

Reports – Explanation of Report Options

Question:

I have run a report in Business Intelligence. On the results page, there are a lot of options on the toolbar. What do all of these icons mean?

Answer:

After running a report in Business Intelligence, there will be several reporting options displayed at the top of the report. These options allow you to do administrative tasks, view the report in different ways, save and export, and manipulate the data. Different options appear for different license levels in BI reporting. Contact Siterra Support for inquiries on upgrading your Business Intelligence license in Siterra.

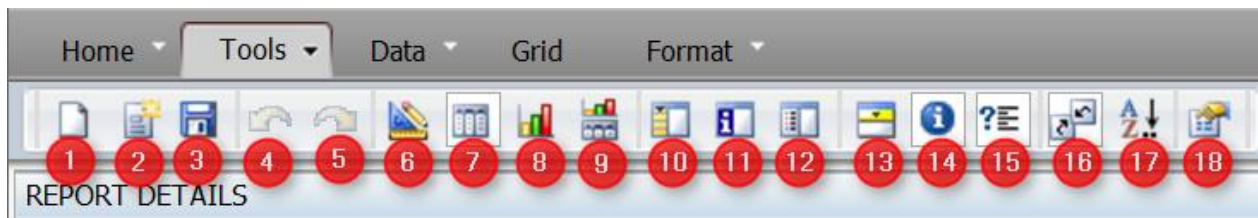
“Home” Tab

- (1) Save As - Saves the report.
- (2) Undo - The previous action performed is undone.
- (3) Redo - The previously undone action is redone.
- (4) Design (only available with WebPro License) - Changes the report to Design Mode so that you can modify the definition of your report.
- (5) Grid - Displays the report as a grid, similar to a standard spreadsheet style.
- (6) Graph - Displays the report as a graph. MicroStrategy can display data in graph types and styles.
- (7) Grid and Graph - Displays the report in both grid and graph views at the same time on the screen.
- (8) Add to History List - Adds the report to the History List of the logged-in user. History List is an area in MicroStrategy Web where you can store report results and document results from various sources.
- (9) Print - Lets you specify print settings for the report and print the report.
- (10) Send Now - Lets you send the report to specified email addresses.
- (11) Schedule delivery to History List - Opens the Subscribe to History List dialog box, which lets you set up automatic delivery of a report/document to your History List on a specific schedule.
- (12) Export - Exports all or a portion of the report in Excel, CSV, HTML, or plain text format.
- (13) PDF - Lets you specify settings to convert and display reports in PDF format.
- (14) Re-prompt - Lets you answer the prompt again, thereby creating a new filter for the report results.
- (15) Full Screen Mode - Maximizes your view of the report by removing most of the Web toolbars.



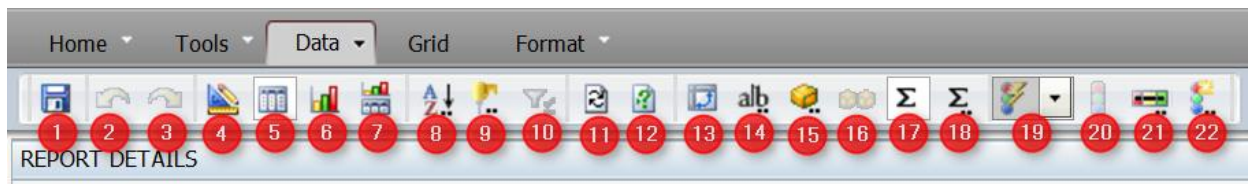
“Tools” Tab

- (1) New - Lets you create a new report using a pre-defined report template.
- (2) Convert to Document - Converts the report into a Report Services document. The new document opens, with the report displayed as a Grid/Graph in the Detail Header.
- (3) Save As - Saves the report.
- (4) Undo - The previous action performed is undone.
- (5) Redo - The previously undone action is redone.
- (6) Design - Changes the report to Design Mode so that you can modify the definition of your report.
- (7) Grid - Displays the report as a grid, similar to a standard spreadsheet style.
- (8) Graph - Displays the report as a graph. MicroStrategy can display data in numerous graph types and styles.
- (9) Grid and Graph - Displays the report in both grid and graph views at the same time on the screen.
- (10) All Objects - Shows or hides the All Objects pane, which lets you search for, locate, and select objects that are part of the project.
- (11) Notes - Shows or hides the Notes pane, which lets you add a new note or edit an existing note. Notes can include details about the report, information on how the report was created, reasons to use it, queries about the data displayed, or anything useful to you and other users who execute the same report.
- (12) Related Reports - Shows or hides the Related Reports pane, which displays a list of reports related to the objects in the current report.
- (13) Page-by Axis - Shows or hides the page-by pane. Page-by is used to group large amounts of data into separate pages of the report, allowing you to view a subset of data.
- (14) Report Details - Shows or hides the Report Details pane, which displays the report description and filter details for the report. The Report Details pane may also display the prompt details and template details of the report.
- (15) Prompt Details - Shows or hides the Prompt Details pane, which displays the prompt information for all prompts in the report. The information includes the name of each prompt and its answers.
- (16) Show Pivot Buttons - Shows or hides pivot buttons on column headers of a grid report. Pivoting lets you re-arrange the columns and rows in a report.
- (17) Show Sort Buttons - Shows or hides the sort buttons on the column headers of a grid report. The sort buttons let you quickly sort the data in either ascending or descending order.
- (18) Report Options - Lets you format a grid report.



