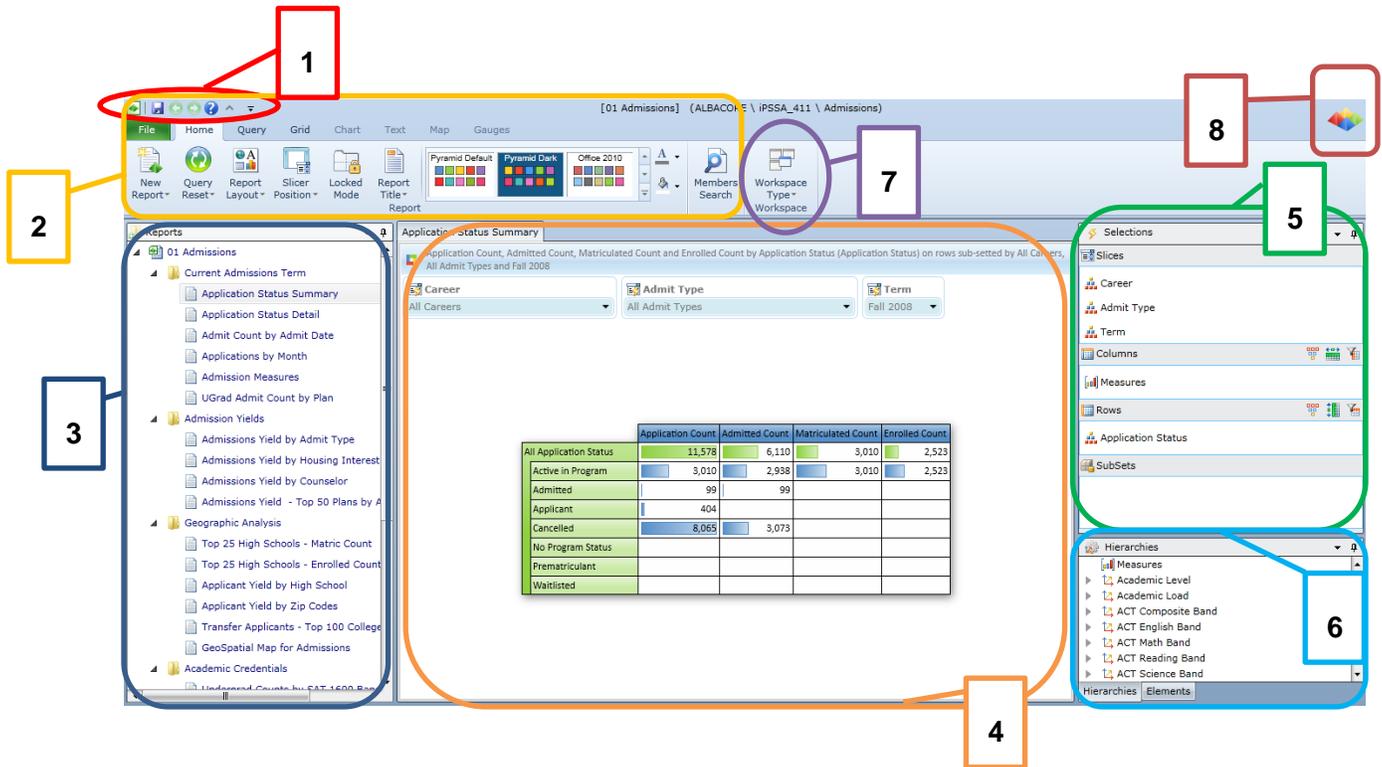


Basic Navigation: Viewer Workspace

- Overview of Workspace



1. **Quick Access Toolbar** – This is a customizable toolbar that enables you to do a quick save, access online help, move forward and back, and the ability to minimize the ribbon panel.
2. **Ribbon Panel** – The ribbon panel will change when clicking on the different tabular items. Most of the items within each panel allow for different formatting options for the report.
3. **Reporting Tree Panel** - This panel, usually on the far left of the screen, shows a hierarchical tree listing of all the reports contained within the current book. When consumers login initially, this panel is exposed. Reports can be nested in report folders for better organization and presentation purposes. Clicking on a report will load it up in the Report Panel. Users can make various changes to the report tree structure within this panel
4. **Report Panel** - This panel is the main panel of the application presenting the rendered query as a report to the end user. The report panel has numerous layout and formatting options that can be controlled from the Ribbon. The report and its underlying query can be further dissected - "sliced, diced and drilled" - by using both the report context menus (right click menus) and the metadata selection and hierarchy trees.

