
CHAPTER 3

Reports Menu

Format Modify Save Drill Surf Print Export

Once you display a report, SageQuest displays additional commands allow you to format, modify, save, drill through statistical information, surf for related reports, print, and export a report to another supported file type. This Chapter describes each function and provides related procedures for using each function on the Reports Menu.

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Running Reports and Presentations

Running reports and presentations through the SageQuest portal is as simple as clicking on the name of the report or hyperlink URL. SageQuest will open or launch the item and display its contents/data in the Content Area of the portal. Similarly, if you click the name of a document created outside of SageQuest (such as a Microsoft Word document), your browser will view or download it, depending on how your browser is configured to handle the document type.

You can also copy uploaded files to your computer by using the browser's command; for example, with Microsoft Internet Explorer, you can copy the file to your local hard disk by shift-clicking on its name.

Other types of information that can be displayed in the SageQuest portal are:

| Type | Description |
|----------------------|--|
| Broadcaster Reports | These are usually in HTML or Microsoft Excel formats. |
| Web Sites | These are other web sites that are linked to by creating a new link in the portal. The web site will display within this Content Area of the portal. |
| Word and Excel files | These are documents that are uploaded to the portal. The document is opened in the Content Area. |
| Web Reports | The results of Web Reports are displayed in the Content Area of the portal. The Report Menu provides additional report functionality. |

Folder and Channel Contents

When a Folder or Channel is opened from the Navigation Menu, the contents are displayed in the Content Area. From the list, you can open content, delete content (if you are the owner), move and copy content and publish content. You can also add a subfolder or subchannel (if your permissions allow). The first 30 items of a folder or channel are displayed. If there are more items, click **Next** to view the additional items.

Format

Format

Since all data is not alike, formatting your report data with multiple views allows you to see stastical data presented in a different manner. Some formats allow for expanded functionality by clicking the right-mouse button.

The Format function allows you to display a report in four formats: Active-X grid, Active-X graph, HTML grid and HTML graph.

ActiveX Format

This format allows additional functionality by using the right-mouse button.

| Format | Description |
|--------|---|
| Grid | This is the standard MicroStrategy grid format. It provides additional functionality when you right-click on the grid. This is useful for drilling-down through data. |
| Graph | This is the standard MicroStrategy graph format. It provides additional functionality when you right-click on the graph. |

HTML Format

| Format | Description |
|--------|---|
| Grid | This displays the report in a grid format using HTML and stylesheets. |
| Graph | This displays the report in a static graph format as a JPG image. |

HTML Grid Styles

When using the HTML grid format, this option provides a list of stylesheets to select from that provide custom layout formatting for the report.

HTML Options

These options give you additional report view capabilities.

| Option | Description |
|---------------|--|
| Totals | Displays Grand Totals on the report. Applies to HTML Grid format. |
| Subtotals | Displays Subtotals on the report. Applies to HTML Grid format. |
| Details | Displays the report criteria. Applies to HTML Grid and Graph formats. |
| SQL | Displays the SQL used to generate the report. Applies to HTML Grid and Graph formats. |
| Checkboxes | Displays checkboxes next to attribute values in the report for use in drilling. The checkboxes selected define the criteria for the drill report. Applies to HTML Grid format. |

HTML Statistics

Select one of the four options to display different levels of statistics about the report. These options apply only to HTML grid and graph formats.

- None
- Basic (Processing Time)
- Medium (Trace Events)
- Advanced (API)

To format an ActiveX report

1. Display a report in the Content Area of the SageQuest portal.
2. From the Reports Menu, click **Format**. The Report Format dialog is displayed.

The screenshot shows the 'Report Format' dialog box. It has a title bar with 'Report Format' and a 'Help' link. The dialog is organized into several sections:

- ActiveX Formats:** Contains two radio buttons: 'Grid' (which is selected) and 'Graph'.
- HTML Formats:** Contains two radio buttons: 'Grid' and 'Graph'.
- HTML Grid Styles:** Contains a dropdown menu with the text '<< default style >>'.
- HTML Options:** Contains five checkboxes: 'Totals', 'Subtotals', 'Details', 'SQL', and 'Checkboxes (For drilling)'. All are currently unchecked.
- HTML Statistics:** Contains four radio buttons: 'None', 'Basic (Processing Time)', 'Medium (Trace Events)', and 'Advanced (API)'. 'None' is selected.

