


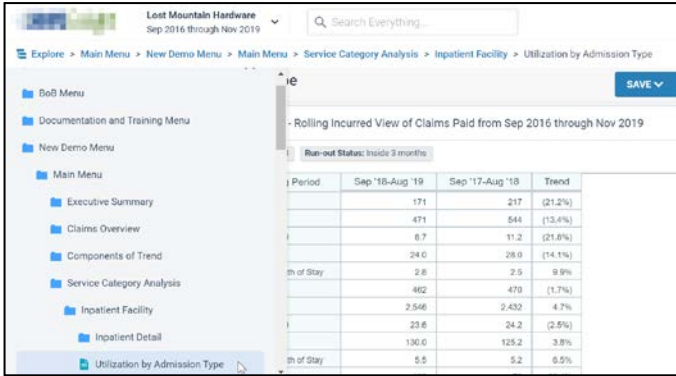









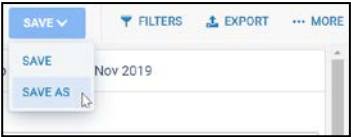






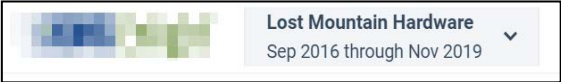




## Quick Reference Sheet

| FEATURE                      | DESCRIPTION / HOW TO  |
|------------------------------|---|
| <p><b>Navigate</b></p>       | <p>The reporting tool is designed to provide a deep analytic value to a broad user base with an intuitive experience, especially regarding navigation.</p> <p><b>Header:</b> At the top of every main page, you can <i>access</i> the Select screen, Search, Online Help, Notifications &amp; Alerts, and additional User Account Options.</p> <p><b>Breadcrumb Navigation:</b> <i>View</i> the breadcrumb navigation to see your current location and <i>click</i> a link to quickly access a higher-level folder or original landing point in the folder structure.</p> <p><b>Left Navigation:</b> On the left side of main pages, you can click to navigate to different pages and solutions within the tool. <i>Hover</i> on the left navigation to display additional selections.</p> <p><b>Explore Page:</b> When you login, you will land here (unless you set a menu item to be default). You can access pre-built templated <b>standard reports</b> , <b>dashboards</b>  and <b>stories</b>  that are housed in <b>folders</b>  in the folder structure and <i>create</i> new reports, dashboards, stories, and folders. Additionally, you can <i>export</i> multiple menu items and utilize the options available in the header, breadcrumb navigation and left navigation.</p> <ul style="list-style-type: none"> <li> <p><b>Folder Structure:</b> Select the appropriate menu (if applicable) and double-click to expand folders and open a menu item. Alternatively, click More Options (...) to access additional functions, including Open, Open in New Tab and Layout. Utilize Search Current Folder if you need additional assistance in locating a menu item.</p> </li> <li> <p><b>Favorites:</b> In the Folder Structure, <i>click</i> ☆ for a folder, report, dashboard or story to make it a favorite. It displays ★ and you can double click to open from the Favorites list.</p> </li> <li> <p><b>Recently Accessed:</b> <i>Double click</i> to quickly open a report, dashboard, or story that you recently visited. You can toggle between the Recently Accessed and Favorites lists.</p> </li> </ul> <p><b>Accordion:</b> In addition to the breadcrumb navigation and double clicking to open folders, you can navigate using the accordion on the Explore page and the Report screen to explore folders and open a report, dashboard, or story with a click.</p> <p><b>To navigate using the Accordion:</b> <i>Click</i> on the accordion (directly below the logo) to display a folder structure on the left side. You can scroll up and down and <i>use</i> a single click to collapse and expand folders. <i>Locate</i> the menu item and <i>click</i> to open. The report, dashboard or story will open on the page. To stop utilizing the Accordion, click <b>X</b>.</p>  |