5. **Selections Panel** - The selection panel allows an end user to add, edit and remove different dimensions and hierarchies from the query by changing the 4 main parts of a query in Pyramid: slicers, sub-sets, rows and columns.
6. **Hierarchy and Element Panel** - The hierarchy tree panels allows an end user to drag-and-drop hierarchies to and from the selections panel; The element tree panel allows users to select elements in a given hierarchy on group basis (e.g. by level) or at granular, singular element basis.
7. **Workspace Type** – This button allows the end user to set how they would like their workspace to appear. The application comes with 4 pre-defined workspace views: Analytic, Viewer, Lite and Legacy.
 - a. Analytic Workspace - This workspace is the default view for 'analyst' and 'professional' users. It is designed to allow users to best conduct ad-hoc analytics with the real-estate split between the ribbon, metadata trees (on the right) and the report panel.
 - b. Viewer Workspace - This workspace is the default view for 'consumer' users. It is designed to allow users to best click through predefined reports in a previously created book with the real-estate devoted to the report panel and the listing of reports in the report tree panel on the left.
 - c. Lite Workspace - This workspace is designed to allow users to consume reporting content without ANY other features cluttering the screen real-estate. The view is also designed for simple report interactions through the context menus and optional slicers only. To navigate between reports in dashboard mode click the right and left buttons (highlighted with the red box in the image below). To execute a query, click the button with the Pyramid logo. To return to the analytic workspace, click the down arrow.
 - d. Legacy Workspace - This workspace model is built around ProClarity's workspace layout. It has been provided for users migrating from ProClarity who prefer its panel positions.
8. **Run Query** – Used to refresh query results.

- **Open a Report**

- From the Backstage area, click on 'Open'
- Click on the Domain of the report location. (Personal, Group, Public, Legacy)
- Click to open the appropriate folder and book.
- Double click on the report you wish to open.

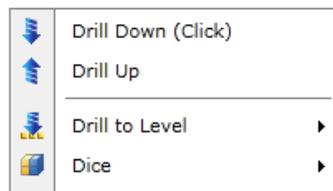
- **Report Navigation**

- Drill** – The Drill features allow you to ability to see specific details of the data for further data analysis.

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
Active in Program	3,010	2,938	3,010	2,523
Admitted	99	99		
Applicant	404			
Cancelled	8,065	3,073		
No Program Status				
Prematriculant				
Waitlisted				

(Starting report sample)

- Drill Down** – Drills down the current element to its child elements. If no child elements, this feature is disabled.
 - Left click on the element within the report or right click on the element and the Context Menu will appear.



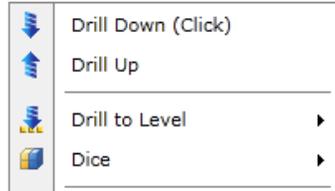
- Click on the "Drill Down" option from the Context Menu.
- Results:

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
Administrative Withdrawal (CN/WADM)	2,664	2,639		
Admission Revocation (CN/ADRV)	1	1		
Applicant Withdrawal (CN/WAPP)	2,586	433		
Defer Decision (CN/DDEF)				
Defer Enrollment (CN/DEFR)				
Deny (CN/DENY)	2,814			
Reconsideration (CN/RECN)				

(Results of Drill Down (Click) on 'Canceled' element)

2. **Drill Up** – Drills up to the parent level.

- i. Right click on the element within the report and click on the “Drill Up” option from the Context Menu.

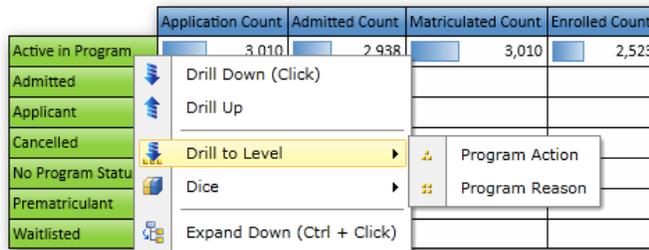


ii. Results:

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
Active in Program	3,010	2,938	3,010	2,523
Admitted	99	99		
Applicant	404			
Cancelled	8,065	3,073		
No Program Status				
Prematriculant				
Waitlisted				

3. **Drill to Level** – Drills down to the descendants of a selected member at the level chosen from the sub menu.