At the bottom of the dialog are two buttons: 'Finish' and 'Cancel'.

3. From **ActiveX Formats**, choose either **Grid** or **Graph**.
4. Click **Finish**.

Grid – The data is displayed in grid format. To format the data or cells, right-click on the grid. Experiment with each option to see which report view best represents you data.

Graph – The data is displayed in a graph. You have additional control of the graph by right-clicking on the graph. You can change the graph type, modify the graph properties and elements, or print the report.

If desired, you can save and publish the graph to other users, groups, or channels.



Refer to For more information on Report Types, refer to Appendix A.

To format a HTML report

1. Display a report in the Content Area of the SageQuest portal.
2. From the Reports Menu, click **Format**. The Report Format dialog is displayed.

Report Format [Help](#)

ActiveX Formats

Grid Graph

HTML Formats

Grid Graph

HTML Grid Styles

<< default style >>

HTML Options **HTML Statistics**

Totals None

Subtotals Basic (Processing Time)

Details Medium (Trace Events)

SQL Advanced (API)

Checkboxes (For drilling)

Finish Cancel

3. From **HTML Formats**, choose either **Grid** or **Graph**.
4. Select the desired **HTML Grid Styles**.
5. From **HTML Options** and **HTML Statistics**, choose the options that you would like to see presented in your report.
6. Click **Finish**.

Grid – The data is displayed in grid format. To format the data or cells, right-click on the grid. Experiment with each option to see which report view best represents your data.

Graph – The data is displayed in a graph. You have additional control of the graph by right-clicking on the graph.

If desired, you can save and publish the graph to other users, groups, or channels.

Modify

Modify

This function provides the ability to modify the criteria and layout of an existing report. The process involves two steps:

- Modify the Filter Criteria
- Modify the Report Layout

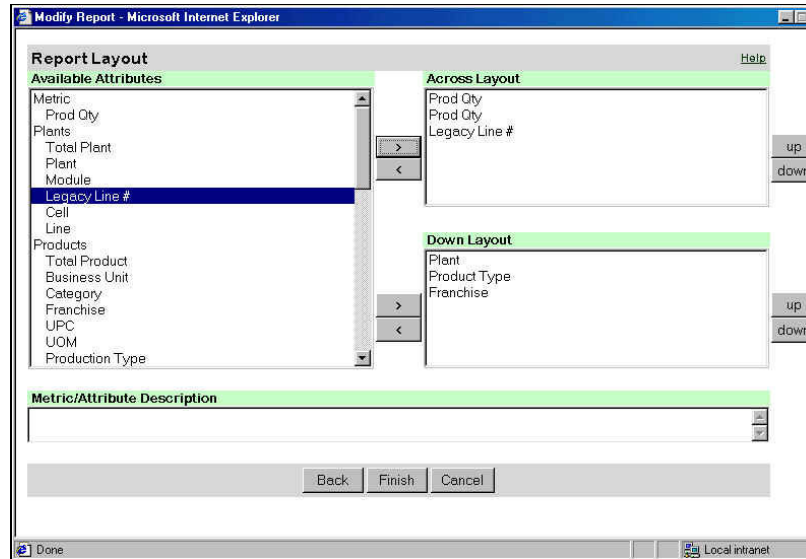


Refer to For more information on Report Templates, Report Filter Criteria, and Report Filters, see Chapter 2.

To modify a report

1. Display a report in the Content Area of the SageQuest portal.
2. From the Reports Menu, click **Modify**. The Filter Criteria dialog is displayed.
3. From the drop-down list, select the **Dimension** and **Attributes** for the data.
4. Select the **Elements** that you wish to see filtered. Click **>** to add the Elements in the **Selected Elements** column.

5. Select the desired **Drill Criteria** and click **Next**. The Report Layout dialog is displayed.



6. In the **Available Attributes** list, select the metric(s) for the **Across Layout** and **Down Layout** lists, and then click **>**. Repeat for each metric to be added. To remove an element, select it and click **<**.
7. To sort the metric data in your layout, select the metric in **Across Layout** or **Down Layout** and click **up** or **down**.
8. In the **Metric/Attribute Description**, type description for your report. This will be displayed in the Content Area of the Portal.
9. Click **Finish**.

