



Infor Business Intelligence Self-Service User Guide

Release 11.0.x

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Contacting Infor

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Self-Service

With Self-Service, you can take advantage of a predefined set of analysis modules, or use the set of charts to create your own dashboards.

The available suite of analyses enables you to expose relationships and trends in data from any multidimensional data source. With the ad-hoc analysis, for example, you can browse, analyze, and explore data.

To get started, use the Self-Service start page or click the content connection on the Dashboards toolbar.

Self-Service start page

The Self-Service start page offers multiple ways to analyze, explore, and visualize your data. To open the start page, click Dashboards, expand the Self-Service folder and select the Self-Service dashboard.

The Self-Service start page serves as an entry point to this functionality:

- Explore your data with ad-hoc analysis.
See [Explore your data](#) on page 5.
- Analyze your data using the predefined analysis modules.
See [Analyze your data](#) on page 6.
- Use the chart guide to find the optimal visualization.
See [Use chart guide](#) on page 11.
- Select your chart and create data visualization that can be used on your dashboards.
See [Pick your chart](#) on page 11.
- Reuse your favorite widgets.
See [View your favorites](#) on page 21.

Explore your data

The **Explore Your Data** widget provides data browsing, data exploration, and advanced data analysis capabilities for ad-hoc analysis.

You can drag and drop hierarchies between filters, and rows and columns axes to enable Slice and Dice functionality to examine different viewpoints of your data.

Note: The format used to display measure values is defined in the source database.

The **Explore Your Data** widget consists of these sections:

- Ad-hoc analysis toolbar: The Ad-hoc analysis toolbar is located below the analysis title. See [Ad-hoc analysis toolbar](#) on page 22.
- Filters: Below the Ad-hoc analysis toolbar, expand the filter menu to select hierarchies with their selected elements. For example: Product: All Tires, Region: All Regions. See [Actions on filters](#) on page 32.
- Data Table: The data table represents the main area of your ad-hoc analysis. The table shows data values for the selected columns, rows, and filters. Elements from the vertical and horizontal hierarchies form the row and column headers.

You can perform these actions on rows, columns, and cells:

- Click on the hierarchies that are highlighted in blue to see the actions on hierarchies. See [Actions on axis hierarchies](#) on page 32.
- Click on the row headers to see the actions that you can perform on row headers. See [Actions on row headers](#) on page 34.
- Click on the column headers that have gray background to see the corresponding actions. See [Actions on column headers](#) on page 35.
- Click on the data cell that typically displays the values to select from the list of action on data cells. See [Actions on data cells](#) on page 36.

Analyze your data

The Self-Service analysis widgets enable you to see relationships and trends in data. The available visualizations are widget-specific.

Select which analysis you want to perform from **Analyze Your Data** widget on the Start page or by clicking the content connection and selecting **Analysis Widgets**.

ABC analysis

ABC analysis is frequently used in inventory management, where it is usually impracticable to devote equal resources to each item. It assumes that, in any inventory, a small number of items is vital to an organization's success and a majority is relatively unimportant.

ABC analysis can expose risk and help to control costs. For example, if sales of a small number of products account for the majority of your profits, any problem with those products has a larger effect than a problem with some other products. Similarly, the majority of customer support calls might result

from a small number of recurring issues. Resources devoted to solving those issues could bring large benefits.

The purpose of this analysis is to highlight the most critical among a set of elements. Typically, a small number of values account for a large percentage of the total value. For example, 20% of products might account for 80% of total revenue.

Chart

The **Chart** tab displays a column chart, where the horizontal axis shows the elements, and the vertical axis shows the percentage of the value for each element.

The dashes represent the cumulative percentage for each element. The rectangular areas represent each category, where the height corresponds to the cumulative sum for the particular category and the width corresponds to the number of elements in this category.

The chart is color-coded to represent threshold categories A, B, and C. The legend displays the cumulative sum and the number of elements for each category. See [Properties](#) on page 7.

Table

The table displays, in descending order, elements and their corresponding values which have been classified A, B, or C by reference to a criterion such as annual dollar usage. The bar chart represents the descending values.

The chart is color-coded to represent the threshold categories A, B, and C.

For each category, the cumulative percentage and the number of elements in the category is displayed. The sum at the bottom of the table shows the total value for all the elements that are listed.

You can sort by ascending or descending values, but the calculation of the cumulative percentage will stay the same, that is, from top down.

You can use sort by ascending when all values are negative. For example, with costs, the highest negative value is at the top.

Alternatively, you can sort by descending when all values are positive. For example, with revenue, where the highest value is at the top.

Properties

To edit threshold ranges, click **Edit > Properties** and modify the threshold.

Specify the A, B, and C ranges by changing the borders of the A and B ranges. By default, range A contains all values which, individually account for up to 60% of the total value. Range B contains values which account for 60% to 80% of the total. Range C contains all values which are not in A or B.

Complexity analysis

Complexity analysis combines two ABC analyses and highlights values at the intersection of the two measurement criteria. In ABC analysis, you group elements into three categories.

For example, you might classify products which yield more than a specified amount of revenue each year as A products, and products which yield less than a certain amount as C products. B products are those which yield less than A products but more than C products. Similarly, you might classify customers who buy the most units as A customers and those who buy the least as C customers.

Complexity analysis compares two categories, such as products and customers, against two measures. The measures are referred to as Coverage and Quantity.

For example, Coverage might correspond to Revenue and Quantity might correspond to Units. In that case, you can use complexity analysis to identify the customers from whom you earn the least revenue, and who also buy the fewest units.

This could be used, for example, to determine which customers buy small quantities of products with low annual dollar usage. For these orders, handling costs is greater than for fewer orders of large quantities.

Properties

To edit threshold ranges, click **Edit > Properties** and modify the threshold.

Specify the A, B and C ranges by changing the borders of the A and B ranges. By default, range A contains all values which, individually account for up to 60% of the total value. Range B contains values which account for 60% to 80% of the total. Range C contains all values which are not in A or B.

Distribution analysis

Distribution analysis sorts the values in a selected hierarchy and divides them into a specified number of intervals or ranges.

The bounds of the intervals are calculated automatically by referencing the difference between the minimum and maximum values in the data table. The number of intervals required is used to calculate the interval bounds.

Note: By default, the number of intervals is 10. You can modify the number of intervals on the **Chart** tab.

Chart

The **Chart** tab displays a column chart, where the horizontal axis shows ascending values for the selected intervals, and the vertical axis shows the frequency of elements within each interval.

Adjust the number of intervals in the **Number of Intervals** drop-down menu.

Statistics

The **Statistics** tab displays these statistical measures for your data:

- Maximum/minimum value with the affected period
- Count, which shows positive, negative, and empty
- Sum of the values for all intervals
- Average value across all intervals
- Median value, with the affected period
- Standard deviation

Movement analysis

Movement analysis is typically used to compare how an element, such as a product, performed over several periods. The highlighted element is then reflected in all chart tabs.