- i. Right click on the element and click on the “Drill to Level” option from the Context Menu.



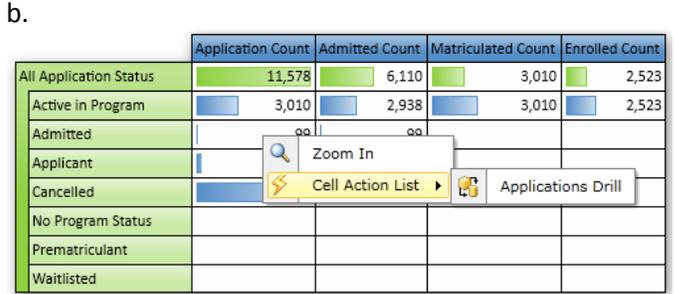
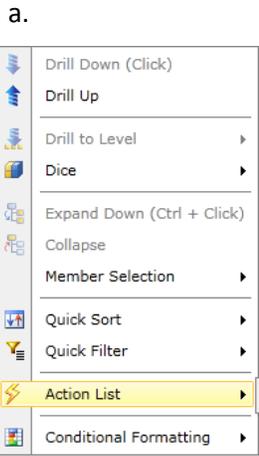
ii. Results:

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
Activate (AC/ACTV)				
Matriculation (AC/MATR)	3,010	2,938	3,010	2,523
Program Change (AC/PRGC)				
Readmit (AC/RADM)				

(Results of Drill to Level on 'Program Action')

4. **Actions (Drill to Detail)** – Exposes cube defined 'actions' on the rows, columns or cells. Action Lists represent DRILLTHROUGH, URL/ Reporting Service and Row-set actions respectively in the Actions sub-menu. The Action List may not be available for all elements

- i. Right click on the row or column header. The Context Menu will appear, click on “Action List” (a.). If you right click on a specific cell/value, the submenu appear (b.), then select the drill



ii. Results:

#	Student.Source Key	Student.Student Name	Student.Preferred Email Address	Student.Preferred Phone	Student.Personal Address1	Student.Per...
1	0020091	Copley, Andrew	student0020091camp@school.edu	555/555-5555		
2	0020173	Ichimura, Stephen	student0020173camp@school.edu	555/555-5555		
3	0020370	Lyons, Ralph	student0020370othr@school.edu	555/555-5555		
4	0020472	Zieff, Marina	student0020472home@school.edu	555/555-5555		
5	0020734	Bostwick, Allison	student0020734camp@school.edu	555/555-5555		
6	0120621	Mather, Stephan	student0120621home@school.edu	555/555-5555		
7	0300559	Fields, Nancy	student0300559camp@school.edu	555/555-5555		
8	0800040	Foley, Emmanuel	student0800040camp@school.edu	555/555-5555		
9	1020170	Finn, Thomas	student1020170camp@school.edu	555/555-5555		
10	1020499	Magner, Johnbull	student1020499home@school.edu	555/555-5555		
11	1020656	O'Keefe, Thomas	student1020656home@school.edu	555/555-5555		
12	1020769	Doherty, Jennifer	student1020769home@school.edu	555/555-5555		
13	1120318	Vaccarello, Catherine	student1120318home@school.edu	555/555-5555		
14	1120400	Webster, Letty	student1120400home@school.edu	555/555-5555		
15	1120851	Brooks, Michael	student1120851home@school.edu	555/555-5555		
16	1120920	Reynoso, Stephanie	student1120920home@school.edu	555/555-5555		
17	1220357	O'Brien, Kellie	student1220357camp@school.edu	555/555-5555		
18	1600829	Becker, Aaron	student1600829camp@school.edu	555/555-5555		
19	1610331	Montoni, Sania	student1610331camp@school.edu			

Rows: 1,000 Resubmit Close

- B. **Dice** - Takes current element and filters/sub-sets by that element; while putting the selected hierarchy in its place.

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
Active in Program	3,010	2,938	3,010	2,523
Admitted	99	99		
Applicant	404			
Cancelled	8,065	3,073		
No Program Status				
Prematriculant				
Waitlisted				

1. Right click on the element and select 'Dice' from the Context Menu. A list of dimensions will appear. Click on a selected dimension. The hierarchies for the dimension now appear. Click on a hierarchy level you wish to use.