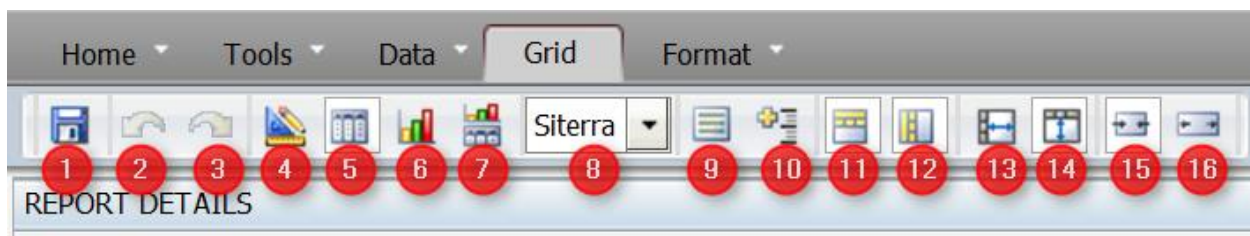
“Data” Tab

- (1) Save As - Saves the report.
- (2) Undo - The previous action performed is undone.
- (3) Redo - The previously undone action is redone.
- (4) Design - Changes the report to Design Mode so that you can modify the definition of your report.
- (5) Grid - Displays the report as a grid, similar to a standard spreadsheet style.
- (6) Graph - Displays the report as a graph. MicroStrategy can display data in numerous graph types and styles.
- (7) Grid and Graph - Displays the report in both grid and graph views at the same time on the screen.
- (8) Sort - Lets you specify advanced sort options. You can sort the data in rows or columns either in ascending or descending order.
- (9) Drill - Lets you customize the drill options for the attributes of a report.
- (10) Filter on Selections - Displays the rows and columns for the selected attribute in a report. For example, if a report has more rows of information than you wish to view, you can specify which rows to display.
- (11) Refresh - Refreshes the current display.
- (12) Re-prompt - Lets you answer the prompt again, thereby creating a new filter for the report results.
- (13) Swap Rows and Columns - Moves all report objects in the rows of the report to the columns of the report, and moves all report objects in the columns of the report to the rows of the report.
- (14) Rename/Edit Objects - Lets you rename an object in a report.
- (15) Edit Attribute Forms - Lets you select the attribute forms to be displayed on the report. For example, the Customer attribute can have the forms such as First Name, Last Name, Address, Email Address, and so on.
- (16) Toggle Attribute Form Names - Shows or hides the attribute forms of an attribute in the report.
- (17) Show Totals - Shows or hides subtotals and grand totals included in the report.
- (18) Edit Totals - Lets you include or remove subtotals from the report.
- (19) Quick Thresholds - Displays the quick thresholds that you can add to a report. Quick thresholds apply green, red, or yellow colors or symbols to metric values on your report.
- (20) Toggle Thresholds - Shows or hides thresholds on the report.
- (21) Visual Threshold Editor - Opens the Visual Threshold Editor, which lets you define and format a simple threshold.
- (22) Advanced Thresholds Editor - Lets you create advanced thresholds based on multiple metrics and uses more complex expressions than a simple threshold.



“Grid” Tab

- (1) Save As - Saves the report.
- (2) Undo - The previous action performed is undone.
- (3) Redo - The previously undone action is redone.
- (4) Design - Changes the report to Design Mode so that you can modify the definition of your report.
- (5) Grid - Displays the report as a grid, similar to a standard spreadsheet style.
- (6) Graph - Displays the report as a graph. MicroStrategy can display data in numerous graph types and styles.
- (7) Grid and Graph - Displays the report in both grid and graph views at the same time on the screen.
- (8) Autostyle - Applies a selected autostyle to quickly format a report. An autostyle is a set of report formatting that is predefined and can be applied to reports to create a consistent look and feel.
- (9) Banding - Applies or removes background colors for alternate rows on a grid report. Banding helps you view and analyze the data on a report.
- (10) Outline - Enables or disables outline mode for the report. You can use outline mode to collapse or expand sections of related data in the report.
- (11) Merge Column Headers - Merges multiple column headers that are identical into a single header.
- (12) Merge Row Headers - Merges multiple row headers that are identical into a single header.
- (13) Lock Row Headers - Retains the display of row headers when scrolling horizontally in a report so that when a user scrolls through a large report, the row headers remain visible.
- (14) Lock Column Headers - Retains the display of column headers when scrolling vertically in a report so that when a user scrolls through a large report, the column headers remain visible.
- (15) Auto Fit to Contents - Enlarges or shrinks the report so that all data on the report fits in the columns and rows.
- (16) Auto Fit to Window - Enlarges or shrinks the report so that it fits in the window.



“Format” Tab

- (1) Save As - Saves the report.
- (2) Undo - The previous action performed is undone.
- (3) Redo - The previously undone action is redone.
- (4) Design - Changes the report to Design Mode so that you can modify the definition of your report.
- (5) Grid - Displays the report as a grid, similar to a standard spreadsheet style.
- (6) Graph - Displays the report as a graph. MicroStrategy can display data in graph types and styles.
- (7) Grid and Graph - Displays the report in both grid and graph views at the same time on the screen.
- (8) Selection - Allows you to format groups of objects at once.
- (9) Selection Drill Down - Allows you to fine tune object group selection.

- (10) Font - Change the current selection to different fonts.
- (11) Size - Change the current selection to different font sizes.
- (12) Bold
- (13) Italics
- (14) Underline
- (15) Left Justify
- (16) Center Justify
- (17) Right Justify
- (18) Currency Style
- (19) Percent Style
- (20) Comma Style
- (21) Decrease Decimal
- (22) Increase Decimal
- (23) Fill Color
- (24) Line Color
- (25) Text Color
- (26) Gridline Selection
- (27) Gridline Style
- (28) Advanced Grid Formatting - Lets you format the template of the grid report.
- (29) Advanced Graph Formatting - Lets you format the graph report.