Save

Save

The Save function saves the current report as a new report with a new name. After the report is saved, it will appear in your Inbox where it can be moved, copied, deleted and published. If the report contains MicroStrategy Autoprompts, the Autoprompt selections will be saved as part of the report.



Note

Autoprompts will not reappear when the newly saved report is opened and executed.

| Field | Description |
|-------------|---|
| Name | A name for the report. This name will appear as the name for the report in the portal. |
| Description | A description for the report. This name will appear as the description for the report in the portal. |
| Publish | This checkbox provides a quick method of publish the report after it is saved. The Publish dialog is displayed that allows you to select the location(s) to publish the new report. |

To save a report

1. Display a report in the Content Area of the SageQuest portal.
2. From the Reports Menu, click **Save**. The Report Save dialog is displayed.
3. Type the name and description for the report. If you want to publish this report, select the **Publish** option.

4. Click **Finish**.

Drill

Drill

The Drill function provides the ability to drill on the current report. Drilling is only supported when using the ActiveX grid and HTML grid report formats. When you drill on a report, it displays compound and complex criteria that exists for the report. This criteria cannot be modified, but can be removed, if desired.

Drill From

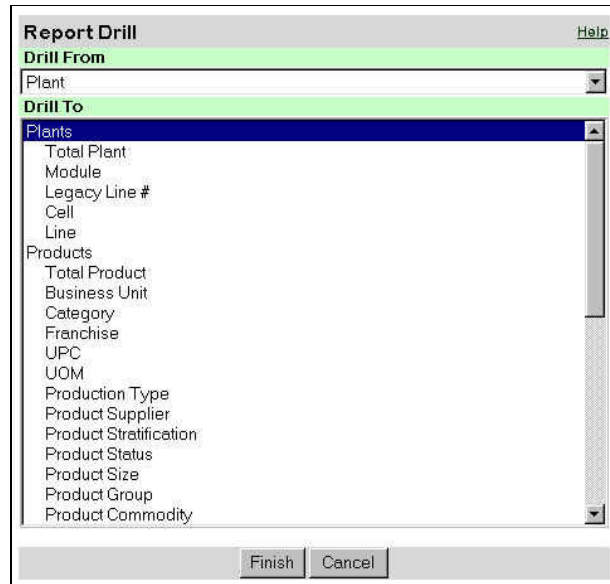
This is a list of attributes that appear in the report that can be drilled from. When drilling occurs, this attribute may be replaced by the Drill To attribute, depending upon how the original report is defined in MicroStrategy Agent.

Drill To

This is a list of attributes to Drill To, which are listed by dimension. When drilling occurs, the attribute selected will be added to the report layout .

To drill on a report

1. Display a report in the Content Area of the SageQuest portal.
2. On the report data, select the rows and columns for the drill criteria.
3. From the Reports Menu, click **Drill**. The Report Drill Criteria dialog is displayed.



4. Select the attribute from the **Drill From** list.
5. Select the attribute from the **Drill To** list.
6. Click **Finish**.
A new report is created with the a new "drill to" attribute in the report. The "drill from" attribute may no longer appear in the new report, depending upon how the original report was defined in MicroStrategy Agent. When drilling occurs, criteria is added to the result, so that only data for rows and/or columns selected to drill on from the original report will be displayed.

Surf

Surf

When you surf on a report, an existing MicroStrategy filter and/or template is applied to the current report.

A filter is a set of criteria that will limit specific parameters/criteria in a report's result. Selecting a filter to surf on applies the criteria defined in the filter and will replace any existing criteria in the report.

A template is a specific layout which defines a reports column, row, and heading positioning. Selecting a template to surf on will apply the layout defined in the template and will replace the existing layout of the report.

Report templates and filters are organized into folders. These folders should be added to your **My Folders**.