Movement chart

The movement chart displays the ranking position of selected elements across the period as a line chart. For example, the movement chart displays the information about how the selected product performed over several periods.

Comparison chart

The comparison chart is a line chart that explores the relation between relative and absolute performance of the selected product over time. The vertical axis on the right side shows the relative performance which is represented by the ranking and vertical axis on the left side shows the absolute performance which is represented by actual values of the selected element. The two trend lines can have opposite directions.

For example, if you have three products, A, B, and C, where the revenue and absolute value, of product B is increasing, then the relative ranking of product B could be declining simultaneously. In this case, product A or C is more successful.

Ranking table

Movement analysis displays a table of values. The values in each column are in descending order. It is typically used to compare how an element, such as a product, performed over a number of periods, with time on the horizontal axis and the elements to be compared on the vertical. To determine which type of table you want to display, use these radial buttons located above the table of values.

- Elements
- Values
- Elements and values

The names of the elements form the row headers and, typically, each column represents a period.

Click on the first column of the period to select the leading time element which defines the rank of the row elements.

Click any row element, or any value in the table, to highlight the values for that element in each column. The selected element is reflected in the Comparison tab and Movement tab.

For example, here, Model C was ranked third in 2013, and second in 2014 but had fallen to fourth in 2015:

Rank	Product	All Years	2013	2014	2015
1	Model A	5706297	Model A	Model A	Model B
2	Model B	5240979	Model B	Model C	Model A
3	Model C	3591655	Model C	Model B	Model D
4	Model D	3320565	Model D	Model D	Model C

Note: Click the **All Years** column to define what drives the ranking of the row headers.

Navigation analysis

Navigation analysis provides a visual overview of your data. You can navigate to a different element from one or more hierarchies and see how your selection impacts the values in all selected hierarchies.

Navigation analysis displays values and corresponding bars for selected hierarchies. The bars are color-coded: blue bars represent positive values and red bars represent negative values. You can add multiple hierarchies to your navigation analysis.

The title of each bar chart displays the hierarchy and the selected element.

By default, the list below the header displays children of the top selected element. If the hierarchy is flat, that is, there are no children of the top element because all elements are on the same level, then all elements are listed and the default element is put into the header.

Actions

You can expand the filter section that is located below the analysis toolbar. When you click on the blue hierarchy in the filter section, you can move the hierarchy to analysis or select a different display type, or select different elements.

To move additional hierarchies to analysis, drag and drop them from the filter section to the **Move to Analysis** box.

These actions are available when you click the gray header that lists the hierarchy:

- **Select Elements:** You can search for and select elements from the hierarchy that you want to display in your analysis. The selected element is highlighted and moved to the header. If you display

multiple hierarchies and select an element in only one hierarchy, then the values in the other hierarchies are updated.

- **Select Level:** Zoom In or Zoom Out to the level you want to show. For example, All, Years, Quarters, or Months can be selected for the Period hierarchy.
- **Select Display Type:** Changes the display type of all elements of a hierarchy. The default display type is the caption. You can replace the caption with an attribute.
- **Remove from Analysis:** Removes the hierarchy from the analysis.

These actions are available on elements:

- **Select:** Moves the element to the header.
- **Zoom In:** Displays all children of the selected element, that is the elements and values at the next level down, without displaying the parents. For example, if you select the Period hierarchy and zoom in the All Years element, the list of years is displayed on the axis. If you zoom in the 2016 element, the list of four quarters of 2016 is displayed.
- **Zoom Out:** Displays the elements that are one level up from the selected element.
- **Zoom to Level:** Displays a selected level below the current element in a hierarchy. For example, if you click on the 2016 element, select zoom to level, and select the Month level, all 12 months of 2016 are displayed.

Use chart guide

If you require assistance selecting the chart to visualize your data, use the **Use Chart Guide** widget on the Self-Service start page. In the chart guide, you can find use cases with descriptions and example images of each visualization type, all grouped under their recommended use:

- **Comparison:** Use comparison charts to compare values or identify trends over time. You can, for example, compare how different categories of your products are performing.
- **Relationship:** Use relationship charts to compare how data sets that are distributed between two or more measurements relate to each other.
- **Composition:** Use composition charts when one total is broken down into composite parts and each part represents a proportion of the total. For example, you can see what part of your revenue is generated by each product category.
- **Distribution:** Use distribution charts to visualize how data is distributed within separate categories.

All charts can be found in [Pick your chart](#) on page 11.

Note: If you need help to set up your chart, see [Self-Service wizard](#) on page 30.

Pick your chart

The **Pick Your Chart** widget contains all visualization options that you can use in Self-Service. Click on the chart you want to create and follow the wizard.

See [Self-Service wizard](#) on page 30.

The charts are grouped into six categories and you can select the chart that best suits your requirements:

Category	Type
Column charts	Single-series column chart on page 13
	Multi-series column chart on page 13
	Positive-negative column chart on page 13
	Stacked column chart on page 13
	Waterfall column chart on page 14
Bar charts	Single-series bar chart on page 14
	Multi-series bar chart on page 14
	Positive-negative bar chart on page 14
	Stacked bar chart on page 15
	Waterfall bar chart on page 15
Line charts	Single-series line chart on page 15
	Multi-series line chart on page 16
Comparison charts	Benchmark chart on page 16
	Radial progress chart on page 16
	Combination chart on page 17
	Comparison table on page 17
	Comparison column chart on page 17
	Overlapping column chart on page 18
	Comparison line chart on page 18
Donuts and pie charts	Donut and pie charts on page 19
Special charts	Bubble chart on page 19
	Bubble chart over time on page 20
	Colored map on page 20
	Radar chart on page 21
	Scatter chart on page 21

Column charts

Single-series column chart

This chart displays single-series columns for the specified categories that form the horizontal axis.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Edit > Properties**.

- You can switch the chart color between blue and gray.

Note: You cannot select multiple elements for a column in a Single-series chart. Additionally, only the first element of multiple elements pushed to the column through widget communication will be shown.

Multi-series column chart

This chart displays columns. The categories form the groups of columns on the horizontal axis. Multiple series are represented by different colors within each group.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Positive-negative column chart

This chart displays the categories as columns. The columns are color-coded to distinguish between negative values (red) and positive values (green).

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Note: You cannot select multiple elements for a column in a Single-series chart. Additionally, only the first element of multiple elements pushed to the column through widget communication will be shown.

Stacked column chart

Stacked charts are similar to multi-series charts, but they plot datasets on top of each other instead of the clustered side-by-side placement. Categories are represented by columns. Series are represented by proportions of shares (colors) on each column.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Waterfall column chart

A waterfall chart is a form of data visualization that helps you to understand the cumulative effect of sequentially introduced positive or negative values.