The screenshot shows a context menu for the 'Application Count' column. The 'Dice' option is selected, opening a list of dimensions. The 'Academic Level' dimension is selected, which opens a sub-menu showing a hierarchy of levels: Academic Level Type, Academic Level, GRE Quantitative Band, GRE Verbal Band, High School, High School GPA Band, High School Rank Band, Housing Interest, Institution, Last College Attended, LSAT Total Band, and Major.

2. Results:

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
Other	454	452	454	366
Preparatory				
Undergraduate	2,063	2,062	2,063	1,724
Graduate	493	424	493	433
Medical				
Professional				

(Results of Dice on Academic Level -> Academic Level Type)

C. **Expand Down and Collapse** – These features will show the current element and its child elements or hide the current element's exposed children. (If there are no child elements, these features are automatically disabled).

1. To Expand Down, hit (Ctrl + Click) or right click for the Context Menu and click on the Expand Down option.

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
Active in Program	3,010	2,938	3,010	2,523
Admitted				
Applicant				
Cancelled				
No Program Status				
Prematriculant				
Waitlisted				

Drill Down (Click)
Drill Up
Drill to Level
Dice
Expand Down (Ctrl + Click)
Collapse

2. Results:

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
Active in Program	3,010	2,938	3,010	2,523
Activate (AC/ACTV)				
Matriculation (AC/MATR)	3,010	2,938	3,010	2,523
Program Change (AC/PRGC)				
Readmit (AC/RADM)				
Admitted	99	99		
Applicant	404			
Cancelled	8,065	3,073		
No Program Status				
Prematriculant				
Waitlisted				

3. **To Collapse**, right click on the element and click on the Collapse option.

4. Results:

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
Active in Program	3,010	2,938	3,010	2,523
Admitted	99	99		
Applicant	404			
Cancelled	8,065	3,073		
No Program Status				
Prematriculant				
Waitlisted				

D. **Member Selections** – The Member Selections feature allow you to **Focus** or **Eliminate** specific elements within the report. The Focus options will allow you to focus on one or elements whereas the Eliminate option will eliminate one or more specific elements from the report.

1. **Focus** on a specific element or row:

- i. Right click on the element and the Context Menu will appear. Click on the Member Selection option and then click on Focus or Focus on Entire Row.

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
All Application Status	11,578	6,110	3,010	2,523
Active in Program	3,010	2,938		
Admitted				
Applicant				
Cancelled				
No Program Status				
Prematriculant				
Waitlisted				

	Drill Down (Click)	Focus
	Drill Up	Focus on Entire Row
	Drill to Level	Focus & Ascendants
	Dice	Focus & Descendants
	Expand Down (Ctrl + Click)	Multi-Select Focus
	Collapse	Eliminate
	Member Selection	Eliminate Entire Row
		Multi-Select Elimination

ii. Results:

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
Active in Program	3,010	2,938	3,010	2,523

2. **Focus & Ascendants** - Keeps the selected element and returns all its parent elements up to the top of the hierarchy tree.

- i. Right click on the element and the Context Menu will appear. Click on the Member Selection option and then click on Focus & Ascendants.

ii. Results:

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
All Application Status	11,578	6,110	3,010	2,523
Active in Program	3,010	2,938	3,010	2,523

3. **Focus & Descendants** – Keeps the selected elements and returns the entire tree of descendants at ALL levels below this element.

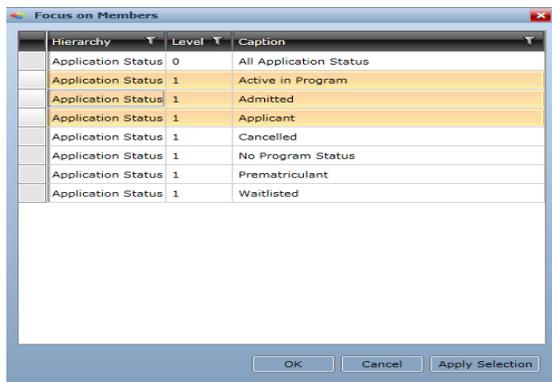
- i. Right click on the element and the Context Menu will appear. Click on the Member Selection option and then click on Focus & Descendants.

ii. Results:

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
Active in Program	3,010	2,938	3,010	2,523
Activate (AC/ACTV)				
No Program Reason (AC/ACTV/----)				
Matriculation (AC/MATR)	3,010	2,938	3,010	2,523
No Program Reason (AC/MATR/----)	3,010	2,938	3,010	2,523
Paid Confirmation (AC/MATR/PAID)				
Quick Posted Confirmation (AC/MATR/QUIK)				
Program Change (AC/PRGC)				
Change of Major (AC/PRGC/CMAJ)				
Readmit (AC/RADM)				
No Program Reason (AC/RADM/----)				

4. **Multi-Select Focus** – Keeps the selected element and removes all others in the hierarchy. Multi-select Focus allows the selection of multiple elements.