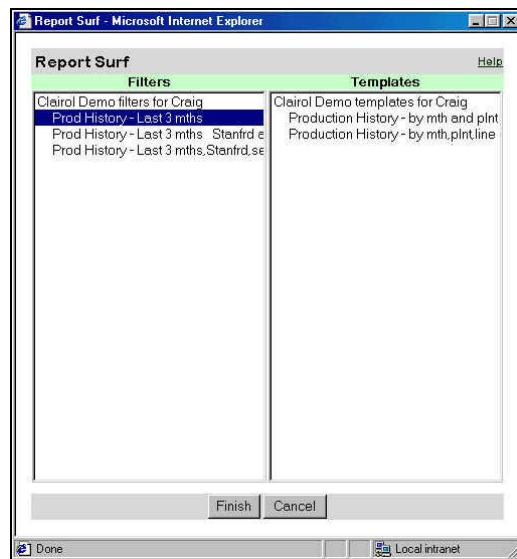


Note

You can only surf on a report with one filter and one template selected at a time.

To surf on a report

1. Display a report in the Content Area of the SageQuest portal.
2. From the Reports Menu, click **Surf**. The Report Surf dialog is displayed.



3. Select the Filters and Templates that you wish to surf on and click **Finish**.

Print

Print

The Print function allows you to print the various SageQuest report formats. The available print option may be different based upon the format of the report. If the report is formatted as an *ActiveX Grid*, the following options will be displayed:

- Page Setup
- Print Setup
- Print

If the report is formatted as an *ActiveX Graph*, the following options will be displayed:

- Page Setup
- Print

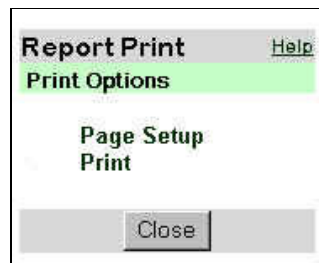
If the report is formatted as a *HTML Grid* or *HTML Graph*, then Print will display the standard web browser print window. This additional functionality allows you to customize and print the report.

Internet Explorer web browsers contain a setting that may improve printing HTML reports. Change the Internet Explorer browser print settings using the following sequence:

- Select **Tools | Internet Options | Advanced tab | Printing** - Print background colors and images.

To print a report

1. Display a report in the Content Area of the SageQuest portal.
2. From the Reports Menu, click **Print**. The Report Print dialog is displayed.



3. Select **Print**.

Export

Export

This function exports a displayed report to one of three formats: Microsoft Excel, Microsoft Word, and Text. The resulting data is displayed in the selected format in a new browser window. You can then save this data to the new file type.

To Export a report

1. Display a report in the Content Area of the SageQuest portal.
2. From the Reports Menu, click **Export**. The Report Export dialog is displayed.



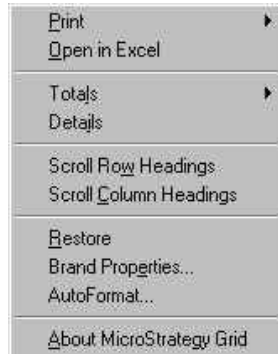
3. From the Export Options, choose the export type for your report and then click **Finish**. The new report type will open in the new format. You can save the report to your local hard drive or network server. Once the document is saved, you can publish it to other user, groups, or folders.

Right-Mouse Click Functionality

When you right-click on an active ActiveX or HTML report or graph in the Content Area, you will see additional commands and options that enable you to perform additional tasks. This topic discusses each menu area and the right-click menu options available for each.

ActiveX Grid Format

Below is an example of the right-click menu options while using an ActiveX grid report. Menu options may vary according to the type of data that is displayed and selected.



The following is a description of the right-click menu options for an ActiveX Grid:

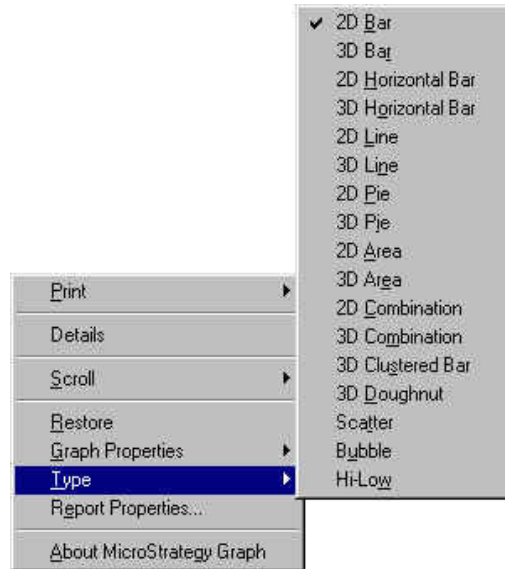
| Option | Description |
|------------------------|--|
| Print | Provides a quick method of printing your report. When you slide the mouse to the right, three additional options are available: Print Report Print Setup Page Setup For more information on Printing, refer to the Print function described earlier in this chapter. |
| Open in Excel | The displayed report/data will open an instance of Microsoft Excel. |
| Totals | Creates an additional row in your report with totals for each column. Other options are: Grand Totals Sub Totals All Totals |
| Details | Opens a small window at the bottom of the Content Area where additional report details are displayed. |
| Scroll Row Headings | Allows you to scroll your row data with while the Row Headings remain visible. |
| Scroll column Headings | Allows you to scroll your heading data while the left-most Column Heading remains visible. |
| Restore | Returns the data to the previous view/format and will undo any changes to the grid. |
| Properties | This option is displayed where there are two or more rows of data. |
| AutoFormat | Displays an additional dialog that allows you to format your data with a predefined grid layout. |

