab Properties** dialog box appears.
- Select one or more options. See **Crosstab Properties** property descriptions in the paragraphs below.
- Click **OK** to apply the selections and exit.

The following paragraphs describe the properties in the **Crosstab Properties** dialog box.

Show Only Siblings

Displays only the lowest level of drilled down crosstab members.

Displays a blank cell when there is no data available.

Show Values/Show Percents – Show Percents and Values

You can display data in a crosstab as percentages of row or column totals. A crosstab can display only percentages, or it can display the percentages together with the actual values. To display only values, check the

Show Values property. To display only percentages, check the **Show Percents by Axis X (by rows)** or **Show Percents by Axis Y (by columns)** property.

To show both percents and values, first select one of the Show Percents properties and then the Show Percents and Values property.

Crosstab Alignment – The crosstab position can be one of the following:

- Top Right
- Top Center
- Top Left
- Middle Right
- Middle Center (default)
- Middle Left
- Bottom Right
- Bottom Center
- Bottom Left

Print Members Using Max Width - When selected, prints the full length of the members.

Highlight Every 2nd Row/Column - When selected, shows every second row/column in highlighted format.

Show Columns

The maximum number of columns to display in the crosstab.

Max. X Axis Cell Width

The maximum width of cells on the X axis.

Max. Y Axis Cell Width

The maximum width of cells on the Y axis.

Min. X Axis Cell Width

The minimum width of cells on the X axis.

Min. Y Axis Cell Width

The minimum width of cells on the Y axis.

Min. visible data columns

The minimum visible data columns when there is not enough room to display the data. The default is two columns.

Apply columns resizing on load – When selected, resize the columns when loading the view.

The width of the data cell is: Set the resizing mode, can be one of the following:

- **The same** – When resizing a single column, all the other columns are affected
- **Different (Best fit)** – Affect only the resized columns (default)

Free mode – set the view to support the Free Nested mode. This property is deselected by default (the view is set with the Structured Nested Mode).

Always show dimension's first level – When selected, the dimension's first level is available. Most of the dimension are set with the "All" level, however, this level is never displayed. Using this property, you can display the "All" level of the dimension.

Highlight Every 2nd Row/Column

When selected, shows every second row/column in highlighted format.

Select View Layout

You can rearrange a view by changing the position of the crosstab and the chart via the **Layout** option.

The **Layout** option provides several layout possibilities.

To select a view layout

- In the toolbar click the **Layout**  icon, or right-click in the crosstab area, outside the crosstab. Select the requested layout from the popup menu.

Selecting Crosstab Data to Display in Chart

All crosstab data is displayed in the chart by default. You can choose to selectively display all or some of the crosstab data in the chart.

To select crosstab data for the chart

Do one of the following:

- In the crosstab, click and drag the mouse across a row and/or column to display that row/column in the chart. A line appears in the crosstab. The chart data is replaced by the selected data. Chart data is based on entire rows or columns within a crosstab selection.
- Drawing a line while pressing the Control key toggles the current row/column selection.
- You can also select rows or columns by using the Select Members options.

Displaying More Rows in the Crosstab

By default, the crosstab shows the first 30 rows of data. If there are more data rows in the view, this will be indicated in the rightmost corner of the status bar (e.g. 30 of 56 means 30 rows are currently displayed out of the 56 rows), and the More  button on the toolbar will be enabled. Click the **More** button to get the next set of rows (100 rows at a time) on the display.

Performing Actions – Drill through

The **Drill through** option provides information about the atomic values that contribute to an individual cell value. If drill through has been defined for the current cube, the Actions... option will appear when you right-click on a cell. Select the drill through you want from the list of possible drill through targets and click **OK**.

Different Chart Types

Panorama Web Access offers a variety of chart types, enabling you to choose the most effective way to graphically represent data.

To select different chart types

- Click the **Chart Options**  icon on the toolbar or right-click in the chart area.
- From the popup menu select one of the chart options: bar chart, stacked chart, line chart, pie chart, 3D bar chart, stacked 3D bar chart, or 3D pie chart.

The chart display reflects your selection.

Controlling Series Properties

You can choose the default colors to be used when charting data series. The colors you specify will be used until you modify them. You can specify default colors for 12 data series.

You can also choose to display a second Y-axis.

To change data series colors

- Click the **Properties**  icon on the toolbar. The **Properties** dialog box displays.
- From the **Chart Series** list box, select the data series whose color you want to change in the chart.
- Click **Edit Color**.
- In the **Select Color** dialog box, choose the color from the palette. The Sample area shows the result of your selection.
- Click **OK**.