- i. Right click on the element and the Context Menu will appear. Click on the Member Selection option and then click on Multi-Select Focus. The Focus on Members menu will appear. Click to select the first element and Ctrl + Click on additional elements. Once all have been selected, click on the 'Apply Selection' button.



ii. Results:

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
Active in Program	3,010	2,938	3,010	2,523
Admitted	99	99		
Applicant	404			

5. **Eliminate** – Eliminates the selected element, leaving all others in the hierarchy.

- i. Right click on the element and the Context Menu will appear. Click on the Member Selection option and then click on Eliminate.

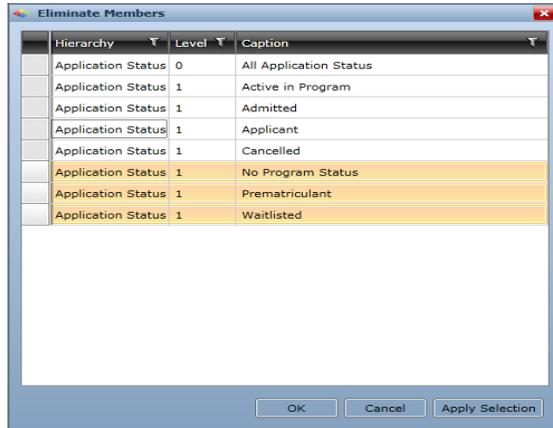
ii. Results:

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
All Application Status	11,578	6,110	3,010	2,523
Active in Program	3,010	2,938	3,010	2,523
Admitted	99	99		
Applicant	404			
Cancelled	8,065	3,073		
No Program Status				
Waitlisted				

(Eliminated Prematriculated)

6. **Multi-Select Eliminate** - Multi-select Elimination allows the de-selection of multiple elements, eliminating entire rows or columns allows for ragged query structures.

- i. Right click on the element and the Context Menu will appear. Click on the Member Selection option and then click on Multi-Select Eliminate. The Eliminate Members menu will appear. Click to select the first element and Ctrl + Click on additional elements. Once all have been selected, click on the 'Apply Selection' button.



ii. Results:

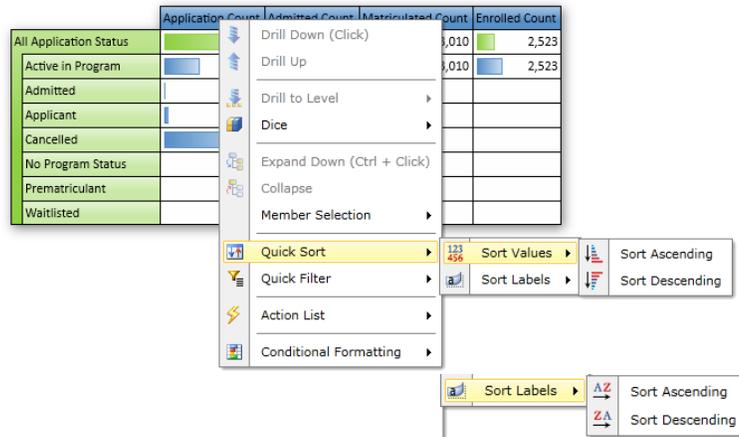
	Application Count	Admitted Count	Matriculated Count	Enrolled Count
All Application Status	11,578	6,110	3,010	2,523
Active in Program	3,010	2,938	3,010	2,523
Admitted	99	99		
Applicant	404			
Cancelled	8,065	3,073		

E. **Sorting and Filtering** - You can sort and/or filter the data easily by using the Quick Sort and Quick Filter options. There are additional sorting and filtering options for the rows and columns within the Query Ribbon.

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
All Application Status	11,578	6,110	3,010	2,523
Active in Program	3,010	2,938	3,010	2,523
Admitted	99	99		
Applicant	404			
Cancelled	8,065	3,073		
No Program Status				
Prematriculant				
Waitlisted				

- 1. **Quick Sort** - Provides a context sensitive sorting of the rows or columns based on the values or on the labels of the element as the sort criteria.