| <p><b>Modify Reports</b></p> | <p><b>To make extensive changes to the report type, utilized dimensions and measures and attributes:</b></p> <ol style="list-style-type: none"> <li>After opening a report, <i>hover</i> the mouse in the report subtitle and <i>click</i>  <b>DESIGN</b>.</li> <li>On the Design window, <i>click</i> a type (<b>Table, Listing, Vertical/Horizontal Bar, Waterfall, Pie, Line, Tree Map, Map, Scatter or Bubble</b>). The active selection displays outlined and in blue. <ul style="list-style-type: none"> <li>The window will update based on the selected type. For example, a Table has Row and Column dimensions and Used measures. However, for a Tree Map, you can add dimensions to be Classification or Stacking and measures to be Response and Color. While the boxes and names differ slightly, the functionality works in a similar manner.</li> </ul> </li> <li>To change selected <b>dimensions</b> (Table), <i>drag and drop</i> an Available Dimension to the Row Dimensions and/or Column Dimensions. Where you release the mouse determines how the dimension is used and ordered. Alternatively, you can <i>select</i> individual or multiple dimensions and <i>click</i> <b>Add to Rows</b> or <b>Add to Columns</b>. <i>Drag and drop</i> to change the order as needed. <ul style="list-style-type: none"> <li>To remove, <i>click</i> the  to the right of the selected Row Dimension or Column Dimension. To clear out all selections, <i>click</i> <b>Remove All</b>.</li> </ul> </li> <li>To change the used <b>measures</b> (Table), <i>drag and drop</i> an Available Measure to the Used Measures box. Where you release the mouse determines the order. Alternatively, you can <i>select</i> individual or multiple dimensions and <i>click</i> <b>Add Selected</b>. <i>Drag and drop</i> to change the order as needed. <ul style="list-style-type: none"> <li>To remove, <i>click</i> the  to the right of the Used Measure. To clear out all selections, <i>click</i> <b>Remove All</b>.</li> <li>By default, measures are displayed in Columns. To display as rows, <i>uncheck</i> <b>Show Measures in Columns</b>.</li> </ul> </li> <li>To change default preferences for your report, <i>click</i> <b>Table Attributes, Listing Attributes or Chart Attributes</b> (depending on type). <i>Double-click</i> to expand the folders or use the search to locate the desired preference. You can <i>hide</i> sub-totals, specify the sort color, specify the text for certain values, chart exporting page orientation, etc.</li> </ol>   |
| <p><b>Filter</b></p>         | <p>Filters can define a portion of the data. Detail and Aggregate Filters are the two main types applied at the report or dashboard level. At the dashboard level, the filter will apply to all applicable reports.</p> <ul style="list-style-type: none"> <li><b>Detail Filters:</b> Dimension Filters and Detail Measure Filters review each record individually. If the condition is met, the record is added to the report. These filters are applied first.</li> <li><b>Aggregate Filters:</b> Aggregate Measure Filters and a Top/Bottom X Filter are added to the results based on how the report is designed.</li> </ul> <p><b>To modify applied filters for a report or dashboard:</b> <i>Click</i> an existing filter in the Report or Dashboard Filter Area and <i>select</i> <b>Edit Filter</b>. Make your changes and <i>click</i> <b>Apply</b>.</p> <ul style="list-style-type: none"> <li>To toggle the Filter Areas to show or hide, <i>click</i> <b>... MORE</b> in the report title and <i>select</i> <b>Filter Areas On/Off</b>.</li> <li><i>Click</i> on a filter in the Filters Area to provide additional options, including the ability to alter the filter level (report or dashboard). <i>Utilize</i> <b>Promote Filter to Dashboard</b> to elevate a report level filter to become a dashboard level filter. Alternatively, <b>Push Filter to Reports</b> changes a dashboard level filter to be report level filters that are applied to every report in the dashboard.</li> </ul>   |