Each element of the selected category is represented by a column, which is color-coded to distinguish between positive (green) and negative (red) values. Each column is placed at the level of the cumulative value for all previous elements. The height of each column represents the value that corresponds to the respective element. The relative position of the column corresponds to the cumulative value. The last column represents the sum of all elements that are displayed.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Note: You cannot select multiple elements for a column in a Single-series chart. Additionally, only the first element of multiple elements pushed to the column through widget communication will be shown.

Bar charts

Single-series bar chart

This chart displays single-series bars for the specified categories that form the vertical axis.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Edit > Properties**.

- You can switch the chart color between blue and gray.

Note: You cannot select multiple elements for a column in a Single-series chart. Additionally, only the first element of multiple elements pushed to the column through widget communication will be shown.

Multi-series bar chart

This chart displays bars. The categories form the groups of bars on the vertical axis. Multiple series are represented by different colors within each group.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Positive-negative bar chart

This chart displays the categories as bars. The bars are color-coded to distinguish between negative values (red) and positive values (green).

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Note: You cannot select multiple elements for a column in a Single-series chart. Additionally, only the first element of multiple elements pushed to the column through widget communication will be shown.

Stacked bar chart

Stacked charts are similar to multi-series charts, but they plot datasets on top of each other instead of the clustered side-by-side placement. Categories are represented by bars. Series are represented by proportions of shares (colors) on each bar.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Waterfall bar chart

A waterfall chart is a form of data visualization that helps you to understand the cumulative effect of sequentially introduced positive or negative values.

Each element of the selected category is represented by a bar, which is color-coded to distinguish between positive (green) and negative (red) values. Each bar is placed at the level of the cumulative value for all previous elements. The width of each bar represents the value that corresponds to the respective element. The relative position of the bar corresponds to the cumulative value. The last bar represents the sum of all elements that are displayed.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Note: You cannot select multiple elements for a column in a Single-series chart. Additionally, only the first element of multiple elements pushed to the column through widget communication will be shown.

Line charts

Single-series line chart

This chart displays a single-series line to represent a trend, typically over time.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Edit > Properties**.

- You can switch the chart color between blue and gray.

Note: You cannot select multiple elements for a column in a Single-series chart. Additionally, only the first element of multiple elements pushed to the column through widget communication will be shown.

Multi-series line chart

This chart displays multi-series lines to represent trends, typically over time. Multiple series are represented by different colors within each group.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Comparison charts

Benchmark chart

The benchmark chart compares the base element with the target. It displays a bar chart that is color-coded. Green bars correspond to categories for which the target was met, while red bars correspond to categories that did not reach the target values. The respective percentage, and both base and target values are displayed.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Steps**:

- Series step: Select a hierarchy from the list, then specify which element is driving your base values and which is driving the target values.

Additional actions in **Edit**:

- Target fulfillment: To define the color-coding for bars in your chart. See [Target fulfillment](#) on page 36.
- Swap Base and Target: To quickly swap your base and target values for the chart.

Radial progress chart

The radial progress chart displays rings that represent how the base measure compares to the target measure for selected categories. Each ring shows the relative percentage and the two values that are compared. If the percentage exceeds 100%, an inner ring is added. The rings are color-coded. By default, the green color represents values that exceed 100%.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Steps**:

- Series step: Select a hierarchy from the list, then specify which element is driving your base values and which is driving the target values.

Additional actions in **Edit**:

-
- Target fulfillment: To define the color-coding for circles in your chart. See [Target fulfillment](#) on page 36.
 - Switch to Vertical/Horizontal layout: To quickly change the layout of your chart.
 - Swap Base and Target: To quickly swap your base and target values for the chart.

Combination chart

This chart displays column chart for the base element and a line chart for the target. The categories form the horizontal axis. You can select an element from the categories by clicking on the corresponding column.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Steps**:

- Series step: Select a hierarchy from the list, then specify which element is driving your base values and which is driving the target values.

Additional actions in **Edit**:

- Show Percentage: Displays a color-coded pin chart above you current chart, which shows the relative variance for each category.
- Show Variance: Displays a color-coded column chart above showing absolute variance for each category above your chart.
- Swap Base and Target: To quickly swap your base and target values for the chart.

Comparison table

This table shows values for two criteria from the same hierarchy. The criteria are selected as series and displayed against the categories.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Steps**:

- Series step: Select a hierarchy from the list, then specify which element is driving your base values and which is driving the target values.

Additional actions in **Edit**:

- Show Percentage: Displays an extra column showing percentage changes for each category.
- Show Variance: Displays an extra column showing absolute variance for each category.

Comparison column chart

This chart displays columns for base and target elements. The categories form the groups of the columns on the horizontal axis.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Steps**:

- Series step: Select a hierarchy from the list, then specify which element is driving your base values and which is driving the target values.

Additional actions in **Edit**:

- Show Percentage: Displays an extra column showing percentage changes for each category.
- Show Variance: Displays an extra column showing absolute variance for each category.
- Swap Base and Target: To quickly swap your base and target values for the chart.

Overlapping column chart

This chart displays overlapping columns for base and target elements. The categories form the horizontal axis. You can select an element from the categories by clicking on the corresponding column.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Steps**:

- Series step: Select a hierarchy from the list, then specify which element is driving your base values and which is driving the target values.

Additional actions in **Edit**:

- Show Percentage: Displays an extra column showing percentage changes for each category.
- Show Variance: Displays an extra column showing absolute variance for each category.
- Swap Base and Target: To quickly swap your base and target values for the chart.

Comparison line chart

This line chart compares base and target elements. You can select an element from the categories by clicking on the corresponding point on the chart.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Steps**:

- Series step: Select a hierarchy from the list, then specify which element is driving your base values and which is driving the target values.

Additional actions in **Edit**:

- Show Percentage: Displays an extra line on top of the chart showing percentage changes for each category.

- **Show Variance:** Displays an extra line on top of the chart showing absolute variance for each category.
- **Swap Base and Target:** To quickly swap your base and target values for the chart.

Donut and pie charts

These charts show the elements of a total and illustrate their corresponding numerical proportion of shares.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Note: You cannot select multiple elements for a column in a Single-series chart. Additionally, only the first element of multiple elements pushed to the column through widget communication will be shown.

Special charts

Bubble chart

A bubble chart is a variation of a scatter chart in which the data points are replaced with bubbles, and an additional dimension of the data is represented in the size of the bubbles. Just like a scatter chart, a bubble chart does not use a category axis, because both horizontal and vertical axes are value axes. In addition to the X and Y values, a bubble chart plots Z (size) values. Categories form bubbles, where the number of bubbles is equal to the number of categories.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Steps**:

- **Series step:** Select a hierarchy from the list, then specify quantitative variables (typically measure) for the X and Y axes, and for the size of the bubble (Z). For example, if you want to see how the Discounts drive your Revenues, then select Measure from the hierarchy list and then specify Discounts on the horizontal axis and Revenue on the vertical axis. The bubble size is driven by “Units” to see the importance of each bubble.

Additional actions in **Edit > Properties**: You can switch the chart color between blue and gray.

Additional actions in **Edit**:

- **Swap Chart Axes:** To quickly swap the variables on the horizontal and vertical axes.