- i. Right click on the column or row you are sorting. The Context Menu will appear. Click on the Quick Sort option and click on the option to sort by the Values or by the Labels. Click on either Sort Ascending or Sort Descending.



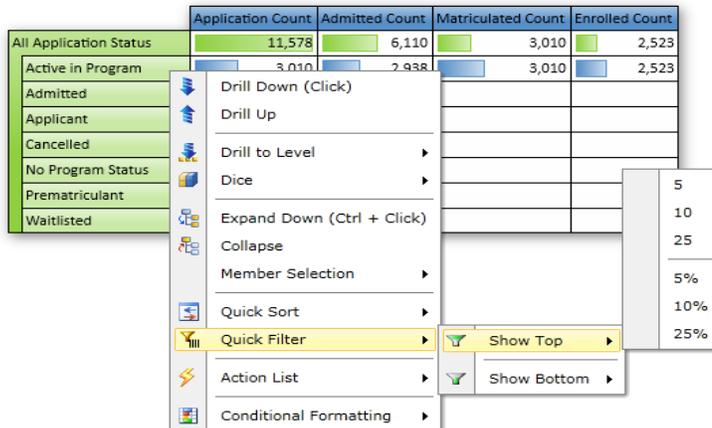
- ii. Results:

	Application Count	Admitted Count	Matriculated Count	Enrolled Count
All Application Status	11,578	6,110	3,010	2,523
Cancelled	8,065	3,073		
Active in Program	3,010	2,938	3,010	2,523
Applicant	404			
Admitted	99	99		
No Program Status				
Prematriculant				
Waitlisted				

(Sort done on column 'Application Count', Sort Values, Sort Descending)

- 2. **Quick Filter** - Provides a context sensitive filtering of the rows or columns based on the selected elements as the filter criteria. Filters are either the TopCount / BottomCount or TopPercent / BottomPercent.

- i. Right click on the column or row you are filtering. The Context Menu will appear. Click on the Quick Filter option and click on the option to sort by the Values or by the Labels.

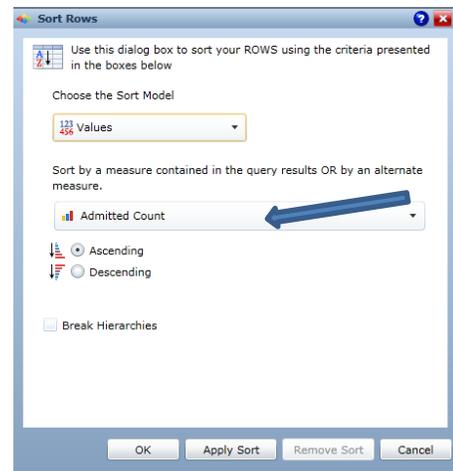
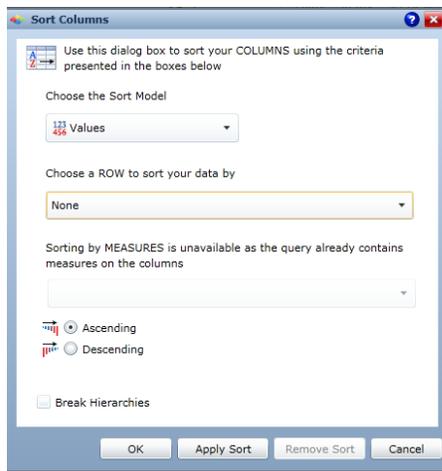


ii. Results:

	Application Count	Matriculated Count	Admitted Count	Enrolled Count
All Application Status	11,578	3,010	6,110	2,523
Cancelled	8,065		3,073	
Active in Program	3,010	3,010	2,938	2,523
Applicant	404			
Admitted	99		99	

(Quick Filter done on column 'Application Count', Show Top 5)

4. **Row and Column Sorting** – Additional sort options are available within the Query Ribbon panel. The user can select any measure (blue arrow) as the metric for sorting (independent of the metric used in the query itself). The 'Break Hierarchies' option will sort from highest to lowest regardless of the dimensional hierarchy. Row and Column sorting is also accessible by right clicking within the Report Panel.



5. **Row and Column Filtering** – Additional Filtering options are available within the Query Ribbon panel. The user can select any measure (blue arrow) as the metric for sorting (independent of the metric used in the query itself). The 'Break Hierarchies' option will sort from highest to lowest regardless of the dimensional hierarchy. Row and Column filtering is also accessible by right clicking within the Report Panel.