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|-------------------------------|--|
|                               | <p><b>To add new filters to a report:</b> Click  <b>FILTERS</b> in the report title to launch the Report Filters window. Then, click  <b>Add Filter</b> in the side panel. <i>Select</i> the dimension or measure and click <b>Next</b>. Enter the parameters and click <b>Add Filter</b>. Add additional filters as needed and click <b>Save</b>.</p> <ul style="list-style-type: none"> <li>Alternatively, you can access the Report Filters window is available from the Design screen. Click  <b>Edit Report Filters</b> to add new and edit existing filters. After saving, you must click <b>Apply</b>.</li> </ul>  |
| <p><b>Save Menu Items</b></p> | <p>After customizing a standard report, dashboard or story or creating one from scratch, you can save the template as a <b>Personal</b> or <b>Group</b> menu item.</p> <p><b>Personal</b> menu items allow ONLY the individual user login who saved it to access it. If you have access to multiple databases, these will be available in all your databases. The data will update based on the selected database.</p> <p>You can <i>share</i> <b>Group</b> menu items with all other users within a selected User Group. Everyone within the group can view, edit, rename and delete saved items (if enabled).</p> <p><b>To save a report:</b></p> <ol style="list-style-type: none"> <li>Click the  drop-down and choose <b>SAVE AS</b> in the report title.</li> <li>Then, enter a <b>Name</b> and select <b>Personal</b> or <b>Group</b> as the <b>Level</b>. If you select <b>Group</b>, use the drop-down arrow to pick the appropriate <b>User Group</b>. <ul style="list-style-type: none"> <li>You can check <b>Set As Default</b> to automatically choose this user group for future group saved menu items.</li> </ul> </li> <li>To change where your menu item will be stored on the Folder Structure, click  <b>CHANGE</b>. Click the links in the breadcrumb navigation, use search and/or <i>double click</i> to locate the folder. <ul style="list-style-type: none"> <li>Alternatively, click <b>New Folder</b> to create a new folder location. Once you <i>choose</i> the location, click <b>Set</b>.</li> </ul> </li> <li>Click <b>Save</b>.</li> </ol> <p><b>To overwrite an existing report:</b> Click the  drop-down in the report header and click <b>SAVE</b>. You can only save over an existing report has been previously saved. On the Question prompt, <i>confirm</i> the overwrite by clicking <b>Yes</b>.</p>    |
| <p><b>Export</b></p>          | <p>You can export to archive and share your reporting. You can export a currently opened report, dashboard or story on the Report Screen, or you can export multiple menu items from the Explore Page.</p> <p>Available file formats include <b>Comma Separated Values File (*.csv)</b>, <b>Tab Separated Values File (*.txt)</b>, <b>HTML File (*.html)</b>, <b>Microsoft Excel (*.xls)</b>, <b>Microsoft Excel 2007 (*.xlsx)</b>, <b>Microsoft Word (*.doc)</b>, <b>PDF File (*.pdf)</b> and <b>Microsoft PowerPoint (*.pptx)</b>. Using the PowerPoint option enables you to export a report into an editable presentation-ready export PowerPoint slide deck</p> <p><b>To export an open menu item:</b></p> <ol style="list-style-type: none"> <li>After opening a report, dashboard, or story, click  <b>EXPORT</b> in the report title.</li> <li>Select the appropriate <b>Format</b>. The format selection determines the available options.</li> <li>Choose the Orientation: <b>Portrait</b> or <b>Landscape</b>. Then, select the Style Name: <b>Plain</b>, <b>Static Publishing</b> or <b>Business</b>.</li> <li>Enable <b>Export Dashboard with Reports on separate pages</b>, <b>Include Dashboard and Report Titles</b> and/or <b>Include Filter Descriptions</b>.</li> <li>Click <b>Export</b>. Once downloaded, view and save the export.</li> </ol> <p><b>To export multiple menu items:</b></p> <ol style="list-style-type: none"> <li>Choose the appropriate menu on the Explore Page and click  <b>EXPORT</b>.</li> <li>On the Export Multiple Items window, <i>double-click</i> to open the folders and <i>utilize</i> the breadcrumb navigation to locate what you want to export.</li> <li>Select one or multiple items. You can select all reports, dashboards and stories in a selected folder, by checking the box to the left of <b>Name</b>.</li> <li>Click  <b>ADD SELECTED</b>, and choose the <b>Format</b>. The format selection determines the available options.</li> <li>Click  <b>OPTIONS</b> to input your selections for Style Name and Orientation. Then, choose to enable: <b>Export Dashboard with Reports on separate pages</b>, <b>Generate As Single File</b>, <b>Include Dashboard and Report Titles</b> and/or <b>Include Filter Descriptions</b>.</li> <li>Click <b>Export</b>. Once downloaded, view and save the export.</li> </ol>  |
| <p><b>Change Database</b></p> | <p>Change your database using the header, which is available on your Explore page or working on an opened report, dashboard, or story.</p> <p><b>To change the database:</b> Click the  in the header and choose a different selection from the <b>Database</b> drop-down.</p> <p>Then, click <b>Apply</b>.</p>    |
| <p><b>Change View</b></p>     | <p>You can switch the view for a specific opened report, dashboard, or story.</p> <p><b>To change the view:</b></p> <ol style="list-style-type: none"> <li>On the Report screen, click  <b>MORE</b> in the report subtitle. Choose <b>Report</b> and click <b>Swap View</b>.</li> <li>Select the View (<b>Rolling Incurred</b>, <b>Calendar/Fiscal Incurred</b>, <b>Rolling Paid</b> or <b>Calendar/Fiscal Paid</b>)</li> <li>Click <b>Swap</b>.</li> </ol>    |
| <p><b>Sort Measures</b></p>   | <p>You can sort by a measure in ascending or descending order in tabular and some graphical reports. Sorted values in tabular reports will display in green by default. Only one measure can be sorted.</p> <p><b>To sort by a measure:</b> Click the measure value or measure label to be sorted and choose to <b>Sort by Ascending</b> or <b>Sort by Descending</b>. The report will appear sorted in descending or ascending order by the selected measure.</p> <p><b>To remove sorting:</b> Click on the sorted measure value or label and choose <b>Measure</b>. Then, select <b>Remove Sorting</b>.</p>  |