Bubble chart over time

This animated chart illustrates the classical bubble chart over the course of time. Time can be represented by two formats: years, month year. You can view the animation as a movie, or use the time slider to control the speed of the animation. Speed is not saved and is lost after refresh.

Note: In show data mode this chart type needs to follow a strict design on row axis. The row axis consists of two fixed hierarchies. The first hierarchy is reserved for Time, and the second hierarchy for categories.

Required steps: **Data Source > Period > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Steps**:

- Period step: Select the Period hierarchy, which contains levels in one of the following time formats: YEAR (2016) or MONTH YEAR (Jan 2016, January 2016). Then on the current selection dialog box specify which of the two levels you want to use for the time slider.
- Series step: Select a hierarchy from the list, then specify quantitative variables for the X and Y axes, and for the size of the bubble (Z). For example, if you want to see how the Discounts drive your Revenues, then select Measure from the hierarchy list and then specify Discounts on the horizontal axis and Revenue on the vertical axis. The bubble size is driven by “Units” to see the importance of each bubble.

Additional actions in **Edit > Properties**:

- You can switch the chart color between blue and gray.

Additional actions in **Edit**:

- Swap Chart Axes: To quickly swap the variables on the horizontal and vertical axes.

Colored map

The colored map is an interactive way to visualize how a measurement varies across a geographic area or to show variations within a region. The values that are displayed fall into a number of ranges. Each range is identified by a different color. When you hover over a region, the name of the region and the value assigned to it are displayed as a tooltip. If the region hierarchy contains sub-regions, such as states within a country and counties within states, you can click a region and drill down to the sub-regions.

On the map, click any country which contains regions and drill down. For example, Click **USA > Florida > Miami Dade**.

Note: For the Colored Map to display correctly, ensure that your data source includes ISO country codes and Region attribute defined in ISO 3166 or in FIPS 6-4 standards. You must select this attribute either in the Regions step or in Properties in the final widget.

Required steps: **Data Source > Region > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Steps**:

-
- Region step: You must select a Region attribute for the region hierarchy. See [Self-Service wizard](#) on page 30.

Additional actions in **Edit > Properties**:

- You can change the Region attribute for the regional hierarchy.
- You can switch the map color between blue and gray.

Radar chart

A radar chart is a graphical method of displaying multivariate data in the form of a two-dimensional chart of three or more quantitative variables (categories) represented on axes starting from the same point. It consists of a sequence of equi-angular spokes, with each spoke representing one of the categories. A color coded line representing the series connects the data values for each spoke.

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Edit**:

- Swap Chart Axes: To quickly swap the variables on the horizontal and vertical axes.

Scatter chart

This chart consists of data points that show the relationship between one measure that is set as the vertical axis and the second measure that is set as the horizontal axis. Each data point represents an element from the currently selected category. For example, you can use the scatter chart to investigate the relationship between Discounts and Revenue for the selected categories..

Required steps: **Data Source > Categories > Series > Filters**

Optional steps: **Browse data > Properties**

Additional actions in **Steps**:

- Series step: Select a hierarchy from the list, then specify quantitative variables for the X and Y axes. For example, if you want to see how the Discounts drive your Revenues, then select Measure from the hierarchy list and then specify Discounts on the horizontal axis and Revenue on the vertical axis.

Additional actions in **Edit**:

- Swap Chart Axes: To quickly swap the variables on the horizontal and vertical axes.

View your favorites

Here you have access to widgets that you configured, saved, and added to your favorites. It shows a maximum of six of your favorites.

Click **Manage All** at the bottom of your Favorites section to see the entire list of your favorite widgets is displayed. You can view, open, edit, or remove widgets from your favorites.

Self-Service toolbars

Ad-hoc analysis toolbar

This table describes the functions of the ad-hoc analysis toolbar:

Icon	Description
	Return to the Self-Service start page.
	View or save the analysis in PDF format.
	View or save the analysis in Excel format. Values are exported but the formulas from which they are derived are not.
	View or save the analysis to PowerPoint format.
	Adds the analysis to a list of your favorite reports.
	Opens a saved report from your favorites.
	Select a chart to use for your analysis.
	Enable zero suppression on rows or columns.
	Select and search for elements for each hierarchy.
	Change the data source or enable write-back. If you enable write-back, then you can also enable editing attributes and adding rows to your data table.

Enable write back

Select the Writeback check box to change or enter values to the database. To be able to write back values to data cells, the cube must be configured as Writable in the Data Configuration dashboard. See [Configuring data](#) on page 39.

After you enable write back, the Add row and Edit attributes are available in Properties. Alternatively, right-click the data cell value and select Replace Values to distribute values.

Replacing values is similar to write back, but you can decide how to distribute values in a report according to a variety of rules. See [Replace values](#) on page 23.

Add row

After you select the **Enable Write-Back** option, the **Add Row** option is visible in the properties of your ad-hoc analysis toolbar.

After you enable the **Add Row** option, the new row is added to your data as the first row. You can use this new row as an alternative to write-back, to enter or change values. This is particularly useful for long and complex reports.

This could be used if you want to change values for Monaco, for example, and your ad-hoc analysis displays a long list of countries. Instead of searching for Monaco, you can use the **Add Row** option, select Monaco in the first row header that was added, and then change the values.

Edit attributes

The ad-hoc analysis offers the possibility to write back values to the cube. You can also edit the attributes for your data.

If you do not see the attributes in your data table, select the attributes by clicking on one of the blue hierarchies that form row or column axes.

See [Actions on axis hierarchies](#) on page 32.

To enable editing attributes, ensure that the write-back option is enabled and select the **Edit Attributes** option in the properties of the ad-hoc analysis toolbar.

The attributes are highlighted and the attribute values are underlined. This indicates that you can start editing the attributes. Click on the attribute value and edit it or specify a new value.

Note: You can edit attributes on rows only.

Replace values

Replacing values is similar to write back, but you can decide how to distribute values in a report according to a variety of rules.

Note: Data is only stored in base elements. If you edit values for a consolidated element directly in the table (manual write back), then the values are distributed automatically. Equal distribution is used to replace a zero value, whilst weighted distribution is used to replace an existing value.

- 1 To replace values in data cells, ensure that write-back is enabled, then right-click the data cell and select **Replace Values**.
- 2 Select one of these methods:

Weighted distribution

Distributes the value to the base cells according to their weights.

You can either select to overwrite, add an absolute amount, or add a percentage amount to the existing value. Depending on your selection, the appropriate field is enabled.

Equal distribution

Replaces the value of the target cell and distributes the value equally to base cells.

You can either select to overwrite, add an absolute amount, or add a percentage amount to the existing value. Depending on your selection, the appropriate field is enabled.

Note: For the add percentage or add absolute fields in both Weighted distribution and Equal distribution, enter a value and press ENTER. The **New value** field calculates or shows you the new value.