Use the **Default All** button to restore all series to default colors. Use the **Default** button to restore the currently selected series to the default color.

To display a second Y-axis

- Right-click on a chart legend member.
- Select the **Second Y-Axis** option from the popup menu.

A second Y-axis will appear for the selected chart element.

Displaying Chart Labels

Chart labels contain the values of the displayed members and appear above the chart.

To display chart labels, right-click on the chart and from the popup menu select **Show Chart Labels**.

To hide the labels, select the **Show Chart Labels** option again.

Changing Chart Properties

You can use the Chart Properties window to customize chart properties.

To change chart properties

- Right-click on the chart and from the popup menu select **Chart Properties**.
- The **Chart Options** dialog box displays.

- Select one or more options. See property descriptions in the paragraphs below.
- Click **OK** to apply the selections and exit.

The following paragraphs describe the properties in the **Crosstab Properties** window.

Axis Numeric Format

Determines the format of numbers on the Y axis. In **First Y Axis**, select the requested format for the first Y axis, and in **Second Y Axis**, for the second axis.

Chart Columns

The maximum number of columns to display in the chart.

Label Every

Determines how many points to label on the X-axis. For example, if you specify 1, every axis point is labeled. If you specify 2, every other axis point is labeled.

Axis Y Scaling

Determines the scale used for the Y-axis. Choose the **Auto** button to determine the optimal scale for the chart automatically. To automatically set the scale to a possible minimum, select the **Auto Minimum** button. To set the minimum and maximum scale values, select the **Customize** radio button, and then enter the minimum and maximum scale values for the axis.

Logarithmic Scale

To use a logarithmic scale base for the Y-axis, click the **Logarithmic Scale** button. In the dialog box that opens you can select a scale for the first and the second Y-axis.

Break Captions

Displays a caption over more than one line, if it contains more than one word.

Show Hierarchies

Displays captions for parent level members along with the selected members.

Line Chart Options

Click the **Line Chart Options** button to display the **Line Chart Options** dialog box. This dialog box contains options for customizing line charts. You can modify the marker to display at data points, the size of the marker, the width of the line and its style, and the chart series to which these changes apply. The Sample area at the bottom shows the results of your selection.

To perform smoothing using the B-Spline algorithm, check the **Use B-Spline** option and select the relevant factor.

Click **OK** to apply the changes and close the dialog box.

Show Data Labels with Series Color

This option is enabled when the Show Chart Labels option is activated. When selected, it displays the labels of the data series, each in its own color.

Show All Pie Charts of the Same Size

By default, pie charts display in different sizes, in proportion to the data they represent. Check this parameter if you want all the pie charts in a view to be of the same size

SECTION 6

Additional Display Features

- Sorting Data
- Hide/Show Members
- Totals
- Percentages



Sorting Data

You can sort data within any member at any level, or over an entire hierarchy. Data can be sorted in ascending or descending order. To sort data over a hierarchy, you should first remove the hierarchy display in the crosstab.

To sort crosstab data

Right-click on the header of the dimension member that you want to sort. From the popup menu, select Sort By <Member>. By default, the crosstab member is sorted in descending order.

To reverse sorting, click the arrow in the sorted member's header.

To remove sorting

In the crosstab header, right-click on the header of the dimension member from which you want to remove a sort. From the popup menu, select **Remove Sort**. The sort is removed from the crosstab and chart.

Hiding and Showing Members

You can hide or show dimension members in crosstabs. You can hide a single member or you can hide several members. You can reveal all hidden members in a dimension or just the hidden child members of a selected member.

To hide a single member

In the crosstab, right-click on the member you want to hide. From the popup menu, select **Hide** and then **Hide <Member>**. The selected member is hidden in both the crosstab and chart.

To show hidden crosstab data

In the crosstab, right-click on a header in the dimension that has hidden members. From the popup menu select **Hide**. From the **Hide** submenu, select one of the following:

- **Show All Hidden Members** reveals all hidden members in the selected dimension.
- Click **Show Hidden Members** to display the **Select Members to Show** dialog box. This dialog box identifies all the hidden members from which you can choose the member(s) that you want to unhide. Select the members and click **OK**.

Totals

Panorama Web Access lets you calculate and display row totals, column totals, or both in a crosstab.

Panorama Web Access inserts columns/rows to the crosstabs to display totals for each header level. For example, if you display totals for a dimension displaying first and second level headers, you will see a total for the entire dimension (first level total) and totals for each second level.

By default, total amounts display in green.

Two additional totaling options are available: The **Subtotal** option displays totals for the currently displayed members. The **Grand Total** option presents totals for the entire dimension.