ActiveX Graph Format

There are 17 graph types that allow you to see your data presented in various formats. SageQuest uses a default bar chart for first-time graph layout. Right-click on the graph to view the available options to format your data with a different graph layout.



Refer to For more information on graph types, see Appendix A.

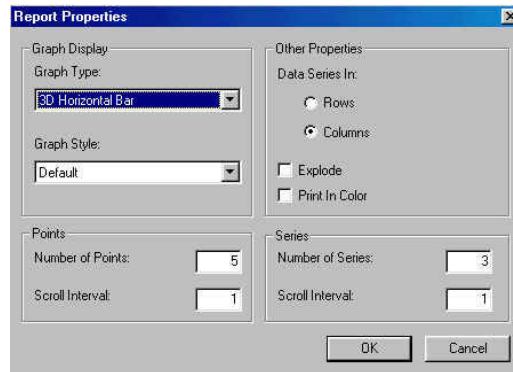


The following is a description of the right-click menu options for an ActiveX graph:

| Option | Description |
|-------------------|---|
| Print | Provides a quick method of printing your graph. When you slide the mouse to the right, three additional options are available: Current Page All Pages Page Setup For more information on Printing, refer to the Print function described earlier in this chapter. |
| Details | Opens a small window at the bottom of the Content Area where additional report details are displayed. |
| Scroll | Allows you to scroll your graph to the left, right, up, or down to see more detail. |
| Restore | Returns the data to the previous view/format and will undo any changes to the graph. |
| Graph Properties | Displays additional options that allow you to format/modify the graph's legend, axis, title, and display values. For more information, refer to the online help for each dialog tab. |
| Type | Lists the 17 graphs that are available to format your data. You can quickly change your graph-type by selecting one of these options. |
| Report Properties | Displays the Report Properties dialog which allows further graph modification. |

To change a Graph Type

1. Right-click on the graph and select **Report Properties**. The Report Properties dialog is displayed.



2. From the Graph Display, click the **Graph Type** drop-down menu and then choose the graph type.
3. Choose the **Graph Style**.
Points (Number of points, Scroll interval)
Other Properties (Data Series), Explode, print in color, Series.
4. Click **OK**.

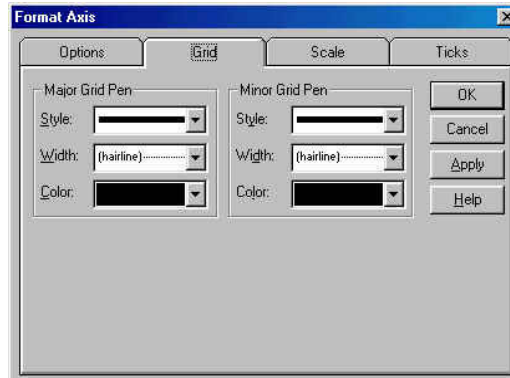
Graph Properties

To further modify your data, the **Graph Properties** menu option displays additional dialogs to change and modify specific elements of an ActiveX chart. For example; if you want to change the color, width, grid, or pattern of one data element in a bar chart, select the specific option from the appropriate tab and click **Apply**. Experiment with a sample chart see how using these features will affect your chart. Once you have the desired results, you can save and publish the modified chart.



Refer to For more information on edit and formatting charts, refer to the online help topics associated with each tab.

Format Axis



Format Series