To each leaf

Assigns the value to each base cell. Enter the value you want to distribute to each base cell in the **New value** field.

Copy

Copy full

The Copy method copies the base cells from the source cell to the target cell. The Copy full method also copies calculated rules.

Specify the source area.

Like

Like full

The like method splashes a new value to a target cell with the same weight specified for the source cell.

You can either select to overwrite, add an absolute amount, or add a percentage amount to the existing value. Depending on your selection, the appropriate field is enabled.

The Copy full method also copies calculated values.

Note: For the add percentage or add absolute fields, enter a value and press **Enter**. The **New value** field calculates or shows you the new value. Then, specify the source area.

Delete

Deletes all values from the target cell.

Source

Here you specify the source cell used to change the value in the target cell.

Note: This section is only active, when you use the methods Copy, Copy Full, Like, or Like Full.

Target

Here you can see the coordinates of the target cell (the cell from which you opened the **Splasher** dialog box). The operations to change the value apply to this cell. Changed values are distributed to the base elements according to the mode you select.

Change data in ad-hoc analysis

After you create your ad-hoc analysis, you can change the data source. Click the **Properties** icon on your ad-hoc analysis toolbar and select the **Change Data** option.

The **Change data** dialog box consists of these sections:

Select Data Source

Lists the cubes for the selected database.

Define Filters and Axes

Consists of the filter section on the left and two tables that define the row and column axis on the right. You can adjust the hierarchies that form the axes and filters of your analysis.

- **Filters:** Lists the filter hierarchies that are highlighted in blue.

You can select which filter hierarchies are visible in your widget. By default, all hierarchies that are enabled on the **Data Configuration** dashboard are visible. To hide a hierarchy in the Filter section, clear the corresponding check box.

Note: Setting the hierarchies as visible applies only to that particular widget. It has a lower priority than enabling or disabling hierarchies using the **Data Configuration** dashboard.

See [Configuring data](#) on page 39.

You can also click the hierarchy and select the corresponding option to move it to the row or column axis.

When working with dimensions that contains multiple hierarchies, you can select which hierarchy is used. Click the filter hierarchy and select the **Change Hierarchy** option.

See [Actions on filters](#) on page 32.

- **Row and column axis:** Consists of two tables that represent the rows and columns, respectively. To move the hierarchies to the row or column axis, you can click the blue hierarchy and select the corresponding option. Alternatively, you can drag and drop a new hierarchy on the empty space in the row or column axis.

If you drag and drop a hierarchy on another hierarchy, then the two hierarchies exchange their position.

To display attributes, for example, unique IDs, code names, or labels that have been translated to other languages, click the blue hierarchy and select the **Select Attributes** option.

- **Zero suppression:** Use the **Zero Suppression** icons that are located on the left side of the Row Axis and Column Axis headers to apply zero suppression on rows and columns, respectively. If the zero suppression option is enabled, the corresponding icon is highlighted in blue.

See [Zero suppression](#) on page 27.

Widget toolbar

The analysis or chart widgets share the same toolbar.

This table describes the functions of the widget toolbar:

Icon	Description
	Select and search for elements for each hierarchy.
	Edit the properties of the widget. You can also edit the actions for manipulating data.
	Edit actions which are used for external manipulations of the widget.

The actions that are available from the toolbar are grouped in these categories:

Filter

Select and adjust elements for filter hierarchies.

See [Select element](#) on page 29.

Note: For advanced manipulation with filters, use the Change Data action.

Edit

Refine your widget. You can modify your element selection and adjust the data that is displayed.

Note: The specific options that are available depend on the type of chart or analysis that was selected. Available actions are described in the chart topics of Pick your chart.

- Show Data: Display the data table.
See [Show data](#) on page 27.
- Show Chart / Show Analysis: Display the chart or analysis, respectively. After you select Show Data, you can switch back to your chart or analysis.
Note: This option is only available for the Show Data mode.
- Zero Suppression: Enable zero suppression on rows and columns or on categories and series, depending on the type of analysis.
See [Zero suppression](#) on page 27.
- Properties: Edit the widget title and description. For some types of widgets, additional properties are listed. To update the title, click the **Refresh** button that is located to the left of the widget title.
See *Properties* in [Self-Service wizard](#) on page 30.
- Change Categories: Modify the elements of categories of your analysis. To select a different hierarchy, use the **Change Data** option.
See [Change data in widgets](#) on page 28.
- Change Series: Modify the selected elements of series. You can select elements, children of a particular element, or Level that you want to display. To select a different hierarchy, use the **Change Data** option.
See [Change data in widgets](#) on page 28.
- Change Data: Change the data source, select different hierarchies for categories and series, adjust the selected elements, and modify filters.

See [Change data in widgets](#) on page 28.

- Swap Chart Axes: Exchange the axes. This means that you can swap the horizontal and vertical axes of your widget.
- Change Chart Type: Change the visualization of your data.

See [Changing the chart type](#) on page 29.

Options

Displays options for all widget types:

- Explore Data: Start exploring your data with ad-hoc analysis.
See [Explore your data](#) on page 5.
Note: After you select to explore your data, you cannot return to your previous analysis or chart.
- Add to Favorites: Add the widget to your list of favorites.
- Export to PDF: View or save the widget in PDF format.
- Export to Excel: View or save the data in Excel format. Values are exported, but the formulas from which they are derived are not.
Note: This option is only available for the Show Data mode of your widget, Complexity analysis, and ad-hoc analysis.

Zero suppression

A common feature of multidimensional databases is that they are "hypersparse". For many combinations of rows and columns, there is no data and reports can contain a large number of empty cells, or zero values. Suppressing zero columns and rows also suppresses empty columns and rows.

Depending on the type of analysis or chart that you selected, the zero suppression option on categories, series, or both categories and series is available.

You can enable this option in several ways:

- Use the **Edit** icon on the toolbar and select the suppression option.
- In ad-hoc analysis, use the **Zero Suppression** icon on the analysis toolbar.
- Click on any data cell in the data table and select the suppression option.
Note: To display the data table, you can use the **Explore Your Data** or **Show Data** options, or the **Table** chart.

Show data

To switch to data view, select **Edit > Show Data** from the tool bar.

In the table, the rows represent your category selection and the columns display series. The data table is similar to Microsoft Pivot Tables. The view contains a horizontal and a vertical hierarchy and several filter hierarchies.

The **Show Data** mode consists of these sections:

Toolbar

The widget toolbar is located below the widget title.

See [Widget toolbar](#) on page 25.

Filters

The filter section is located below the widget toolbar. It lists the filter hierarchies and their selected elements.

Example: REGION: All Regions, PRODUCT: All Products, PERIOD: All Periods

See [Actions on filters](#) on page 32.