By default, for the vertical axis total rows appear above the data rows, and for the horizontal axis totals appear in the leftmost columns. You can change this using the **Show Totals Below** option, which displays the totals below the data (bottom rows or rightmost columns).

The **Show As Tree** option arranges the dimension members on the vertical axis of the crosstab in tree format. This feature is especially useful for dimensions reflecting organizational structures; for example, the “human resources” dimension with members corresponding to the positions in an organization.

To display row or column totals (all members)

In the crosstab, right-click the dimension for which you want to display totals, or click in a column or row header. From the popup menu, select **Dimension Properties**. From the submenu, select **Show Totals**.

New columns or rows are inserted in the crosstab, showing totals for each displayed level.

To display subtotal and grand total

In the crosstab, right-click the dimension for which you want to display totals, or click in a column or row header. From the popup menu, select **Dimension Properties**. From the submenu, select **Show Subtotal**.

To display the grand total, perform the above steps and from the submenu select **Grand Total**.

To display totals below details

After displaying the requested totals, open the **Dimension Properties** submenu and select the **Show Totals Below** option. The total rows or columns will move to the end of the data (bottom rows or rightmost columns).

To display vertical axis members in tree format

Open the **Dimension Properties** submenu and select the **Show As Tree** option.

Percentages

You can display data in a crosstab as percentages of row or column totals. A crosstab can display only percentages, or it can display the percentages together with the actual values.

The chart is modified to reflect the percentage display.

To display percentages

- In the crosstab, right-click the dimension for which you want to display percentages.
- From the popup menu, select **Crosstab Properties**. From the submenu select **Show Percents by Axis X (by rows)** or **Show Percents by Axis Y (by columns)**. You can also select this option via the Crosstab Properties dialog box (to open the dialog, select **All Properties** from the submenu).

By default, the crosstab displays the data as percentages of the parent level. For example, if one member of the first level is drilled down, the other first level members will display percentages of the dimension total, whereas the drilled-down cells will display percentages of the parent level total.

To change percentage display

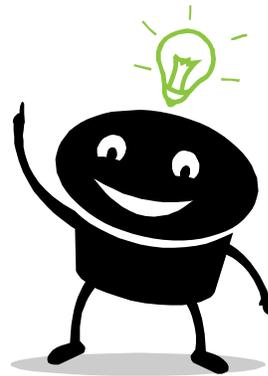
To display the actual values together with the percentages, set on the Show Percents and Values property in the **Crosstab Properties** dialog box (**All Properties** from the submenu).

To redisplay only the values, right-click on a crosstab header. From the popup menu, select **Crosstab Properties**. From the submenu select **Show Values**. Or, set on the **Show Values** property in the **Crosstab Properties** dialog box.

SECTION 7

Member Selection/ Value Filter

- Member Selection Filter
- Value Filter



Member Selection Filter

Filtering by member selection displays data according to selected dimension members.

You can define one or more member selection filters for each dimension.

There are two methods for defining a member selection filter:

- **Direct selection:** Activating the **Select Members/Highlighted Members** option after clicking on the relevant members in the crosstab.
- **Advanced member selection:** Use the **Select Members/Advanced Selection** option. In this option, after selecting members you can filter and sort the data to be displayed by member values. For example, you can select the Store members CA and OR, and apply the filter "top 5 products in Q1".

To create a filter by direct selection

- Select dimension members by holding the Ctrl key and clicking on the column or row headers.
- Right-click on any of the selected members and choose **Select Members** from the popup menu and **Highlighted Members** from the submenu. The crosstab will display only the selected member.

To create an advanced member selection filter

- Right-click on a column or row header in the crosstab. Choose Select Members from the popup menu and Advanced Selection from the submenu. The Select Members in <Dimension> dialog box displays.
- You can first search members by name and then pick the relevant members from the retrieved list. To use this option, click the **Search** button and follow the instructions as in the **To Select Members by Names** procedure, below.
- In the **Select by Members** tab, select a member on the left pane and click the Add button to move it to the right pane. You can use the + and - signs to expand and collapse a member on the left pane. Right-clicking on a member on the right pane allows you to select its descendants.
- After moving members to the right pane, you can change their order by dragging them to a new position in the list. This option is enabled only when the **Allow Drill Down on Selected Members** option is deselected.
- You can remove a member from the list by clicking the member and then the Remove button, or remove all the members by clicking the **Remove All** button.
- To display the full caption for the displayed members, deselect the **Show Caption** option.
- To view the list of the selected members, click the Preview button. Click OK to close the Preview window.
- To filter and sort your selection by member value, select the [Filter&Sort tab](#).
- Click **OK** to exit the **Select Members in <Dimension>** dialog box and apply the filter.