Data Table

The table shows data values for the selected columns, rows, and filters. You can adjust the data and perform these actions:

- Click on the hierarchies that are highlighted in blue to see the actions on hierarchies.
See [Actions on axis hierarchies](#) on page 32.
- Click on the row headers to see the actions that you can perform on row headers.
See [Actions on row headers](#) on page 34.
- Click on the column headers that has gray background to see the corresponding actions.
See [Actions on column headers](#) on page 35.
- Click on the data cell that typically displays the values to select from the list of action on data cells.
See [Actions on data cells](#) on page 36.

Change data in widgets

After you create your data visualization or analysis, you can still adjust the data source, hierarchies, or filters. You can, for example select a different cube to analyze, or modify the hierarchies that form the categories.

To change the data, click the **Edit** icon on your widget toolbar and select the **Change Data** option.

The tabs and content of the **Change data** dialog box consists of wizard steps, where the name and number of steps reflects the name and number of tabs.

For more information about tabs, see [Self-Service wizard](#) on page 30

Current selection

When you select the hierarchy in the wizard step, typically Categories or Series, the **Current Selection** dialog box is displayed.

First, you need to select one of these options:

- Element selection: Select multiple elements from a hierarchy. You can select elements from several levels of the hierarchy.
- Children of: Select the children of a single, consolidated element.
- Level: Select one of these levels to display:

- Entire: By default, the entire level is selected.
- Filter: You can filter a specific level of an element in the hierarchy. For example, you can select the Month level and apply filter for 2010. This selection will produce all months of the year 2010.
- Range: Specify a level and a range between two values. For example, you can select the Month level and specify the range from January 2010 to December 2012.

After you select one of these options, you can select the element from the **Select Element** dialog box, or search for elements using the filters.

You can also change the hierarchies that are selected for categories or series, respectively.

To add or change a hierarchy, click the plus (+) icon. To remove the hierarchy, click the trash icon.

Select element

Depending on the type of analysis or chart that you selected, you can select single or multiple elements from the hierarchy.

Consolidated elements can be expanded to display their children. You can select consolidated elements, base elements, or both. Consolidated elements are those that contain one or more child elements. For example, Year is typically a consolidated element, with children which are also consolidated elements, such as Quarters, Months, and Weeks. Base elements are those with no children, or with no parent and no children. In this example, Day would typically be a base element.

The **Select Element** dialog box toolbar has these options, from left to right:

- Find: Search for a specific phrase within the elements of the selected hierarchy.
- Filter: Click this icon to narrow your search.
- Filter in previous result: Click this icon to narrow your previous search criteria. This is only enabled after you clear your filter selection.
- Reset Filter: Click this icon to clear your search criteria and display the top level of the hierarchy.
Note: If you select any elements, resetting the filter does not clear your element selection.
- Find Next: Click this icon to move to the next element that meets the search criteria.
- Find Previous: Click this icon to move to the previous element that meets your search criteria.
- Use Check Boxes: Click this icon to enable multi-selection in the hierarchy.

Changing the chart type

After you select what analysis you want to perform, browse through your data, and select filters, you can easily modify the visualization of your data. When you change the chart type, your data selection and the context of the current analysis is unchanged.

- 1 Click the **Edit** icon.
- 2 Select **Change Chart Type**.

A list of chart types is displayed. The list contains a subset of chart types that are most suitable for your data selection.

- 3 Select the new chart type.

4 Click **OK**.

Self-Service wizard

When you click on any chart or analysis on the Self-Service start page, or use a widget from the content connection, the wizard is displayed. Navigate through the wizard to create and configure your Self-Service widget.

To navigate through the wizard, select the required elements and use the Next and Previous buttons to move between tabs or click the corresponding tab.

Typically, completion of the Self-Service wizard follows this process:

Data Source

Search for or select available data sources from the list. The database and the cube, with a description are shown in the list. The last cube selection is shown at the top of the list and is highlighted in blue.

You can also search for a data source. Specify a phrase in the search field and click the search icon or press Enter. The list of results that contain the phrase in the cube name, description, or in the database alias is displayed.

Note: This list can be restricted by an Administrator.

See [Data configuration](#) on page 38.

Region

Select the Region hierarchy and provide the Region code attribute, which contains standardized identifications of countries and their subdivisions. These codes are accepted:

- ISO 3166: A standard published by the International Organization for Standardization (ISO). It defines codes for the names of countries, dependent territories, special areas of geographical interest, and their principal subdivisions, for example, provinces or states.
- FIPS 6-4: The FIPS county code is a five-digit Federal Information Processing Standard (FIPS) code (FIPS 6-4) which uniquely identifies counties and county equivalents in the United States, certain U.S. possessions, and certain freely associated states.

Note: Available only on the Colored map widget.

See [Colored map](#) on page 20.

Period

Select the Period hierarchy, which contains levels in one of the following time formats: YEAR (2016) or MONTH YEAR (Jan 2016, January 2016). Then on the current selection dialog box specify which of the two levels shall be used for the time slider.

Note: Available only on the bubble chart over time widget.

See [Bubble chart over time](#) on page 20.

Categories

Select the hierarchy and one or more elements that you want to display as categories.

See [Current selection](#) on page 28.

Series

Specify the hierarchy and one or more elements that represent your data series.

See [Current selection](#) on page 28.

Note: For comparison charts, you specify the base and the target elements.

Measure step

Select the hierarchy and specify what will be your coverage and quantity element.

Note: Only available on the Complexity analysis chart.

See [Complexity analysis](#) on page 8.

Filters

Here you can define filters for the selected chart. If there are multiple hierarchies available for a dimension, you can click the currently selected hierarchy and select **Change Hierarchy**. Your last selection is remembered.

To change selected elements to default members of each hierarchy, click **Restore defaults**.

Additionally, you can select which filter hierarchies are visible in your widget. By default, all hierarchies that are enabled on the Data Configuration dashboard are selected and, consequently, visible. To make a hierarchy not visible in the Filter section, clear the check box that corresponds to this hierarchy. Setting the hierarchies as visible apply only to the particular widget. It has a lower priority than enabling or disabling hierarchies using the Data Configuration dashboard.

See [Configuring data](#) on page 39.

After you define your filters, you can either skip to the **Finish** step, or continue to Browse Data or select Properties.

Browse Data

Optionally, adjust the data. Similar to the show data mode, this step shows the filters and selected data in a data table.

For available actions, see [Show data](#) on page 27.

Properties

Optionally, modify the title and description of your widget. For some types of widgets, additional properties are listed, such as threshold for ABC and complexity analyses, or the region code attribute for the colored map chart.

The default title and the description are generated automatically. To update the title, click the Refresh button that is located to the left of the widget title. By default, the description lists the filters that are selected for your widget. If you do not edit the description but change the filters, the default description is updated when you save the widget. However, if you modify the description and save your widget, your custom description is saved.

Self-Service actions

Actions on filters

For the Ad-hoc Analysis widget, filters are displayed below the toolbar. For other widget types, filters are displayed under the toolbar when you are in Show Data mode.

See [Show data](#) on page 27.

To enable Actions on filters, click the expand button, or the blue text.

Actions on filter hierarchies

You can drag and drop the hierarchies on the row and column axes. When you drop a hierarchy on a plus (+) icon on a row or column axis, the hierarchy is added to the axis. When you drop the filter hierarchy on any horizontal or vertical hierarchy of the data table, the new hierarchy replaces the hierarchy from the data table axis.

When you click on any hierarchy in the filter section, these actions are available:

- **Move To Row Axis:** Moves the hierarchy from the filter area to the row axis.
- **Move To Column Axis:** Moves the hierarchy from the filter area to the column axis.
- **Change Hierarchy:** Each dimension in a cube is represented by its hierarchy. Only one hierarchy can be displayed for each dimension at a time. When working with a dimension that contains multiple hierarchies, the default hierarchy that is associated with the dimension is selected. To select an alternate hierarchy from the same dimension, click the **Change Hierarchy** option and select a different hierarchy. Alternatively, drag and drop a hierarchy on another hierarchy to exchange their position, or drag and drop it on the white hierarchy header with the plus (+) icon.
- **Select Display Type:** You can change the attribute that is displayed for the hierarchy in the filter area.
- **Select elements:** Selects elements for a particular hierarchy.

Actions on axis hierarchies

Hierarchies, which are highlighted in blue, form vertical and horizontal axes of your data table. See [Explore your data](#) on page 5 and [Show data](#) on page 27.

When you click the blue hierarchy in the data table these actions are available:

Select Elements / Add Elements

You can search for and select elements from the hierarchy that you want to display in your chart or analysis. You can also select additional elements from the same hierarchy.

See [Select element](#) on page 29.

Select Level

You can select which level of the hierarchy is shown.

For example, All, Years, Quarters, or Months can be selected for the Period hierarchy.

Select Range

With this option, you first select the level and then select two values that define the range to be displayed.

For example, you can select the level as quarter and select to display values from 4th quarter of 2007 to 3rd quarter of 2009 for the `Period` hierarchy.

Select Attributes

Depending on your data content, you can display multiple attributes, for example, unique ids, code names, or labels that have been translated to other languages.

The attributes are displayed as additional rows or columns, respectively.

Sort Ascending**Sort Descending**

Select one of these options to sort a column in increasing or decreasing order, respectively. You can sort any column, including the attribute column.

Break Hierarchy

Enabling this option sorts the elements regardless of the hierarchy of the dimension. The **Break Hierarchy** option is enabled when you select sorting.

Disable this option if you want to preserve the hierarchy and its levels when sorting the dimension.

For example, you select the `Month` level in the `Period` hierarchy and you sort the `Period` hierarchy in ascending order. As a result, the break hierarchy option is automatically enabled and months are listed alphabetically. To list the months in a chronological order, disable the break hierarchy option.

Aggregation Setting

With this option you can display aggregation calculations. Select one of these aggregation options: None, Sum, Average, Minimum, Maximum. To change the aggregation settings, you can also click on the aggregated row and select a different aggregation option.

Note: The aggregation settings option is only available for the ad-hoc analysis.

Move to Column Axis**Move to Row Axis**

If there are multiple hierarchies selected for the row or column axis, you can move any of those hierarchies to the other axis.

Remove

Adds the hierarchy to filters. This option is only available if there are multiple hierarchies selected for the axis.

Swap Table Axes

Exchanges the table axes.

Note: This option is not available in chart and analysis types where a fixed number of columns is required.

Ranking

Provides ranking of the data. The ranking options include: None, Top Count, Top Sum, Top Percent, Bottom Count, Bottom Sum, Bottom Percent.

See [Ranking](#) on page 34.

Remove Ranking

Removes the ranking and shows all filtered data.

Select Display Type

Changes the display type of all elements of a hierarchy. The default display type is the caption. You can replace the caption with an attribute.

Ranking

You can use the ranking option to narrow your view to the most or least successful data subsets, respectively.

For example, you can use Top count or Bottom count to display the 5 regions in which the most or least revenue was earned. Or specify a value and use Top sum or Bottom sum to display the sales persons whose combined sales equaled or exceeded that value. Or specify a percentage and use Top percent or Bottom percent to display the products that contribute up 30% of the total turnover.

Click on the bottom ranking row to open the Ranking dialog box.

Ranking displays a subset of values. These are the available ranking options:

- None
- Top/Bottom count: Specifies the number of elements with top/bottom values that are displayed. For example, enter 5 in the text field to show the top/bottom 5 products.
- Top/Bottom sum: Specifies the sum of the elements that are displayed. For example, enter 50,000 in the text field to show products with a total turnover of at least 50,000.
- Top/Bottom percent: Specifies the percentage of elements that are displayed. For example, enter 30% to show the products that make up 30% of the total turnover.
- Based on: Select the element on which you want to base the ranking.

Note: Sorting follows these priorities:

- 1 Caption/Attribute
- 2 Value
- 3 Ranking

Actions on row headers

When you click on a row header, these actions are available:

- Select: Highlights the light blue row and can be used in widget communication
- Zoom In: Displays all children of the selected element, that is the elements and values at the next level down, without displaying the parents.
For example, if you select the Period hierarchy and zoom in the All Years element, the list of years is displayed on the axis. If you zoom in the 2016 element, the list of four quarters is displayed.
- Zoom Out: Displays the elements that are one level up from the selected element.
- Zoom to Level: Displays a selected level below the current element in a hierarchy.
For example, if you click on the 2016 element, select zoom to level, and select the Month level, all 12 months of 2016 are displayed.
- Keep This Element Only: Keeps only the selected element.

- **Remove Element:** Removes the element and all corresponding values from the data table.

Actions on column headers

When you click on a column header, which has gray background, these actions are available:

Zoom In

Displays all children of the selected element, that is the elements and values at the next level down, without displaying the parents.

For example, if you select the Period hierarchy and zoom in the All Years element, the list of years is displayed on the axis. If you zoom in the 2016 element, the list of four quarters of 2016 is displayed.

Zoom Out

Displays the elements that are one level up from the selected element.

Zoom to Level

Displays a selected level below the current element in a hierarchy.

For example, if you click on the 2016 element, select zoom to level, and select the Month level, all 12 months of 2016 are displayed.

Keep This Element Only

Keeps only the selected element.

Remove Element

Removes the column and all corresponding values from the data table.

This option is only available when multiple columns are selected.

Sort Ascending/Descending

Sorts a column in increasing/decreasing order.

Note: Sorting follows these priorities:

- 1 Caption/Attribute
- 2 Value
- 3 Ranking

Break Hierarchy

Breaks the hierarchy and sorts the elements regardless of the hierarchy that you sort. The **Break Hierarchy** option is enabled when you select sorting.

Disable this option if you want to preserve the hierarchy and its levels when sorting the hierarchy.

For example, you select the Month level in the Period hierarchy and you sort the Period hierarchy in ascending order. As a result, the **Break Hierarchy** option is automatically enabled and months are listed alphabetically. To list the months in a chronological order, disable the **Break Hierarchy** option.