To select members by name

- In the **Select by Members** tab, click the **Search** button.
- In the **Search <Dimension>** dialog box, you can search for members by:
 - Typing a precise name and selecting the Exact Search option. This search will yield only those members whose name matches the specified string (fastest search).
 - Typing a few letters and selecting the Starting With option. This search will yield all members whose names start with the specified string.
 - Typing a pattern with wildcards (e.g. S*B - names starting with S and ending with B) and selecting the **Anywhere Within** option (slowest search)
- To search at a specific level, make sure the Search At Level checkbox is checked and then select the requested level from the list.
To search for members by properties (relevant only if the dimension has properties; for example, the Customers dimension in the Sales cube), make sure the Search At Level checkbox is checked and then select the requested property from the list.
- Click **Search**. The Results pane displays the members that meet the search criteria. The number of members found appears at the top of the pane.
To display the full caption for the displayed members, deselect the **Show Caption** box.
- Select the requested members by clicking them using the Shift and Control key. Use CTRL+A to select all members.
- Click **OK**. The selected members will appear in the right pane in the **Select by Members** tab.

To filter and sort by cell value

- Check the **Filter By Member Value** box.
- Choose an operator from the Filter Type list box and specify a value in the Value box. For example, if you want the selection to include only the top 5 items, select the Top Count operator (default) and type the value 5.

You can choose from the following operators:

Select...	To apply this definition...
=	Equal to specified value
>	Greater than specified value
<	Less than specified value
>=	Greater than or equal to specified value
<=	Less than or equal to specified value
<>	Less than or greater than specified value
Top Count	Specified amount from the topmost members of the list; for example, first 3 topmost values in list
Bottom Count	Specified amount from the bottom of the list; for example, lowest 3 values in list
Top Percent	Smallest group of topmost members that is greater than or equal to the percentage value
Bottom Percent	Smallest group of bottom members that is greater than the percentage value.
Top Sum	Smallest group of topmost values that is higher than the sum value
Bottom Sum	Smallest group of bottom values that is greater than the sum value
Inside Range	Higher than the lower defined value and lower than the higher defined value
Outside Range	Lower than the lower defined value and higher than the higher defined value

- Specify the members according to which you want to filter, by dragging members from the crosstab or from the Slicers pane to the For box. For example, if your member selection includes the stores in CA and OR, and you want to filter this selection according to the top 5 food products in Q1, then drag the Food (Product dimension) and Q1 (Time dimension) members into the **For** field. Use the delete button to remove a member you have dragged.
- To sort the results, check the **Sort** box and select **Ascending or Descending**. To sort by other members, check the **Sort By Filter Cell** box and drag the requested member(s) into the **Order By** box.

Value Filter

A value filter filters data for a selected crosstab member or for the entire crosstab, by cell values, meaning it defines items to be displayed according to their values.

A value filter is applied within each displayed level when dimension members are displayed in hierarchical levels. Alternatively, value filters are displayed for all visible members when level hierarchies are broken.

To create a value filter for a crosstab member

- In a crosstab header, right-click on a member and select **Filter** from the popup menu. From the submenu, select **By Value**. The **Value Filter By <Member>** dialog box opens.

- Define a condition by choosing an operator from the operators list box and specifying a value in the value box. For example, if you want the query to include only the top 40%, select the Top Percent operator and type the value 40.

You can choose from the following operators:

Select...	To apply this definition...
=	Equal to specified value
>	Greater than specified value
<	Less than specified value
>=	Greater than or equal to specified value
<=	Less than or equal to specified value
<>	Less than or greater than specified value.
Top Count	Specified amount from the topmost members of the list; for example, top 3 values in list
Bottom Count	Specified amount from the bottom of the list; for example, lowest 3 values in list
Top Percent	Smallest group of topmost members that is greater than or equal to the percentage value
Bottom Percent	Smallest group of bottom members that is greater than the percentage value
Inside Range	Higher than the lower defined value and lower than the higher defined value
Outside Range	Lower than the lower defined value and higher than the higher defined value

- To apply the filter to a different level with hierarchies shown or broken, check the **At Level** box and select the level from the level list box.
- Select/deselect the Show Hierarchies box to show or break hierarchies.
- Check the **Include Members Up To Selected** level box, to include all the members in the selected level.
- Click **OK** to apply the filter and exit the dialog box. The **Filter**  icon appears in the caption of the crosstab member.

To remove a value filter

In a crosstab header, right-click on a member and select **Filter** from the popup menu. From the submenu, select **Remove Filter**. The display changes to show all unfiltered data.