Ranking

Provides ranking of the data. The ranking options include: None, Top Count, Top Sum, Top Percent, Bottom Count, Bottom Sum, Bottom Percent.

See [Ranking](#) on page 34.

Remove Ranking

Removes the ranking and shows all filtered data.

Actions on data cells

When you click on the data cell in the data table, these actions are available:

Replace Values

Replacing values is similar to write back, but you can decide how to distribute values in a report according to a variety of rules. See [Replace values](#) on page 23.

Zero Suppression

You can enable zero suppression on rows, columns, or both rows and column. For some types of analysis, zero suppression option on categories, series, or categories and series is available instead. See [Zero suppression](#) on page 27.

Note

Additionally, you can add a note to the table cell in ad-hoc analysis. After adding a note, a small triangle in the top right corner of the cell indicates that a note was added. You can edit, view, or delete the note.

This option is only available when you explore your data with the ad-hoc analysis. See [Explore your data](#) on page 5.

Replace Values

Replacing values is similar to Splashing, which distributes values in a report according to a variety of rules.

This option is only available when you explore your data with the ad-hoc analysis. See [Replace values](#) on page 23.

Target fulfillment

The Target Fulfillment option is available for selected charts only.

The **Target Fulfillment** dialog box lists all categories and provides two options for color-coding. The first option, which is the default one, uses green color to represent values that exceed 100%. Use it when the desired effect is to meet or exceed the target value, for example, when analyzing sales targets. The second option uses red color to represent values that exceed 100%. Use this option when the target value represents a limit that you do not want to exceed. For example, if you compare expenses against the budget, red color would indicate that your expenses exceed your budget.

Creating dashboards using Self-Service

You can combine several reports and charts on a dashboard.

- 1 Create your first widget by selecting any chart or analysis on the Start page. Alternatively, you can create it from the Self-Service content connection, open one of your favorite analyses.

- 2 To add a secondary report to your dashboard, drag any widget from the Self-Service content connection to your screen and hold it until the blue hotspot is displayed.
Note: To split the current full screen report, drag any widget from the Self-Service content connection and place it at the middle of the right/left hand border of your screen. The widget automatically occupies half of your dashboard. See [Self-Service content connection](#) on page 38.
- 3 Optionally, to resize your widgets, click **Edit Dashboard**.

Filters widget

You can access the **Filters** widget from the content connection.

The **Filters** widget consists of an element picker and a filter, which you can use to filter data on your dashboard.

Element Picker

You can use the **Element Picker** widget on your dashboard to select an element and apply the selection to multiple widgets on your dashboard.

For example, place a chart displaying sales by region, and the element picker on your dashboard. Configure the element picker to display Years from the Period hierarchy. When you select a particular year in the element picker, the chart shows data for the year that you selected.

Note: The parameters that are used in widget communication are detected automatically if you use the default elements of the hierarchy when adding new widgets.

Data Source

Select the cube and the corresponding database.

Hierarchy

Select the hierarchy and select elements or level.

See [Current selection](#) on page 28.

Browse Data

View the hierarchy and its selected elements. You can click the blue hierarchy and select elements or sort your data.

Click the row headers to see the actions that you can perform on row headers.

See [Actions on row headers](#) on page 34.

Filter

You can use the **Filter** widget to apply your element selection across multiple hierarchies to other widgets on your dashboards. See [Filters widget](#) on page 37.

Data Source

Select the cube and the corresponding database.

Filters

Define filters and select elements for each filter hierarchy. Additionally, you can use the check boxes to choose whether all filter hierarchies are visible in your widget.

Note: If there are multiple hierarchies available for a dimension, you can click the currently selected hierarchy and select **Change Hierarchy**. Multiple hierarchies are indicated by a blue triangle.

Properties

Modify the title and description of your widget.

The default title and the description are generated automatically. To update the title, click the Refresh button that is located to the left of the widget title. By default, the description lists the filters that are selected for your widget. If you do not edit the description but change the filters, the default description is updated when you save the widget. However, if you modify the description and save your widget, your custom description is saved.

Self-Service content connection

Self-Service content connection is located in the Dashboards toolbar. It serves as an entry point to data visualizations when creating or adding new content to your dashboard. It gives you access to the Explore your data, Analyze your data, Favorites, and the Pick your chart start-page widgets. Additionally, it offers Filter widgets to better manage your interactive dashboards.

Self-Service widget communication

Self-Service widget communication enables you to apply your element selection across multiple hierarchies to other widgets on your Dashboard.

For the widget communication to work automatically, add your widgets to dashboards using the default members of the hierarchy. When all the widgets use the same parameters, the parameter connections can be established automatically. As a result, changes applied to one widget are automatically made to other widgets on your dashboard.

Note: You can also establish connection by selecting a column or bar on the chart. The highlighted category will be reflected on other widgets filters.

Data configuration

The **Data Configuration** dashboard is available only for administrator users. With this dashboard, administrators can enable or disable databases, cubes, and dimensions. By default, all databases that are connected to Self-Service are enabled.

Additionally, administrators can use the **Paging Limit Configuration** widget to configure paging limits for rows and columns.

Configuring data

To configure databases, cubes and dimensions, configure the corresponding widgets on the **Data Configuration** dashboard.

- 1 Select **Dashboards > Self-Service** and open the **Data Configuration** dashboard.
- 2 To disable or enable a database that is listed in the **Database Configuration** widget, clear or select the corresponding check box.
Note: The changes to settings made in the **Data Configuration** dashboard do not overrule the OLAP settings that are configured in the table access cube.
- 3 To configure cubes in the **Cube Configuration** widget:
 - a Select a database in the **Database Configuration** widget.
A list of all cubes within the database is shown in the **Cube Configuration** widget.
 - b To disable or enable a cube, clear or select the **Enabled** check box.
 - c To enable or disable the write back option for a cube, select or clear the **Writable** check box.
The write back function is applied only to those cubes that are set as writable.
- 4 In the **Dimension Configuration** widget, the administrator can disable or enable dimensions of the selected cube.
As you disable the dimension, the default member turns blue and you can select a new default member for the hidden dimension.

Paging limit configuration

Paging is used to limit the number of records displayed per page. This feature can be particularly helpful when showing and working with large data sets.

You can use the **Paging Limit Configuration** widget to modify the paging limits for rows and columns.

It is located at the bottom of widgets that display data in a table, for example in ad-hoc analyses. You can navigate between multiple pages of data in your widget. It has control buttons to move forwards and backwards one page at a time, and to jump to the first page. It indicates which rows are currently displayed and the current page number.

To modify the paging limits for rows and columns, specify different values in the **Paging Limit Configuration** widget on the Data Configuration dashboard.

Rows limit

Specify the maximum value for the number of rows that are displayed per page.

Default: 1000

Columns limit

Specify the maximum value for the number of columns that are displayed per page.

Default: 100

Note: Paging is not available in Navigation Analysis. In Colored Map and Scatter Chart, it is not shown in chart mode.